



Getting Ready for A3

Introduction

Thanks for signing up to A3! In order to get you up and running as soon as possible, we need a little bit of information from you.

What We Need From You

This guide is split into two sections, the first section *Required Information* contains 4 items that all companies are required to provide to be able to use A3. If you purchased the option for Data Import you'll also need to provide the information from Section 2.

Section 1 - Required Information

1. Logo

Your Company brand is important to us. We want to ensure A3 is producing well presented documents in consistent formats.

Please provide a High Resolution file of your Logo (preferably in an .svg or .eps format, but .jpg and other image formats are OK)

2. Office Details

Attached to the email we just sent you is an xlsx file named 'Office Details'. Simply add the details of each of your offices (one per line) and we'll use this to create them in your A3 instance to help you get started when you first login.

3. Users

Very similar to 'Office Details' you'll find a second xlsx file attached named 'User Details'; this is to be completed with the details of your Users (one per line).

An important note on users is the column highlighted Blue in the 'User Details' xlsx; A3 has a Permissions Structure to help you control what your Team can do, the permissions are given by

assigning a 'Role'. A breakdown of the capabilities of each role is given in the xlsx on the tab named Permissions.

4. Appointment Reference

Every appointment created in A3 needs a reference. Rather than logging this in an old register, A3 can assign this automatically based on a format of your choosing. If you want that to happen just let us know your preferred Appointment Reference format, standard options are Year, Office, Incremental Number, i.e. 18LON1234 or a standalone Incremental Number, i.e. 12345. Alternatively, this can be manually specified per appointment if that is your preference.

5. Ports

Let us know what ports you operate at this will help us ready DA Estimator for your go-live.

Section 2 - Optional Information

5. Company Database (Only applicable if purchased)

If you've purchased the option to import your company database you will have received an xlsx named 'Company Database' in addition to the above mentioned items. Again this will need populating per the template provided.

Important Notes

To ensure a smooth and painless Go Live process please note the following important information.

- Where xlsx templates have been provided, this means we can only receive data as is laid out in these templates. We are not able to import data in any other format or arrangement without our prior consent.
- If more than one import is required due to a errors in the Company Database provided this may result in a further charge being applied.
- Once the supplied files have been completed with your data, please send them via email to onboarding@my-a3.com

If you have any queries whatsoever, please do not hesitate to contact us and we'll be on hand to assist.

Otherwise, we look forward to receiving your data and getting you started on A3!