	Delivered (Yes/No)
1. CRM Platform, Accounts & Ownership	
• Zoho CRM organization/account(s) registered in the aggregator's name, with the aggregator's official email as primary (super) administrator	
• Super administrator and administrator credentials securely transferred to the aggregator	
• List of all user accounts created, with assigned roles, profiles and permissions	
• Service provider access removed or reduced to the agreed support level after handover	
• Confirmation that no account, module, integration or credential remains exclusively controlled by the service provider	
2. Licenses & Subscriptions	
• Inventory of Zoho modules/products and edition (subscription tier) in use	
• License and subscription details: number of users, billing owner, start and renewal dates, and period covered under the contract	
• Third-party add-ons, extensions or marketplace apps used, with their subscription details	
• Estimated recurring costs after the contract-funded period (Year 2 onwards)	
3. CRM Configuration Records	
• Configured modules, custom fields, page layouts and web forms	
• Workflows, automation rules, notifications and approval processes	
• Customer-side setup: leads, contacts, sales pipeline/stages, quotations and sales orders (where applicable)	
• MSE supplier-side setup: supplier profiles, products and capacity, orders assigned, quality and delivery follow-up, and payments	
• Disaggregated data fields for MSE suppliers (gender, age, disability, home-based business status)	
• Dashboards and reports, with export in applicable formats (Excel, CSV, PDF)	
• Arabic/English language settings and mobile application access configured	
• Any custom code developed under the contract (Deluge custom functions, scripts, widgets, integration/middleware code), with documentation, if applicable	

	Delivered (Yes/No)
4. Data Migration & Backups	
• Approved data migration plan and migration summary (records imported per module, validation and reconciliation results)	
• Log of unresolved data issues and agreed limitations	
• Full data backup/export of all CRM modules and attachments at launch, in open formats (CSV/XLSX)	
• Backup and data export procedure and recommended schedule	
• Baseline figures recorded at inception (number of users, customers and MSE suppliers)	
5. Integrations & Third-Party Access	
• Integration matrix (connected systems, data flow direction, method, status and limitations)	
• Email account integration settings	
• Website enquiry forms and e-commerce platform integration settings, if applicable	
• WhatsApp Business and social media channel integration, if applicable	
• API keys, connection tokens and webhook credentials, registered under the aggregator's ownership	
6. Security & Data Protection	
• User authentication settings (password policy, two-factor authentication) and access-control configuration	
• Audit log enabled and accessible to the aggregator's administrator	
• Data protection and confidentiality measures, aligned with Jordan's Personal Data Protection Law	
• Incident reporting procedure and contact points	
• Written confirmation of return/deletion of aggregator data held by the service provider at contract end	
7. Testing & Acceptance	
• Test plan and results (functional, workflow, access-control, integration, data-migration, backup/export)	
• Issue log showing all approved issues resolved before launch	
• Signed user acceptance (UAT) by the aggregator	
• Written acceptance of deliverables by AmCham-Jordan	
8. Documentation & Training	

	Delivered (Yes/No)
• CRM configuration documentation (functions, workflows, roles, permissions, dashboards and reports)	
• Administrator Guide	
• End-User Guide (Arabic or bilingual)	
• Training materials and attendance records for administrator and end-user sessions	
• Recorded training sessions, if available	
9. Warranty, Support & Closure	
• Written warranty statement covering the three-month post-launch period	
• Support terms: channels, contact persons, response and resolution times, and warranty fix vs. change request	
• Support log of issues reported and resolved during the warranty period	
• Support closure report: issues resolved, adoption indicators (active users, records entered) and recommendations	
• Final completion report and signed handover acknowledgment by the aggregator and AmCham-Jordan	