Client onboarding checklist

How we set up access without holding your passwords. Print this page and tick items as you go.

These are Botler's usual access practices, not a legal contract. The service agreement, including confidentiality and data-handling terms, should be reviewed by a lawyer before you sign.

Before kickoff

- [ ] You create the Grok Bot account and start the subscription in your name.
- [ ] You add Felipe as a helper or member (you can remove this access at any time).
- [ ] You have a password manager ready (1Password or Bitwarden).
- [ ] You list the services and tools to connect (for example Outlook, Shopify, accounting, Slack).
- [ ] You name who will approve outbound emails, texts, and purchases.
- [ ] The service agreement is reviewed — have a lawyer look it over.

Kickoff call

- [ ] Screen share is on; Felipe guides, you type.
- [ ] For each connector, you sign in on your own "Sign in with..." screen.
- [ ] Where a service allows it, you create a limited-permission bot or staff user (for example a Shopify staff account with no payout access).
- [ ] Two-factor authentication stays on for your accounts.
- [ ] If a bot truly needs a login, you store it in your password manager and share it to the bot's vault — never by text or email.

Build & test

- [ ] Routines and skills are built around the agreed workstreams.
- [ ] Approval is required before any email, text, or purchase goes out.
- [ ] Test drafts are reviewed by you.
- [ ] You confirm you can approve, reject, and pause work.

Handoff

- [ ] Walkthrough of how to run and adjust the bots.
- [ ] Connection inventory is handed over (every service connected, and how).
- [ ] Access review: who has access, and that Felipe is only a helper on your account.
- [ ] Two-factor authentication is still on; no passwords have been emailed or messaged.

Offboarding

- [ ] You remove Felipe as a helper or member.
- [ ] Any passwords that were shared to a vault are rotated.
- [ ] The connection inventory is confirmed current.
- [ ] You keep the Grok Bot account, the data, and the subscription.