Merantia New Subscriber Onboarding Guide

Welcome to Merantia! We're excited to have you on board.

This guide is designed to help you get started with our platform, understand how to reach support, and know what to expect across all industries we serve. You will also find links to specialized onboarding resources tailored to your business category.

✉️Getting Started

1. **Your Login Credentials**
   Upon subscription, you will receive an email with your admin dashboard login details.

2. **First-Time Setup Checklist**

3. Change your password
4. Add your business details (Name, Logo, Contact Info)
5. Set up primary categories (Products/Services)

6. Configure notifications

7. **Training and Orientation**
   A short video walkthrough and knowledge base are available from your dashboard under the "Help" section.

🧮General Support

- **Support Hours:** Monday to Friday, 9am – 6pm EST
- **Email:** support@merantia.com
- **Live Chat:** Available on your dashboard
- **Phone Support:** Reserved for Premium Tier Subscribers
- **Emergency Tech Support:** Available via dashboard flagging tool

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📝Account & Billing

All billing and account management take place through your dedicated portal hosted on our main server under your own branded domain.

- **Manage Subscription:** Accessible via the "Billing" tab in your private dashboard
- **Add/Remove Users:** Admins can manage user roles within your portal
- **Invoices:** Automatically generated and downloadable anytime from your dashboard
- **Cancellation:** Submit a cancellation request directly through your account portal

⚙️ Merantia is a SaaS platform built on Odoo, meaning every client receives a private, fully branded portal with complete control over their subscription, billing, and support requests.

📊 Reports & Insights

- Real-time analytics are provided across most modules
- Export tools available for .csv and .pdf formats
- AI Assistant can help with interpreting trends (Premium Tier)

🔷 Platform Features Overview

- Unified Dashboard for Storefront, CRM, Inventory, and Marketplace Listings
- Omnichannel integrations: TikTok, Facebook/Meta, Google Shopping, and more
- Smart Automation Tools: Order sync, Inventory alerts, Customer tagging
- Industry-specific templates for faster launch

📄 Category-Specific Onboarding Resources

Depending on your industry, we have dedicated onboarding documentation:

- **Retail & eCommerce**
  merantia.com/retail-onboarding

- **Service Providers & Trades**
  merantia.com/service-onboarding

- **Healthcare & Compliance**
  merantia.com/health-onboarding

- **Professional Services (Legal, Financial)**
  merantia.com/pro-onboarding

🧱 Final Tips

- Bookmark your dashboard login page
- Check your email for updates and feature releases
- Follow us on LinkedIn for customer success stories and updates
- Submit your feedback anytime from your dashboard

Thank you for choosing Merantia. We're not just a platform—we're your growth partner.