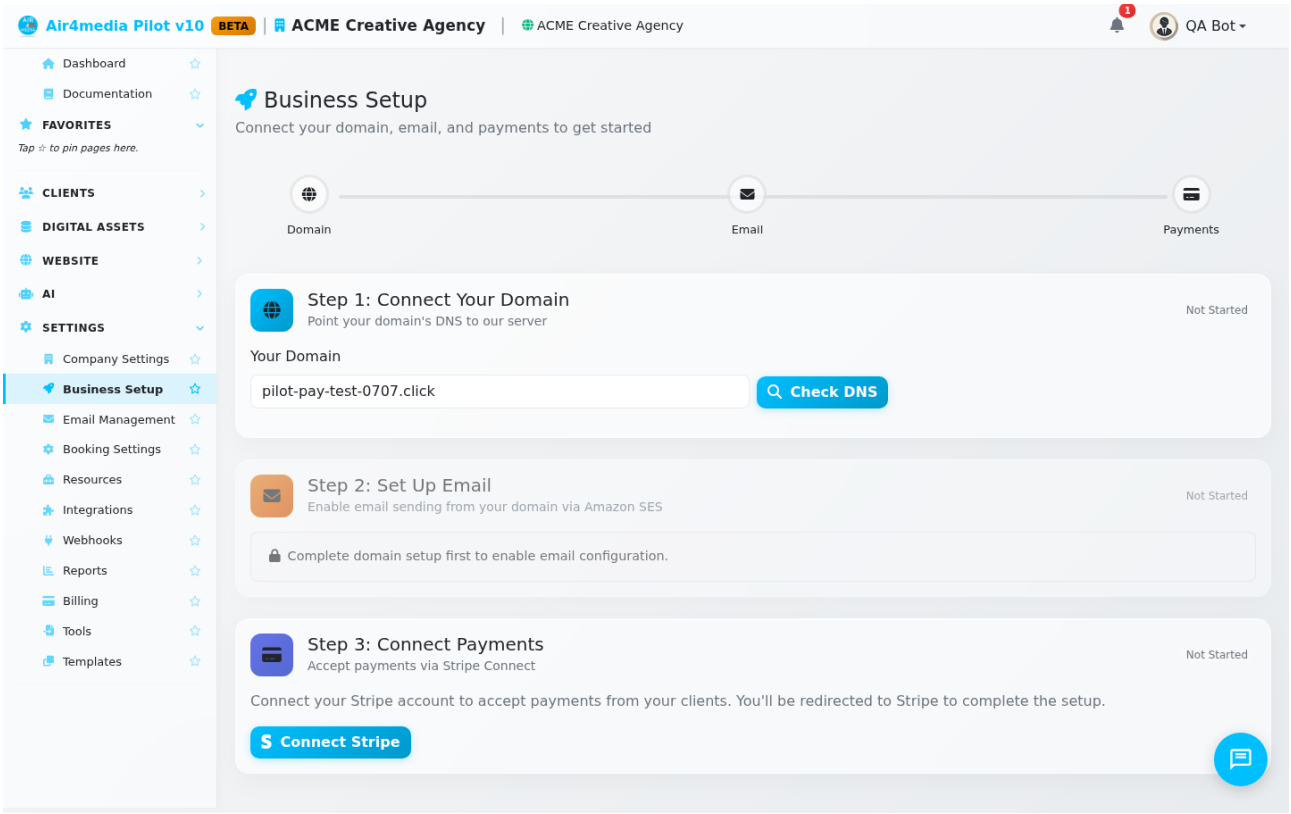

Business Setup

A guided three-step wizard that connects your domain, email, and payment processing so your business is ready to accept clients and send invoices.

Key Features

- **Progress Tracker**: A visual bar with three step indicators (Domain, Email, Payments) fills as you complete each step. An "All Set!" badge appears at the top when everything is done.
- **Domain Connection**: Link your own domain with DNS verification, Cloudflare routing, and automatic SSL — each handled as a guided sub-step.
- **Email Sending**: Once your domain is connected, enable outbound email from your domain address. Verification happens automatically in the background.
- **Stripe Payments**: Connect your Stripe account to accept payments from clients. This step can be started at any time, independently of the others.
- **Auto-refresh**: When a step is in progress (like DNS propagation or email verification), the page checks for updates every 30 seconds — no manual refreshing needed.

How to Use

Step 1: Connect Your Domain

1. Enter your domain (e.g. `acme-creative.com`) in the Domain field. If you've connected a domain before, it will be pre-filled.
2. Click **Check DNS** to verify your domain is pointing to the server.
3. If DNS isn't set up yet, the page shows an **A record** to add at your domain registrar — the exact IP address is displayed. DNS changes can take up to 48 hours to propagate, and the page checks again automatically.
4. Once DNS is verified, click **Add to Cloudflare** to route your domain through Cloudflare.
5. A **Provision SSL** button then appears — click it to secure your domain with an SSL certificate.
6. When complete, a green banner confirms your domain is connected with SSL enabled.

Step 2: Set Up Email

1. This step is locked until your domain is fully connected. Once Step 1 is complete, a **Set Up Email Sending** button appears.
2. Click it — the system adds the required DNS records and verifies your domain automatically. No manual DNS work needed here.
3. While verification runs, you'll see live status for **Domain Verification** and **DKIM** updating on screen.
4. When both are verified, a green banner confirms email sending is ready.

Step 3: Connect Payments

1. Click **Connect Stripe** to start onboarding. You'll be redirected to Stripe to set up your account — this can be done at any time, even before finishing the other steps.
2. After completing Stripe setup, you're returned to Business Setup where the page confirms your **Business Name**, **Charges**, and **Payouts** are enabled.
3. If you didn't finish the Stripe flow, click **Continue Stripe Onboarding** to return and complete it.

Tips

- You must be a company owner or admin to access Business Setup.
- Email setup stays locked until the domain step is fully complete (SSL included), but payments can be connected at any time.

- If DNS is taking time, leave the page open — it polls every 30 seconds while a step is in progress.
- After returning from Stripe, the page refreshes automatically after a moment. If you see a "needs more info" message, click **Continue Stripe Onboarding** to finish the process.