

Prospect Prep Engine: Account and Credential Setup

Intent Solutions

Public fictional demonstration

Prepared for: Avery Example and the Fictional Advisory Team.

Demonstration notice: Every person, team relationship and service-area label in this document is fictional. This is an example setup checklist, not a real client record, account invitation or commercial offer. No live credentials, personal contact details or private account links are included. The provider descriptions reflect a historical concept; verify current capabilities, plans, coverage and pricing before implementation.

1. What this example describes

The Prospect Prep Engine concept reads a team's approved Trello cards, identifies missing property-research fields and prepares a printable briefing for human review. It illustrates how approved property-data integrations could reduce manual preparation. The demonstration does not connect to a client's accounts or authorize purchases.

Begin with a sandbox, a small synthetic dataset and a clear definition of the fields the team is allowed to process. Do not use real property-owner contact details in a public demonstration.

2. Example responsibilities

Hosting and application operation: Assigned to the implementation operator in the agreed scope. Hosting charges, ownership and ongoing support must be agreed before production use.

Trello workspace: Owned by the example customer, with the integration limited to an approved board.

Property-data subscriptions: Prefer customer-owned accounts and explicit spending limits. The operator receives only the access needed for the agreed integration.

LLM access: Supplied by the operator or customer under an explicit usage budget. An LLM can help summarize and reconcile candidate values; deterministic rules and human review govern consequential changes.

3. Example account checklist

A. Trello

Purpose: Read approved cards and write reviewed enrichment results to the intended board fields.

Before setup: Confirm that the selected plan supports the required fields and integration permissions. Do not assume a free plan includes every feature.

Setup: Use Trello's official developer administration to create the integration and generate the required credentials. Authorize only the intended workspace and board.

Operator handoff: Board identifier, approved field mapping and a securely shared, least-privilege credential. Do not put the credential in this document or send it through an ordinary email reply.

B. BatchData

Purpose: Illustrate permitted property, ownership and contact-enrichment lookups.

Before setup: Confirm permitted uses, available fields, regional coverage and the account's sandbox or production status.

Setup: Follow the provider's official API-account instructions and generate a scoped key if supported. Start with synthetic or provider-approved sandbox examples.

Operator handoff: Environment, allowed operations, spending limit and a securely shared credential. Do not publish real owner records or phone numbers in demonstration output.

C. Regrid

Purpose: Illustrate parcel, boundary and zoning enrichment for the fictional Example County service area. The fictional service-area label does not establish actual provider coverage.

Before setup: Confirm API access, the requested geography and licensing for every returned field.

Setup: Follow the provider's current developer or sandbox onboarding instructions. Use the least-privilege account and token available for the approved task.

Operator handoff: Environment, authorized coverage and a securely shared credential.

D. ATTOM

Purpose: Illustrate permitted ownership and tax-record enrichment.

Before setup: Confirm the approved product, licensing, quotas and required fields. Trial availability and production pricing must be checked directly with the provider.

Setup: Use the official developer-account process and keep sandbox and production credentials separate.

Operator handoff: Authorized API product, quota, environment and a securely shared credential.

E. Claude API

Purpose: Summarize research and recommend how to reconcile conflicting candidate values.

Before setup: Agree on allowed data, model selection, usage budget, review rules and retention. Model output must not authorize purchases or make irreversible business changes.

Operator handoff: An approved project or workspace, budget controls and server-side credentials supplied through the secure handoff process.

4. Existing accounts and manual exceptions

In this fictional scenario, Avery Example coordinates with Riley Sample and Jordan Demo to identify existing subscriptions before creating anything new. Those names identify invented demonstration roles, not actual people or account holders.

Tools such as Invelo, Forewarn, Land ID, MLS systems, CRS Tax, OpenCorporates and PropWire require an individual check of current plans, permissions and integration terms. Use a documented, approved integration where available. Route unsupported sources to a human research queue; do not bypass login controls, MFA or provider terms.

5. Choose account ownership

Customer-owned accounts: The customer controls subscriptions, billing and revocation. The integration receives only approved access.

Operator-provisioned accounts: The parties must explicitly agree to billing, access, export and termination arrangements. This example makes no such commercial agreement.

Record the choice before provisioning or incurring a charge.

6. Share credentials securely

Use an approved password-manager share, an authenticated secret handoff or a supervised setup session. Verify the recipient and agreed destination before sharing. Never paste passwords, API keys, signing links or tokens into this public document, a demo form, an ordinary email or a chat transcript.

Store production secrets server-side using the agreed secret-management controls. Limit access, retain an audit trail and provide a revocation path. If a credential is exposed, stop using it and rotate it through the provider's supported process.

7. Pre-flight checklist

- Board and required fields approved.
- Provider plans, geography and permitted uses confirmed.
- Sandbox and production environments distinguished.
- Account ownership and spending limits agreed.
- Credentials handed off securely, with revocation available.
- Synthetic test records prepared.
- Human review and exception handling defined.
- No real person's information present in public demonstration output.

8. Validate before expanding

Run one synthetic property through the approved workflow. Check source attribution, conflicting values, failure behavior and the resulting briefing. Require human approval before connecting real accounts or processing real personal information. Expand only after the responsible operator accepts the results and the scope.

Prepared by Intent Solutions for public demonstration purposes.