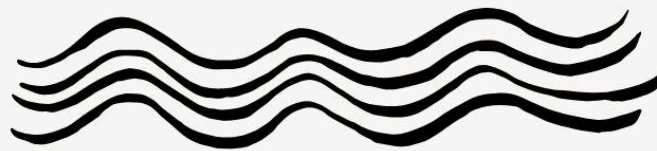


FLODESK SETUP WORKSHOP

BY MELISSA TORIO





PRE-SETUP WORKSHEET

Complete this worksheet before starting the workshop so you have everything ready when we walk through account setup together.

Create Your Flodesk Account First

Before starting the workshop, create your Flodesk account and start your free trial.

[Click here to sign up to Flodesk and get 25% off your first year](#)

(Note: This is an affiliate link. If you subscribe to a paid plan after your free trial, I may receive a small commission at no extra cost to you.)

Already have a Flodesk account?

- Yes, I have an account
- No, I need to create one

Why create your account first?

Having your account ready means you can follow along in real-time during the workshop videos and complete each step as we go.



Business Information

Your Flodesk Handle:

This creates your custom URL for forms and pages (e.g., yourhandle.myflodesk.com).
This can be your *FirstName+LastName* or your *BusinessName* (no spaces).

Choose a handle: _____

Website URL (if you have one): https://_____

Your Timezone: _____

(This controls email scheduling, analytics, and send times in Flodesk.)

Mailing Address:

To comply with email marketing laws, you must include a valid mailing address in your emails.

Don't have a mailing address yet? Or prefer not to use your home address?

Common alternatives include:

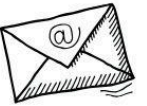
- PO Box
- Virtual business address (sometimes called a virtual office address)

⚠ Important: Do NOT use a fake address. Email providers scan for invalid addresses, and using one can hurt your deliverability.

Your Business Mailing Address

Street Address: _____

City: _____ Province/State: _____ Postal/Zip Code: _____



Email Address & Sender Settings

Flodesk requires a custom domain email address (like hello@yourbusiness.com).

Why this matters: Email providers like Gmail trust custom domain emails more than free email addresses (like Gmail or Yahoo). This improves your email deliverability.

Sender Email (yourname@yourbusiness.com): _____

Sender Name (the "From" name people see in their inbox): _____

Examples: "FirstName LastName" or "FirstName" or "FirstName | Your Business"

Don't have a custom email yet?

Option 1: Set it up yourself

If you have website hosting: Many hosts include email

- Check if your hosting plan includes email
- Common hosts with email: BigScoots, SiteGround, Bluehost, HostGator, etc.

If your host doesn't include email OR if you need email only:

- If you already own a domain, you can set up a custom email through your domain provider. [See Flodesk help for more info.](#)
- **iCloud+** - Free if you have a paid subscription - apple.com/icloud/
- **Zoho Mail** - Free for 1 user - zoho.com/mail
- **Google Workspace** - workspace.google.com
- **Microsoft 365** - microsoft.com/microsoft-365

Option 2: Get help setting it up

If you need hands-on help purchasing a domain, setting up your custom email, or connecting it to Flodesk, book a Tech Consult:

Book Tech Consult → melissatorio.com/book-consult



What is Domain Authentication?

Domain authentication proves you're a legitimate sender. We'll cover how to complete this in the Account Setup Module. For now, we just need to verify you have access to your domain provider / DNS settings.

Where Is Your Domain Registered?

Where do you manage your domain name (yourbusiness.com)?

Common domain providers include: GoDaddy, Namecheap, Porkbun, Squarespace, Bluehost

My domain provider is: _____

Not sure? Check your email receipts for “domain”, or check where you manage your website.

Where Are Your DNS Records Managed?

Domain authentication requires adding DNS records. These are usually managed at your domain provider, but sometimes they're managed separately (like Cloudflare).

My DNS records are managed at: _____

Do you have access to manage DNS records?

- Yes, I have access
- No, someone else manages this
- Not sure

What to Do Based on Your Answer:

If you have access: Great! We'll walk you through the process in the workshop.

If someone else manages your domain: Contact them now to get login credentials, or ask them to be available during the workshop to add DNS records for you.

If you're not sure: Try logging into your domain provider's dashboard to confirm you can access DNS settings. Or book a Tech Consult for help: melissatorio.com/book-consult



Brand Visuals

Your Logo:

- I have a logo ready to upload (transparent PNG file recommended for best results)
- I'll add this later

Logo file location: _____

Your Brand Colors:

List your brand colors here (hex codes like #845E3E). Flodesk allows you to save up to 10 colors.

1. # _____

2. # _____

3. # _____

4. # _____

5. # _____

- I don't have brand colors yet (I'll choose them in Flodesk)

Social Media Links

These are optional. If you have social accounts you want to link in your emails, add them here.

Instagram: _____

Facebook: _____

LinkedIn: _____

Other: _____



Content Planning

Email Subject Line Ideas

Brainstorm 3-5 subject line ideas for your first email:

1. _____
2. _____
3. _____
4. _____
5. _____

What to Include in Your Welcome Email

Use this checklist to plan your welcome email:

- Thank them for signing up
- Set expectations (how often will you email them?)
- Share your tone/personality
- Optional: Deliver a freebie or resource

Welcome Email Draft

What do you want to say in your welcome email? Draft a few sentences here:



Pre-Workshop Checklist

Before starting the workshop, make sure you have:

Required:

- [Flodesk](#) account created
- Custom domain email address ready (yourname@yourbusiness.com)
- Access to domain provider/DNS settings verified (*for domain authentication*)
- Mailing address ready (PO Box, virtual address, or business address)
- Flodesk handle decided
- From/Sender name decided
- Timezone identified

Optional (can add later):

- Logo file ready (transparent PNG format)
- Brand colors identified (up to 10)
- Social media links ready
- Website URL (if you have one)
- Welcome email draft written
- Subject line ideas brainstormed

STUCK OR NEED HELP?

If you're having trouble completing any part of this worksheet, email me at:

hello@melissatorio.com

Or book a Tech Consult for personalized support:

melissatorio.com/book-consult