



Agency & White Label Agency
White Glove Pre-Onboarding Checklist

If you are not a technical person, please have that individual be on the call, if possible.

Stripe Account Setup:

- You must setup a new Stripe account or new sub-account to be able to connect to your **AI Lead Intelligence software before the call. You can setup a new sub-account in an existing Stripe account or setup a completely new account, whichever you prefer. Stripe will need to verify your new account or sub-account. This can sometimes take up to 24 hours, so for that reason, it is **MANDATORY** that this new Stripe account or new sub-account is setup **BEFORE** we meet to not delay your onboarding session.**

Gmail Master Account:

- If you already have one or more Gmail accounts, you will need to decide which one you will use to be the master google sheets account. If you do not have a Gmail account or do not want to use an existing one, you will need to create one to use before our call.

White Label URL Setup:

- If you're a White Label Agency, please know the URL you're going to use for your white label agency and know how to log in to edit your DNS settings for us to make sure it is already set up and propagated so that we can connect it on our call.

SMTP Setup:

- If you're a White Label Agency, you will need to know how to set up SMTP permission for whichever email provider you choose to use. If you're using a Google account, you must have two-factor authentication enabled and use an app password and you will want to know how to do that before our call.