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| **Logo  Description automatically generated** | **Comprehensive CloudRadial** **Company Setup Checklist** Use this checklist to help standardize your company deployments |

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| Create Your Client Company |
| [ ]  | Add your client company via **Partner > Clients** and apply relevant PSA/M365 connections and sync preferences |
| [ ]  | Assign the new company the appropriate **Feature Set** and **Company Groups** |
| [ ]  | Set company-specific customizations in the initial menu (**Customizations**, **Integrations**, **Branding**) |
| [ ]  | Create the company by pressing **Submit.** Edit any settings after creating it, if necessary  |

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| Apply Company-Specific Customizations |
| [ ]  | Apply necessary custom tokens (**question template**s, **routing overrides**, and general **company-level token** overrides as examples of a few) |
| [ ]  | Audit the company’s user list via **Usage > Users** and apply necessary exclusions  |
| [ ]  | Create custom content (either at the **company level** or with **custom folders within Partner > Content**) |
| [ ]  | (**Optional**) If Microsoft 365 is connected, add any shared company calendars via **Company > Calendar** at the company level |

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| Establish Company Reporting and Stage Strategic Planner  |
| [ ]  | Deploy the **CloudRadial agent** to endpoints and servers in the company  |
| [ ]  | Apply **Compliance Policies** against the newly added agent data and other user data and mark policy exceptions as necessary |
| [ ]  | Submit and/or forward IT solution reports into the company’s **Report Archive(s)** |
| [ ]  | Stage the **Planner** with existing services from Partner > Content, plus any other relevant services or talking point within the relevant column(s)  |
| Launching the Portal to Client Users |
| [ ]  | Distribute **customized deployment/launch materials** through email, meetings, and the portal itself |
| [ ]  | (**Optional**) Deploy the portal’s desktop app and/or the Teams app to the company |