PUBLIC OPERATIONAL GUIDE

Sales and Builder Onboarding Playbook

Audience	IND EstatePilot sales team and builder customers
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Purpose

Use this practical hand-off guide to set up a builder workspace without overstating product readiness or requesting sensitive information. It is not a sales script, contract, payment process or production-launch approval.

1. Discovery

- Confirm the builder's intended workspace owner and the appropriate work email.
- Identify whether the immediate need is development setup, a Website Project, media organisation, lead follow-up or a future domain hand-off.
- Record only approved business context in the correct workspace. Do not collect passwords, payment details, identity documents, customer/lead information or domain-provider credentials during discovery.

2. Workspace setup

- The builder creates their own account, then arrives at the Dashboard.
- Encourage completion of the company profile when the builder is ready; it is not a barrier to exploring supported areas.
- Create or continue the correct Development and Website Project workflow. Choose development positioning and Website Project type in their own workflows, not during account sign-up.

3. Builder hand-off

- Explain where the builder can add factual content, select eligible media, review drafts and use the Dashboard next actions.
- Show the difference between a saved draft, a reviewed internal lifecycle record and a publicly reachable website.
- Share the Website Setup and Launch Checklist, Domain guide and Guidelines Centre as appropriate.

4. Launch checklist hand-off

- Confirm the intended workspace, Website Project and customer-owned domain are known to the responsible builder.
- Keep production Vercel configuration, Atlas/Blob setup, DNS records, TLS confirmation, commercial access and public smoke testing with the designated operators.
- Do not claim that a Website Project, domain request, payment request or internal version is publicly live.

5. Support and escalation

Use the configured public Support contact for supported workflow questions and protected domain or commercial-access coordination. Escalate missing legal text, uncertain content permission, customer-data concerns, domain ownership issues or a production incident to the accountable owner. Do not create a workaround by sharing access, credentials or private screenshots.

Before a commercial launch

The existing Terms, Privacy and Support placeholder or configuration content is an external-launch blocker until approved legal text, support ownership and production contact configuration are complete. Sales and builders must not treat this guide as legal, compliance or public-launch approval.

Use only the current visible IND EstatePilot workflow and the responsible support process. This guide does not replace legal, compliance, security or external platform decisions.