

Initial Setup

After successful registration and the first login, the user is automatically guided through the setup process. The goal of this step is to fully configure the company profile so that Surface Solutions can correctly configure all functions and documents. The setup process consists of ten consecutive steps in which all relevant company information is collected.


Login

Enter your email address and password to log in.

Remember Me [Forgot password?](#)

Login

Don't have an account? [Register here](#)



Let's get your company profile set up

Tell us a bit about your company so that we can preset all configurations and settings for you. It takes less than 5 minutes to have your account up and running!

Let's start...

1. Company Name

In the first step, the full company name is entered as it appears in the commercial register. This information will later appear on all automatically generated documents, such as offers, invoices, and purchase orders.

2. Company

In the second step, the company address as well as country, postal code, and city are entered. These details are used by default as sender information on documents and can be adjusted later if needed.

3. Localization

Here, the **language** and **currency** of the organization are defined.

The selected language determines the language in which document definitions and standard texts are created in Surface Solutions.

The currency defines the unit in which all calculations, offers, and invoices are managed by default.

4. Contact

In the “Contact” step, the general contact information of the company is recorded. This includes a contact person, a phone number, and an email address.

It is recommended to use a functional address such as `info@my-coating-company.com` so customer responses can be managed centrally.

5. Company Logo

In this step, the company logo can be uploaded. This logo is automatically printed on all relevant documents, such as offers, orders, and invoices, and can be adjusted or replaced at any time.

6. Company Data

Here, the company’s legal information, such as **VAT identification number** and **commercial register number**, is entered. If this information is not available, a checkbox can be used to confirm that no such data exists.

7. Bank Details

In this step, the company's bank account information is entered.

This information is used **exclusively for display on documents** (e.g., invoices) and is **not** used for payment purposes within the platform.

8. Team Members

Additional users can be added to the organization here.

For each team member, first name, last name, and email address are entered.

Invited persons automatically receive an email with a link enabling them to set their password and gain access to the organization.

9. Key Figures

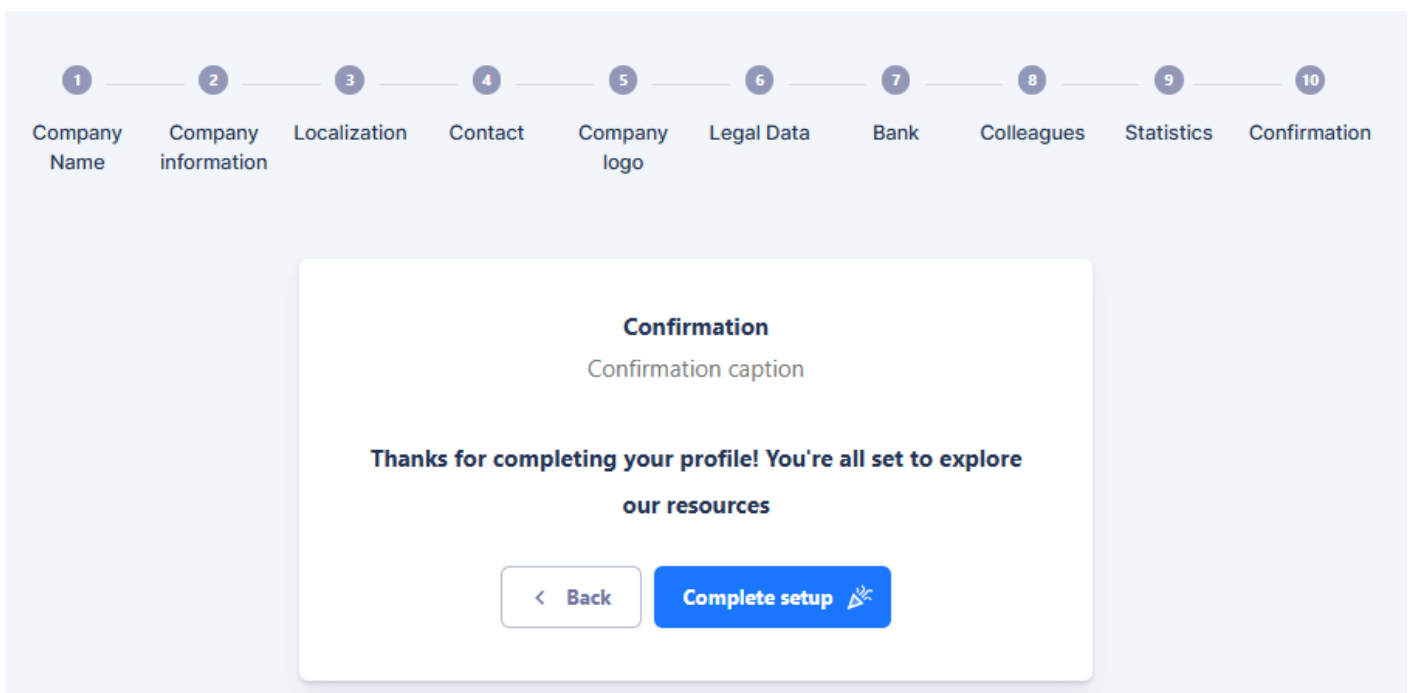
This step is used to enter basic company metrics.

The provided values are used **exclusively internally and anonymized** for statistical evaluations to continuously improve the platform and its functions.

10. Confirmation

In the final step, all information is reviewed. By clicking **"Set up company profile"**, the profile is created.

From this moment, the company profile is fully set up, and the user can immediately begin **making full use of Surface Solutions**.



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