pasito | LOCKTON

LOCKTON WEST'S AI PARTNER

Getting Started in Pasito

Your AI-native workbench for client deliverable production and management

Today’s Agenda

1. Where to Access
2. Dashboard Tour
3. Adding a Client
4. Your Templates
5. Editing a Client
6. Making a Guide

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Your Pasito Success Team



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Onboarding in 4 Steps

1. Provide Key Client Account Information
2. Designate Plan Year, Eligibility, and Benefits
3. Upload Plan Documents
4. Select Client Features

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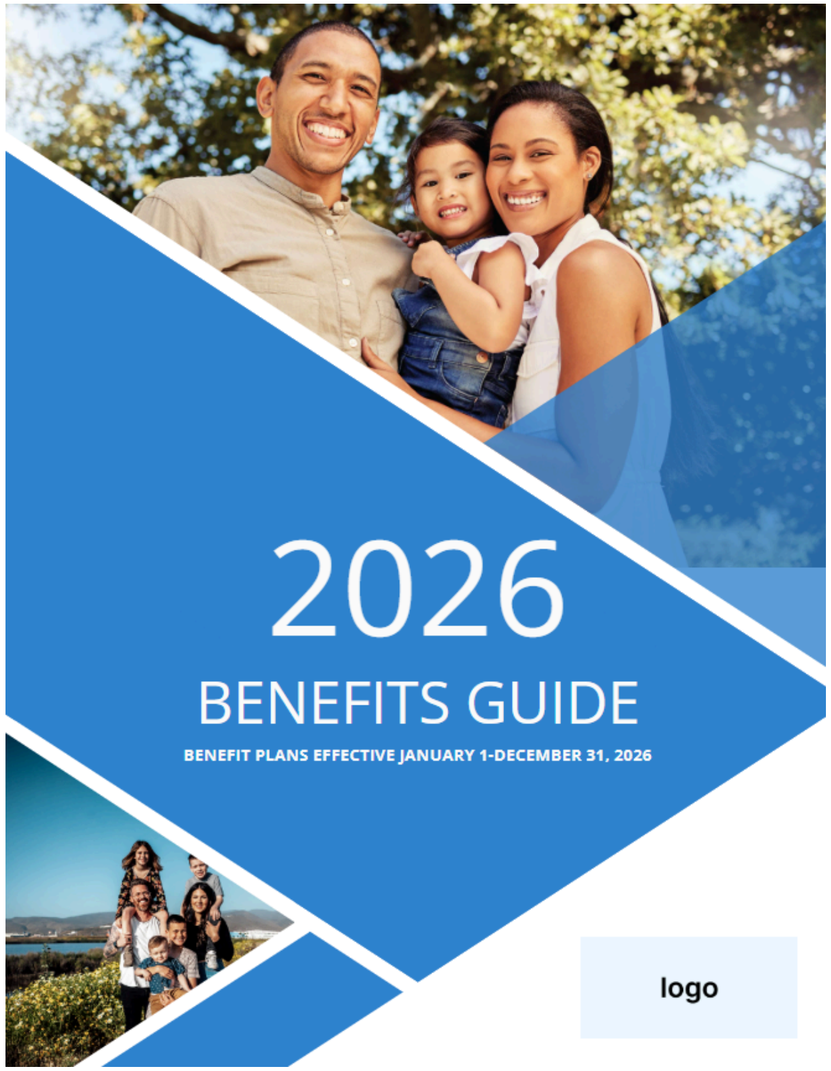
Onboarding Goals

Remember...!

Our goal is to get your team 70-75% of the way to a complete deliverable in a matter of clicks. Instances of manual work, while heavily reduced, should still be expected.

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Let’s Get Started



Thank You!

We look forward to partnering with you as you begin using Pasito.

Next Steps

Session 1b tomorrow!
Session 2 next week

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