

# Private Label Setup Completion

## Member Subscription Payments

As a private Label you will be setting your own pricing for both the Virtual and Live Coached success system memberships. Any non-paid member of your system will be able to complete Step 1 – Lender Compliance and will be locked out of Steps 2 through 7. When a non-paid member attempts to access these other Steps they will see this membership subscription page:

**Success System Membership Subscription**

### Coaching & Subscription Options

Having a coach will help you complete each step of the **Business Success System**.

Step 1 - **Lender Compliance** is free & vital for your business to complete.  
Continue to your dashboard with a free subscription for Step 1 Lender Compliance only

Steps 2 through 6 put your business on the **Success Path** & require a subscription.

VIRTUAL COACH	LIVE COACH
<ul style="list-style-type: none"><li>✓ Build Business Credit</li><li>✓ Access Financing</li><li>✓ Increase Traffic</li><li>✓ Optimize Rankings</li><li>✓ Maximize Earnings</li><li>✓ Step-By-Step Virtual Coach</li><li>✗ Live Hands On Coach</li></ul>	<ul style="list-style-type: none"><li>✓ Build Business Credit</li><li>✓ Access Financing</li><li>✓ Increase Traffic</li><li>✓ Optimize Rankings</li><li>✓ Maximize Earnings</li><li>✓ Step-By-Step Virtual Coach</li><li>✓ <b>Live Hands On Coach</b></li></ul>
\$699 / Year	\$2999 / Year
<a href="#">Subscribe Now</a>	<a href="#">Subscribe Now</a>

The amounts shown above are placeholders only. You can charge whatever and however you want for either membership subscription type.

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## Member Payment Activation

Once a member has paid for a subscription you will need to activate their subscription. You do this by going to the Member Search area inside your administration portal. Here you will indicate that the member is now a paid subscriber and that you have successfully collected their payment:

Please note that there that the payment indicator “Paid User” must be set to “Yes” for your members to be able to access all areas of your back office success system and for them not to receive the membership subscription payment required notifications.

The “Payment Approved” flag is for internal accounting only to show the license fee has been paid.

Dashboard | Members > Member Search

(Site: ownerspath.com, ID: 1756070) << Back

End User Information | Member Coaching CRM | UBF Funding Estimator

**Contact Info**

Company: Demo Test Company | Address: |  
First Name: | City: |  
Last Name: | State: | Zip: |  
Phone: | Email: |

**Account Info**

User ID: 1756070  Active | Site: |  
Username: demo123 | Step: Welcome To Your Business Success System  
Password: demo123 | User Type: User  Disable Tradelines Check  
Last Login: | View Login History | Signup Date: 2/23/2021 3:26:10 PM

**Other Info**

Paid User: Yes  | Payment Approved: No   
Status: | Timer: 59 Days the user has been in the system  
Notes: | Concierge Call:  Needed  Completed  
Referral Agent: [Unassigned] |

Save | Login As This User | Send Welcome Email | Close

# Private Label Setup Completion

## Private Label Contact Info

Inside your Administration area is the Private Label Settings page.

This page needs to be completed and will control what your Members see for their system support and what notifications you receive for their actions or needs. Make sure you complete this section before adding new members. This page also controls your system pricing and where your member payment pages are linked.

<a href="#">Dashboard</a>	<a href="#">Account &gt; Private Label Settings</a>
<a href="#">Manage Account</a>	
<a href="#">PL Setup Completion</a>	
<a href="#">Setup Staff &amp; Agents</a>	
<a href="#">Private Label Settings</a>	
<a href="#">Your User Settings</a>	
<a href="#">Vendor Monetization</a>	
<a href="#">Manage Members</a>	
<a href="#">Training &amp; Marketing</a>	
<a href="#">Finance &amp; Coaching</a>	

<b>Primary Contact (How Fundability contacts you)</b>	
Primary Contact Name:	<input type="text"/>
Primary Contact Phone:	<input type="text"/>
Primary Contact Email:	<input type="text"/>
<b>Member Support (Shown on your website)</b>	
Phone number for your member support:	<input type="text"/>
Email to send help desk tickets to:	<input type="text"/>
<b>Funding Programs Support (Shown after funding program submission)</b>	
Phone number for your funding program support:	<input type="text"/>
Email to send funding program apps to:	<input type="text"/>
<b>Funding Range Reports (Shown after Funding Range Report completion)</b>	
Phone number for your FRR program support:	<input type="text"/>
Email to send FRR program updates to:	<input type="text"/>
<b>Virtual &amp; Live Coaching Pricing/Payment Links</b>	
Virtual Coaching Price:	<input type="text"/>
Virtual Coaching Payment Link:	https:// <input type="text"/>
	Example: www.sample.com
Live Coaching Price:	<input type="text"/>
Live Coaching Payment Link:	https:// <input type="text"/>
	Example: www.sample.com
<b>Completed Assessment Support (Shown in auto-response emails and notices sent to you) <a href="#">See Sample Results</a></b>	
Phone number for your assessment support:	<input type="text"/>
Email to send completed assessments to:	<input type="text"/>
Concierge Call:	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="button" value="Update"/>	

# Private Label Setup Completion

## Your Revenue Generation Vendors

Inside your Private Label success system are vendors who provide some fulfillment services for Lender Compliance and other items your members need to complete.

- Optimize Credit
- Access Funding
- Increase Rankings
- Local Listings
- Maximize Earnings

**Full Step Sections**

- Lender Compliance**
- Complete Compliance**
- Your Business Entity ✓
- Business Location ✗
- Business Phone & 411 ✓
- Website & Email ✗
- EIN & Licenses ✓
- Business Banking ✓
- Agency Listings
- Getting Approved**
- Your Business Plan
- Available Assets
- Owners Credit
- Your Bank Rating
- CD Business Loan
- Which Banks

### Business Entity

To become bankable and build business credit that is separate from you personally, an entity must exist.

The only way to completely separate your personal credit from your business's credit is to have a legal business entity such as an Incorporation or LLC.

Action items for this step:

1. Set up a business entity or make sure your business entity is set up correctly
2. Make sure your entity is "In Good Standing" and Foreign File your entity if required

Why do you need a business entity to build business credit?

It is best to build business credit with an LLC or Corporation (S or C Corporation). Creditors, Lenders, Trade Accounts and so on prefer to see an actual business entity. Furthermore filing and using a business entity to build business credit can separate you personally from the liability of operating your business.

Unless you're required to operate as a LLP or other type of partnership (Medical Practice, Law Firm, CPA, etc.), you should create a business entity. Your personal and business credit can never be truly separated if you operate as a sole proprietorship or partnership - everything you do remains "personal".


#### Compliance Item - Must Have A Business Entity


Compliance Item Fix - Form An Entity


**Haven't formed an LLC, C-Corp or S-Corp for your business yet?**

Protecting your personal credit and assets is just one of many reasons to operate your company as a separate entity (LLC, C-Corp, S-Corp, etc.). Whether you're a single owner-operator or a larger company with employees, it's the right decision. Get set up quickly and affordably with a corporate entity that best fits your needs.

**Your business cannot become Bankable without being its own entity.**

[Go To MyCorporation](#)

[Go To CorpNet](#)

[Go To IncFile](#)

You have the ability to control these vendors and earn from them by having them point to your affiliate, reseller, or white label links. We have provided a spreadsheet of known vendors for each of these vendor service areas. It is up to you to sign up for your selected vendors and return your selection for implementation.

# Private Label Setup Completion

## Your Vendor Selections

Inside your Admin Area is the Revenue Generating Vendors selection spreadsheet.

These are suggested vendors that you have the ability to sign-up for their affiliate, reseller or white label programs to earn that revenue yourself for those Lender Compliance items that your members choose to work with when completing those items. You can place up to four (4) vendors in each lender compliance item area, but can have only one if that is what you elect to do.

Return your selections to us for implementation.

### 10 Revenue Earning Vendor Affiliate, Reseller, or White Label Sections

You are free to select any vendor affiliate programs you want even ones not listed here. On the applicable Step page in the Success System up to four (4) vendors can be displayed with one (1) preferred vendor. We suggest you review all available vendors in each section to find the one best suited to your client base by looking at their websites, what they charge, what they will pay you, and how often they pay it. To optimize your revenue making opportunities you may consider white labeling each service and then marketing each of your white labels separately as lead gen for your success system private label.

1. VOIP Business Phone	Website/Programs	Affiliate/Partner Program	Your Monetizing Link
VoipStudio.com	<a href="https://voipstudio.com/pricing/usd/">https://voipstudio.com/pricing/usd/</a>	<a href="https://voipstudio.com/affiliate-program/">https://voipstudio.com/affiliate-program/</a>	
RingCentral.com	<a href="https://www.ringcentral.com/office/plansandpricing.html">https://www.ringcentral.com/office/plansandpricing.html</a>	<a href="https://affiliates.ringcentral.com/">https://affiliates.ringcentral.com/</a>	
Vonage.com	<a href="https://www.vonage.com/business/">https://www.vonage.com/business/</a>	<a href="https://www.vonage.com/partners/unified-communications/referral-partners/">https://www.vonage.com/partners/unified-communications/referral-partners/</a>	
Grasshopper.com	<a href="https://signup.grasshopper.com/plans">https://signup.grasshopper.com/plans</a>	<a href="https://grasshopper.com/affiliates/">https://grasshopper.com/affiliates/</a>	
Phone.com	<a href="https://www.phone.com/pricing/">https://www.phone.com/pricing/</a>	<a href="https://www.phone.com/partners/">https://www.phone.com/partners/</a>	
8x8.com	<a href="https://www.8x8.com/x-series/small-business/plans-and-pricing.html">https://www.8x8.com/x-series/small-business/plans-and-pricing.html</a>	<a href="https://www.8x8.com/about-us/partners">https://www.8x8.com/about-us/partners</a>	
Nextiva.com	<a href="https://www.nextiva.com/nextiva-pricing.html">https://www.nextiva.com/nextiva-pricing.html</a>	<a href="https://www.nextiva.com/company/partners.html">https://www.nextiva.com/company/partners.html</a>	
Ooma.com	<a href="https://www.ooma.com/small-business-phone-systems/">https://www.ooma.com/small-business-phone-systems/</a>	<a href="https://partner.ooma.com/">https://partner.ooma.com/</a>	
Jive.com	<a href="https://jive.com/pricing/">https://jive.com/pricing/</a>	<a href="https://jive.com/partners/">https://jive.com/partners/</a>	
Onsip.com	<a href="https://www.onsip.com/">https://www.onsip.com/</a>	<a href="https://www.onsip.com/partner">https://www.onsip.com/partner</a>	

The above are for affiliate and reseller programs. If you want to white label the service search Google for "white label business phone services"

2. Virtual Office	Website/Programs	Affiliate/Partner Program	Your Monetizing Link
Opusvirtualoffices.com	<a href="https://www.opusvirtualoffices.com/">https://www.opusvirtualoffices.com/</a>	<a href="https://www.opusvirtualoffices.com/ida/">https://www.opusvirtualoffices.com/ida/</a>	
Davincivirtual.com	<a href="https://www.davincivirtual.com/">https://www.davincivirtual.com/</a>	<a href="https://www.davincivirtual.com/davinci-virtual-affiliates">https://www.davincivirtual.com/davinci-virtual-affiliates</a>	
Starhubcenters.com	<a href="https://starhubcenters.com/">https://starhubcenters.com/</a>	<a href="https://starhubcenters.com/starhub-affiliate-program/">https://starhubcenters.com/starhub-affiliate-program/</a>	
Instantoffices.com	<a href="https://www.instantoffices.com/">https://www.instantoffices.com/</a>	<a href="https://www.instantoffices.com/en/about-us/partner-with-us/affiliates">https://www.instantoffices.com/en/about-us/partner-with-us/affiliates</a>	
ipostal1.com	<a href="https://ipostal1.com/virtual-office-plans-pricing.php">https://ipostal1.com/virtual-office-plans-pricing.php</a>	<a href="https://ipostal1.com/affiliate_signup.php">https://ipostal1.com/affiliate_signup.php</a>	
Alliancevirtualoffices.com	<a href="https://www.alliancevirtualoffices.com/">https://www.alliancevirtualoffices.com/</a>	Call For Link 888-869-9494	
Cloudvirtualoffice.com	<a href="https://www.cloudvirtualoffice.com/content/virtual-office-plans">https://www.cloudvirtualoffice.com/content/virtual-office-plans</a>	Call For Link 888-698-6334	
Regus.com	<a href="https://www.regus.com/">https://www.regus.com/</a>	Call For Link 201-234-2168	

The above are for affiliate and reseller programs. If you want to white label the service search Google for "white label business virtual office"

3. WebSite Building/Hostir	Website/Programs	Affiliate/Partner Program	Your Monetizing Link
Wix.com	<a href="https://www.wix.com/">https://www.wix.com/</a>	<a href="https://www.wix.com/about/affiliates">https://www.wix.com/about/affiliates</a>	
Hostgator.com	<a href="https://www.hostgator.com/">https://www.hostgator.com/</a>	<a href="https://www.hostgator.com/affiliates">https://www.hostgator.com/affiliates</a>	
Networksolutions.com	<a href="https://www.networksolutions.com/">https://www.networksolutions.com/</a>	<a href="https://www.networksolutions.com/affiliate-program/index.jsp">https://www.networksolutions.com/affiliate-program/index.jsp</a>	
Weebly.com	<a href="https://www.weebly.com/">https://www.weebly.com/</a>	<a href="https://get.weebly.com/affiliates/">https://get.weebly.com/affiliates/</a>	
Shopify.com	<a href="https://www.shopify.com/">https://www.shopify.com/</a>	<a href="https://www.shopify.com/affiliates">https://www.shopify.com/affiliates</a>	
Webflow.com	<a href="https://webflow.com/">https://webflow.com/</a>	<a href="https://webflow.com/affiliates">https://webflow.com/affiliates</a>	
Strikingly.com	<a href="https://www.strikingly.com/">https://www.strikingly.com/</a>	<a href="https://www.strikingly.com/affiliate-program">https://www.strikingly.com/affiliate-program</a>	
Site123.com	<a href="https://www.site123.com/">https://www.site123.com/</a>	<a href="https://www.site123.com/affiliates">https://www.site123.com/affiliates</a>	
Webnode.com	<a href="https://us.webnode.com/">https://us.webnode.com/</a>	<a href="https://us.webnode.com/affiliate/">https://us.webnode.com/affiliate/</a>	
Godaddy.com	<a href="https://www.godaddy.com/">https://www.godaddy.com/</a>	<a href="https://www.godaddy.com/affiliate-programs">https://www.godaddy.com/affiliate-programs</a>	

The above are for affiliate and reseller programs. If you want to white label the service search Google for "white label website builder" and "white label website hosting"

# Private Label Setup Completion

## Your Member's Success System

Your private label comes with a Demo account ID: **demo123** PW: **demo123** for either sales or staff training purposes. The account is blank when you first get it meaning many of the system features will not work until you complete the Success Scan for this Demo account.

Please note that on the dashboard there are links to all the tutorial and promotional videos, links to the promotional e-books, to the bonus vendors, help desk support, and the ability for your members to update their success scan questions.

**Business Success System Dashboard**

**Step 1 - Lender Compliance**  
Complete these foundational items before building business credit

**Step 2 - Optimize Credit**  
Learn the secrets of optimizing your business and personal credit

**Step 3 - Access Funding**  
Select funding programs and vendor credit lines for your needs

**Step 4 - Increase Rankings**  
Attract customers on search engines, social media, star ratings

**Step 5 - Local Listings**  
Get found on local directories and on the GPS map listings

**Step 6 - Maximize Earnings**  
Maximize the amount that your business is worth if you elect to sell

Tutorials | Success Elements | Success Scan Result | Help Desk | Bonus Ebooks | Bonus Vendors

View the full system tutorials. Please watch them all:  
[Main Success System Tutorial](#)  
[Full Educational Video Library](#)

\* \* \*

We greatly look forward to the success of your Private Label. Please let us know what we can do to further assist you in funding small businesses and helping them to get and stay on the success path.

We have found that by far the most successful and satisfied system members are those small business owners who have first been funded before placing them into your Success System. These member clients have the resources they need to complete all 12 success elements and to do the things that their coaches will need for them to do.

**We ask you to please set the proper expectations for your system and focus on funded members.**