API Project Planning and Implementation Checklist

Design Phase	Create Account		
		☐	Create Sandbox Account
		☐	Add / Manage Users
		☐	Issue Sandbox API Access Token
	Review Documentation		
		☐	Review REST API Documentation and other resources to determine implementation path for your needs
		☐	Review best practice recommendations
		☐	Review verification field requirements
		☐	Review template request configuration options
		☐	Review Getting Started Sample Recipe Code
	Technical Kick-off		
		☐	Schedule kick-off meeting with the SheerID technical team to review project scope, discuss technical questions, and coordinate assistance required
		☐	Set up periodic implementation status / consulting reviews with SheerID team
Implementation Phase	Create Verification Service		
		☐	Design/Implement Presentation Layer - Organization Combo box for School/ID selection
		☐	Configure Template Verify Request Configuration
		☐	Determine / Implement Strategy for Asset Upload - Client implemented - SheerID hosted, define branding requirements, upload instructions
		☐	Configure HTTP Notifier, Filter if applicable
		☐	Configure Verification Email Messaging if applicable
		☐	Configure Same Person Limits if applicable
		☐	Configure Primary, Consolation Reward if applicable
	User Acceptance Testing		
		☐	Review Sandbox Verification Source and Automate Document Review Instructions to test all instant and document review use-cases
Final Pre-live check and launch	Readiness Review		
		☐	Demonstrate final implementation with SheerID staff for readiness confirmation and post live support preparations.
		☐	Determine any special Document Upload or Document Review criteria
	Activate Live Implementation		
		☐	Activate Production Account
		☐	Migrate or configure templates and notifiers from sandbox environment
		☐	Delegate Asset Review to SheerID Document Review Specialist team
		☐	Production Smoke test / Soft Launch to re-confirm live functionality
Post Live Support	Post Live Operational Tools and Support		
		☐	Introduce SheerID contacts for Client Services and verification Customer Service
		☐	Provide orientation to Control Center tools, including Verification Reporting Options and other relevant tools
		☐	Coordinate any marketing or promotional campaign assistance with SheerID team