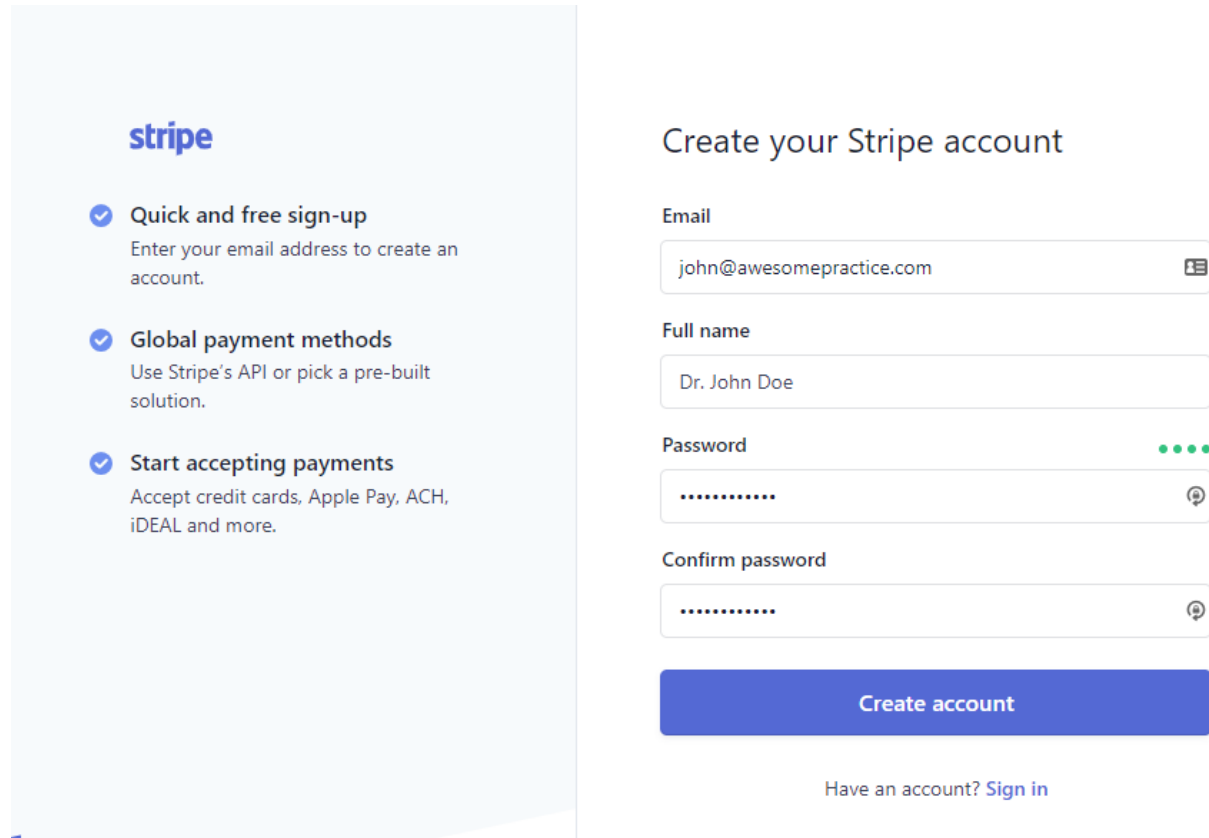


## Getting Setup on Stripe + Plaid to accept ACH and Credit Card Payments

Step 1: Register a new Account on Stripe

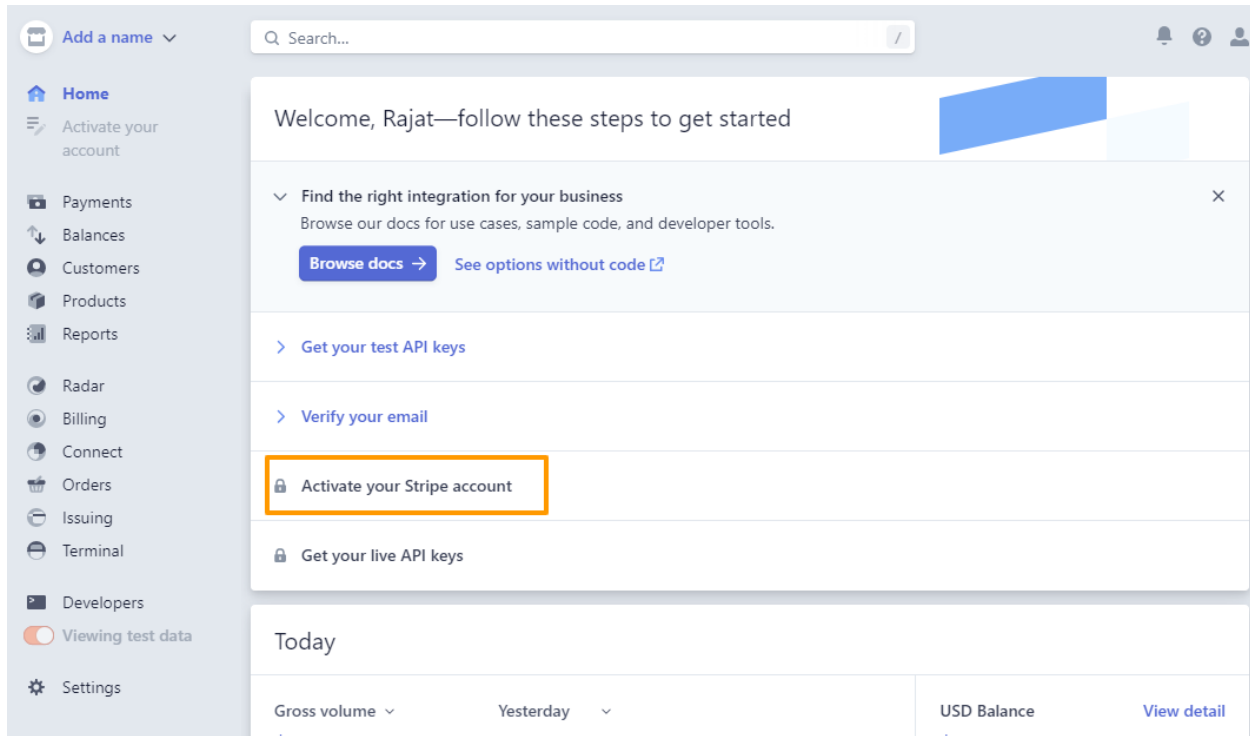
Visit: <https://dashboard.stripe.com/register>



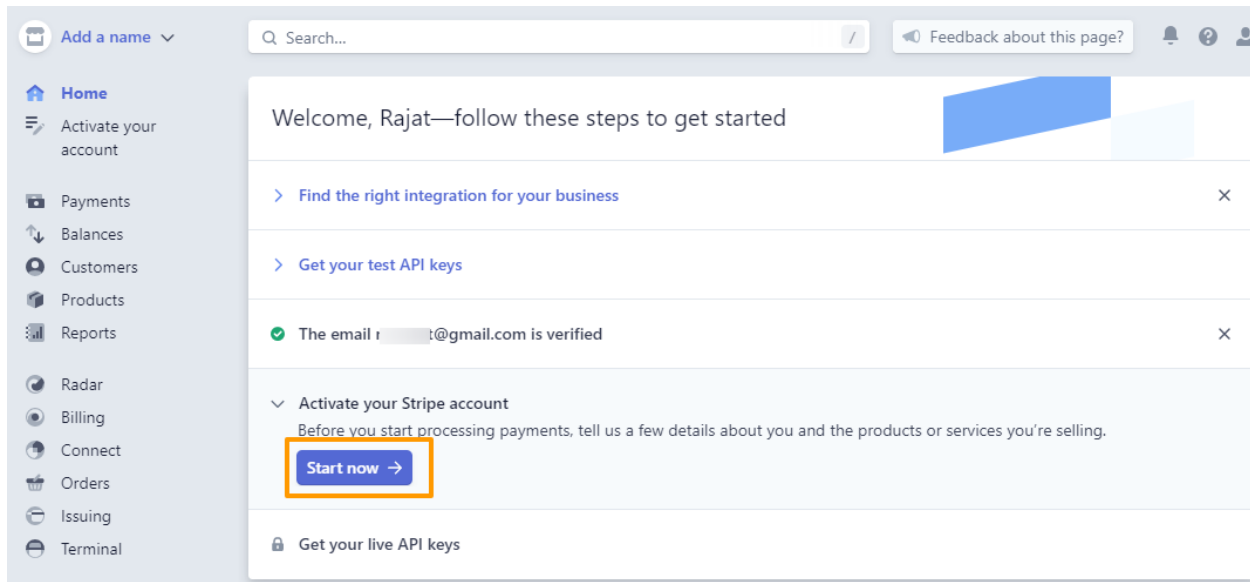
The screenshot shows the Stripe registration page. On the left, the Stripe logo is at the top, followed by three bullet points: 'Quick and free sign-up' (with a checkmark), 'Global payment methods', and 'Start accepting payments'. The main area is titled 'Create your Stripe account' and contains four input fields: 'Email' (with 'john@awesomepractice.com'), 'Full name' (with 'Dr. John Doe'), 'Password' (with a strength indicator of four green dots), and 'Confirm password'. Below these fields is a blue 'Create account' button and a link for 'Sign in'.

Enter your email, Name and a secure password

## Step 2: Complete your Stripe Account Setup – Follow steps to Activate your Stripe account



- A. Verify your email
- B. Complete your profile



Complete all steps in the Activation Process – Business Structure, Business details

Fulfillment details thru Summary

**Business structure**

Business details

Fulfillment details

Credit card statement

Bank details

Two-step authentication

Summary

## Tell us about your business

Before you can accept payments with Stripe, we need to learn more about you and your business. We collect this information to comply with requirements from regulators and financial partners and the terms of our [Services Agreement](#).

**Registered business address**United States 

If your country isn't listed, please [sign up for updates](#) about availability.

**Registered business address**Address line 1 

Address line 2

City

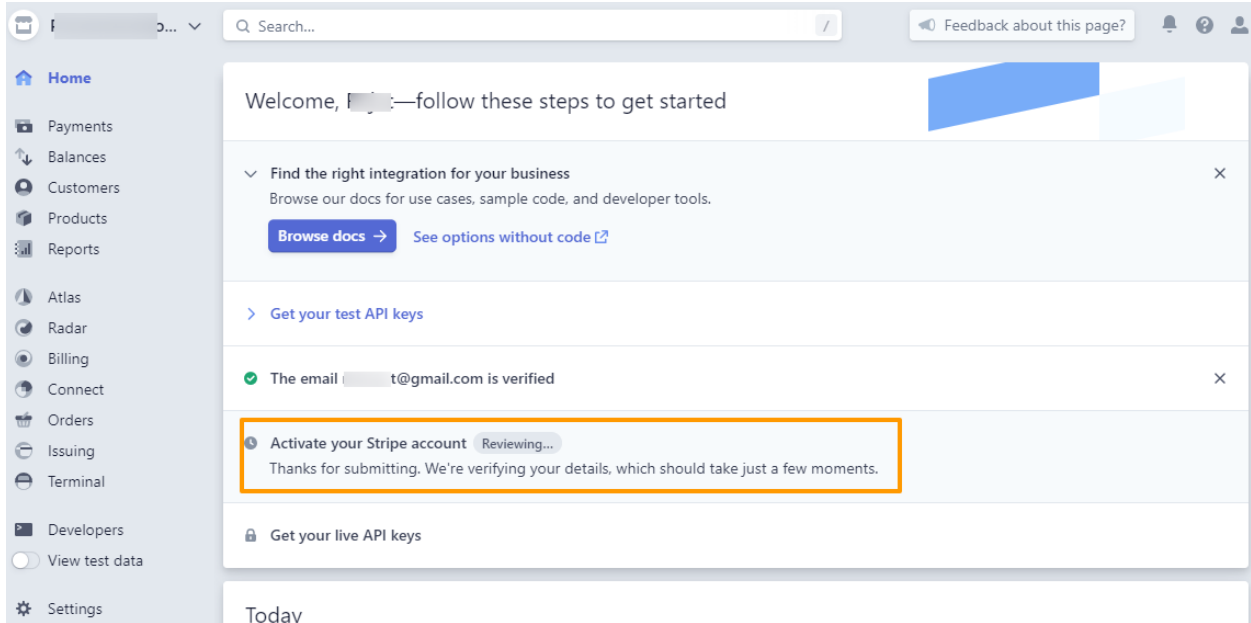
State 

ZIP

You can use your home address if you don't have a business address.

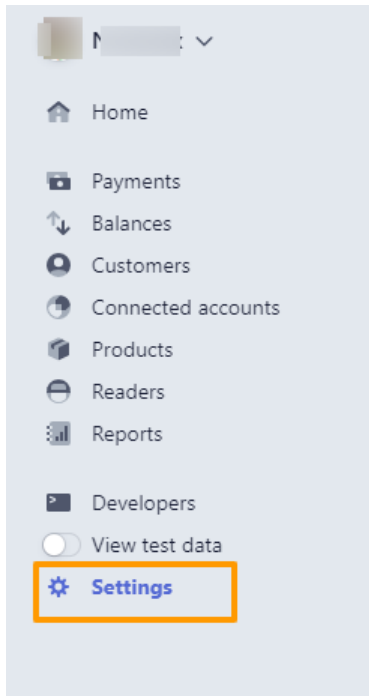
**Type of business**Individual, sole proprietor, or single-member LLC **Next →**

Once you complete all steps, you should now see this status:

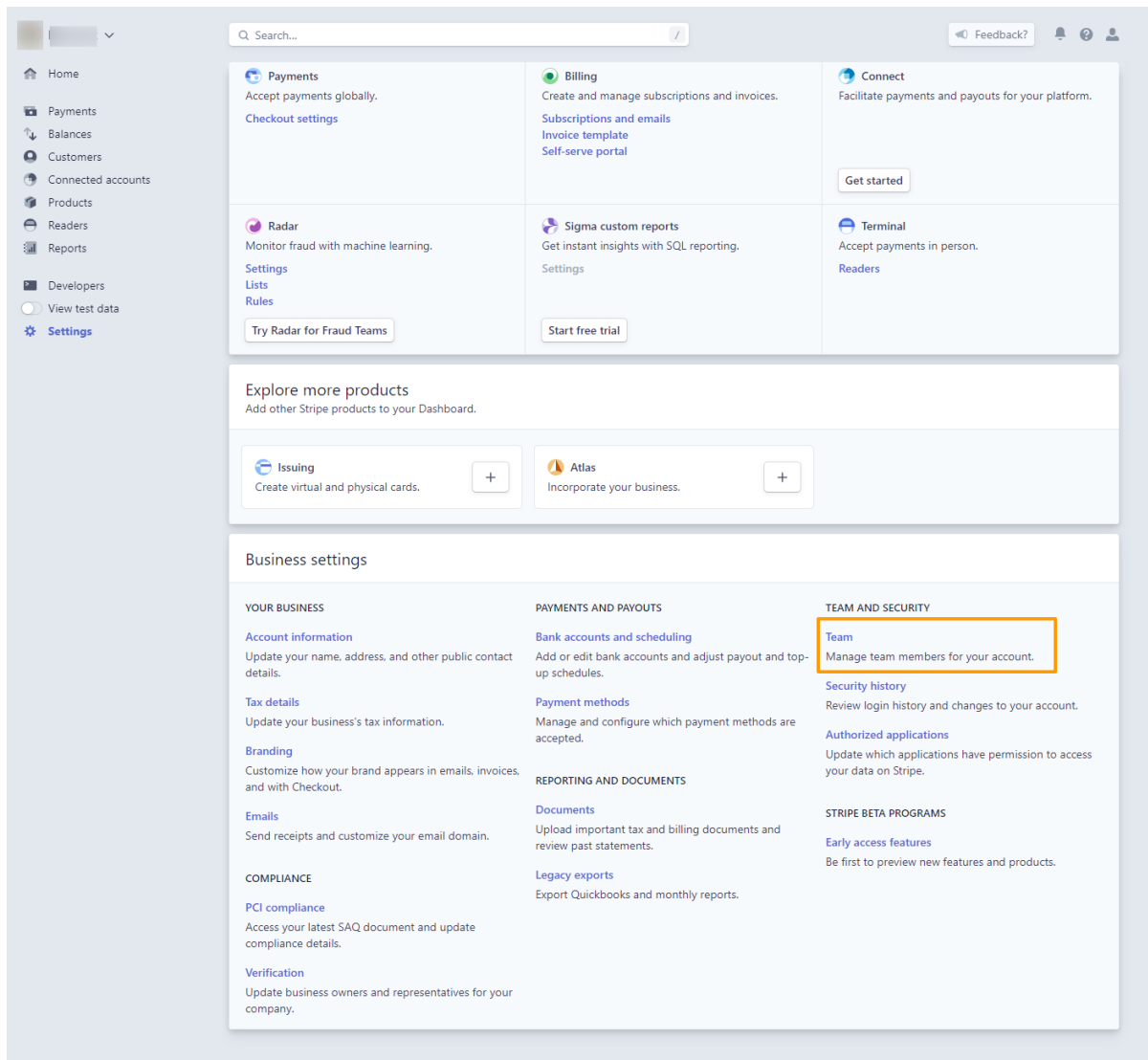


The account should take anywhere from 5 minutes to 24 hours to activate.

### Step 3: Go into Stripe account Settings

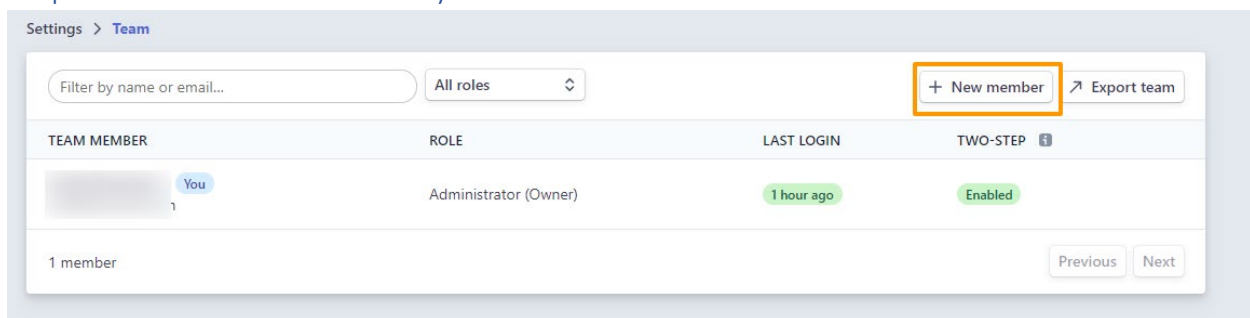


## Find Team under Team and Security



The screenshot shows the Stripe dashboard with a sidebar on the left containing navigation items like Home, Payments, Balances, Customers, Connected accounts, Products, Readers, Reports, Developers, View test data, and Settings. The main content area is divided into several sections: Payments, Billing, Connect, Radar, Sigma custom reports, and Terminal. Below these is an 'Explore more products' section with Issuing and Atlas. The 'Business settings' section is expanded, showing categories like YOUR BUSINESS, PAYMENTS AND PAYOUTS, REPORTING AND DOCUMENTS, COMPLIANCE, and TEAM AND SECURITY. The 'TEAM AND SECURITY' section is highlighted with an orange box, and the 'Team' link is also highlighted with an orange box.

## Step 4: Add a New member to your team



The screenshot shows the 'Settings > Team' page. At the top, there is a search filter 'Filter by name or email...', a dropdown for 'All roles', and buttons for '+ New member' (highlighted with an orange box) and 'Export team'. Below this is a table with the following columns: TEAM MEMBER, ROLE, LAST LOGIN, and TWO-STEP. The table contains one row for a user named 'You' with the role 'Administrator (Owner)', last login '1 hour ago', and two-step authentication 'Enabled'. At the bottom left, it says '1 member', and at the bottom right, there are 'Previous' and 'Next' buttons.

Enter email: [rajat@neolytix.com](mailto:rajat@neolytix.com)

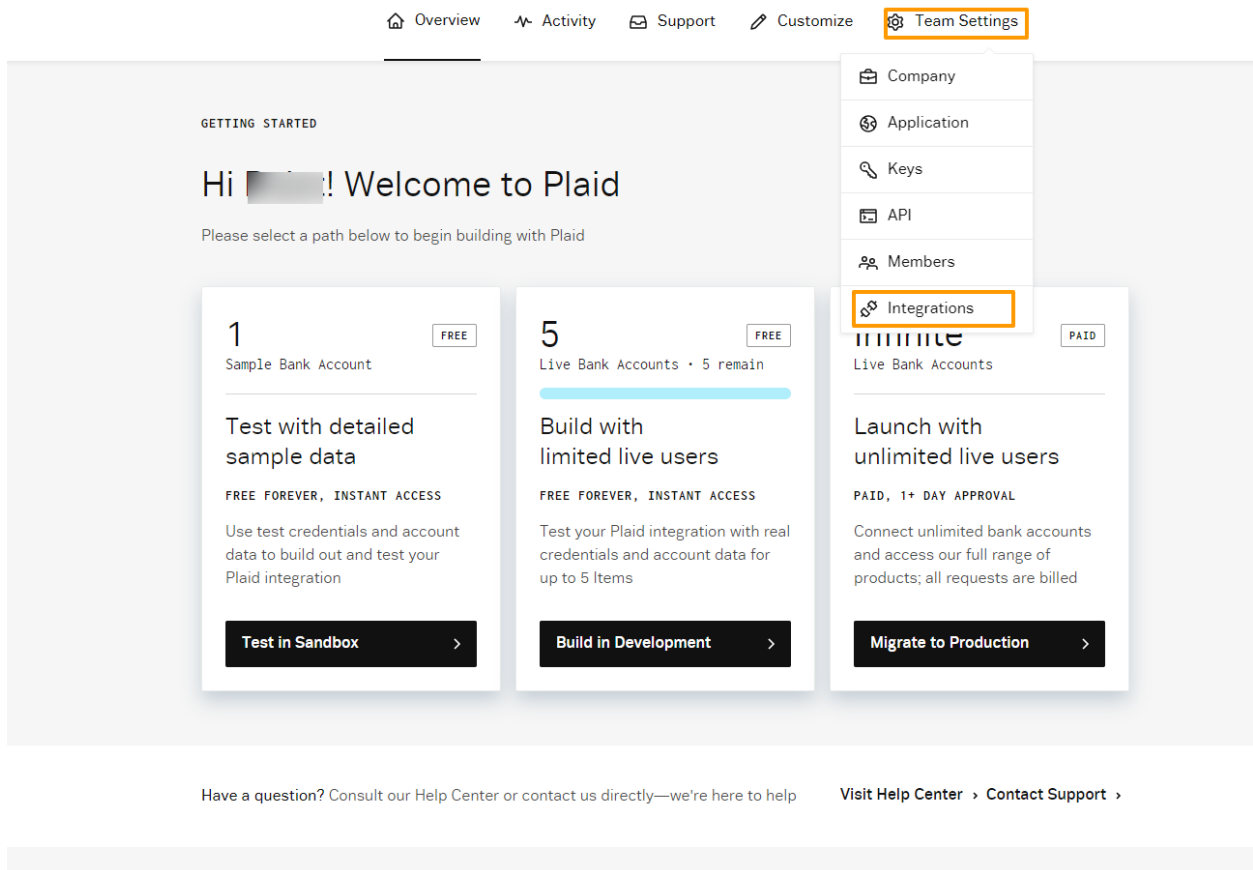
Access Type: Developer

## Step 5: Register for a Plaid Account

Visit: <https://dashboard.plaid.com/signup>

- A> Register with the same email you used for Stripe account registration
- B> Verify your email

## Step 6: Connect your Stripe Account



The screenshot shows the Plaid dashboard interface. At the top, there is a navigation bar with links for Overview, Activity, Support, Customize, and Team Settings. The 'Team Settings' menu is open, showing options like Company, Application, Keys, API, Members, and Integrations. The main content area is titled 'GETTING STARTED' and says 'Hi [redacted]! Welcome to Plaid'. Below this, it asks the user to select a path to begin building with Plaid. There are three main cards:

- 1 Sample Bank Account (FREE):** 'Test with detailed sample data'. 'FREE FOREVER, INSTANT ACCESS'. 'Use test credentials and account data to build out and test your Plaid integration'. Button: 'Test in Sandbox >'.
- 5 Live Bank Accounts (FREE):** 'Build with limited live users'. 'FREE FOREVER, INSTANT ACCESS'. 'Test your Plaid integration with real credentials and account data for up to 5 Items'. Button: 'Build in Development >'.
- Unlimited Live Bank Accounts (PAID):** 'Launch with unlimited live users'. 'PAID, 1+ DAY APPROVAL'. 'Connect unlimited bank accounts and access our full range of products; all requests are billed'. Button: 'Migrate to Production >'.

At the bottom, there is a footer with the text: 'Have a question? Consult our Help Center or contact us directly—we're here to help' and 'Visit Help Center > Contact Support >'.

- P**  
Created 3 minutes ago
- Company
- Application
- Keys
- API
- Members
- Integrations**

### Integrations

**stripe** OFF **Connect** [View documentation >](#)  
Instantly authenticate your customers' bank accounts for use with Stripe's ACH API

**DWOLLA** OFF **Enable** [View documentation >](#)  
Instantly authenticate your customers' bank accounts for use with Dwolla's ACH API

## Step 7: Get Ready for your account to Go Live

GETTING STARTED

# Hi [redacted]! Welcome to Plaid

Please select a path below to begin building with Plaid

**1** FREE  
Sample Bank Account

Test with detailed sample data

FREE FOREVER, INSTANT ACCESS

Use test credentials and account data to build out and test your Plaid integration

**Test in Sandbox** >

**5** FREE  
Live Bank Accounts · 5 remain

Build with limited live users

FREE FOREVER, INSTANT ACCESS

Test your Plaid integration with real credentials and account data for up to 5 Items

**Build in Development** >

**Infinite** PAID  
Live Bank Accounts

Launch with unlimited live users

PAID, 1+ DAY APPROVAL

Connect unlimited bank accounts and access our full range of products; all requests are billed

**Migrate to Production** >

Click on Migrate to Production

Complete the Steps from Get Started to Agree to Pricing & Contracts

## Launch with unlimited live users

ALL REQUESTS ARE BILLED, 1+ DAY APPROVAL

Push traffic with no rate limits and access our full range of products

- Get started
- Tell us about your team
- Describe your use case
- Agree to pricing and contracts

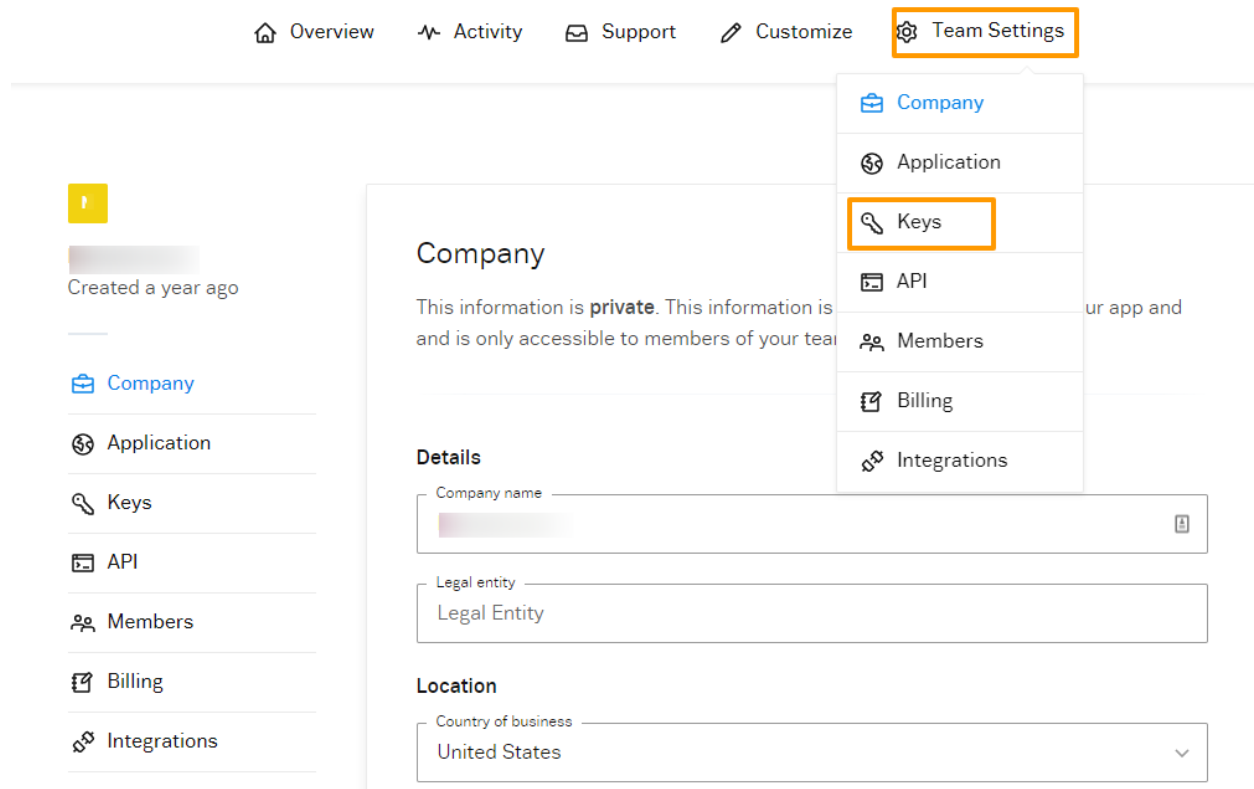
< BACK

# Request access to the Plaid Production Environment

Requires a compliance review, contract commitments, and a 1+ day turnaround

**Get started** >

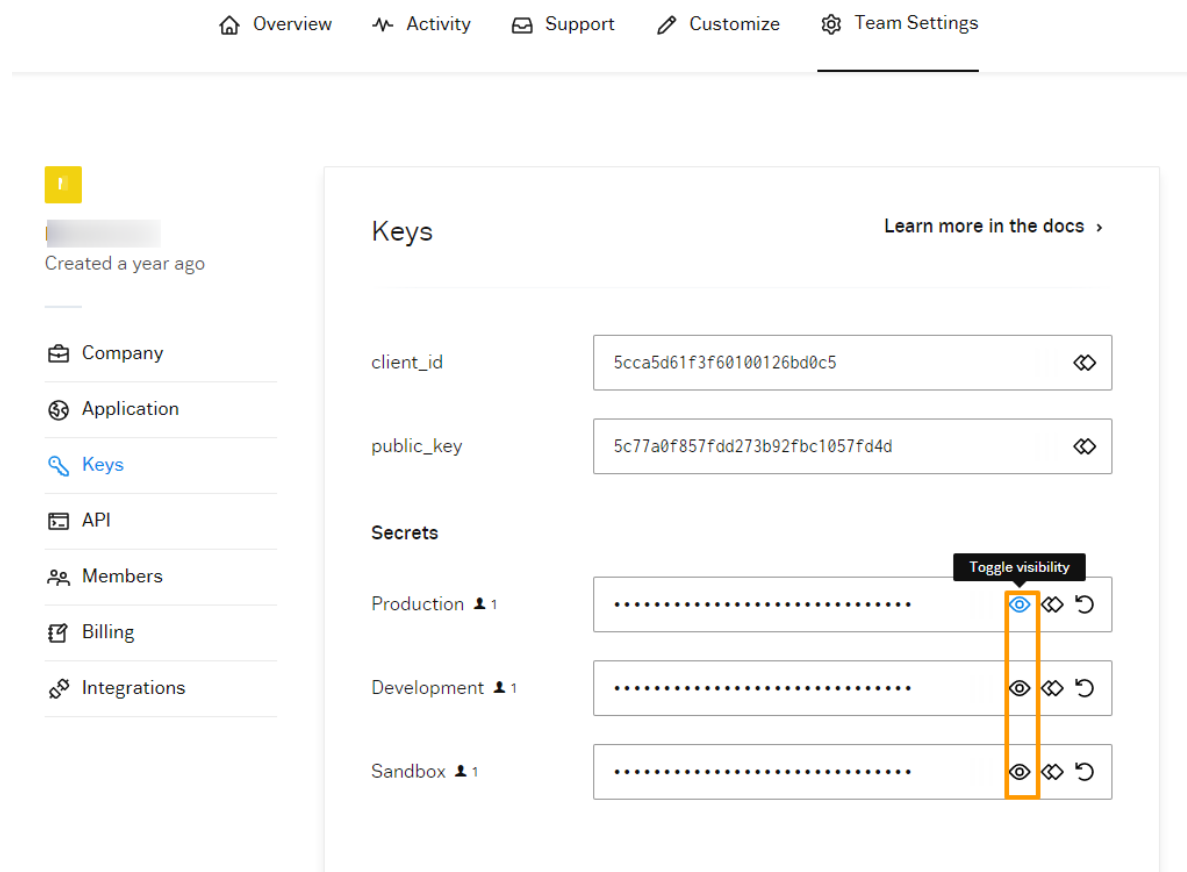
## Step 8: Go into Team Settings > Keys



The screenshot shows the Plaid dashboard navigation bar with the following items: Overview, Activity, Support, Customize, and Team Settings (highlighted with an orange box). Below the navigation bar, a dropdown menu is open under 'Team Settings', listing: Company, Application, Keys (highlighted with an orange box), API, Members, Billing, and Integrations. The main content area shows the 'Company' settings page. The page title is 'Company' and it includes a warning: 'This information is private. This information is and is only accessible to members of your team'. The 'Details' section contains a text input for 'Company name' and a text input for 'Legal entity' with the value 'Legal Entity'. The 'Location' section contains a dropdown menu for 'Country of business' with the value 'United States'.



Copy/ Paste the following information in a file:



1. Client\_id
2. Public\_key

You will need to toggle visibility in order to see the following keys:

3. Production key
4. Development Key
5. Sandbox key