Agency Onboarding Checklist

Step 1: Set up Your Agency Account

- ❏ Add your Agency Logo to your White Label Settings
- ❏ Connect your Stripe Publishable Key & Secret Key
- ❏ Create a Free Subscription for Agency Use
- ❏ Create a Paying Subscription for Clients
- ❏ Upload Your Order Form Links
- ❏ Set up Client Training

Step 2: Add Your Agency As Your First Client

- ❏ Create a Free User for your Agency
- ❏ Add Your Logo
- ❏ Update your Timezone
- ❏ Connect your Facebook Account
- ❏ Connect your Twitter Account
- ❏ Connect your Linked In Account
- ❏ Connect your Google My Business Account

Step 3: Claim Social Packs

- ❑ Claim the Digital Agency Pack from the Market Place
- ❑ Claim a Date Based Pack from the Market Place
- ❑ Create your own Custom Content Bucket

Step 4: Create Your Schedule

- ❑ Create a Rotation Schedule
- ❑ Create a Date Based Schedule

Step 5: Setting Up New Clients

- ❑ Setting up a New Client
- ❑ Logging into your Client's Location
- ❑ Gathering Assets from Clients

Resources:

- ❑ Register for the Weekly Q&A Call
- ❑ How to Watch Replays of past Calls
- ❑ Canva Templates
- ❑ Client Onboarding Trello Template
- ❑ Bulk Upload CSV Sheet

How to get Help:

- ❏ Join the Priority Support Facebook Group
- ❏ Submit a Ticket to the Support Team
- ❏ Schedule a 1-on-1 Call with a Social Rotation Team Member
- ❏ Send us an email