ACCOUNT SETUP FOR SUCCESS

ADMIN CHECKLIST

Complete Setup Guide for CRM Implementation

1. ACCOUNT BASICS

- ☐ Access Settings
- ☐ Configure Business Profile (logo, name, contact info, branded domain)
- ☐ Set up Business Information for Compliance
- ☐ Configure Physical Address & Regional Settings
- ☐ Set General Settings (contact management, time zone, email settings)
- ☐ Complete Admin Profile Setup
- ☐ Configure Calendar Settings
- ☐ Set up Billing Information

Important: Do NOT add staff yet

2. PHONE SETUP: BUSINESS VOICE

- ☐ Access Phone Settings
- ☐ Choose and Purchase Business Phone Number
- ☐ Complete Identity Verification
- ☐ Configure Phone Settings (call routing, recording)
- ☐ Set up Advanced Settings (optional)
- ☐ Configure Voicemail and Greeting
- ☐ Test Phone Setup
- ☐ (Optional) Prepare for A2P Registration for Text Messaging

3. EMAIL SETUP: PROFESSIONAL COMMUNICATIONS

- ☐ Access Email Settings
- ☐ Set Up Your Subdomain (e.g., reply.yourbusiness.com)
- ☐ Verify Domain DNS Records (TXT, CNAME, MX)
- ☐ Confirm Verification and SSL Certificate
- ☐ Understand Domain Warmup Process
- ☐ Test Email Functionality (send and receive)
- ☐ Create Professional Email Signature

4. CONNECT CORE TOOLS & INTEGRATIONS

- ☐ Access Integrations Settings
- ☐ Connect Google Account (Calendar, Analytics, Business Profile)
- ☐ Connect Social Media Platforms (Facebook, Instagram)
- ☐ Set Up Payment Processors (Stripe, PayPal, etc.)
- ☐ Verify All Integration Connections
- ☐ Explore Additional Settings (Automation, Labs, Brand Board)
- ☐ Review Audit Logs

5. LEAD CAPTURE SETUP

- ☐ Access Form Builder (Sites → Forms → Builder)
- ☐ Add Essential Contact Fields
- ☐ Add Custom Interest/Qualification Fields
- ☐ Set Up Compliance Checkboxes (A2P messaging opt-in)
- ☐ Customize Form Appearance
- ☐ Get Embed Code and Add to Website
- ☐ Submit Test Lead and Verify
- ☐ Confirm Contact Creation in CRM
- ☐ Set Up Basic Opportunity Pipeline

6. WORKFLOW AUTOMATION BASICS

- ☐ Access Workflow Builder (Automation → Workflows)
- ☐ Configure Workflow Settings
- ☐ Set Up Trigger (Form Submitted)
- ☐ Create Internal Notification Action
- ☐ Add Lead to Sales Pipeline Action
- ☐ Create Automatic Note with Form Details
- ☐ Publish and Test Workflow

7. CALENDAR & BOOKING SYSTEM

- ☐ Navigate to Calendar Settings
- ☐ Create New Personal Calendar
- ☐ Configure Advanced Settings (availability, buffer times)
- ☐ Set Up Pre-Appointment Forms
- ☐ Configure Notifications
- ☐ Customize Calendar Appearance
- ☐ Align Calendar with Profile Availability
- ☐ Embed Calendar on Website
- ☐ Test Booking Process
- ☐ Share Direct Booking Links

8. CRM ESSENTIALS NAVIGATION

- ☐ Explore Dashboard and Metrics
- ☐ Navigate Contacts Section
- ☐ Review Conversations Tab
- ☐ Explore Opportunities Pipeline
- ☐ Practice Adding Tasks and Notes
- ☐ Understand Three-Column View Layout
- ☐ Review Dashboard Reporting

9. MOBILE APP SETUP

- ☐ Download Lead Connector App (iOS/Android)
- ☐ Log In with Your Credentials
- ☐ Customize Mobile Dashboard (Pinned Apps)
- ☐ Configure Push Notifications
- ☐ Test Core Mobile Features
- ☐ Set Up Quick Actions
- ☐ Verify Real-Time Syncing

10. TEAM MANAGEMENT & MONITORING

- ☐ Establish Daily Dashboard Check-in Routine
- ☐ Set Weekly and Monthly Review Schedule
- ☐ Add Team Members (Settings → My Staff)
- ☐ Set Roles and Permissions
- ☐ Send Team Member Invites
- ☐ Ensure Team Completes Profile Setup
- ☐ Provide Team Training Resources ☐ Review Team Access and Usage

11. FINAL VERIFICATION & LAUNCH

- ☐ Verify Brand/Campaign Approved (if applicable)
- ☐ Send and Receive Test Email
- ☐ Submit and Track Test Lead
- ☐ Complete Test Calendar Booking
- ☐ Review Dashboard Metrics
- ☐ Document Login Credentials Securely
- ☐ Celebrate Your Setup Success!

🎉 **CONGRATULATIONS!** 🎉
Your CRM setup is complete and ready for business!

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