

# Playbooks Ready to Launch Checklist (Salesforce)

Pre-Provisioning a Playbooks Account	
	Identified or created an Integration User
	<u>Reviewed - Minimum Requirements for Playbooks</u>
	Salesforce Requirements
	Network & System Requirements
	Telephony Requirements
	Email Requirments
	Verified 7 custom task fields are available
Salesforce Setup	
	Installed 'Basic Playbooks Fields & Reports' Unmanaged Package, <b>OR</b> manually added the fields to Lead, Contact, Account, and Task objects.
	Added IP addresses to 'Network Access'
	Disabled Session Settings
	Verified Integration User has correct permissions in Salesforce (this can be done by modifying their profile or use a permission set)
	Verified users have correct permissions in Salesforce (this can be done by modifying their profile or use a permission set)
	Added relvant Playbooks fields to page layouts for end users
	(Optional) Added Playbooks fields as columns in List Views and Reports
	API Enabled for all Playbooks Basic Users and Integration User
	(Recommended) Integration user password never expires
Network & Telephony Setup	
	Whitelist websocket traffic
	Whitelist XANT domains and ports
Playbooks Configuration	
	Email is configured in Playbooks
	User Management: At least 1 team has been configured in Playbooks
	User Management: Permission Groups have been reviewed/customized
	Plays have been created and assigned to appropriate teams
	Playbooks Reports added via Unmanaged Package, or created
	Playbooks Report filters have been updated
	Playbooks Reports have been shared with relevant users