Client Onboarding Checklist

1) Set up Your Email

2) Set up Your Phone

3) Set up Your Calendar

- Be sure to attach your calendar to your staff profile.

4) Do You Have a Domain Name?

- Yes: Set up DNS for the following subdomains - go, unsubscribe, promo, and calendar.
- No: Follow our walkthrough to purchase a domain name and set up your subdomains.

5) Do You Have a Website Built on That Domain?

- Yes: Move to the next step.
- No: Set up DNS with a CNAME record for 'www' and an A record for '@' so your website can be hosted in the CRM.

6) Do You Have an EIN Tax ID from the IRS?

- Yes: Great, move on to the next step.
- No: Follow our instructions to register for an EIN through the IRS website and download the confirmation PDF.

7) Set Up Your Calendar Website

- Use the 'cal.' subdomain.
- Enter this subdomain under Marketing -> Trigger Links.

8) Set Up Your Unsubscribe Website

- Use the 'unsubscribe' subdomain.
- Enter the subdomain under Marketing -> Trigger Links.
- Make sure the unsubscribe link is included in your staff email signature file.

9) Fill Out Your Business Profile

- Complete the Business Profile under Settings. This is required for A2P 10DLC, Toll-Free Number Registration, and SHAKEN/STIR.

Client Onboarding Checklist

- Complete your signature file under Staff Profile -> User Info. Be sure to include your unsubscribe and calendar links.

10) Walk Through and Test Your System

- Create a contact.
- Send a test email.
- Send a test SMS.
- Make a test phone call.
- Create a test task.
- Create a test calendar invite.
- Explore each section in the left-hand menu:
- -> Launchpad
- -> Dashboard
- -> Conversations
- -> Calendars
- -> Contacts
- -> Opportunities

11) Bring Your Questions

- We'll open up for Q&A to make sure you're feeling confident.

12) Bonus for Advanced Users

- If time allows, we'll demo Marketing, Automation, and Sites features.