

Prospect Prep Engine — Account & Credential Setup

What we need from you to wire it up

Prepared by Jeremy Longshore · Intent Solutions

June 1, 2026

Prospect Prep Engine — Account & Credential Setup

Prepared for: J. Scott Porter **Prepared by:** Jeremy Longshore, Intent Solutions **Date:** June 1, 2026

1. What this is

The Prospect Prep Engine reads your Trello cards, fills in what's missing from a few property-data services, reconciles everything to the freshest and most-trusted value, and prints a one-pager per property you can hold while you dial. To build it, we need a handful of accounts and API keys.

This sheet lists **exactly which accounts, how to create each, what to send us, and how to send it safely**. Most are free to start (trials and sandboxes). You may already hold some — check the boxes as you go. Nothing here commits you to a paid plan; we begin on free tiers and only scale spend once it's proven on a real board.

2. Who provides what

Table 1.

Component	Provided by	Notes
Hosting (Contabo VPS)	Intent Solutions	Already running our other systems — no cost to you
The software / service	Intent Solutions	Built for you; code is yours
Claude AI (the reconciliation brain)	Intent Solutions (or you, if you prefer)	~\$0.01 per property — see Service E
Trello board + API access	You	You already use Trello

3. What we need from you — the checklist

A. Trello — **REQUIRED** (the spine)

- **Role:** your board is the system of record; the engine reads each card and writes the enriched data back.
- **Do you already have a Trello account?** Yes No (*you do — you use it with Scott Kuhlkin*)
- **Plan needed: Standard** (about \$5 / user / month). The custom data fields on each card require a paid plan — the Free plan will not work.
- **How to get the keys:**
 1. Go to trello.com/power-ups/admin and create a Power-Up (any name, e.g. “Prep Engine”).
 2. Open its **API Key** tab and generate a new API Key. Copy it.
 3. On the same page, click the **Token** link, authorize, and copy the Token.
- **Send us:** the **API Key**, the **Token**, and the **name or link of the board** you want enriched.
- **Cost:** Standard plan ~\$5 / user / month. Generating the keys is free.

B. BatchData — **REQUIRED** (owner, phones, skip trace, motivation flags)

- **Role:** replaces Forewarn and PropWire — resolves the human behind an LLC, returns up to 8 phone numbers, and flags absentee / senior / pre-foreclosure owners.
- **Do you already have an account?** Yes No
- **Plan needed:** start free in the sandbox. Skip-trace is pay-as-you-go (no subscription required); volume plans only matter once you’re running thousands of properties a month.
- **How to get the key:** sign up at app.batchdata.com, then go to **Settings** → **API** and generate an API key.
- **Send us:** the **API Key**.
- **Cost:** free sandbox to start; roughly \$0.02–\$0.15 per lookup pay-as-you-go.

C. Regrid — **REQUIRED** (parcel, zoning, boundaries)

- **Role:** replaces Land ID — parcel boundaries and standardized zoning. Confirmed to cover **Charleston, Berkeley, and Dorchester counties**.
- **Do you already have an account?** Yes No
- **Plan needed:** free **30-day sandbox** (2,000 parcel lookups) to start; self-serve monthly plan afterward.
- **How to get the token:** sign up at app.regrid.com (choose the API / sandbox option), then open **Account Profile** → **API** and copy the token.
- **Send us:** the **API token**.
- **Cost:** free 30-day trial; roughly \$300+/month self-serve afterward (confirm the current figure at signup).

D. ATTOM — REQUIRED (ownership + tax records)

- **Role:** ownership and tax records, with LLC resolution built in (“Transparent Owner”). Often removes the MLS-to-tax step entirely.
- **Do you already have an account?** [] Yes [] No
- **Plan needed:** free **30-day trial** (150 million property records); production by plan or quote afterward.
- **How to get the key:** sign up at api.developer.attomdata.com/signup; the API key is issued automatically and appears under **Account** → **Applications**.
- **Send us:** the **API Key**.
- **Cost:** free 30-day trial; production pricing by quote.

E. Claude AI (Anthropic) — WE PROVIDE

- **Role:** the “reconcile to freshest” brain that decides which value wins when sources disagree. Costs about **\$0.01 per property**.
- **Action needed from you:** none by default — we run this on our Anthropic account. If you’d rather own it so it sits on your own bill, tell us and we’ll walk you through it.

F. Stays manual — NOT wired (for now)

These are tools you use today that we deliberately do **not** automate, and what we use instead:

Table 2.

Tool	Why it isn’t wired	What we do instead
Invelo	No developer API — it only connects through Zapier, which we’re not using	BatchData + ATTOM return the same data through real APIs; Invelo stays your manual research tool
Forewarn	No API, and it texts a login code every time	Kept for the occasional manual double-check; BatchData covers phones in the automation
Land ID	No API	Regrid covers parcel and zoning through its API
MLS / CRS Tax	Board login, can’t be automated cleanly	ATTOM’s tax and ownership data usually replaces it. If you want the manual step assisted, you can optionally share your MLS login
OpenCorporates / PropWire	Costly or no clean API at low volume	BatchData and ATTOM already resolve LLC owners and portfolios

4. Do you already have any of these?

Before anyone signs up for a paid account — **tell us if you, Scott Kuhlkin, Paul, or Harris already hold a BatchData, Regrid, or ATTOM account or API key.** No sense paying twice. If you have Invelo on the Professional plan and want it kept in the loop later, note that too — but today it can't be wired in (no API).

5. One decision we need from you

Who owns the data-provider accounts (BatchData / Regrid / ATTOM)?

- **Option 1 — You own them (recommended).** Your data, your cost, the keys are yours, and you can walk away any time. We simply use the keys you provide.
- **Option 2 — We provision them** and pass the cost through on your invoice.

Pick one. Everything else about the build is identical either way.

6. How to send the credentials — safely

Do not paste API keys or tokens into a plain email or text message. Email isn't secure, and copies linger in sent folders and inboxes. Instead, use one of:

- A password-manager secure share (1Password or Bitwarden “Send”), or
- A 15-minute screenshare where we set them up together (easiest, and we can confirm each one works on the spot), or
- A secure upload link we send you.

On our side, every key is stored **encrypted at rest** and never in plaintext. If any key is ever exposed, we rotate it immediately.

7. Pre-flight checklist

- Trello on the Standard plan; API Key + Token generated; board name sent
- BatchData account created; API key ready
- Regrid account created; token ready (the free sandbox is fine to start)
- ATTOM account created; API key ready (the free trial is fine to start)
- Ownership decision made (Section 5)
- Credentials sent through a secure method (Section 6)
- (Optional) MLS login shared for the manual-exception step

8. What happens next

Once we have the keys, we wire **one board**, run a **single real property** end-to-end, and send you the first auto-generated one-pager to eyeball. If it's right, we widen to the full board. Start small, prove it on a deal you know, then scale.

Steps and figures verified against the vendors' own documentation (Trello / Atlassian, BatchData, Regrid, ATTOM, Anthropic) as of June 2026. Free-trial terms and pricing change over time — confirm current details at signup. Prepared by Intent Solutions.