Launch and Go-Live Checklist

Enrollment and Shopping

- ❏ Complete Enrollment forms in **eCommerce Shop** for each customer type.
- ❏ Complete guest checkout in **eCommerce Shop**.
- ❏ Add a new associate in **Corporate Office**.
- ❏ Ensure proper tree placement for new enrollees in **Corporate Office**.

Web Office/eCommerce Shop

- ❏ **eCommerce Shop**/**Web Office** loads as expected.
- ❏ Default *{webalias}* loads and works as expected.
- ❏ All **eCommerce Shop/Web Office** navigation and links work and target pages; content correctly loads.
- ❏ **Web Office** links to **eCommerce Shop** as expected (via **Team Dashboard** > **Marketing Sites** widget).
- ❏ **eCommerce Shop** displays correct associate information in site header and **URL**.
- ❏ Sign off on **eCommerce Shop**/**Web Office** desktop view (all content, links, and user content types).
- ❏ Sign off on **eCommerce Shop**/**Web Office** mobile view (all content, links, and user content types).

Ordering and AutoShip

- ❏ Complete an associate order in **Web Office** with new payment card.
- ❏ (If applicable) Complete an associate order in **Web Office** with a migrated tokenized card.
- ❏ Place an associate order in **Corporate Office**.
- ❏ Refund an order from **Corporate Office**.
- ❏ Add a new autoShip in **Web Office**.
- ❏ Add a new autoShip in **Corporate Office**.
- ❏ Edit an existing autoShip in **Web Office** (change product and payment info).
- ❏ Delete an autoShip in **Corporate Office**.
- ❏ (If business rules allow) Delete an autoShip in **Web Office**.
- ❏ Successfully process an autoShip order in **Corporate Office**.

- ❏ Trigger the daily run to process waiting autoShips and ensure orders are created.

Communication & Notifications

- ❏ Email receipt is received for a new order.
- ❏ Email is received when autoShip is processed.
- ❏ Email is received when enrollment is completed.
- ❏ Notification received when an associate gains a new rank.
- ❏ Send message to an associate in downline in **Web Office**.
- ❏ Received new customer notifications.
- ❏ Received new associate notifications.

Reports

- ❏ Confirm that **Quick Reports** can be added and work correctly.
- ❏ Create new custom report in **Web Office**.
- ❏ Create new custom report in **Corporate Office**.

Stats / Volumes / Trees

- ❏ Placing a new personal order increments key volumes (**PV**, **GV** and **CV**) as expected.
- ❏ Placing an order in somewhere in the downline increments key volumes (**GV**, **CV**, **DV**) as expected.
- ❏ Stats box displays in **Corporate Office** associate detail page and values match the **KPIs** in the **Home** > **Business Snapshot** widget in **Web Office**.
- ❏ Rank advancement percentage is increased as expected from an order placed.
- ❏ Rank advancement percentage is increased as expected from new enrollments.
- ❏ New enrollments are correctly placed in the tree.
- ❏ **Placement Suit**e is configured to business rules and works correctly.
- ❏ **Visual Tree** in **Web Office** is configured to business rules and works correctly.

General Web Office

- ❏ All navigation links work.
- ❏ Social networking links work.
- ❏ Test associate search function.
- ❏ **Team Dashboard** loads and links work correctly.
- ❏ Communication settings all perform as expected.
- ❏ **Training Courses** links work correctly.

❏ Associates can manage their account (update username, password, email, contact info).

General Corporate Office

❏ Associate search works for **Name**, **ID** and **Phone Number**.
❏ Corporate admin can edit associate personal information.
❏ Associate status can be updated.
❏ Passwords for **Web Office** can be reset.
❏ Inventory items can be created and added to stores.

Commissions

❏ Confirm rank names and requirements show correctly in **Web Office**.
❏ Test each commission plan bonus.
❏ Test commissions calculation.
❏ Test paying commissions to a new account.
❏ (If applicable) Test paying commissions to migrated account.
❏ Verify all key volumes are showing correctly in **Corporate Office** associate detail page.
❏ Verify all key volumes are showing correctly in **Web Office** (such as **Business Snapshot** and **Quick Reports**).
❏ Check that associate stats are running in **Corporate Office** associate detail page.
❏ Sign off on compensation plan (programming, volume calculation, payout, etc.).

Integrations

❏ Audit money-in integration with DirectScale contact.
❏ Sign off on money-in integration.
❏ Audit money-out integration with DirectScale contact.
❏ Sign off on money-out integration.
❏ Audit shipping/3PL integration with DirectScale contact.
❏ Sign off on shipping/3PL integration.
❏ Audit tax integration with DirectScale contact.
❏ Sign off on tax integration.
❏ (If applicable) Audit data migration with DirectScale contact.
❏ (If applicable) Sign off on data migration.