

	Task	Reference
<input type="checkbox"/>	1CRM Cloud instance live, or on premise Server platform installed with server operating system and 1CRM software	Chapters 2 & 3
<input type="checkbox"/>	Check system default currency is as desired (otherwise reinstall)	3.2
<input type="checkbox"/>	Check any required language packs are installed	4.2.3
<input type="checkbox"/>	Check Help module is installed	4.2.3
<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"> • check scheduler is enabled and running via Cron or similar • enable scheduler tasks as needed 	4.1.3 4.1.3
<input type="checkbox"/>	Configure <i>Admin - Backup Management</i> settings to protect your valuable data!	4.2.2
<input type="checkbox"/>	Configure <i>Admin - Company Information</i> setting for <i>Application Login Page</i> message	4.1.1
<input type="checkbox"/>	Configure <i>Admin - Company Information</i> settings in <i>General Information</i> panel	4.1.1
<input type="checkbox"/>	Configure <i>Admin - Email & Notification Settings</i> , including server outbound email	4.4.1
<input type="checkbox"/>	Configure settings for <i>Admin - Group Inboxes</i> for bounce handling, auto case creation	4.4.4
<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	4.1.5
<input type="checkbox"/>	<i>Admin - System Settings</i> : configure values for <i>User Interface</i> , <i>Export</i>	4.1.2
<input type="checkbox"/>	<i>Admin - Users - User Management</i> : define system users	4.3.1
<input type="checkbox"/>	Import data after de-duping and cleaning	5.1, 5.2.6
<input type="checkbox"/>	<i>Admin - Studio - Dropdowns Editor</i> : customize existing dropdown lists as desired, create any new lists required	4.5.3
<input type="checkbox"/>	<i>Admin - Studio - Custom Fields Editor</i> : define any custom fields required	4.5.2
<input type="checkbox"/>	<i>Admin - Studio - Layout Editor</i> : edit screen layouts to add custom fields & optimize	4.5.1
<input type="checkbox"/>	<i>Admin - Studio - Smart List Tab Sharing</i> : define any smart list tabs desired, and share them as appropriate	4.5.4
<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	4.3.4
<input type="checkbox"/>	<i>Admin - Users - Role Management</i> : define Roles for data access control, limiting modules seen in user interface	4.3.3
<input type="checkbox"/>	Configure order management <ul style="list-style-type: none"> • define <i>Product Categories</i> and <i>Types</i> • import <i>Product Catalog</i> • use <i>PDF Form Designer</i> (Enterprise only) to create custom Quote, Invoice PDFs • configure <i>Price Books</i> (Enterprise only) for client segmentation • configure <i>Admin - Company Information</i> settings for <i>Order Management</i>, <i>Company Logos</i>, <i>Company Address</i>, <i>Standard Terms</i> text, <i>PDF</i> settings in General Info tab • configure <i>Admin - System Settings</i> values for <i>Invoices</i>, <i>Bills</i> • configure <i>Tax Codes</i>, <i>Tax Rates</i>, and <i>Shipping Providers</i> 	5.4 4.5.10 6.14 4.1.1 4.1.2
<input type="checkbox"/>	Define any <i>Email Templates</i> desired for sales, marketing & service communications	U 5.3.1
<input type="checkbox"/>	ALL USERS: <i>MY Account - Email Options</i> tab - define outbound email settings.	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 - 10.1.20