

# What to send us: the Velvet Lead onboarding checklist

A practical list of everything we need from your clinic to build, load and launch your patient-booking website. Tick items off as you go and send them over in one batch.

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This clinic website onboarding checklist lists everything we need to build your website, load your treatments and schedules, train your AI assistant and launch. Our launch timeline is `{{LAUNCH_TIMELINE}}`. The quickest launches happen when most of this list arrives together.

You don't need everything to be perfect. Send what you have, mark anything you're unsure about, and we'll work through the rest on a call. If you haven't seen how setup works yet, start with [how it works](#).

## Your clinic basics

- ☐ Clinic name, exactly as you want it shown on the website
- ☐ Full address of your one location (each website covers one location)
- ☐ Time zone, for example Pakistan Standard Time (PKT) or US Eastern, Central or Pacific time
- ☐ Opening hours for each day of the week
- ☐ Planned closures and public holidays for the coming months
- ☐ Main phone number and WhatsApp number for patients

- ☐ Domain access: your domain name, where it's registered, and a login or a person who can change its settings
- ☐ If you don't own a domain yet, two or three names you'd like

## Brand

- ☐ Logo files, ideally SVG or a high-resolution PNG with a transparent background
- ☐ Your accent color, as a hex code if you have one
- ☐ Theme preference: Rosewood, Plum, Sage, Ocean or Noir
- ☐ Photos of your clinic, team and treatment rooms
- ☐ Proof you have the rights to each photo, and any photographer credits you need to show

## Treatments

Fill in these details for each treatment. A spreadsheet with one row per treatment works well.

- ☐ Treatment name
- ☐ Category, for example laser, skin, injectables, dental or physiotherapy
- ☐ Price, a price range (for example per area), or "price at consultation"
- ☐ Duration of the appointment
- ☐ Clean-up time needed before the next appointment
- ☐ Downtime, in your clinic's own careful wording
- ☐ How long results usually last, if you state this
- ☐ Recommended number of sessions

- ☐ Aftercare instructions
- ☐ Who the treatment is not suitable for
- ☐ Minimum age
- ☐ Bookable online: yes or no
- ☐ Consultation required first: yes or no

Treatment descriptions are your clinic's medical content. Please make sure a qualified member of your team has approved the wording.

## Team

- ☐ Name of each practitioner who sees patients
- ☐ Title wording for your team: doctors, clinicians, practitioners or therapists
- ☐ Which treatments each practitioner performs
- ☐ Weekly working hours for each practitioner
- ☐ Known time off, such as leave or training days
- ☐ Short bio and photo for each practitioner, if you want them on the about page

## Booking rules

- ☐ Confirmation mode: manual (your team confirms every request) or instant
- ☐ If manual: how many hours an unconfirmed request should wait before it expires
- ☐ Minimum notice before a booking, for example no same-day bookings
- ☐ How far ahead patients can book

- ☐ Cancellation window, meaning how close to the appointment patients can still cancel themselves
- ☐ Reminder timing, meaning how long before the appointment reminders go out

Read more about how these rules shape [online booking](#).

## Messages

- ☐ Email sender name and address patients should see
- ☐ Who on your team should get new-lead and new-booking alerts
- ☐ WhatsApp Business phone number to send confirmations and reminders from
- ☐ Access to your Meta Business account, or a person who can approve it
- ☐ Opt-in wording patients see when they choose WhatsApp messages at booking

WhatsApp is used for confirmations and reminders to patients who opt in. See [WhatsApp reminders](#) for the messages we set up.

## Website wording

- ☐ Practitioner title to use across the site
- ☐ Free consultations: yes or no
- ☐ Reply-time promise, for example the time within which your team replies to enquiries
- ☐ Payment note, for example which payment methods you accept at the clinic
- ☐ Arrival instructions, such as parking, entrance, floor or what to bring

- ☐ Homepage headline ideas or wording you already like
- ☐ Any current offers, with promo codes and start and end dates

## Gallery and reviews

- ☐ Before-and-after photos you want to show
- ☐ A consent record for each patient whose photos you use
- ☐ Real patient reviews or testimonials, with permission to publish them
- ☐ Links to review profiles you'd like to mention

Only send real reviews. We don't publish invented testimonials.

## Chatbot knowledge

The [AI assistant](#) answers patient questions from your clinic's own information. The more complete this section is, the fewer questions it has to hand over.

- ☐ Your most common patient questions and your answers
- ☐ Price lists
- ☐ Aftercare sheets
- ☐ Brochures or treatment guides
- ☐ Your cancellation policy
- ☐ Questions it must refuse or hand over, for example anything about medication, pregnancy or specific medical conditions

The assistant does not give medical advice and never books on its own. It points emergencies to emergency services.

## Legal

- ☐ Legal business name and registered address
- ☐ Contact email for privacy requests
- ☐ Details for your privacy policy, such as who can access patient data
- ☐ Details for your terms, such as your cancellation and late arrival policy
- ☐ Wording you want in your medical disclaimer

We start your privacy policy, terms and medical disclaimer from templates filled in with your details. They are a starting point, not legal advice, so please have a lawyer review them.

## Team access

- ☐ Email address for each staff member who needs the admin panel
- ☐ Role for each person: admin, manager or staff
- ☐ Who should attend team training

Each role only sees what it allows. Read more about [team access](#).

## Marketing

- ☐ Current ad campaigns and where they point
- ☐ Links to your Instagram and Facebook pages
- ☐ How you'd like to name campaigns in UTM tags (source, medium and campaign)
- ☐ Anyone else who runs your ads, such as an agency, and their contact details

Consistent UTM naming lets your [lead inbox](#) show which campaign each enquiry came from.

## When you're ready

Send everything in one shared folder if you can, and tell us what's still missing. We'll confirm what we've received, follow up on the gaps, and keep you updated until launch.