

Your first 10 steps in Votel.

A start-to-finish setup path for a new business or client account. Built for people who know HighLevel and want to get productive in Votel without guessing where everything lives.

TYPICAL HANDS-ON TIME

45–75 min

Fast essentials

30–45 minutes for CRM, pipeline, and a tested agent

Complete account

60–90 minutes including core channels

Optional website

Add roughly 15–30 minutes

Possible waiting

DNS and connected-app approvals

This is the client-account guide, not the agency white-label guide. Use it inside each business or sub-account after the agency shell is ready. It mirrors Votel's in-app checklist but adds decisions, safety checks, and definitions of "done."

01–02

Account + CRM

03

Pipeline

04

AI agent

05–07

Channels

08–10

Capture + launch

01

1 MINUTE

AUTOMATIC

Confirm your account

Confirm that you are working in the correct client account before changing anything.

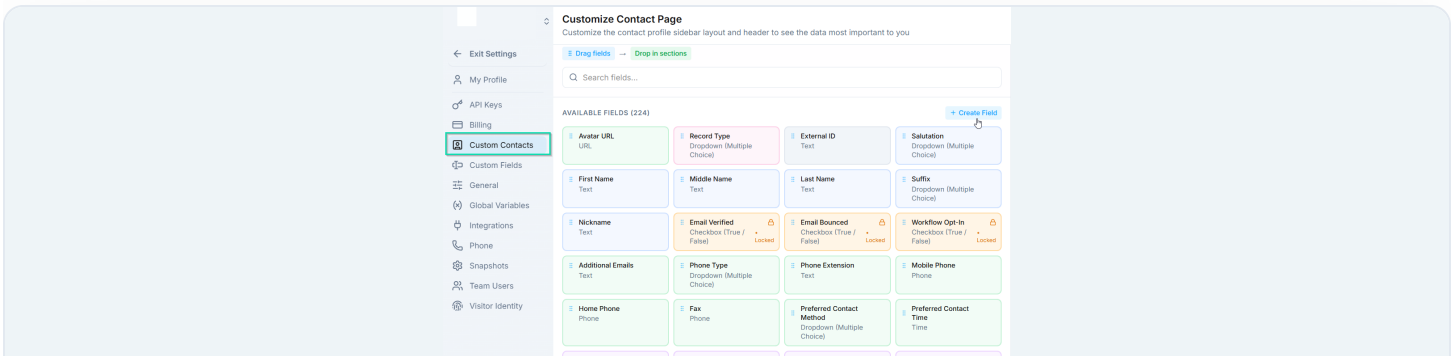
1. Confirm the business or location name and owner email.
2. Open the checklist from the progress percentage in the top navigation.
3. Check that “Create your account” is complete.

Done means

The correct business is selected and the account item is checked.

Customize contacts

Shape the CRM around the facts that affect qualification, routing, reporting, and follow-up.



Settings → Custom Contacts. Source: [Votel Custom Fields documentation](#).

1. Choose **Customize with AI**, or go to **Settings → Custom Contacts**.
2. List the 5-10 facts the business needs about a lead.
3. Add only useful fields, choose the right field types, and save.
4. Open a test contact and confirm the layout is readable.

HighLevel translation

This combines Custom Fields and contact layout. The same data can feed agents, workflows, filters, and pipeline cards.

AI HANDOFF PROMPT

Help me design the contact record for [BUSINESS NAME], a [BUSINESS TYPE]. Ask what we sell, how we qualify a lead, and what the team needs before following up. Propose no more than 10 fields with name, type, allowed values, purpose, and where each will be used. Do not create or delete anything until I approve the table.

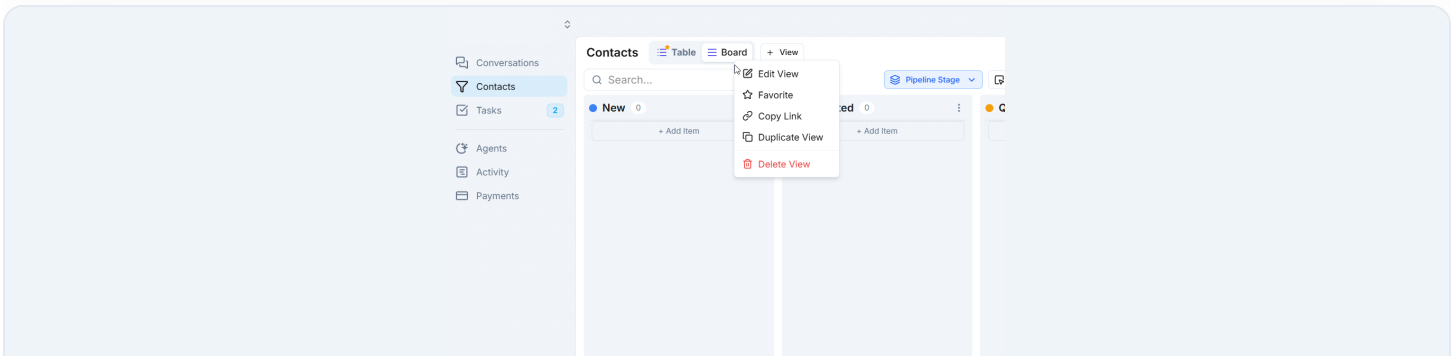
The agent should propose first and wait for approval.

Done means

A test contact shows the right fields and every field has a purpose.

Review your pipeline

Use stages that describe meaningful movement in the buying process.



Source: [official CRM overview](#).

1. Open **Contacts** → **Pipeline**.
2. Use clear stages such as New Lead, Contacted, Qualified, Appointment Booked, Won, and Lost.
3. Remove vague or duplicate stages.
4. Create a test contact and move it through the first two stages.

Keep version one small

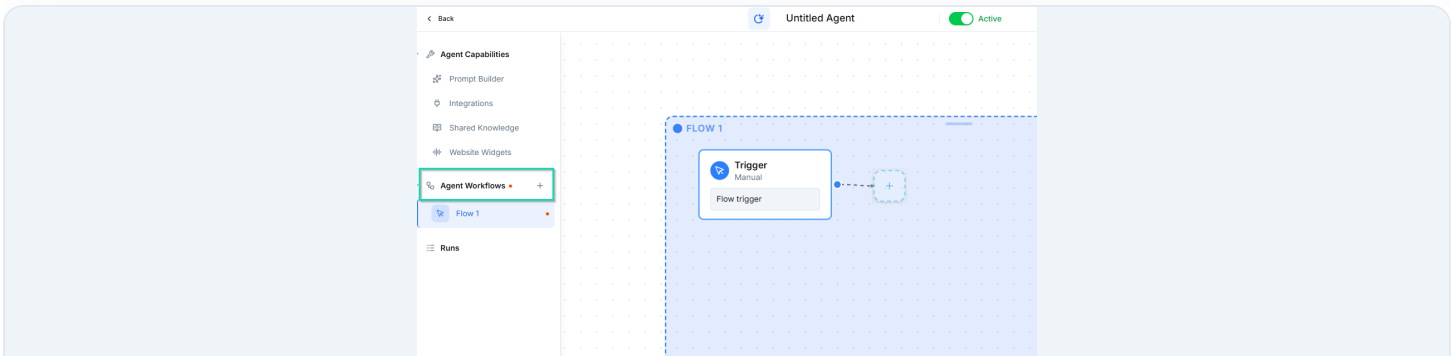
Five to seven stages are enough for most first setups.

Done means

A test contact moves through a clear, real sales journey.

Build and test one AI agent

Start with one job, one audience, and one measurable outcome.



Source: [Votel AI Agents overview](#).

1. Create one role, such as Front Desk or Lead Qualifier.
2. Define identity, tone, rules, FAQs, and human handoff.
3. Choose a model and voice, then test in the browser.
4. Try a normal inquiry, unclear answer, prohibited request, and human handoff. Revise and retest.

AGENT-BUILDING PROMPT

Create a first-draft system prompt for an AI [ROLE] at [BUSINESS NAME]. Its primary outcome is [OUTCOME]. Include identity, opening behavior, data it may collect, FAQs, prohibited claims, escalation rules, and confirmation rules. Mark every missing fact as [NEEDS INPUT]. Then give me 10 test conversations. Never invent prices, policies, hours, or regulated advice.

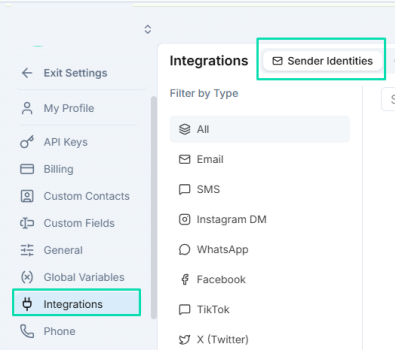
Replace every [NEEDS INPUT] before activation.

Done means

The agent passes four test conversations and hands off correctly.

Connect email

Use a shared sender for a quick test or a branded identity for production.



Source: [Votel Sender Identities documentation](#).

1. Open **Settings → Integrations → Sender Identities**.
2. Select a shared identity for testing, or add a branded email identity.
3. Complete provider authorization and copy any account-specific DNS values exactly.
4. Send a test and check From name, reply path, and spam placement.

Do not break existing email

Do not delete or replace MX, SPF, DKIM, or DMARC records without understanding the existing mail setup. Never create multiple SPF records.

SAFE DNS PROMPT

Help me add Votel sender-identity DNS records for [DOMAIN] at [DNS PROVIDER]. First create a change plan and check conflicts. Do not change nameservers, delete records, or overwrite existing MX, SPF, DKIM, or DMARC. Never ask for passwords, API keys, recovery codes, or MFA codes. Pause before every Save and show the exact record and effect. After I approve, verify public DNS. Votel records: [PASTE EXACT RECORDS FROM VOTEL]

You handle login, MFA, and final approval.

Done means

A test message arrives and replies go where expected.

06

5-10 MINUTES

PAID ACTION

Buy and route a phone number

Decide what answers the number and verify the recurring price before purchase.



Search

Country, area code, or digits



Review price

Confirm recurring cost



Route calls

Webphone, person, or agent

1. Open **Settings → Phone → Buy Numbers**.
2. Search by country and area code, then review capabilities and price.
3. Set the call destination before clicking **Buy Now**.
4. Call from an outside phone and confirm the expected destination answers.

SMS compliance is separate

Buying a number does not make every type of outbound texting compliant.

Done means

An outside test call reaches the correct destination.

07

10-15 MINUTES

Connect a calendar

Connect real availability and prove a booking appears in both places.

G

Authorize

Use the intended Google account



Availability

Hours, buffers, booking window



Test booking

Verify events and notices

1. Click **Open Scheduling** and connect the correct external calendar.
2. Set availability, duration, buffers, timezone, and required questions.
3. Create a clearly labeled test booking.
4. Verify the event and host/guest notifications.

HighLevel translation

Votel scheduling can work while this checklist item remains incomplete. The checklist is looking for an external calendar connection.

Done means

One test booking appears correctly in both systems with the right timezone.

08

10-15 MINUTES

Create and test one form

Capture only what the next action needs, then verify where every answer lands.



Create with AI

Start from the outcome



Map fields

Save to the contact record



Publish

Test URL or embed

1. Click **Create with AI** or open Forms.
2. If unsure, choose a standard one-page form.
3. Map answers to the correct contact fields.
4. Set the success message or redirect and publish.
5. Submit a test and verify the contact, submission, and workflow.

Done means

A test submission creates or updates the correct contact with every answer mapped.

09

20-40 MINUTES

OPTIONAL DNS WAIT

Build or connect a website

Prove the content and conversion path on the temporary URL before connecting a domain.



Describe

Audience, offer, proof, action



Publish

Test the generated URL



Connect domain

Add the exact CNAME

1. Describe the audience, offer, proof, and primary CTA.
2. Review factual accuracy, mobile layout, contact details, and buttons.
3. Publish to the provided URL and test the complete conversion path.
4. Only then connect a domain using the exact DNS record shown.
5. After DNS and SSL are active, retest on phone and desktop.

Two different DNS jobs

A public website domain is separate from an agency white-label app domain.

WEBSITE BRIEF PROMPT

Turn the verified information below into a one-page Votel website brief. Include audience, offer, problem, outcome, three proof points, services, FAQs, CTA, contact details, and prohibited claims. Mark missing proof or policies as [NEEDS INPUT]. Then create a mobile-first QA checklist for links, forms, phone buttons, metadata, headings, accessibility, and tracking. Business information: [PASTE VERIFIED DETAILS]

A human should approve claims, legal text, domain changes, and publishing.

Done means

The public page works on phone and desktop and every CTA completes its action.

Bookmark the training path

Use Votel Quick Start for deeper agent building and this SOP for account-level setup.

1. Click **Open Quick Start Docs**.
2. Bookmark the official Quick Start.
3. Assign one next lesson tied to the first live use case.
4. Manually mark any checklist item complete if it was finished another way.

Done means

The owner knows where training lives and has one specific next lesson.

The 10-minute launch check

Prove one complete customer journey before calling the account ready.

1. Enter

Begin exactly like a customer.

2. Respond

Confirm the agent or team behaves correctly.

3. Record

Check contact, fields, conversation, and stage.

4. Complete

Verify the email, booking, handoff, or next action.

Sources and scope. This SOP follows Votel's in-app ten-step checklist and was cross-checked September 13, 2026 against official documentation for [CRM](#), [agents](#), [sender identities](#), [forms](#), and [websites](#).