OPIFEX Back-office software for the trades

GETTING STARTED: WHAT TO SEND US

To build your website and back office we need the things below. **Send what you have; we will ask for the rest.** Nothing here commits you to anything.

1 YOUR BUSINESS

So your site and paperwork carry the right names and reach the right people.

- [ ] **Legal name** and the **name you trade as**
- [ ] **Owner name**
- [ ] **Best phone** and **best email**
- [ ] **Business address**, or the town you work from
- [ ] **Service area**
  The towns you cover.
- [ ] **Hours**
- [ ] **How long you have been in business**

2 WHAT YOU DO

This becomes your price list and your estimate wording.

- [ ] **Your services**, each with the price or range you usually charge, or “quote only”
- [ ] **What you will not do**
- [ ] **Anything you specialize in**

3 YOUR LOOK

No stock photos. Real photos bring in more calls.

- [ ] **Your logo**, if you have one
  PNG or SVG, the biggest version you have.
- [ ] **Two colors you like**, or a site you like the feel of
- [ ] **6 to 12 photos** of real work, and of you or your truck
  Phone photos are fine. Landscape is preferred.

4 YOUR DOMAIN AND ONLINE ACCOUNTS

You stay the owner of every account. We only need to be pointed at, or added as a manager.

- [ ] **Your domain name** and who controls it
  Your registrar login stays yours. You point the domain at us, or add us as a manager.
- [ ] **Your Google Business Profile**
  We will ask for manager access. You stay the owner.
- [ ] **Facebook and Instagram links**, if any
- [ ] **Any existing website** we should pull from

5

HOW YOU WANT TO BE REACHED

Decides what customers see and how calls and texts reach you.

- [ ] **The number customers should see**
- [ ] **A dedicated business line?**
  Forwarding, voicemail transcription and missed-call text-back.
- [ ] **Do you text customers today?**
- [ ] **The email address for the business**

6

YOUR CUSTOMERS (OPTIONAL)

Day one is not empty if we can import who you already work for.

- [ ] **A customer list**, if you have one
  A spreadsheet, phone contacts or an export from an old invoicing app. We import it.
- [ ] **Payment methods you accept**
- [ ] **Your usual warranty or terms sentence**

7

THE PAPERWORK

Kept short on purpose.

- [ ] **Setup fee**, due before the real build starts
- [ ] **One-page agreement and an invoice**, which we send you
- [ ] **Monthly or annual**, your choice

HOW TO SEND IT

Email everything to hello@opifexapp.com. The button below opens an email with this checklist as a fill-in template. Or text us a link to a shared folder.

Large photos: a Google Drive or Dropbox link is fine.
Email: hello@opifexapp.com