Complete Guide to Company Profile & Tenant Onboarding

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A beginner-friendly walkthrough of the tenant onboarding wizard and company profile - every field, why it matters, and how it is used across the CRM, website, billing and invoices.

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1. Introduction

Your company profile is the single source of truth for who you are as a business inside Araona Connect. Every property you list, every lead you receive, every invoice you download, and every page on your public website pulls information from this profile. Getting it right during onboarding means your website looks professional from day one, your invoices are GST-compliant, and your team can start working immediately.

This guide walks you through the entire onboarding flow and each section of the company profile in plain English, so a first-time user can complete it end-to-end without support.

[Screenshot: Onboarding Wizard]

2. Purpose of Company Profile & Onboarding

Onboarding exists to collect the minimum information Araona Connect needs to:

* Set up your isolated tenant workspace (your own CRM, website and data).

* Populate your public website's header, footer and Contact page automatically.
* Generate legally valid, GST-compliant invoices in your company name.
* Verify that your business is genuine (PAN, GST, RERA where applicable).
* Apply your logo, favicon and brand colours across the website and CRM.

Every field maps to a real place in the product - nothing is collected "just in case".

3. The Onboarding Journey

From sign-up to a fully working dashboard, the journey has seven stages:

1. Register a new account - enter your name, business email and a password on the Sign Up page.
2. Email verification - click the confirmation link sent to your inbox. This step is skipped only if your platform has auto-confirm enabled.
3. First login - sign in with the email and password you just registered.
4. Start the onboarding wizard - you are automatically redirected to /onboarding until the profile is complete.
5. Complete the four steps - Company Information, Business Address, Contact Information, and Tax & Compliance.
6. Finish onboarding - review your entries on the summary screen and click Submit. Your trial timer starts here.
7. Access the dashboard - you land on the Tenant Super Admin dashboard, ready to add properties, staff and cities.

Tip: You can save each step and come back later - progress is preserved even if you log out.

4. Starting the Onboarding Wizard

The wizard appears automatically on first login. If you close it, you can reopen it any time from Settings › Company Profile - the same four steps are shown as tabs, and any missing mandatory field is flagged in red.

A progress bar at the top shows which of the four steps you are on. You cannot move to the next step until every mandatory field on the current step is filled correctly.

5. Step 1 - Company Information

[Screenshot: Company Profile]

6. Step 2 - Business Address

This is the address that appears on your invoices and on the Contact page of your website.

* Registered Office Address (required) - the full street address of your head office.
* City (required) - must match one of the cities enabled for your tenant. If your city is not listed, ask the Platform Owner to add it, or subscribe to a plan that allows more cities.
* State (required) - used to decide CGST+SGST vs. IGST on your invoices.
* Country (required) - currently India for all invoices.
* PIN Code (required) - 6-digit Indian postal code.
* Branch Office (optional, if supported by your plan) - additional branches shown on the Contact page.

7. Step 3 - Contact Information

Contacts entered here appear on the public website header, footer, Contact page, WhatsApp buttons and inside system-generated emails.

* Primary Mobile Number (required) - main "Call Now" and default WhatsApp number.
* Secondary Mobile Number (optional) - shown on the Contact page as an alternate number.
* Office Phone (optional) - landline shown on the Contact page.
* Business Email (required) - displayed on the website and used as the reply-to address for lead notifications.
* Website URL (optional) - your existing website, if any. Not required if you are using the Araona Connect website engine.

These values are read live - the moment you update them here, your public website reflects the change on the next page load.

8. Step 4 - Tax & Compliance

This step decides how your invoices are prepared.

* PAN Number (required) - 10-character alphanumeric PAN of the company or proprietor. Printed on every invoice.
* GST Registration (required) - Yes or No.
* GST Number (required if GST = Yes) - 15-character GSTIN. Once saved, invoices switch to a GST tax invoice format with CGST+SGST (intra-state) or IGST (inter-state) based on your business address state versus the platform’s state.
* GST Declaration (required if GST = No) - a signed declaration confirming that your turnover is below the GST threshold. You can download the template, sign it and upload it.
* Supporting Documents - upload PAN card, GST certificate and any other document requested. See the next section.

9. Company Branding

Branding controls how your business looks to visitors on your website and to your staff inside the CRM.

* Company Logo - square or landscape image, at least 400×400 px, PNG with transparent background preferred. Shown in the website header and CRM sidebar.
* Favicon - the tiny icon in the browser tab. 32×32 or 64×64 px PNG/ICO works best.
* Company Banner (if supported) - wide hero image used at the top of the home page when a template includes a banner slot.
* Brand Colours - primary and accent colours applied to buttons, links and highlights on your public website.

[Screenshot: Branding Settings]

10. Verification Documents

These files are collected for KYC, invoicing and RERA compliance:

* PAN Card (image or PDF)
* GST Certificate (if GST registered)
* Business Registration Certificate (Incorporation, Partnership Deed, GUMASTA, etc.)

* RERA Certificate (if you list real-estate projects)
* Other supporting documents requested by the Platform Owner

Only you and the Platform Owner can view these files. They are stored in a private, tenant-isolated storage bucket and are never exposed on your public website.

[Screenshot: Document Upload]

11. Editing the Company Profile

After onboarding, open Settings › Company Profile to edit any section. Most fields update instantly. However, a few sensitive changes are placed in a review queue and only take effect once the Platform Owner approves them:

* Legal Company Name
* PAN Number
* GST Number and GST Registration status
* Business Address (state / PIN)

You will see a "Pending review" badge next to these fields until they are approved.

12. Field-by-Field Explanation

A quick reference of where each field surfaces:

[Screenshot: Tax Information]

13. Best Practices

* Always use your legal company name exactly as printed on your PAN card.
* Keep your primary mobile and email current - leads and system alerts go here.
* Upload a high-resolution logo (at least 400×400 px) with a transparent background.
* Fill in every mandatory field before submitting a step - the wizard will not let you skip.
* Complete the GST section correctly - mismatched GSTINs cause invoice rejection.
* Add your RERA number if you list real-estate projects - it is a legal requirement in most states.

14. Tips & Recommendations

* Keep a folder ready with soft copies of PAN, GST certificate, RERA certificate and your logo before you start onboarding - you will finish in one sitting.
* Use a business email (e.g. contact@yourcompany.com) rather than a personal Gmail - it looks more professional on invoices and leads.
* Pick brand colours that contrast well with white text - the Preview panel shows how buttons will look before you save.
* If two team members will manage the profile, invite the second person as a Super Admin Staff before uploading documents so both can review.

15. Common Mistakes

* Incorrect PAN number - a wrong PAN blocks invoice generation.
* Missing GST details when you are actually GST registered - leads to non-compliant invoices.
* Incomplete address (missing PIN or state) - breaks tax calculation and Contact page rendering.
* Low-quality logo uploads (blurry, wrong aspect ratio, JPEG with white background) - looks

unprofessional in the website header.
* Forgetting to click Save before moving to the next tab in edit mode - changes are lost.
* Using a personal Gmail as the business email - reduces trust with website visitors.

16. Troubleshooting

Why can’t I complete onboarding? Every mandatory field on all four steps must be filled. Scroll to the top of the wizard - any field flagged in red is blocking you.

Why is my company profile marked "incomplete"? A mandatory field was added later (for example, RERA became mandatory in your city) or a sensitive change is pending Platform Owner review.

Why isn’t my logo appearing on the website? Clear your browser cache and refresh. If the logo still does not appear, check that the file is under 2 MB and in PNG, JPG or SVG format. Very wide logos may need to be re-uploaded as a square image.

Why can’t I upload a document? Documents must be under 5 MB and in PDF, PNG or JPG format. If upload fails repeatedly, try a different browser or a smaller file.

How do I update my GST details? Open Settings › Company Profile › Tax & Compliance, edit the GST fields and click Save. The change goes into a review queue and appears on invoices only after the Platform Owner approves it.

My state is wrong on invoices. Update the state in Business Address. Future invoices will use the correct CGST+SGST or IGST split. Past invoices are not changed retroactively.

17. Frequently Asked Questions

Is onboarding mandatory? Yes. You cannot access the dashboard, list properties or invite staff until all four steps are complete.

How long does onboarding take? About 10-15 minutes if you have your PAN, GST certificate and logo ready.

Can I skip a step and come back? You can save a step as a draft and return, but you cannot move past it until every mandatory field is filled.

Does my trial start before or after onboarding? Your 14-day trial starts the moment you click Submit on the final onboarding step.

Who can see my uploaded documents? Only you (the Tenant Super Admin) and the Platform Owner. Staff members and website visitors cannot see them.

Can I change my legal company name later? Yes, but the change goes through Platform Owner review because it affects invoices.

What if I do not have a GST number yet? Select "Not registered" and upload the signed GST declaration. Your invoices will be issued without GST.

18. Related Articles

* Complete Guide to Subscription, Plans & Billing
* Website Content Knowledge Base
* Complete Guide to Website Templates
* Complete Guide to Custom Domains

* Complete Guide to Staff, Roles & Permissions