**Customer Onboarding Checklist**

***Welcome to improveit 360!***

We are happy to have you! Included in this document is a basic list of onboarding tasks each new customer will be completing in preparation for Go-Live. This is simply one of the tools at your disposal to guide a great onboarding experience. The checklist aligns to the In-App Guidance right within your new system, as well as the onboarding sessions you will start scheduling with your Solution Consultant.

**Training and Onboarding Process**

To make the set-up and configuration of your new improveit 360 platform easy, and training a breeze, adherence to our defined onboarding process is strongly recommended. Our process is designed to expose you to your new application in small bit-sized chunks. Phase 1 of your onboarding includes 6-8 collaborative sessions to train you on the managed package and complete basic setup items.

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**Your Onboarding Checklist**

| Steps to Success! - Action Items | Additional Details |  | Quick Reference Documentation | Need for i360 to help? | Date completed |
| --- | --- | --- | --- | --- | --- |
| TRACK YOUR PROGRESS. ENTER THE DATE COMPLETED AS YOU FINISH EACH THEM | | | | | |
| Login & Bookmark the Login Page. Save your Login Credentials someplace safe and easy to access. | improveit 360 does not recommend using a Microsoft web browser. The best login page is always:  <https://login.salesforce.com/> |  | [Login and Bookmark the Login Page](https://i360lightning.zendesk.com/hc/en-us/articles/13734870830743-Login-and-Bookmark-the-Login-Page) | **NA** | **Do it TODAY!** |
| Access improveit 360 Console App and complete our Home page Walk-thru | Be ready to help other Users Login and navigate to the App for their first time! | Our in-app Home page Walk-thru will guide you through the basic system navigation. | [Account Page Video Walk thru](https://i360lightning.zendesk.com/hc/en-us/articles/14365390039063-Account-Page-Video-Walk-thru) | **NA** | **Enter Date Completed** |
| Review Quick Lead tool, the Glossary of Terms and Object diagram but don’t create new Leads just yet! | Review the required fields when creating a new Contact, Account and Sales Opportunity for a foundational knowledge of the platform. | [Glossary of Terms by Object](https://i360lightning.zendesk.com/hc/en-us/articles/14139954090903-Glossary-of-Terms-by-Object-)  and  Object Relationship Diagram | [Lead Entry](https://i360lightning.zendesk.com/hc/en-us/articles/14047190823575-Lead-Entry-) | **NA** | **Enter Date Completed** |
| Review Lead Source’s “Source” and "Source Type" and deactivate ones you will not be using | Configuring Source Types assures you can track broad marketing spending as well as individual efforts. | If converting Data, wait until Data is loaded before editing Sources and Source Types | [[Set Source Type and Source Values for Lead Sources](https://i360lightning.zendesk.com/hc/en-us/articles/13345533566743-Set-Lead-Source-Source-Type-Values-)](https://i360lightning.zendesk.com/hc/en-us/articles/13345533566743-Set-Lead-Source-Source-Type-Values-) | **NA** | **Enter Date Completed** |
| Create Lead Sources / End Past Lead Sources | Lead Sources are in individual ways in which you advertise. Ex:  Source Type: Internet Source: Facebook Lead Source: Facebook Spring ‘23 campaign | If converting Data, wait until Data is loaded before adding Lead Sources | [Creating Lead Sources and Ending Lead Sources](https://i360lightning.zendesk.com/hc/en-us/articles/13344030859799-Creating-Lead-Sources-and-Ending-Lead-Sources) | **NA** | **Enter Date Completed** |
| Setup Global Product Categories | These names are how the system determines sales reps when Scheduling, or Project staff on the calendar. | If converting Data, wait until Data is loaded before setting Product Category values. | [Set Global Product Categories](https://i360lightning.zendesk.com/hc/en-us/articles/13344860280215-Set-Global-Product-Categories) | **NA** | **Enter Date Completed** |
| Setup Territories | Territory is the general markets or geographic region where you sell and install your products. Some companies may work in only one Territory. | If converting Data, wait until Data is loaded before editing Territory values. | [Set Global Territory Values](https://i360lightning.zendesk.com/hc/en-us/articles/13348343756439-Set-Global-Territory-Values-) | **NA** | **Enter Date Completed** |
| Setup Organization Wide Email Address | This is the email address where any automated emails will come from. (Reply to) |  | [Set Organization Wide Email Address](https://i360lightning.zendesk.com/hc/en-us/articles/13390214155031-Set-Organization-Wide-Email-Address) | **NA** | **Enter Date Completed** |
| Setup Company Information - Address Phone Time Zone | This contact info will appear on Email Templates and documents like Quotes & Invoices |  | [Set Company Information](https://i360lightning.zendesk.com/hc/en-us/articles/13391902941207-Set-Company-Information-) | **NA** | **Enter Date Completed** |
| Setup Fiscal Year (if applicable) & Define Business Hours | If your Fiscal Year does not begin in January, be sure to set the starting month for your Fiscal Year. | Define your company’s Business Hours to ensure you are not scheduling outside of normal operating hours. | [Set Fiscal Year and Business Hours](https://i360lightning.zendesk.com/hc/en-us/articles/13392736865175-Set-Fiscal-Year-and-Business-Hours) | **NA** | **Enter Date Completed** |
| Upload Company Logo | This logo will appear on Email Templates and documents like Quotes & Invoices |  | [Upload your Company Logo](https://i360lightning.zendesk.com/hc/en-us/articles/14228500939287-Upload-your-Company-Logo) | **NA** | **Enter Date Completed** |
| Review Staff records and End Former Staff | If converting Data, wait until Data Conversion is completed before adding Staff | If converting Data, wait until Data is loaded before adding Staff to your system. | [Ending Staff members and Deactivating Users](https://i360lightning.zendesk.com/hc/en-us/articles/13342891998999-Ending-Staff-members-and-Deactivating-Users) | **NA** | **Enter Date Completed** |
| Review Standard User Profiles/ Determine if Profiles suit Usership | Determine if any Custom User Profiles are needed before Activating the User | Review the OOB Profiles included with the Lightning platform. | [User Profile Settings](https://i360lightning.zendesk.com/hc/en-us/articles/13403659437719-User-Profile-Settings) |  | **Enter Date Completed** |
| Activate Key Users (Department Heads) | Allowing a select group of Users (your Management Team) access now will help better determine Configuration needs |  | [Creating Staff and Activating Users](https://i360lightning.zendesk.com/hc/en-us/articles/13268272701207-Creating-Staff-and-Activating-Users) | **NA** | **Enter Date Completed** |
| eLead Integration Setup (if applicable) | Having leads come directly into improveit 360 allows you to jumpstart marketing efforts |  | [eLead EndpointI Setup](https://i360lightning.zendesk.com/hc/en-us/articles/14989637680023-Setup-eLead-Endpoint) |  | **Enter Date Completed** |
| Activate Matching Rules or create your own! | Matching Rules are used to prevent duplication of Leads, Customers and Accounts in your system. |  | [Standard Matching Rules for Account and Contact](https://i360lightning.zendesk.com/hc/en-us/articles/14497251003287-Standard-Matching-Rules-for-Account-and-Contact-) |  | **Enter Date Completed** |
| Intro to Accounts, Contacts, Sales Opportunities & Task List Views | Configured List Views are the best way to find Contacts or groups of contacts which need to same type of action. | (refresh your memory on) [Glossary of Terms by Object](https://i360lightning.zendesk.com/hc/en-us/articles/14139954090903-Glossary-of-Terms-by-Object-) | (recap) [Lead Entry](https://i360lightning.zendesk.com/hc/en-us/articles/14047190823575-Lead-Entry-)  [List View Guide](https://i360lightning.zendesk.com/hc/en-us/articles/16944571126807-List-View-Guide) |  | **Enter Date Completed** |
| Review Result Details and Appointment Status and Status Detail fields. | Capture reasons why an appointment did not sell and automate reminds for you to call the Contact again. |  | [Editing Picklist Values and Working with Dependent Picklists](https://i360lightning.zendesk.com/hc/en-us/articles/13259576466711-Editing-Picklist-Values-and-Working-with-Dependent-Picklists) |  | **Enter Date Completed** |
| Setup Lender and Vendor Accounts | When tracking Loans or Creating Purchase Orders and Products, you'll need to setup Lenders and Vendors |  | [Create Lenders & Loan Options](https://i360lightning.zendesk.com/hc/en-us/articles/15697379800215-Create-Lenders-Loan-Options-) | **NA** | **Enter Date Completed** |
| Create your Products Database and setup Quote Templates | Before your team can create Quotes and Sales, you’ll need to enter the individual Products you sell.  \*At a minimum you should have one Product for each Product Category. |  | [Working with Products and Quote Templates](https://i360lightning.zendesk.com/hc/en-us/articles/15754710303895-Working-with-Products-and-Quote-Templates) |  | **Enter Date Completed** |
| Appointment Scheduling Settings – Time Block Calendar vs Scheduling Calendar | Your Team has two options when scheduling Appointments. Review both methods and determine your appropriate internal process. | [Using Time Blocks and the Time Block Calendar](https://i360lightning.zendesk.com/hc/en-us/articles/15690884483863-Time-Blocks) | [Appointment Scheduling using the Scheduling Calendar](https://i360lightning.zendesk.com/hc/en-us/articles/14662130492183-Schedule-Sales-Appointment) |  | **Enter Date Completed** |
| Review the Quote creation process and how to Result into a Sale | What does your company include on a Quote? Is it itemized or a lump sum? | [Rescheduling and Resulting Sales Appointments](https://i360lightning.zendesk.com/hc/en-us/articles/15969138416279-Rescheduling-and-Resulting-Sales-Appointments) | [Creating a Quote and using Quote Templates](https://i360lightning.zendesk.com/hc/en-us/articles/15821501989015-Creating-a-Quote-and-using-Quote-Templates-) |  | **Enter Date Completed** |
| Define Sales Approval Process & Create or Edit Sale Status Details & Create Sale List Views | When is the handoff from Sales to Production? Configure improveit 360’s Approval Process to match your internal processes. |  | [Sale Status and Status Detail](https://i360lightning.zendesk.com/hc/en-us/articles/16306465472279-Sale-Status-and-Status-Detail) |  | **Enter Date Completed** |
| Review the Payment Processing information. Decide if you will use automated payments in i360. | improveit 360 integrates with PaySimple for real-time payment processing. In addition, your team can log payments in i360 without any integrations at all. | [PaySimple payment processing & Payment Links to request payments](https://i360lightning.zendesk.com/hc/en-us/articles/28283591686167-Payment-Links-functionality-using-PaySimple) | [Apply Payments to Sales and Projects](https://i360lightning.zendesk.com/hc/en-us/articles/16487952308119-Apply-Payments-to-Sales-and-Projects-) |  | **Enter Date Completed** |
| Review Loans and Loan Options | Loan records can help track finance agreements with Lenders and ensure your team follows up on Approved Loans when the Contact didn’t move forward with their purchase. |  | [Adding Loan records to Quotes and Sales](https://i360lightning.zendesk.com/hc/en-us/articles/16305337923735-Adding-Loan-records-to-Quotes-and-Sales) |  | **Enter Date Completed** |
| Create Project Templates | Project Templates streamline your production process using step dependency. |  | [Creating Project Templates and Project Template Activities](https://i360lightning.zendesk.com/hc/en-us/articles/16587321190679-Creating-Project-Templates-and-using-Templates-and-Project-Activities) |  | **Enter Date Completed** |
| Create Project and Project Activity List Views | Configured List Views are the best way to give your Staff a list of tasks to work through each day. Practice creating Projects and tailoring List Views |  | [Locating Sales without a Project, Create the Project and apply a Template](https://i360lightning.zendesk.com/hc/en-us/articles/16595983070871-Create-Projects-Using-Project-Templates-) |  | **Enter Date Completed** |
| Review OOB Reports & Dashboards - Identify any Custom Report needs | improveit 360 comes with 15 Reports and 1 Dashboard, ready to use Out-of-the-Box |  | [Reports and Dashboard Guide](https://i360lightning.zendesk.com/hc/en-us/articles/17795127886615-Reports-and-Dashboard-Guide) |  | **Enter Date Completed** |
| Building Reports in Lightning Report Builder | Report Types determine which Data is queried in a Report.  Practice modifying existing Reports by changing Date Range, Grouping or Sort Order. |  | [Report Types](https://i360lightning.zendesk.com/hc/en-us/articles/18140412098199-Work-with-Report-Types)  [Change Date Range, Grouping and Sort Order](https://i360lightning.zendesk.com/hc/en-us/articles/18142683482647-Report-Date-Ranges-Grouping-and-Sort-Order) | **NA** | **Enter Date Completed** |
| Report Formulas vs Formula Fields | Because the Lightning Report builder allows you to create Formulas at the row-level, there are fewer use-cases for Formula fields on the object. |  | [Creating a Formula Field on a Report](https://i360lightning.zendesk.com/hc/en-us/articles/18144040550423-Create-Report-Formulas-or-Formula-Fields-) |  | **Enter Date Completed** |
| Review OOB Email Templates - Customize the Wording | improveit 360 comes with 6 Contact-facing Emails and 4 Staff-facing Emails Out-of-the-Box |  | [Lifecycle Email Communications Guide](https://i360lightning.zendesk.com/hc/en-us/articles/17627136301975-Lifecycle-Email-Communications-Guide) | **NA** | **Enter Date Completed** |
| Setup > Flows | Your Administrator User can turn on and off your automated Emails from the Flows menu |  | [How to Activate or Deactivate Email Automations](https://i360lightning.zendesk.com/hc/en-us/articles/17681838073623-How-to-Activate-or-Deactivate-Email-Automations-) |  | **Enter Date Completed** |
| Activate Secondary Users! | Once appropriately configured, you're ready to give the rest of your Users access to the system and conduct General User Training. |  |  | **NA** | **Enter Date Completed** |
| Go Live! | Work directly with our Onboarding Team on the day of Go Live to ensure a smooth successful transition for your team! |  |  |  | **SET THE DATE!** |

**Get ready for CRM greatness!**