

Onboarding Prep Checklist

For prospective LOTULIS customers preparing for their setup call

Your LOTULIS account takes about 45 minutes to set up on a call with your sales rep. To make that call fast and productive, please gather the items below ahead of time. Everything is optional except your email and a password - the rest just speeds things up.

1. Account basics

These are the fields on the signup form itself.

- ☐ **Your name** - First + last
- ☐ **Business name** - What your customers know you as
- ☐ **Email** - This becomes your login. Use the address you actually check.
- ☐ **Password** - Pick one now, or we'll help you set one on the call
- ☐ **Phone** - For account recovery. We never send marketing texts.
- ☐ **Website** - Your existing site, if you have one
- ☐ **Business address** - Street, city, state, zip

2. Business profile

You fill these in from Settings after signup. If you ask for assisted setup at signup, our team sets them up for you from the information you send in your setup ticket.

- ☐ **Tagline** - Your one-line "what you do"
- ☐ **About description** - Short paragraph (2-4 sentences) about your business
- ☐ **Logo** - PNG file, transparent background preferred
- ☐ **Brand colors** - Primary + secondary, as hex codes (e.g. #1A2B3C) or hex picker on the call
- ☐ **Services list** - Every service you offer with a price. Example: "Real estate photography - \$250 for first 1500 sqft" / "Twilight shoot - \$150 add-on". Include name, price, and a one-line description for each.
- ☐ **Team members** - For each person on your team: name and role (e.g. "Jane Smith, photographer")

3. Features to enable

We'll walk through these on the call. They're a set of toggles for which parts of LOTULIS you want active out of the gate. You can change any of them later from Settings.

Recommended (default-on):

- ☐ **Services** - Catalog and pricing for what you offer
- ☐ **Orders** - Track jobs from booking to delivery
- ☐ **Calendar** - Schedule jobs and appointments
- ☐ **Invoices** - Send and track payments
- ☐ **CRM** - Manage customer relationships

Optional add-ons (default-off):

- ☐ **Galleries** - Deliver photos and videos to clients

4. Plan choice

Final step: pick a plan. Your rep will walk through the options on the call, but here's the short version:

- ☐ **Starter - free** - Limited features. Good for trying us out.
- ☐ **Pro - \$45.95/mo** - The full feature set. The default choice for active businesses.

Every new account starts on Starter; Pro is a paid plan. Asking for assisted setup at signup includes six months of Pro, paid up front. Lotulis Pro: \$275.70 for your first 6 months, plus applicable taxes. After your first six months, your subscription automatically continues at \$45.95/month, plus applicable taxes, unless canceled.

5. Optional extras for the call

These aren't required for onboarding, but if you can bring them along, your rep can set them up during the same call instead of scheduling a follow-up. All optional - skip any that aren't ready yet.

- ☐ **Existing customer list** - CSV or list of current clients you'd like imported into your CRM. Include name, email, phone, and any other info you have on each.
 - ☐ **Stripe (or other payment processor) account** - Needed for taking online payments. You connect it yourself from your Settings during the call, and your rep walks you through each step. If you don't have one yet, you create it during the call with your rep's guidance. Never share your Stripe login, password or API keys with LOTULIS staff; nobody will ask for them.
 - ☐ **Tax rate + pricing modifier rules** - Your local sales tax rate, plus any rules like rush fees, weekend surcharges, travel / mileage fees.
 - ☐ **Business hours / typical availability** - Your normal working hours and any standing days off. Detailed scheduling can be tuned later.
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After the call

Your account will be live and you'll be able to log in, view your dashboard, and start using the features you enabled. Your rep stays available for a follow-up if you need help with the post-onboarding configuration (Stripe, tax rates, calendar, customer import).

Questions before the call? Email your rep directly - they're your point of contact.