



CRM Reporting Checklist

Data Source Validation

Verify data sources are correctly configured and accessible for reporting.

Primary Data Source

- ☐ Salesforce
- ☐ Microsoft Dynamics 365
- ☐ HubSpot
- ☐ Other

Connection Method

- ☐ API
- ☐ Direct Database Connection
- ☐ CSV Import
- ☐ Other

Last Data Source Synchronization

Enter date...

Synchronization Frequency (hours)

Enter a number...