

CREATE, SEND and SIGN documents with all your business partners

DASHBOARD to keep track of all incoming and outgoing business transactions

STANDARD and CUSTOM TEMPLATES to keep things efficient and organized

1

Select templates from the library

[Tools](#) -> [Template builder](#) -> [Assign templates](#)

The CARLAVIA document library offers a large number of templates ready for use including sales, purchasing, billing, operational, and many many many more. Each company can also create their own custom templates using the template builder. Just don't forget to assign them for use.

2

Add business partners

[Master data](#) -> [Business partners](#) -> [Add new business partner](#)

Prior to sending a document, it is a prerequisite to have a receiver created as a business partner. To add a new business partner, i.e. supplier, customer, individual, and / or collaborators please search through the CARLAVIA business directory first, then add to your records. If the entity is not found, invite them to join the platform.

3

Enter your company data - Settings & Master data

[Settings](#) -> [My company](#) / [Bank Details](#) / [Tax Rates](#)

A number of templates use the data which is entered in the setting and master data of the company. It is recommended, depending on the use, to fill out: Company address, Business and Tax registration numbers, Contacts, and Locations. If using for billing and financial documents fill out Tax rates, Bank information, and Items/Products.

4

Assign additional users

[Settings](#) -> [User management](#) -> [Add new user](#)

To achieve maximum collaboration, allow your colleagues and employees to use the platform. Even your external collaborators such as your accountant, lawyer, or business development agents can work on your behalf. Enhanced permissions can be set at document type level.

5

Modify your subscription as needed

[Settings](#) -> [Subscriptions](#) -> [Update Plan](#)

All new registrations are created with default ~Essentials package which is entirely free. The Essentials package includes 1+1 user and up to 15 outgoing transactions per month.

As needed, packages with more users and or more transactions can be selected anytime.