

Planning Checklist

Talkdesk strongly recommends that you check if you have all of the items on this checklist in place.

Monitoring & Alerting

- ☐ Administrators and Supervisors are subscribed to the Talkdesk StatusPage.
- ☐ Studio Flow error reporting is configured and scheduled.
- ☐ Guardian Call Quality reporting is configured and scheduled.
- ☐ Permissions for the Recent Activity Multichannel Dashboard have been configured.

Resilience

- ☐ Single Sign-On (SSO) settings have been reviewed & Support Access enabled, if required.
- ☐ Error Handling for critical Studio Flow steps has been reviewed and configured.
- ☐ Complex Studio JavaScript functions have been configured with error-handling methods.

Disruption Planning

- ☐ Conversations Mobile application access has been configured and tested, if required.
- ☐ Call forwarding and outage messaging have been configured in Continuity Settings.
- ☐ Permissions to View, Update, and Enable/Disable Continuity Settings have been assigned.
- ☐ Contingency Routing in Studio has been installed and configured.

Other

- ☐ Administrators have been trained on the use of all business continuity strategies.
- ☐ A runbook has been created and provided to all Administrators.