

# SNUD OS™ Setup & Onboarding Guide

How to Set Up a Client From Scratch — Explained Simply

## What You're Doing

Taking the SNUD OS™ master template and cloning it for a new client. Think of it like photocopying a perfect recipe and customizing it for each restaurant.

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### Collect Client Info (The Onboarding Form)

**Think of it like a doctor's intake form:** Before you build anything, you need to know who the client is. Collect this information:


 Business name


 Industry type

 Owner's name

 Package chosen (Easy/Med/Hard/Elite)

 Email address

 Brand colors & logo

 Phone number

 Payment method

 Website (if they have one)

 Preferred start date








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### Collect Payment

**Think of it like a gym membership:** They pay the setup fee upfront (or finance at 0% for 18 months) and their monthly subscription starts.

Package	Setup	Founder Monthly	Build Time
 Easy	\$1,495	\$99/mo	48 hours
 Medium	\$2,495	\$249/mo	48 hours
 Hard	\$3,995	\$499/mo	5–7 days
 Elite	\$6,495	\$698/mo	10 days + 20 monitored

 **Where does the money go?** Into your business bank account. If the account isn't ready yet, payments sit in your temporary processor until you connect it.



# Building Their System

What you actually do after they pay

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## Clone the Master Template

**Think of it like copying a recipe:** You take the SNUD OS™ master template (which lives on the Abacus AI platform) and make a copy for this client. The master template has everything pre-built — website, automations, CRM, email sequences, the whole thing.

**💡 The master template lives at:** snudos.com (and the Abacus AI app management console). You never edit the master — you always clone it!









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## Customize for the Client

**Think of it like decorating a room:** The walls are already up, you're just picking the paint color and hanging their pictures. You customize:

-  Their logo, brand colors, and business name
-  Their phone number and email
-  Their Calendly booking link
-  Email templates with their branding
-  GHL automations tailored to their industry
-  Their dashboard with their data feeds



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## Test Everything

**Think of it like test-driving a car:** Before you hand over the keys, you make sure everything works:

- Submit a test form — does the email arrive?
- Click every button — do they all work?
- Check on phone — does it look good on mobile?

- ✓ Test automations — do follow-up emails fire?
- ✓ Check the dashboard — does the client login work?
- ✓ Test payment flow — can their clients pay?




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## Deploy & Go Live

**Think of it like opening night:** Everything is tested, everything works. You deploy the client's site to their domain (or a subdomain) and it's LIVE. Their automated system is now running 24/7.

 **Send them their login credentials** for their dashboard so they can see leads, billing, and support from any device.

# The Client's Experience

What your client sees and does after going live







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## Client Gets Their Login

**Think of it like getting keys to a new apartment:** You send them an email with their dashboard login. They can access it from their phone, tablet, or computer — anytime, anywhere.

### What they see on their dashboard:

-  Overview — quick stats on leads, automations, tickets
-  My Package — what they're paying and what's included
-  Deployment — progress tracker for their build
-  Integrations — what's connected (GHL, Calendly, etc.)
-  Support — submit tickets and see responses
-  Billing — payment history and invoices







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## System Runs on Autopilot

**Think of it like a vending machine:** Once it's stocked and plugged in, it just works. Leads come in, follow-ups go out, appointments get booked — all automatically.

### The client's job now is simple:

-  Show up to calls that get booked for them
-  Close the deals that come in warm
-  Collect the money
-  Submit a support ticket if anything needs tweaking



## Remember: YOUR Job After Launch

Monitor their system, respond to support tickets, and make sure the automations keep running. The dashboard shows you everything. Check it daily for the first 2 weeks, then weekly.

 **Need Help? Contact Us**

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