# Start Your Automation.

Onboarding Process.

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# Welcome to armatic.

You'll be receiving an email shortly to introduce you to your Implementation Team.

In the meantime, you can begin with the setup.

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# Set Up

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# Step 1

- Update Company Details

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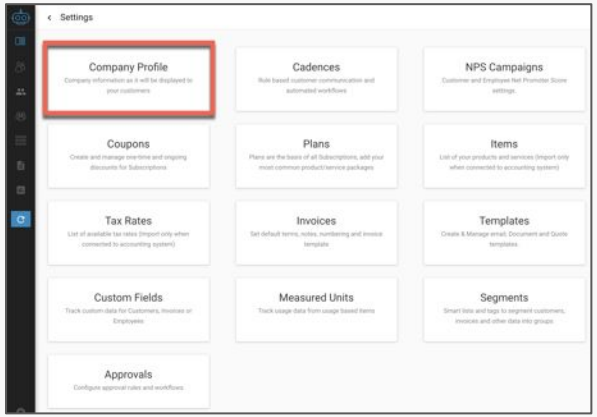
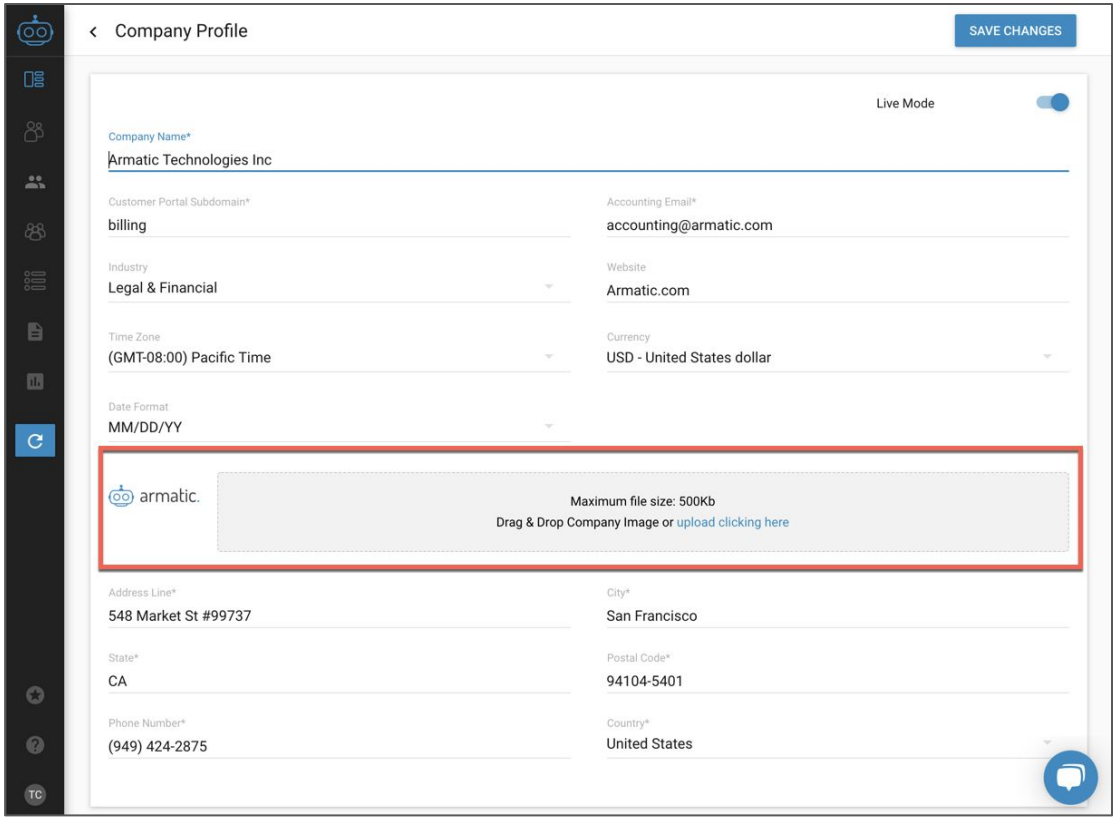
# Logo

Upload company logo 35px high (transparent PNG preferred).

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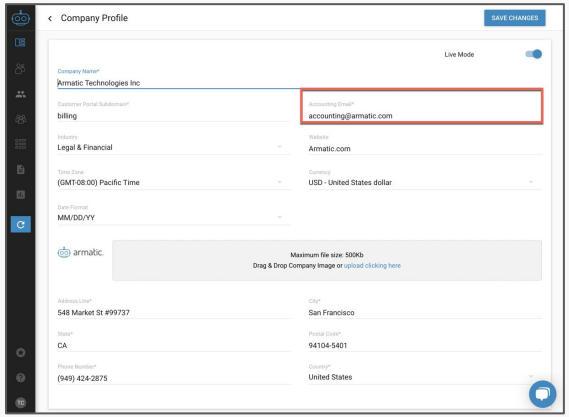
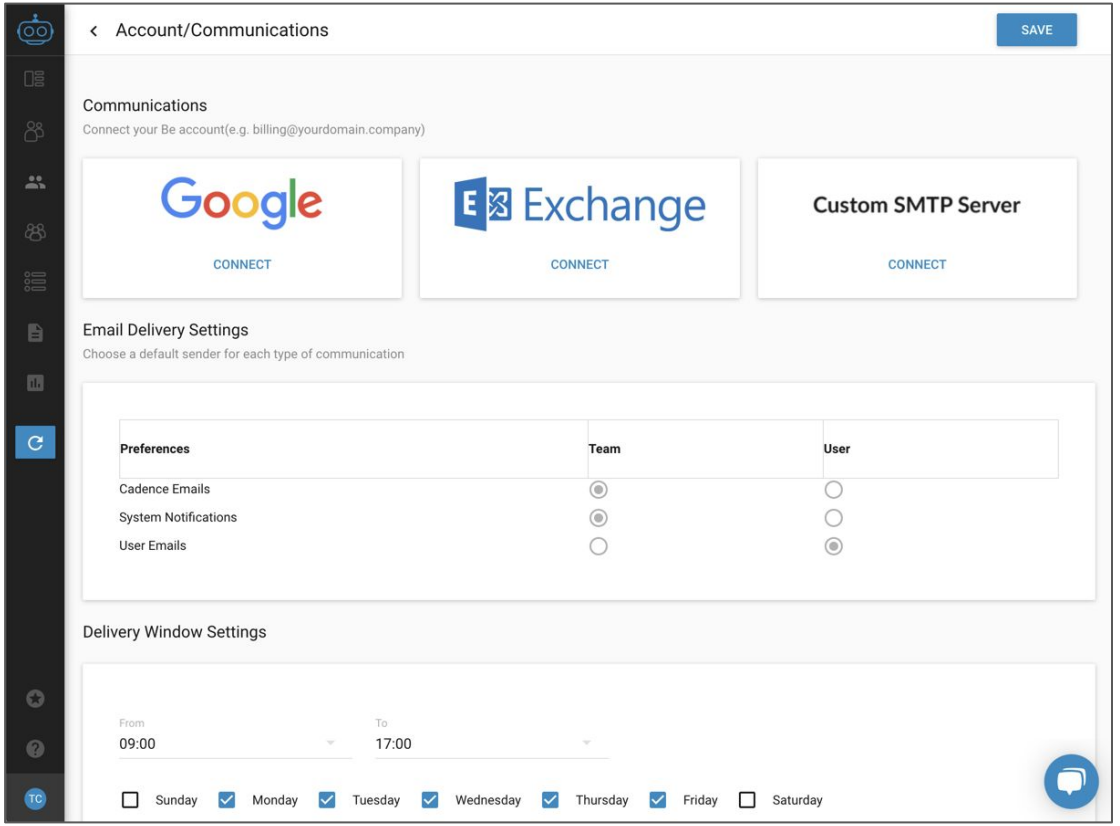
# Billing Email

Connect your billing email.

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# Step 2

- Update Personal Details

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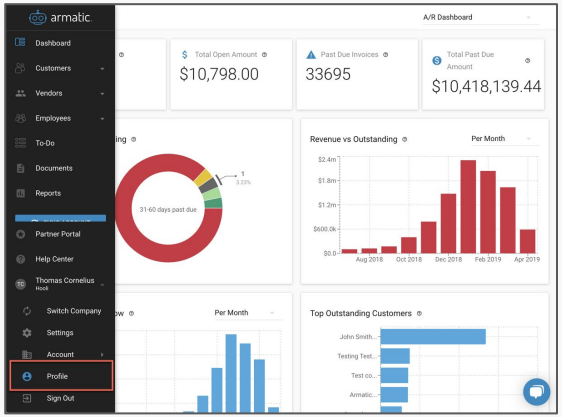
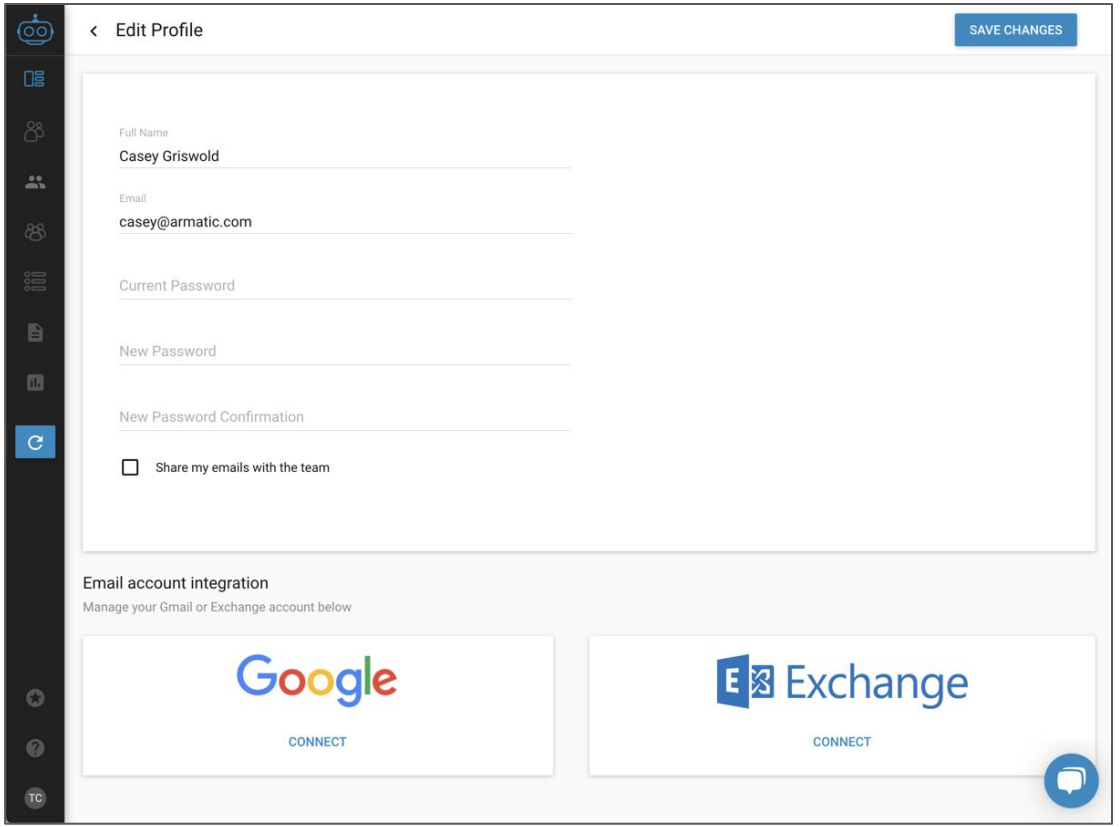
# Personal Email

Connect your personal email.

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# Step 3

- Connect Your Applications

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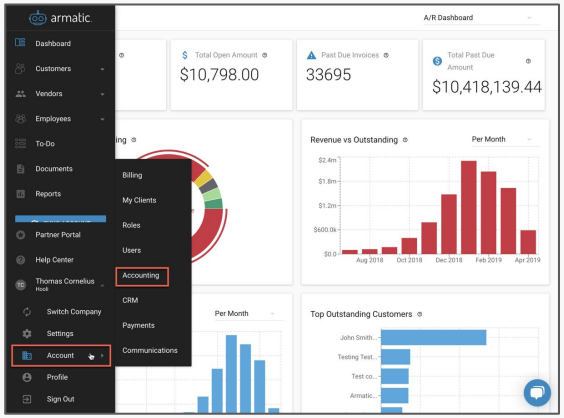
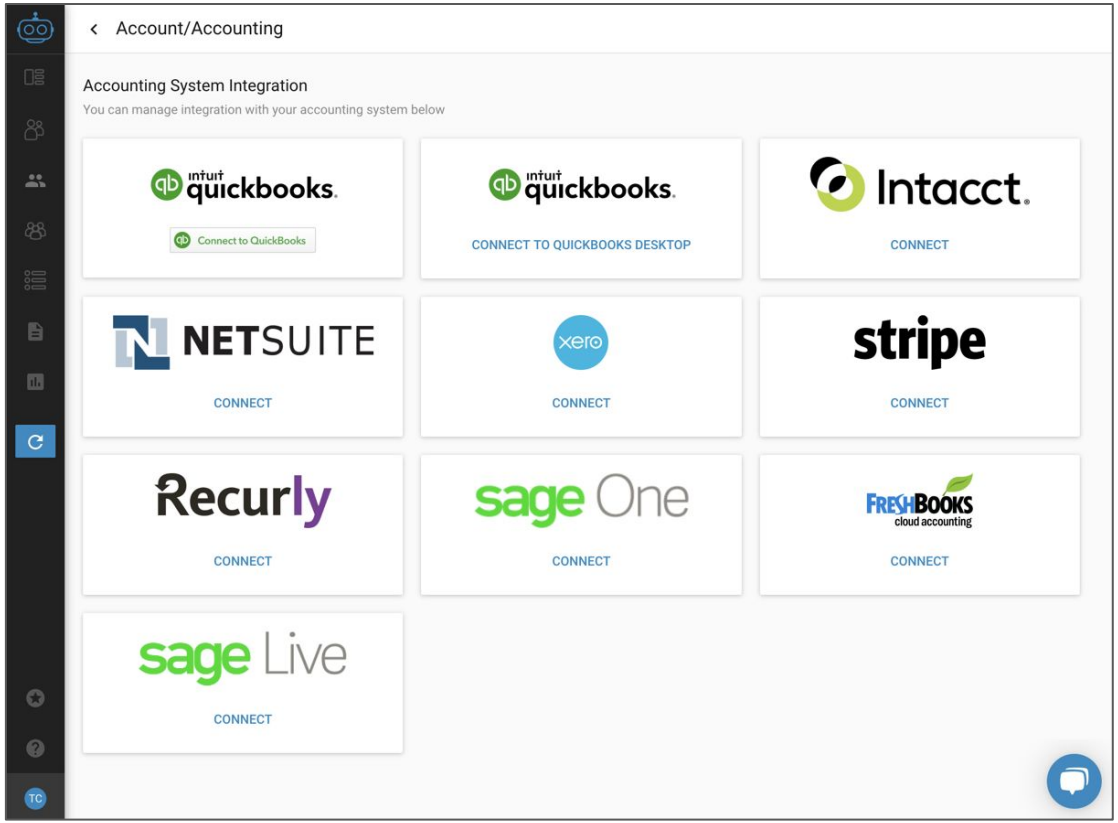
# Accounting

Connect your accounting software.

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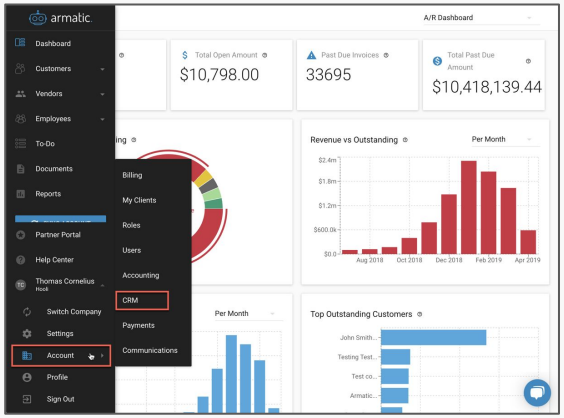
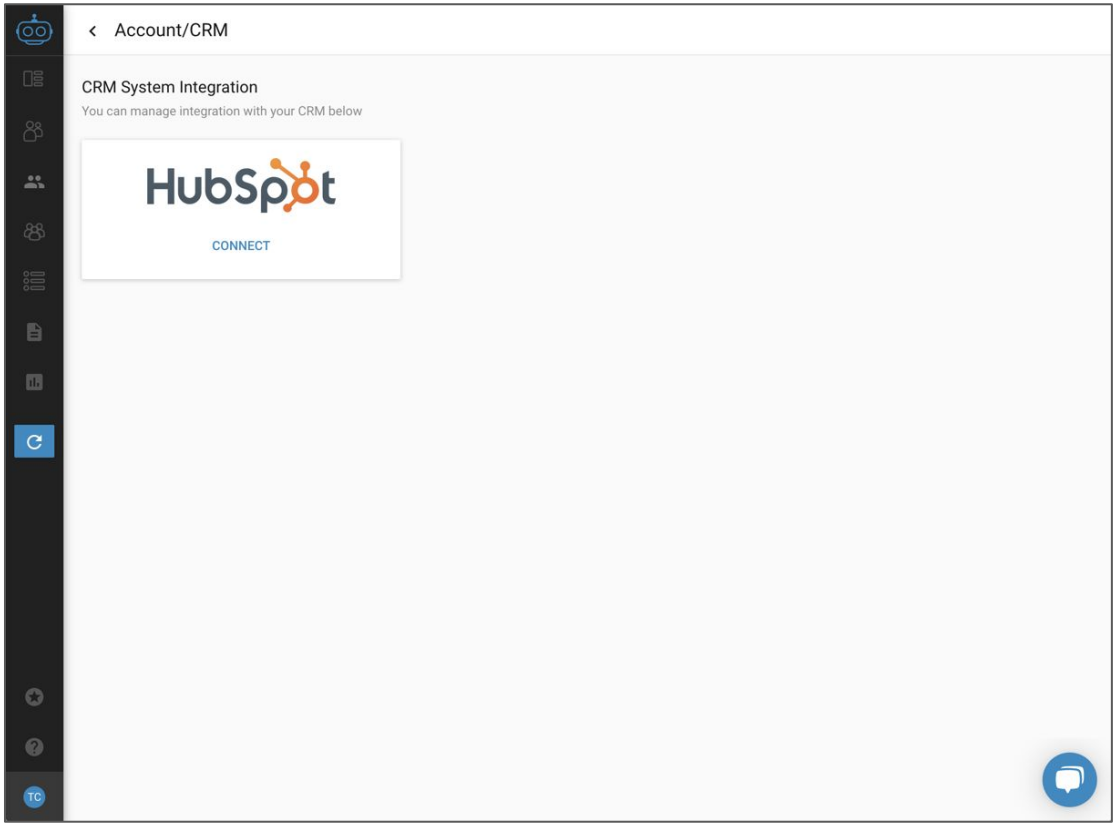
# CRM

Connect your CRM software.

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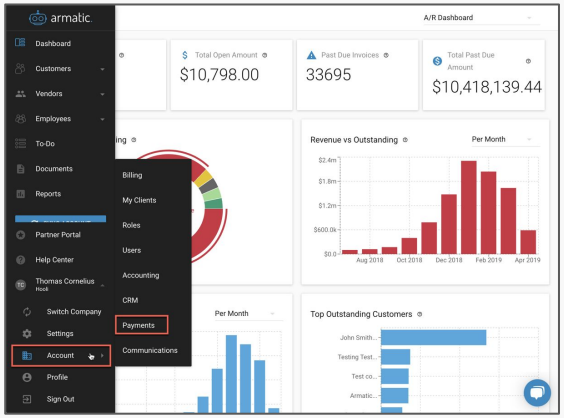
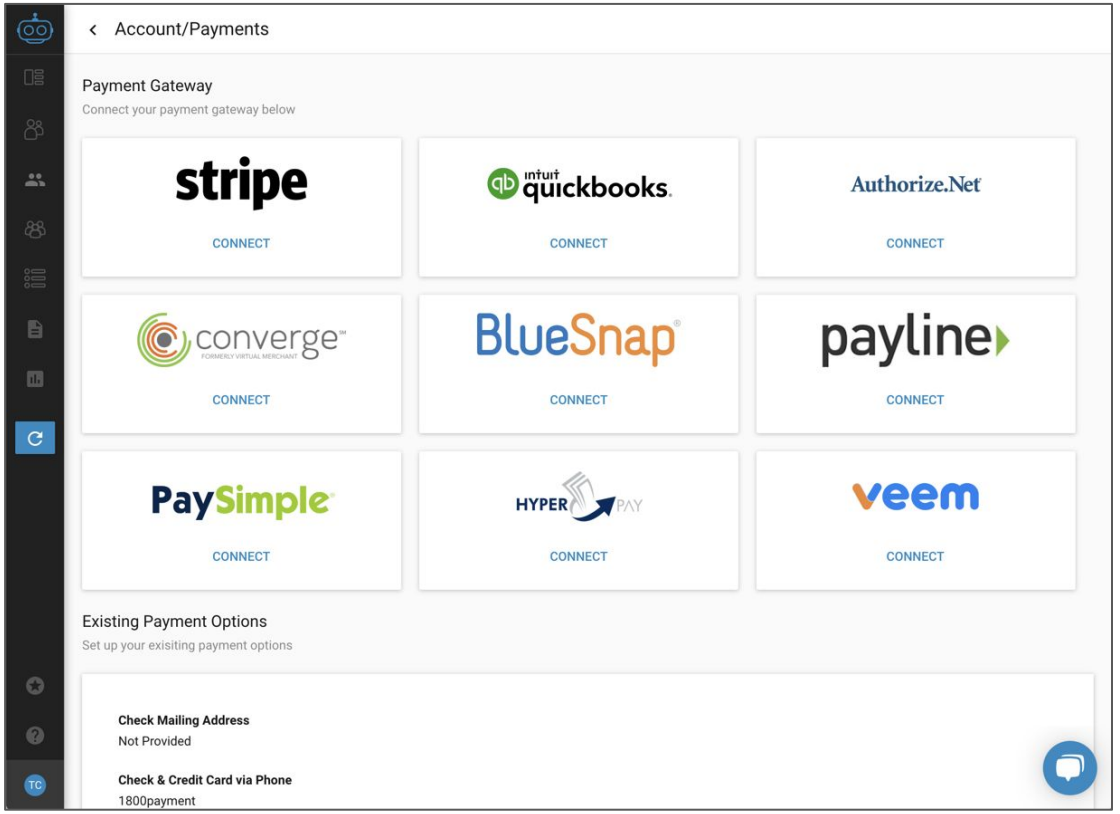
# Payments

Connect your payment processors.

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# Step 4

- Invite Your Users

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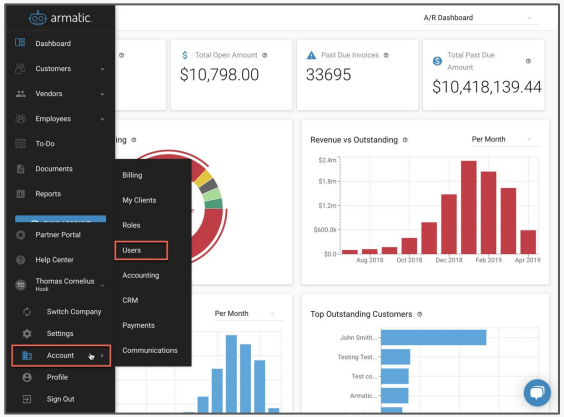
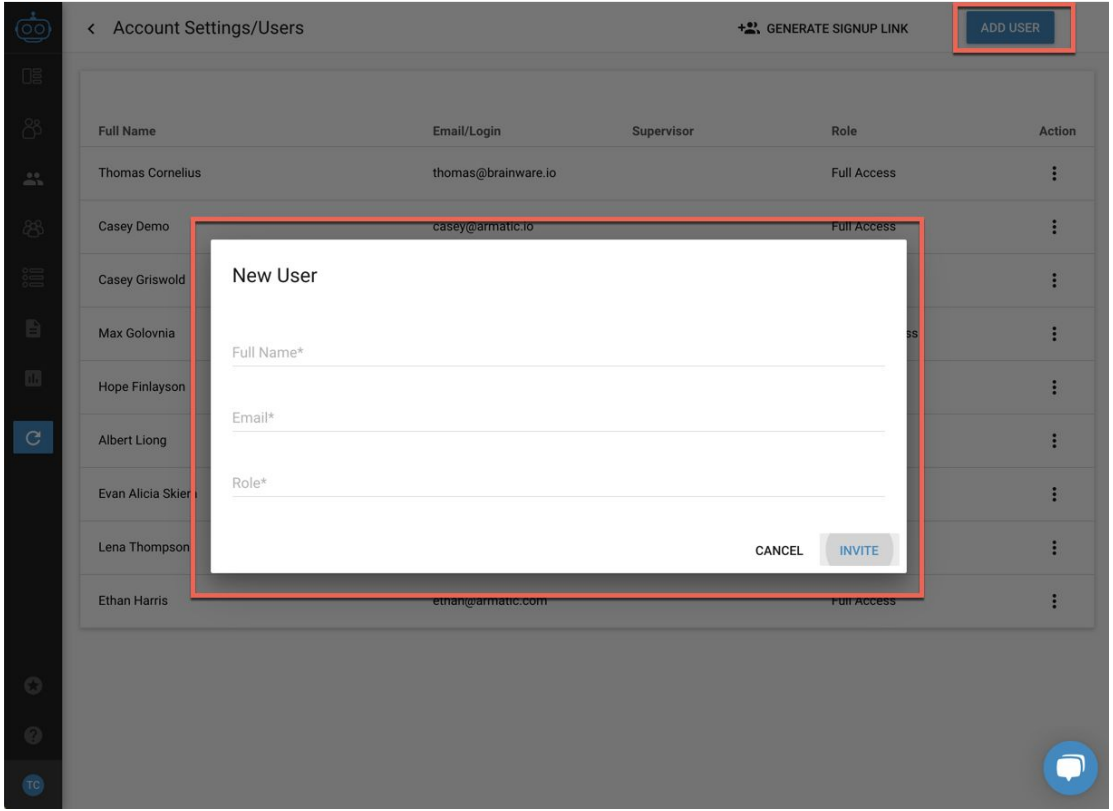
# Add Users

Invite users by role, adding them to the system.

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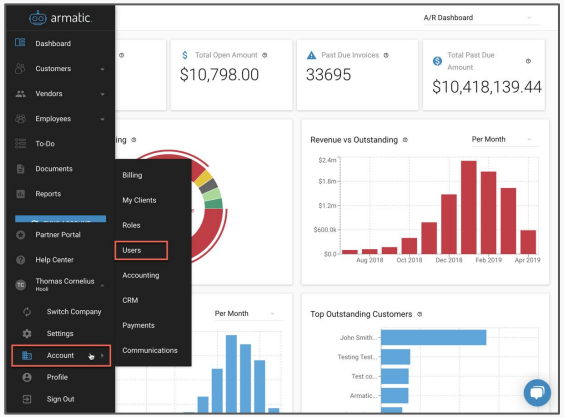
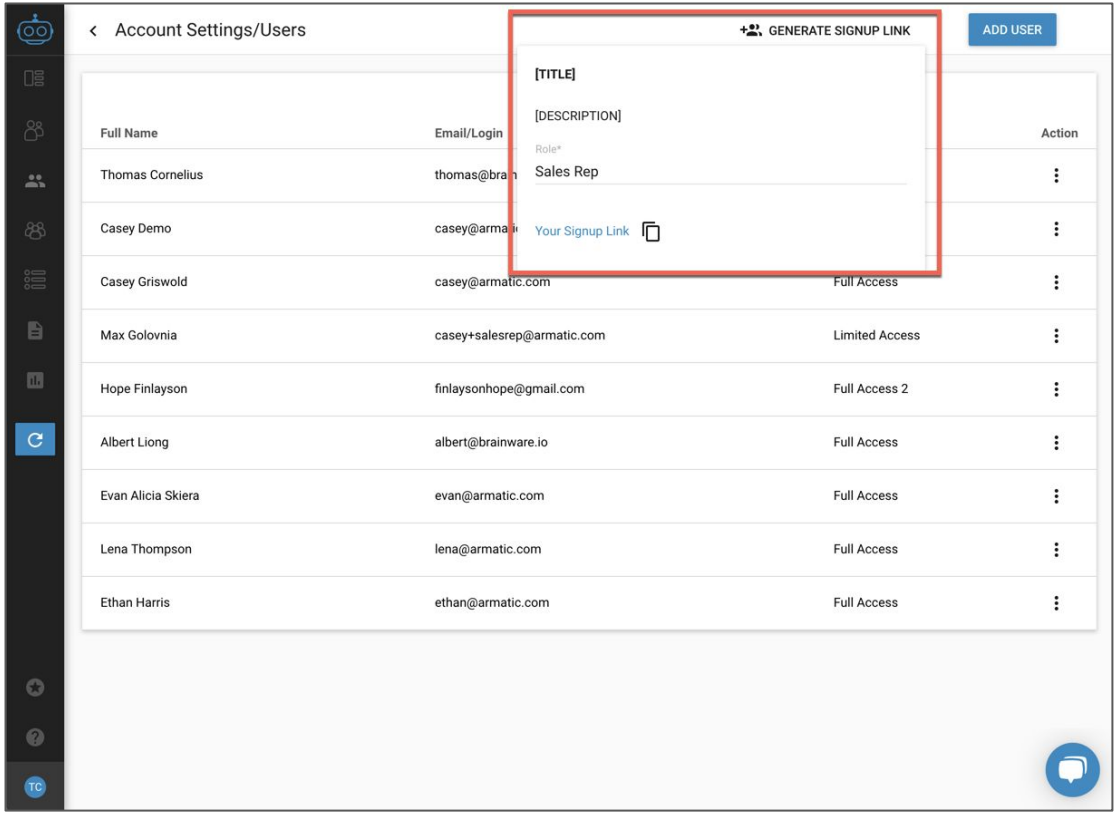
# Sign Up Link

Create a role based sign-up link and share with multiple users of the same role.

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# Configuration

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# Step 5

- Cadence configuration

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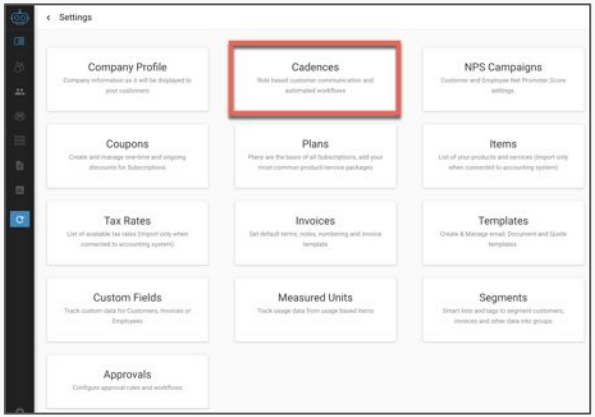
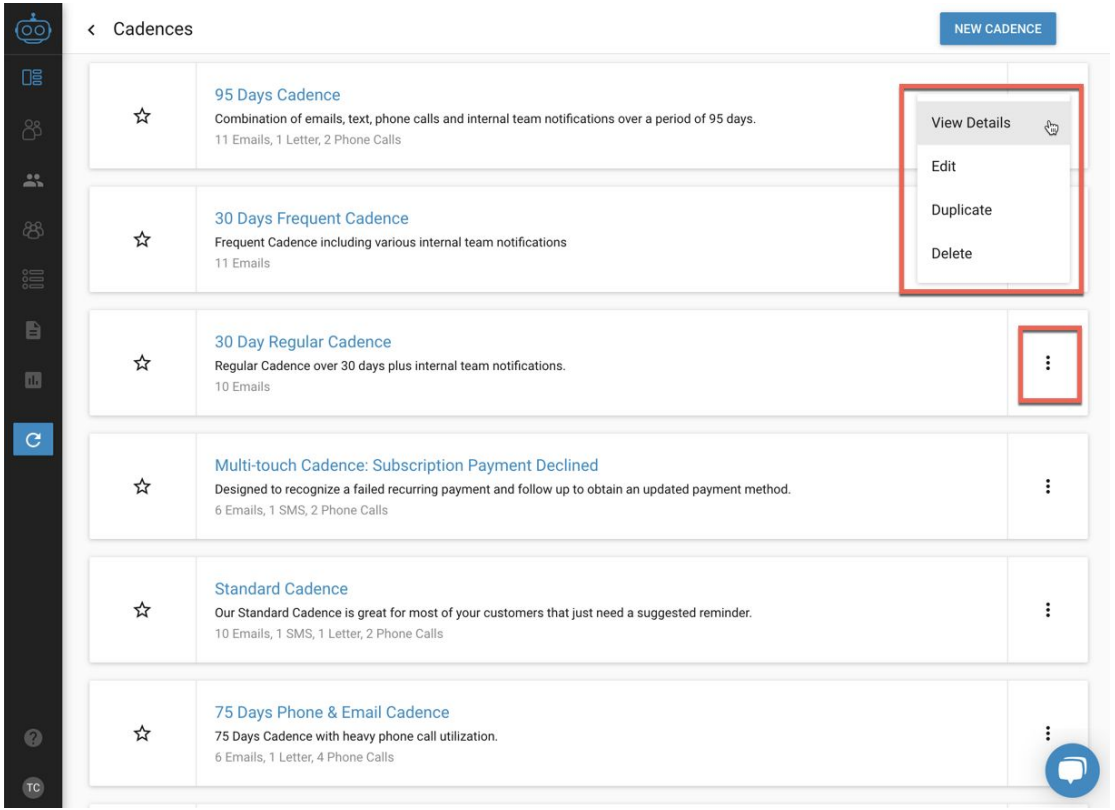
# Cadence

Review the cadence templates and configure and modify them as needed.

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# Step 6

- Template configuration

  Proposals, Quotes, Contracts

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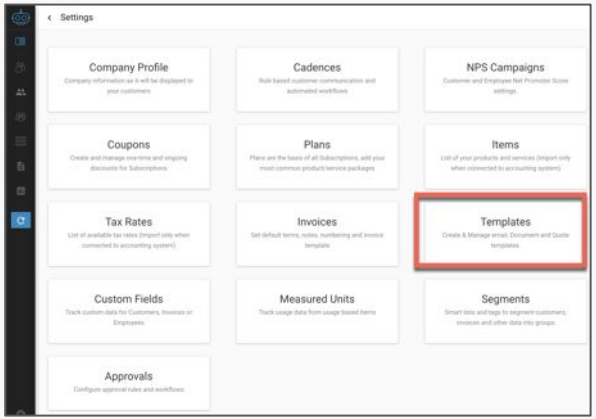
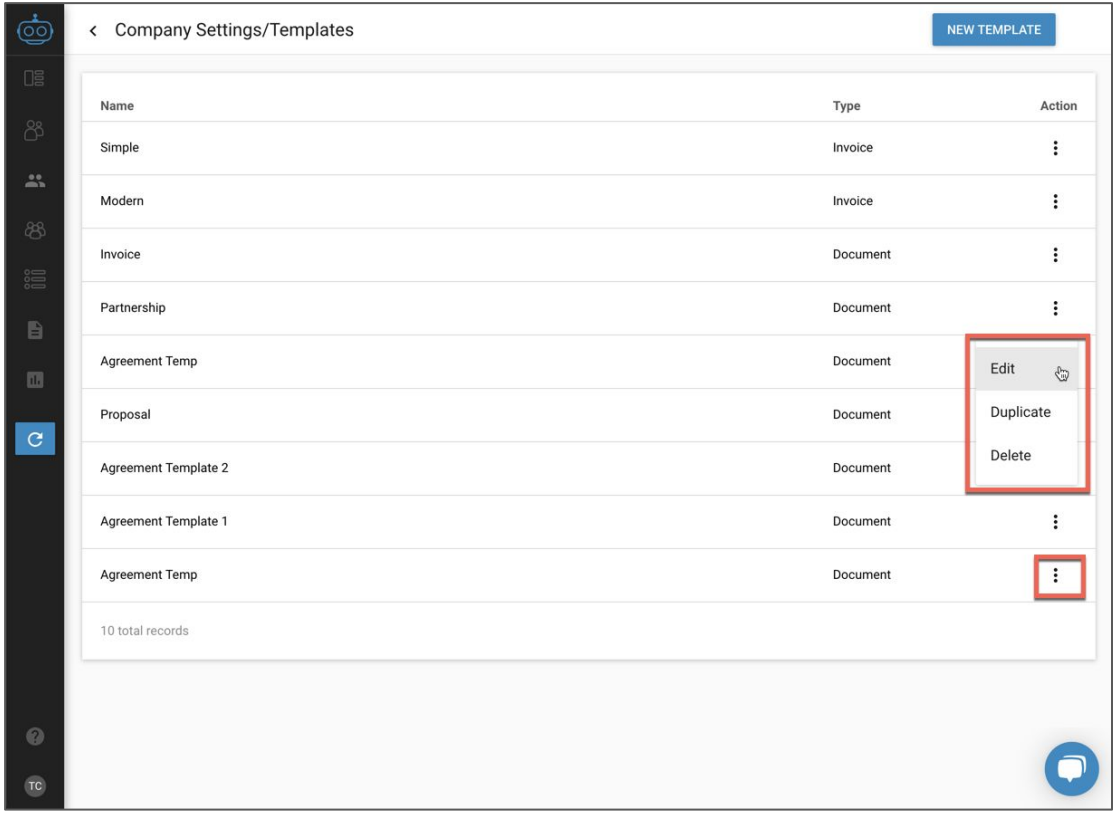
# Templates

View the document templates and update them as needed or create new ones.

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# Step 7

- Approvals

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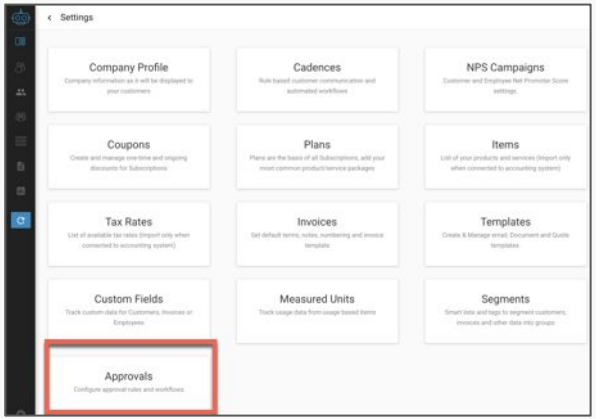
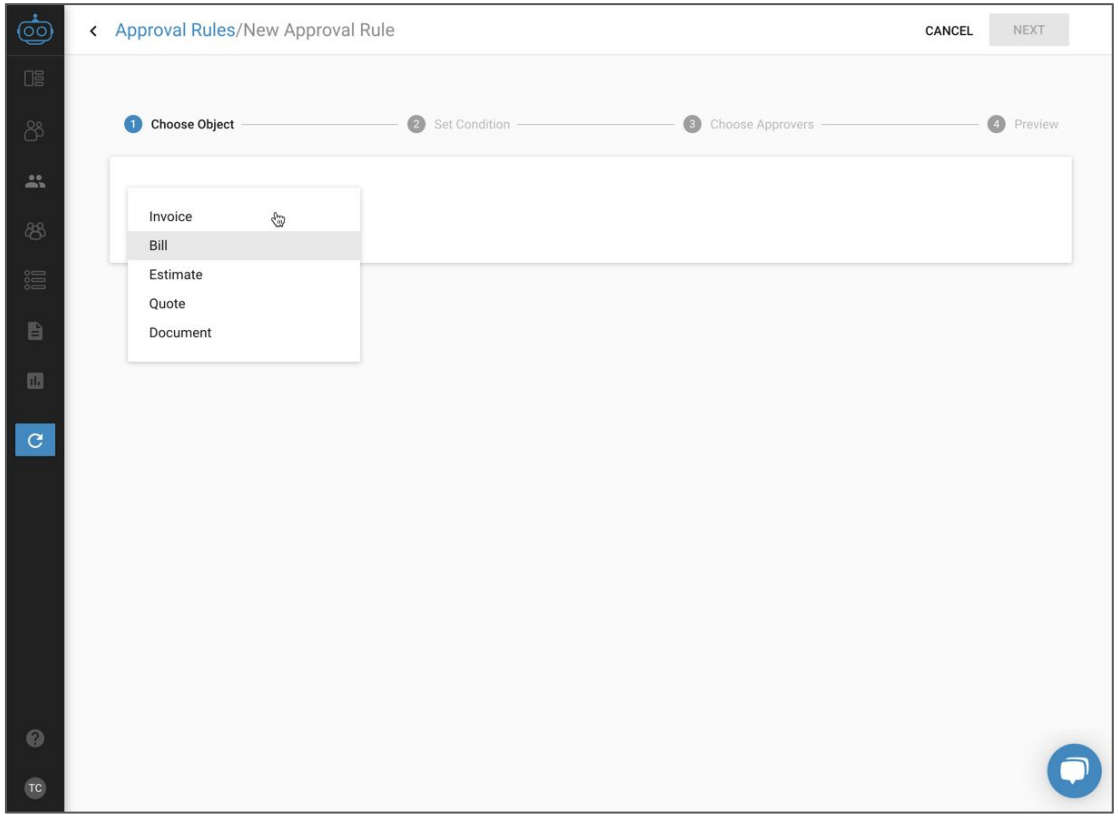
# Approvals

Configure approvals based on your desired internal workflow.

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# Client Testimonial

CIENCE

*"Armatic has helped us to improve customer satisfaction and become a more integrated team."*

**John Girard**

CEO at CIENCE

armatic.

# Thank You!

armatic.

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