

## DISPUTESUITE SOFTWARE SETUP CHECKLIST

This checklist is a guide to support your learning of the DisputeSuite Software. You are not required to complete any of these tasks. The steps are suggestions for assisting in your successful software implementation. This was created to help support your learning every step of the way. The idea behind the checklist is to setup the software and practice the processes in segments, as you go through live webinar trainings.

Support Center Training Videos: <https://disputesuite.zendesk.com/hc/en-us>

Training Steps	Reference Links	Complete!
<b>Step 1: General Overview</b>		
<b><u>Training Videos</u></b>		
*General Overview Training Video	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/202262308-General-Overview">https://disputesuite.zendesk.com/hc/en-us/articles/202262308-General-Overview</a>	
general resources (reference if needed)	<a href="https://disputesuite.zendesk.com/hc/en-us/sections/200384318-First-Step-Resources">https://disputesuite.zendesk.com/hc/en-us/sections/200384318-First-Step-Resources</a>	
<b><u>Basic Setup</u></b>		
Change your Password & Security Question	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/203398987-Changing-your-Password-and-Security-question">https://disputesuite.zendesk.com/hc/en-us/articles/203398987-Changing-your-Password-and-Security-question</a>	
Practice Adding a Customer	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/201895867-How-to-Add-a-Customer">https://disputesuite.zendesk.com/hc/en-us/articles/201895867-How-to-Add-a-Customer</a>	
Add additional Users to your Account	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/202551963-Users-Roles-and-Permissions">https://disputesuite.zendesk.com/hc/en-us/articles/202551963-Users-Roles-and-Permissions</a>	
<b>Step 2: Customer Portal</b>		
<b><u>Training Video</u></b>		
*Customer Portal Training Video	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/202512235-Customer-Portal-Training">https://disputesuite.zendesk.com/hc/en-us/articles/202512235-Customer-Portal-Training</a>	
customer portal resources (reference if needed)	<a href="https://disputesuite.zendesk.com/hc/en-us/sections/200468827-Customer-Portal-Resources">https://disputesuite.zendesk.com/hc/en-us/sections/200468827-Customer-Portal-Resources</a>	
<b><u>Customer Portal Setup</u></b>		
Update your Company Information	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/203402587-System-Settings">https://disputesuite.zendesk.com/hc/en-us/articles/203402587-System-Settings</a>	

Upload your Logo into the Status Portal	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/203402587-System-Settings">https://disputesuite.zendesk.com/hc/en-us/articles/203402587-System-Settings</a>	
Copy & Paste your Contract into the Credit Repair Agreement section	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/203402577--Credit-Repair-Agreement-Electronic-Signature">https://disputesuite.zendesk.com/hc/en-us/articles/203402577--Credit-Repair-Agreement-Electronic-Signature</a>	
Update your Resources OR turn the page off	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/203402587-System-Settings">https://disputesuite.zendesk.com/hc/en-us/articles/203402587-System-Settings</a>	
Create Portal Pages	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/202476213-Portal-Pages">https://disputesuite.zendesk.com/hc/en-us/articles/202476213-Portal-Pages</a>	
Create Note Templates	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/203402947-Note-Templates">https://disputesuite.zendesk.com/hc/en-us/articles/203402947-Note-Templates</a>	
Create Global Notes & Attachments	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/202347976-Global-Notes-Global-Attachments">https://disputesuite.zendesk.com/hc/en-us/articles/202347976-Global-Notes-Global-Attachments</a>	
<b>Step 3: Autoresponders</b>		
<b><u>Training Video</u></b>		
*Autoresponder Training Video	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/202512335-Autoresponder-Training">https://disputesuite.zendesk.com/hc/en-us/articles/202512335-Autoresponder-Training</a>	
autoresponder resources (reference if needed)	<a href="https://disputesuite.zendesk.com/hc/en-us/sections/200456237-Autoresponder-Resources">https://disputesuite.zendesk.com/hc/en-us/sections/200456237-Autoresponder-Resources</a>	
<b><u>Autoresponder Setup</u></b>		
Create & Test Email Autoresponders	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/202227773-Email-Autoresponder-and-Templates-">https://disputesuite.zendesk.com/hc/en-us/articles/202227773-Email-Autoresponder-and-Templates-</a>	
Create & Test Voicemail Autoresponders	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/202650038-Left-Message">https://disputesuite.zendesk.com/hc/en-us/articles/202650038-Left-Message</a>	
Create & Test Text Messaging Autoresponders	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/202221823-SMS-Templates">https://disputesuite.zendesk.com/hc/en-us/articles/202221823-SMS-Templates</a>	
<b>Step 4: Billing</b>		
<b><u>Training Video</u></b>		
*Billing Training Video	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/202528985-Billing-Training">https://disputesuite.zendesk.com/hc/en-us/articles/202528985-Billing-Training</a>	
billing resources (reference if needed)	<a href="https://disputesuite.zendesk.com/hc/en-us/sections/200385243-Billing-Resources">https://disputesuite.zendesk.com/hc/en-us/sections/200385243-Billing-Resources</a>	
<b><u>Billing Setup</u></b>		
Sign Up with a Payment Processor	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/201896277-Payment-Processors">https://disputesuite.zendesk.com/hc/en-us/articles/201896277-Payment-Processors</a>	
Enter the Payment Processor account information	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/201896277-Payment-Processors">https://disputesuite.zendesk.com/hc/en-us/articles/201896277-Payment-Processors</a>	

Enter the Products & Services	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/202287468-Products-and-Services-">https://disputesuite.zendesk.com/hc/en-us/articles/202287468-Products-and-Services-</a>	
Practice entering Payment Method	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/201919947-How-to-Add-a-Customer-Payment-Method-">https://disputesuite.zendesk.com/hc/en-us/articles/201919947-How-to-Add-a-Customer-Payment-Method-</a>	
Practice Creating an Invoice	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/202287458-Create-an-Invoice">https://disputesuite.zendesk.com/hc/en-us/articles/202287458-Create-an-Invoice</a>	
Practice setting up Recurring / Auto-Charge	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/202017833-How-to-Create-a-Recurring-Automatic-invoice">https://disputesuite.zendesk.com/hc/en-us/articles/202017833-How-to-Create-a-Recurring-Automatic-invoice</a>	
Practice Making a Manual Payment	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/202295808-Making-a-payment">https://disputesuite.zendesk.com/hc/en-us/articles/202295808-Making-a-payment</a>	
<b>Step 5: Letters</b>		
<b>Training Video</b>		
*Letter Training Video	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/201747639-Letters-Training">https://disputesuite.zendesk.com/hc/en-us/articles/201747639-Letters-Training</a>	
letter resources (reference if needed)	<a href="https://disputesuite.zendesk.com/hc/en-us/actions/200403276-Letter-Resources-">https://disputesuite.zendesk.com/hc/en-us/actions/200403276-Letter-Resources-</a>	
<b>Letters Setup</b>		
Create Letter Categories	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/202353828-Edit-Template-Categories">https://disputesuite.zendesk.com/hc/en-us/articles/202353828-Edit-Template-Categories</a>	
Download Letters Templates	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/202353808-Select-and-Download-Letter-Templates">https://disputesuite.zendesk.com/hc/en-us/articles/202353808-Select-and-Download-Letter-Templates</a>	
Create your own Letters	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/201994867-Create-a-Dispute-Letter-Template">https://disputesuite.zendesk.com/hc/en-us/articles/201994867-Create-a-Dispute-Letter-Template</a>	
Practice Importing a Credit Report	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/201895063-Import-Credit-Report">https://disputesuite.zendesk.com/hc/en-us/articles/201895063-Import-Credit-Report</a>	
Practice Adding Items Manually	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/201893973-Quick-add-new-items">https://disputesuite.zendesk.com/hc/en-us/articles/201893973-Quick-add-new-items</a>	
Practice Using a Letter for a Customer	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/202003663-Using-a-Dispute-Letter-for-a-Customer-">https://disputesuite.zendesk.com/hc/en-us/articles/202003663-Using-a-Dispute-Letter-for-a-Customer-</a>	
Practice Entering Dispute Results	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/202353798-Enter-Dispute-Letter-Results">https://disputesuite.zendesk.com/hc/en-us/articles/202353798-Enter-Dispute-Letter-Results</a>	
<b>Affiliate Portal &amp; Webform</b>		
<b>Affiliate Setup</b>		

Build Affiliate Relationships		
Practice Adding an Affiliate	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/201859816-How-to-Add-an-Affiliate">https://disputesuite.zendesk.com/hc/en-us/articles/201859816-How-to-Add-an-Affiliate</a>	
Review the Affiliate Portal	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/201953173-Affiliate-Portal">https://disputesuite.zendesk.com/hc/en-us/articles/201953173-Affiliate-Portal</a>	
affiliate resources (reference if needed)	<a href="https://disputesuite.zendesk.com/hc/en-us/solutions/200402287-Affiliate-Resources">https://disputesuite.zendesk.com/hc/en-us/solutions/200402287-Affiliate-Resources</a>	
<b>Webform Setup</b>		
Create Webforms	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/202017883-Web-Forms-Overview">https://disputesuite.zendesk.com/hc/en-us/articles/202017883-Web-Forms-Overview</a>	
<b>Processing (only if outsourcing)</b>		
*Processing Training Video	<a href="https://disputesuite.zendesk.com/hc/en-us/articles/202464309-Processing-Training">https://disputesuite.zendesk.com/hc/en-us/articles/202464309-Processing-Training</a>	
*Important Processing Resources	<a href="https://disputesuite.zendesk.com/hc/en-us/solutions/200403196-Processing-Client-Resources">https://disputesuite.zendesk.com/hc/en-us/solutions/200403196-Processing-Client-Resources</a>	
email the name of your first client to <a href="mailto:jcullen@disputesuite.com">jcullen@disputesuite.com</a> before setting Processing Status to Active		