

	Task	Reference
<input type="checkbox"/>	1CRM Cloud instance live, or on premise Server platform installed with server operating system and 1CRM software (check APC is installed, for top performance)	Chapters 3, 4, 5, 6
<input type="checkbox"/>	Check system default currency is as desired (otherwise reinstall)	7.1.4
<input type="checkbox"/>	Check any required language packs are installed	7.2.3
<input type="checkbox"/>	Check Help module is installed	7.2.3
<input type="checkbox"/>	Check server certificate is installed, and https: access is working	
<input type="checkbox"/>	<i>Admin - Scheduler</i> <ul style="list-style-type: none"> <li>• check scheduler is enabled and running via Cron or similar</li> <li>• enable scheduler tasks as needed</li> </ul>	7.9 7.1.3
<input type="checkbox"/>	Configure <i>Admin - Backup Management</i> settings to protect your valuable data!	7.2.2
<input type="checkbox"/>	Configure <i>Admin - Company Information</i> setting for <i>Application Login Page</i> message	7.1.1
<input type="checkbox"/>	Configure <i>Admin - Company Information</i> settings in <i>General Information</i> panel	7.1.1
<input type="checkbox"/>	Configure <i>Admin - Email &amp; Notification Settings</i> , including server outbound email	7.4.1
<input type="checkbox"/>	Configure settings for <i>Admin - Group Inboxes</i> for bounce handling, auto case creation	7.4.4
<input type="checkbox"/>	<i>Admin - Locale Settings</i> : define settings on <i>User Interface</i> and <i>Telephony</i> panels, including server timezone, default theme	7.1.5
<input type="checkbox"/>	<i>Admin - System Settings</i> : configure values for <i>User Interface, Export</i>	7.1.2
<input type="checkbox"/>	<i>Admin - Users - User Management</i> : define system users	7.3.1
<input type="checkbox"/>	Import data after de-duping and cleaning	8.1, 7.2.6
<input type="checkbox"/>	<i>Admin - Studio - Dropdowns Editor</i> : customize existing dropdown lists as desired, create any new lists required	7.5.3
<input type="checkbox"/>	<i>Admin - Studio - Custom Fields Editor</i> : define any custom fields required	7.5.2
<input type="checkbox"/>	<i>Admin - Studio - Layout Editor</i> : edit screen layouts to add custom fields & optimize	7.5.1
<input type="checkbox"/>	<i>Admin - Studio - Smart List Tab Sharing</i> : define any smart list tabs desired, and share them as appropriate	7.5.4
<input type="checkbox"/>	Customize Dashboards, and share them as appropriate	U 4.1
<input type="checkbox"/>	<i>Admin - Users - Team Management</i> : define Teams for data access control and sharing	7.3.4
<input type="checkbox"/>	<i>Admin - Users - Role Management</i> : define Roles for data access control, limiting modules seen in user interface	7.3.3
<input type="checkbox"/>	Configure order management <ul style="list-style-type: none"> <li>• define <i>Product Categories</i> and <i>Types</i></li> <li>• import <i>Product Catalog</i></li> <li>• use <i>PDF Form Designer</i> (Enterprise only) to create custom Quote, Invoice PDFs</li> <li>• configure <i>Price Books</i> (Enterprise only) for client segmentation</li> <li>• configure <i>Admin - Company Information</i> settings for <i>Order Management, Company Logos, Company Address, Standard Terms</i> text, <i>PDF</i> settings in General Info tab</li> <li>• configure <i>Admin - System Settings</i> values for <i>Invoices, Bills</i></li> <li>• configure <i>Tax Codes, Tax Rates, and Shipping Providers</i></li> </ul>	8.4 7.5.11 7.1.1 7.1.2 7.6
<input type="checkbox"/>	Define any <i>Email Templates</i> desired for sales, marketing & service communications	U 5.3.1
<input type="checkbox"/>	Define outbound email settings for all users	U 10.1.9
<input type="checkbox"/>	ALL USERS: <i>My Account - General</i> tab - define user info and settings	U 10.1.1 - 10.1.5
<input type="checkbox"/>	ALL USERS: <i>My Account - Display Options</i> tab - set preferred locale information	U 10.1.6, 10.1.7
<input type="checkbox"/>	ALL USERS: <i>My Account - Email Options</i> tab - define monitored mailboxes	U 10.1.8 - 10.1.10
<input type="checkbox"/>	ALL USERS: <i>My Account - Integration</i> tab - setup integration with Google Apps, Gotomeeting, Dropbox; sync of Contacts/Calendar/Tasks to iOS/Android/Outlook/OSX	U 10.1.11 - 10.1.19