Channeltivity®

Implementation Guide Checklist

☐ Configure Global Portal Settings

☐ Configure Global Email Settings

☐ Create Groups

☐ Organization Setup

☐ Configure Partner Organization Fields / Become a Partner Form

☐ Create Partner Types

☐ Configure Regions

☐ Configure Partner Agreements

☐ Determine Library Content Structure

☐ Add Library Folders

☐ Upload Content to Folders

☐ Set Content Group Permissions for Content

☐ Configure Deal Registration Process

☐ Configure Lead Distribution Process (if licensed)

☐ Configure Distributor Module (if licensed)

☐ Configure Referral Module (if licensed)

☐ Configure MDF Process (if licensed)

☐ Configure Business Planning Process (if licensed)

☐ Configure Training and Certification (if licensed)

☐ Configure Co-Branded Collateral (if licensed)

☐ Configure News & Email Marketing Modules (if licensed)

☐ Update Home Page Content & Welcome Message

☐ Add Partner Users (Final Step)