

AD2GO Data Installation Steps:

1. Create necessary User Profiles
2. Upload Users and assign appropriate profiles
3. If available, upload data to the org utilizing dataloader.io with spreadsheets or integrations, in the following order:
 - a. Accounts: Upload Parent accounts first, then upload the child accounts.
 - b. Contacts
 - c. Leads: Activate inactive lead statuses (in profiles) before uploading leads.
 - d. Campaigns
 - e. Opportunities
 - f. Courses
 - g. Terms
 - h. Program Plans
 - i. Program Enrollments
 - j. Course Offerings
 - k. Course Connections
 - l. Team
 - m. Team Stats
 - n. Team Members
 - o. Agility
 - p. Body
 - q. Conditioning
 - r. Distance
 - s. Incidents
 - t. Name & Likeness Contracts
 - u. Nutrition
 - v. Player's Stats
 - w. Strength
 - x. Term Grades
 - y. Wearable Data
 - z. Equipment
 - aa. Players Equipment
 - bb. Community
 - cc. Community Players
 - dd. Expense Types
 - ee. Team Expense Allowances
 - ff. Team Expenditures
4. If established data is unavailable, collect player/team member information via a web-to-lead form, or sign-up sheet.
 - a. Collect first name, last name, email, phone, etc.
 - b. Create new Contacts/Accounts with this data
5. Link Team Member record to Contact record (add player name to +New Team Member field on the Contact record, then lookup contact on the New Team Member popup)
6. Create a Customer Community site (for players/student athletes)

- a. Enable Digital Experiences, use the Customer Account Portal template
 - b. Customize with logos/colors/fonts
 - c. Add Site Page for Team Member Object
 - d. Update Navigation Menu
- 7. Enable Contacts (players and/or parents) as Customer Users
- 8. Start adding data and developing data insights