

Final acceptance before invitation

What you should check again

Administration

1. General

- Data in account management is correct
- Employees created and employee roles maintained
- Service provider types created
- E-mail notifications (especially sender)

2. Customer portal

- Settings
- Customized look & feel
- Questions & Answers area updated
- Document types created

3. SmartTask

- Task types created
- Internal checklists created for tasks

Properties

- Service providers are linked
- Visibility of contact persons
- First documents provided
- Property image created (alternatively placeholder in the "Administration" area)
- Welcome message set (optional)