

FOR AGENCY OWNERS COMING FROM HIGHLEVEL

White-label Votel without getting lost.

A visual, step-by-step setup guide for agency owners. Know where to click, what to prepare, how long each stage takes, and exactly how to confirm it worked.

About 60 minutes

When assets and pricing are ready

Allow up to 2 hours

For a careful first setup and testing

Up to 48 hours

Possible DNS wait; no active work required

The shortest useful answer: do the work in Votel's recommended order. Branding comes first, then the domain, plans, signup and one test client. Do not send customers to the signup page until you have completed the final quality check.

Use the web guide

Jump to any step and copy the AI prompts.

Watch alongside it

Use the official 12-minute Votel walkthrough.

Take it offline

Download the same SOP as a printable PDF.

NEED AN ACCOUNT FIRST?

If you don't already have a Votel account, [click here to get a free account.](#)

Free to start. No credit card required. This is an affiliate link, which may earn All Things Votel a commission at no extra cost to you.

[Get my free Votel account →](#)

Before you touch a setting

Spend ten minutes gathering these items. It prevents the stop-start loop that makes a simple setup feel much longer.

Your HighLevel mental model	Full path in Votel
Agency branding	Settings → SaaS Configurator → Branding
White-label and API domains	Settings → SaaS Configurator → Custom Domain
SaaS Configurator plans	Settings → SaaS Configurator → SaaS Plans
Stripe and SaaS Mode checkout	Settings → SaaS Configurator → Signup Form
Location accounts	Settings → Sub-Accounts

☐ Company name, support email, phone and website URL

☐ Light logo, dark logo, favicon and a square 512x512 app icon

☐ A subdomain choice such as `app.yourbrand.com`

☐ Administrator access to the domain's DNS provider

☐ Stripe administrator access and an approved pricing model

☐ A test email address that is not your agency-owner login

Important: use the exact DNS records shown inside your own Votel account. DKIM and verification values can be account-specific. Examples in a guide are never a substitute for the live values in your setup panel.

☐ Preparation complete

01

Brand the platform

15-20 min hands-on

No waiting

Go to: Settings → SaaS Configurator → Branding

Set the company identity and upload both light- and dark-background versions of your logo. Screenshot: Votel documentation.

- 1 Enter the company name, support email, phone number and website clients should see.
- 2 Upload the primary logo, then adjust its height and fit so it reads clearly in the sidebar.
- 3 Upload a dark-mode logo, favicon and square app icon. Preview each at small size.
- 4 Add social links only if they belong in client-facing email footers.
- 5 Paste your support-widget embed code if you want help chat inside every client account.
- 6 Decide whether to show “Powered by,” live support and feedback buttons, and whether sub-accounts may change branding.
- 7 Click **Save Branding Settings**, refresh the page and inspect both light and dark modes.

If you are coming from HighLevel: this is the agency-level brand layer. Choose the identity you want every client workspace to inherit before you create or invite clients.

Success check: your company name and logo replace the platform defaults, support information is yours, and both themes remain readable.

Copy the branding-prep AI prompt

Prepare my Votel white-label brand checklist from the company details, colors, and logo files I provide. Check for a light-background logo, dark-background logo, favicon, and 512x512 app icon. Flag missing, low-resolution, or unreadable assets and recommend filenames and dimensions. Draft concise client-facing support details without inventing information. Do not upload or change anything. Return a table marked Ready, Needs work, or Missing.

☐ Step 1 complete

Connect your branded domain

15-25 min hands-on

DNS: minutes to 48 hr

Go to: Settings → SaaS Configurator → Custom Domain

Domain Verification - app.fedoratest13.ai

Add DNS records to verify domain ownership

Enable Inbound Email
Receive emails at this domain. MX records will be generated when enabled.

Website Configuration (0/1 verified) Verify Now

Add these records to configure your website hosting:

Type	Name	Value
CNAME	app	dash.noote1.com

Last checked: 19/01/2026, 23:52:42

Auto-checking every 30 seconds Verify Domain Done

Votel generates the exact records for the website, verification and email. Copy the values from your account. Screenshot: Votel documentation.

- 1 Choose a clear client-facing subdomain such as `app.yourbrand.com` or `portal.yourbrand.com`.
- 2 Click **Add Domain**, enter the full subdomain and open its setup panel.
- 3 In a second browser tab, open the DNS manager for the root domain. Do not change nameservers.
- 4 Add the website CNAME and every verification record exactly as Votel displays them. Leave TTL on Auto unless your provider requires a value.
- 5 If you want system email to come from your domain, turn on email and add the exact SPF, DKIM, DMARC and routing records Votel provides.
- 6 Return to Votel and click **Check**. If a record is pending, compare host/name, type and value character by character.
- 7 Only enable inbound email routing if you intentionally want replies handled there and you understand how it interacts with your existing mail provider.

Never replace an existing SPF record with a second SPF record. A domain should normally have one SPF TXT record. If one exists, the required include value may need to be merged. Get qualified help before changing production email DNS.

Success check: Votel marks the custom domain active, the branded URL loads securely, and any enabled email records pass verification.

Copy the guarded DNS-agent prompt

Help me add the exact DNS records copied from my Votel account. First, create a change plan and check for conflicts with existing CNAME, SPF, DKIM, DMARC, MX, or routing records. Never invent values, change nameservers, or delete or overwrite records. If SPF already exists, stop and explain that it may need to be merged. If operating my browser, pause before every save and show Type, Host, Value, TTL, and impact. I will handle login, MFA, secrets, and final approval. After approval, verify each record and return a results table.

My DNS provider: [PROVIDER]
My intended subdomain: [SUBDOMAIN]
Exact records copied from Votel:
[PASTE RECORDS HERE]

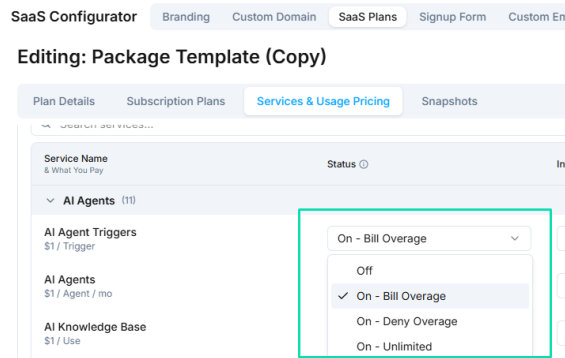
☐ Step 2 complete

Build the plan clients will buy

25-40 min hands-on

Pricing decision required

Go to: Settings → SaaS Configurator → SaaS Plans



Each service can be included, metered, capped or disabled independently. Screenshot: Votel documentation.

- 1 Start with one sellable plan. Give it a client-friendly name and a one-sentence outcome, not an internal code.
- 2 Choose monthly, quarterly or annual billing. Add a setup fee or trial only when it matches your sales process.
- 3 For each service, choose **Unlimited**, **Pay-Per-Use**, **Deny Overage** or **Off**.
- 4 Use Votel's 2X Markup control as a starting point, not a substitute for margin math. Include support, onboarding and payment fees in your model.
- 5 Add one-time credits if clients need a safe starting balance immediately after signup.
- 6 Review the sub-account defaults, then publish the plan only after checking every included service and unit price.

Mode	What the client experiences	Use it when
Unlimited	Included with no metered retail charge.	You have modeled the underlying cost and acceptable-use risk.
Pay-Per-Use	Usage is charged at your configured unit price.	Consumption varies and you want margin tied to usage.
Deny Overage	Usage stops at the plan limit.	A hard budget boundary is more important than continuity.
Off	The service is unavailable.	The feature does not belong in this tier.

Success check: the published plan has the correct billing interval, services, usage rules, free credits and sub-account defaults.

Copy the SaaS-plan modeling prompt

Draft a Votel SaaS plan from the costs, limits, support workload, payment fees, target customer, and desired margin I provide. Show assumptions. For each service, recommend Unlimited, Pay-Per-Use, Deny Overage, or Off and explain the risk. Calculate break-even and margin at low, expected, and high usage. Do not publish or change anything. Return one plan table and the decisions I must approve.

Target customer: [DESCRIBE]
 Monthly platform cost allocation: [AMOUNT]
 Usage costs: [PASTE]
 Included support/onboarding cost: [AMOUNT]
 Desired margin: [PERCENT]
 Services I want to include: [LIST]

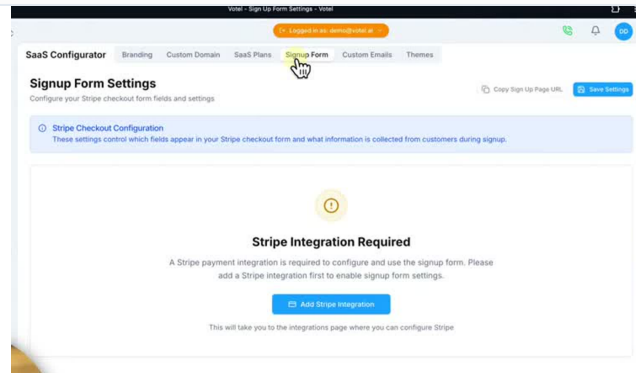
☐ Step 3 complete

Connect Stripe and open signup

15-25 min hands-on

User approval required

Go to: Settings → SaaS Configurator → Signup Form



The signup form remains unavailable until Stripe is connected. Screenshot from Votel's official white-label walkthrough.

- 1 Confirm the custom domain is active and at least one sellable SaaS plan is published.
- 2 Click **Connect Stripe** and choose the Stripe account that should receive client payments.
- 3 Complete Stripe authentication, permissions, identity and business confirmations yourself.
- 4 Return to the signup form, choose the plan or plans clients may buy and configure the required checkout fields.
- 5 Copy the hosted signup URL and open it in a private browser window.
- 6 Inspect the logo, domain, price, billing interval, fields, legal links and mobile layout before sharing it.

Financial safety boundary: an AI agent can prepare the checklist and navigate, but you should complete authentication, MFA, identity, bank, tax, permissions and final connection approval. Never paste Stripe secrets or card details into an AI chat.

Success check: the hosted signup URL loads on your branded domain, shows the intended plans and sends payment through the correct Stripe account.

Copy the Stripe setup assistant prompt

Guide me through connecting Stripe to Votel and checking the hosted signup page. First confirm the Stripe business, live/test mode, approved plan, billing interval, checkout fields, support contact, policies, legal links, and test email. You may navigate, but stop for login, MFA, identity, banking, tax, permissions, payment data, publishing, or final approval. I will complete those actions. Never request secrets or create a live charge, change payouts, disconnect Stripe, issue a refund, or publish without explicit approval. Finish with private-window QA and a list of what I confirmed.

☐ Step 4 complete

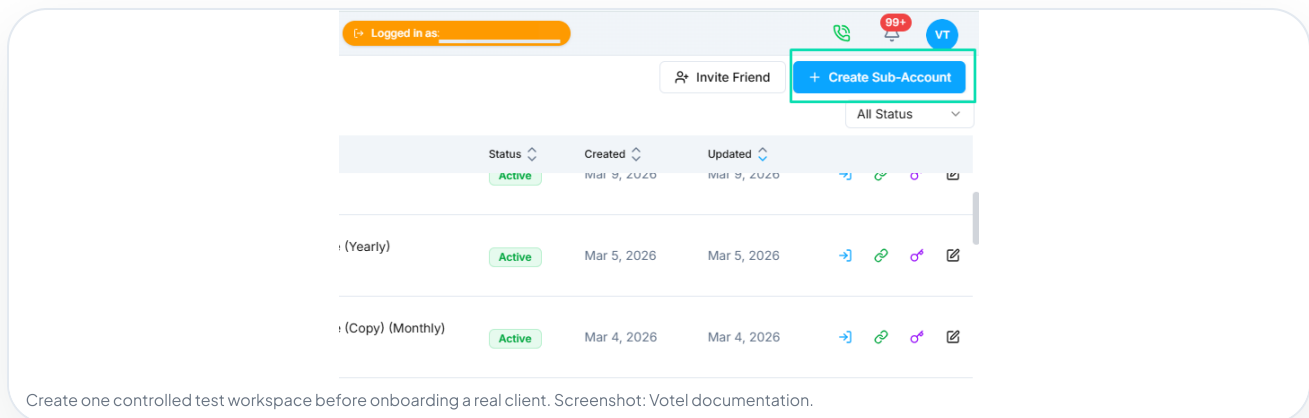
05

Create one test client account

15-20 min hands-on

Test before inviting clients

Go to: Settings → Sub-Accounts



- 1 Click **Create Sub-Account**. Do not confuse this with Votel's separate "Invite Friend" referral action.
- 2 Use a controlled test email, assign the plan you built and create the account.
- 3 Use **Login as** to inspect exactly what a client sees.
- 4 Verify the brand, domain, theme, enabled services, usage limits, support links and system email.
- 5 Generate a login link and test it in a private browser window. Treat login links as sensitive and short-lived.
- 6 Confirm the account and subscription appear correctly in the Sub-Accounts list and billing/contact view.

If you are coming from HighLevel: think of this as your controlled location-account test. Prove the inherited agency configuration before a real customer encounters it.

Success check: the test client can enter through the branded URL, receives the correct plan, sees the expected services and can reach your support path.

Copy the launch-QA agent prompt

Run read-only QA using only my test Votel sub-account. Check the branded HTTPS URL, company name, logos, favicon, theme contrast, support details, services, plan, limits, welcome email, login link, mobile layout, and billing display. Do not invite clients, send messages, create charges, change plans, expose login links, or deactivate or delete anything. Mark each item Pass, Fail, or Not Tested with evidence and a fix. Stop for authentication, MFA, financial, destructive, or customer-facing actions.

☐ Step 5 complete

The ten-minute launch check

Do this once from a private browser window and once from your phone. If every item passes, the basic white-label path is ready for a controlled client launch.

Branded HTTPS URL loads

Logo works in light and dark mode

Support details belong to your agency

Correct plan and interval appear

Usage modes match your pricing

Stripe receives the payment path

Welcome email uses your identity

Test sub-account gets correct access

Login link opens the right workspace

Mobile signup remains readable



Final launch check complete

Questions agency owners ask

How long should I budget?

Plan on about 60 minutes when your brand assets, domain access, Stripe account, and pricing decisions are ready. Allow up to two hours for a careful first setup and testing. DNS may verify in minutes, but Votel's documentation notes that propagation can take up to 48 hours. That is waiting time, not active setup work.

Do all five steps live in the SaaS Configurator?

Branding, Custom Domain, SaaS Plans and Signup Form do. Client Sub-Accounts has its own Settings menu item.

Can an AI agent do the whole setup for me?

It can prepare assets, model plans, draft DNS changes and perform structured QA. Keep login, MFA, secrets, Stripe identity and banking, final financial approvals, destructive actions and production client communication under human control.

Should I turn on inbound email routing?

Only if you intentionally want replies handled through the configured Votel route and have checked the effect on your existing email provider. Outbound branded system email and inbound mailbox routing are separate decisions.

What should I launch first?

One plan and one controlled test account. Additional tiers, advanced theming and automation can follow after the core signup-to-login path is proven.

Primary sources: Votel's [White Label overview](#), [SaaS Configurator](#), [Custom Domain](#), [SaaS Plans](#), [Signup Forms](#), [Sub-Accounts](#), and the [official walkthrough](#). Verified September 13, 2026. Interface labels can change; use the live values in your account. All Things Votel is independent and not affiliated with Votel.ai.