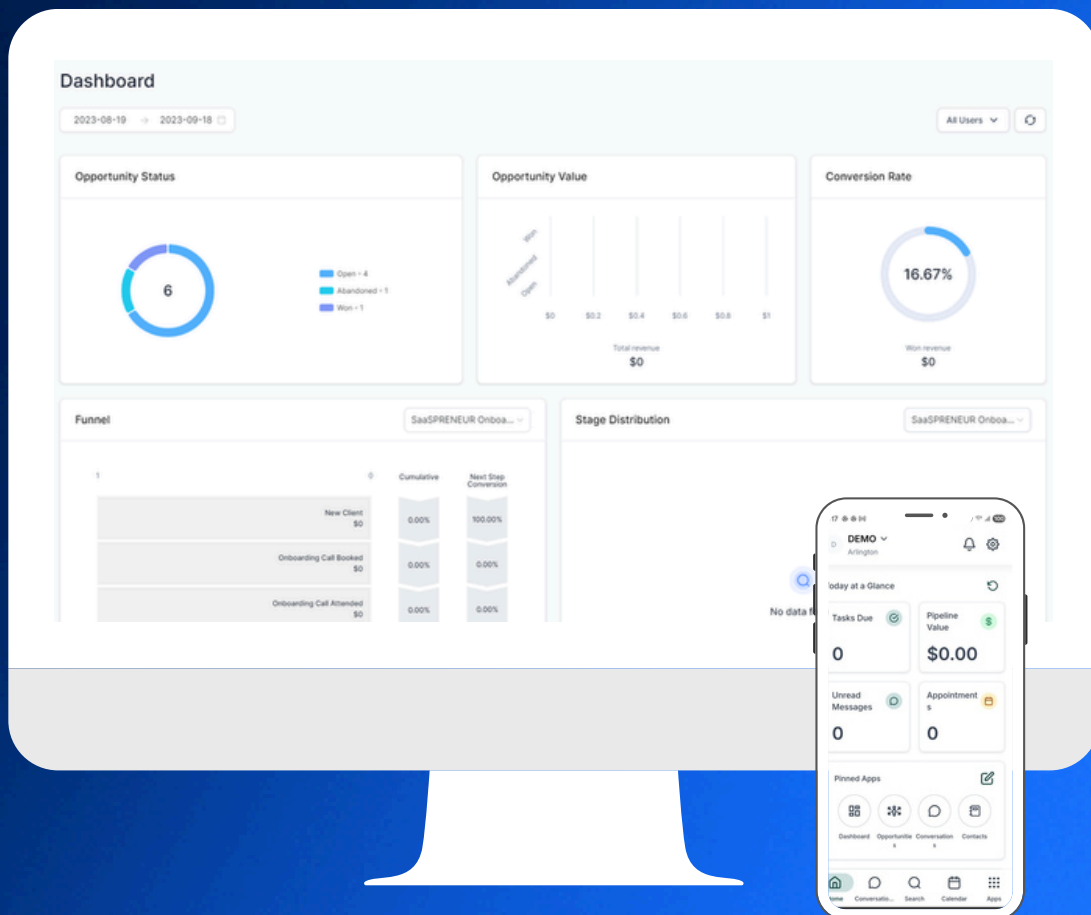


ADMIN

Account Setup For Success Reference Guide



Your Setup Roadmap

Work through these in order. Each one builds on the last, and every step here has its own lesson with full detail.

1

Account Basics

Business profile, your admin profile, billing, and time zone

2

Phone Setup

Local number, A2P registration, and SMS compliance

3

Email Setup

Dedicated sending domain, DNS verification, and warmup

4

Connect Core Tools

Google, Facebook/Instagram, Stripe, and integrations

5

Get a Workflow Running

Your first automation, triggers, and actions

6

Calendar Setup

A live personal calendar, ready to put on your website

7

CRM Essentials

Contacts, Conversations, and Opportunities, the daily-use core

8

On the Go Mobile

The mobile app, pinned features, and notifications

9

Add Your Staff

Roles, permissions, and getting your team set up last

Core Definitions

The terms that show up across the whole setup process.

A2P

Application-to-Person messaging, the carrier verification that tells AT&T, Verizon, and T-Mobile your texts are legitimate.

Dedicated Domain

A subdomain (like reply.yourbusiness.com) used to send email through the system, separate from your main business domain.

Domain Warmup

A gradual sending period after your email domain is verified, builds your sending reputation before you send in volume.

Branded Domain

A subdomain used to customize system-generated links (booking, replies) with your own domain instead of a generic one.

Round Robin Calendar

A team calendar that distributes appointments across multiple people automatically.

Workflow Trigger

The event that starts an automation, like a form being submitted.

Opportunity Pipeline

The stages a lead moves through, from new lead to closed.

Custom Value

A placeholder (like a contact's name) that pulls in real data automatically, used in forms, workflows, and notes.

Roles & Permissions

What a team member can see and do. Admin gets full access, User gets only what you assign.

Pinned Apps

The features you choose to show on your mobile dashboard for quick access.

Where to Find Everything

A quick-jump index for every setting covered in onboarding.

Business Profile	Search for Business Profile
Your Admin Profile	Search for My Profile
Billing	Search for Billing
Phone Numbers	Search for Phone Numbers
A2P Registration	Search for Trust Center
Email Services	Search for Email Services
Integrations	Search for Integrations
Workflows	Search for Workflows
Calendars	Search for Calendars
Contacts / Conversations / Opportunities	Search for each one by name
Notifications	Bell icon, top right
My Staff	Search for My Staff

Quick-Start Setup Checklist

Every step, in order. Work through this once and your account is ready.

- ☐ Fill out your business profile: logo, legal name, EIN, address, time zone
- ☐ Set up your own admin profile, password, and two-factor authentication
- ☐ Add a billing card and set an auto-recharge amount
- ☐ Get a local phone number and start your A2P registration (allow 24-48 hours)
- ☐ Set up SMS compliance: opt-out language and your business sender info
- ☐ Connect a dedicated email domain, verify DNS, and begin the warmup period
- ☐ Connect Google, Facebook/Instagram, and Stripe (or your payment processor)
- ☐ Build your first workflow, start with following up a website form
- ☐ Set up a personal calendar and add it to your website
- ☐ Spend time in Contacts, Conversations, and Opportunities to get comfortable
- ☐ Download the mobile app and pin your most-used features
- ☐ Add your team last: user info, then roles and permissions

Tips Worth Remembering

The habits and shortcuts that come up again and again during setup.

- ⚡ Don't add your staff until you've finished your own setup. Onboard yourself first, then bring in your team.
- ⚡ You won't be approved for texting the same day. Start A2P registration early so it's ready by the time you need it.
- ⚡ Use a subdomain like reply. or links. for email and branded links, never your main business domain directly.
- ⚡ The more you send and receive email in the system early on, the faster your domain reputation builds.
- ⚡ If you're in Texas, block bulk SMS until you're registered with the state, it's a legal requirement, not optional.
- ⚡ Set your working hours on your personal profile first, your calendar pulls availability from there.
- ⚡ Turn on Allow Reentry while you're testing a new workflow, or repeat tests won't trigger it again.
- ⚡ A blue button almost always means you need to click it to save, don't leave a settings page without checking.
- ⚡ If something looks like it's missing, it's often just moved. Settings gets reorganized as features grow.
- ⚡ Start with just a few contacts to practice your workflow before importing your full database.

5 AI Prompts You Can Use Today

1. Business Profile Checklist for My Business

ACT AS AN OPERATIONS CONSULTANT

I want to make sure I fill out my business profile completely and correctly the first time.

- [Insert your business type and whether you have an EIN or business registration number]
- A checklist of every field I should fill out, grouped logically
- One sentence on why each group matters (branding, compliance, or scheduling)
- A reminder of what to double check before I click update
- Keep it short enough to follow while I'm actually filling out the form.

2. A2P Registration Prep Sheet

ACT AS A COMPLIANCE CONSULTANT

I want to gather everything I need before I start A2P registration so it goes smoothly the first time.

- [Insert your business type and whether you already have an EIN]
- A list of the information and documents I should have ready
- One sentence on what happens if any of it is missing or wrong
- What to expect for approval timing, and what I can do while I wait
- Keep it practical, not legal jargon.

3. Email Domain Warmup Plan

ACT AS AN EMAIL DELIVERABILITY CONSULTANT

I just verified my sending domain and want a simple plan to warm it up properly.

- [Insert roughly how many contacts you have and how often you plan to email]
- A short day-by-day or week-by-week warmup plan
- What kinds of emails are good for warming up versus risky this early
- One sign that would tell me something's wrong and I should slow down
- Keep the plan realistic for a small business, not an enterprise sender.

4. First Workflow Planner

ACT AS A MARKETING AUTOMATION CONSULTANT

I want to plan my very first automation before I start building it.

- [Insert what form or trigger you want to automate, and your business type]
- The trigger, and 3 actions that should happen after it fires
- One decision I need to make up front (like time zone restrictions or business hours)
- A simple way to test it safely before turning it on for real leads
- Keep it to one simple workflow, not a whole campaign.

5. Roles and Permissions Planner

ACT AS AN HR-MINDED OPERATIONS CONSULTANT

I'm about to add my team and want to plan out roles before I start clicking through permissions.

- [Insert the roles on your team, for example sales, support, marketing, admin]
- A recommended access level (Admin or User) for each role, with reasoning
- The 2-3 permission areas each role most needs access to
- One thing to double check before giving someone Admin access
- Keep this as a simple table I could reference while setting up each person.

5 More AI Prompts to Try

6. Calendar Availability Setup Guide

ACT AS A SCHEDULING CONSULTANT

I want to make sure my calendar and my profile availability actually match before I put it on my website.

- [Insert your working days and hours]
- A short checklist confirming profile availability matches calendar settings
- One common mismatch that causes bad booking times, and how to catch it
- A reminder of what to check after publishing the calendar to a page
- Keep it short and practical.

7. Website Form Follow-Up Message Writer

ACT AS A COPYWRITER

I need a short internal notification and confirmation message for when someone fills out my website form.

- [Insert your business type and what the form is for]
- A short internal notification alerting my team to the new lead
- A friendly confirmation message the lead could receive
- One line explaining what makes a first response feel fast and human, not automated
- Keep both messages under 50 words each.

8. Mobile Pinned Features Recommendation

ACT AS A PRODUCTIVITY CONSULTANT

I want to know which features to pin on my mobile dashboard so I'm not hunting for things on the go.

- [Insert how you mainly work: mostly calls, mostly text, mostly in-person]
- My top 4 recommended pinned features, in priority order
- One sentence on why each one earns a spot for someone who works the way I do
- One feature most people forget to pin but shouldn't
- Keep the list to exactly 4.

9. 30-60-90 Day Setup Plan

ACT AS AN ONBOARDING CONSULTANT

I've finished initial setup and want a simple plan for what to focus on over the next 30, 60, and 90 days.

- [Insert your business type and what you're most excited to use the software for]
- 3-4 focus areas for the first 30 days
- 3-4 focus areas for days 31-60
- 3-4 focus areas for days 61-90
- Keep each phase realistic. This is a small business owner's plan, not a corporate rollout.

10. Team Onboarding Message

ACT AS A TEAM COMMUNICATIONS CONSULTANT

I'm ready to add my team and want a short message to send them once their account is set up.

- [Insert your team member's role and what you most need them to start doing]
- A short welcome message explaining what they now have access to
- 2-3 first things they should do when they log in
- Who to contact if they get stuck
- Keep the tone welcoming, not overwhelming, this is their first message about the system.

Setup Time Benchmarks

Roughly how long each step takes, so you can plan your onboarding session.

Account Basics

15-20 min. Business profile, admin profile, and billing.

Phone Setup

10-15 min active time. A2P approval takes 24-48 hours after.

Email Setup

15-20 min. DNS verification can take a few minutes to propagate.

Connect Core Tools

10 min. Faster if you're already logged into Google and Facebook.

Get a Workflow Running

15-20 min for your first simple automation.

Calendar Setup

10-15 min for a single personal calendar.

FULL ONBOARDING ROLLOUT CHECKLIST

- ☐ Finish your own setup completely before adding any staff.
- ☐ Keep your ID and business documents handy for A2P verification.
- ☐ Send a few test emails and texts to yourself before going live with contacts.

The Bottom Line

Setup is a one-time investment

Nine steps, done once, properly, save hours every week after. Work through them in order, don't rush A2P or email warmup since both run in the background while you keep setting up everything else.

"You get out of it what you put into it. Start with just a few contacts to practice the workflow before importing your entire database."

Keep this guide nearby through your first 90 days. Come back to it any time a setting doesn't look familiar.