



Channeltivity®

Implementation Guide Checklist

- Create Internal and Partner Groups
- Organization Setup
- Configure Partner Organization Fields / Become a Partner Form
- Create Partner Types
- Set Prospective Partner Stages
- Configure Partner 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)
- Update Home Page Content & Welcome Message
- Configure Global Email Settings
- Add Partner Users (Final Step)