

| | Task | Reference |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------|
| <input type="checkbox"/> | 1CRM Cloud instance live, or on premise Server platform installed with server operating system and 1CRM software | 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"> • check scheduler is enabled and running via Cron or similar • enable scheduler tasks as needed | 7.10 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 & 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"> • 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, Company Logos, Company Address, Standard Terms</i> text, <i>PDF</i> settings in General Info tab • configure <i>Admin - System Settings</i> values for <i>Invoices, Bills</i> • configure <i>Tax Codes, Tax Rates, and Shipping Providers</i> | 8.4 7.5.10 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"/> | 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 |