

Dear Customer

Thank you for downloading this preparation letter for basic settings. It contains a series of questions. Your answers will enable you set up your new CRM system in a way that fits your business. A system that is set up in a good way, will help your users to adopt to the new CRM system much faster.

1.1 Users/request handlers

- Which user groups/departments will be using SuperOffice Service and which users/request handlers belong to which groups/departments?
- Which users are to be superusers/administrators of the solution?
- Is there a need for differentiating information between the user groups (we call it MDO – Multi Department Organization)?
 - Should all groups see the same information (requests, categories etc.)?
 - Should some only be available to certain groups? If yes, which users should see which information?
- All users should have a signature. This can be either the request handler's name or a group signature. If you want to use multiple different signatures, these must be entered as reply templates.
- How do you want users/request handlers to be notified about events in the system? Notifications can be set up by request handler and for different types of events.
 - Popup notification within the solution
 - E-mail
 - Both popup notification within the solution and e-mail
 - SMS (if SMS module is installed)

1.2 Categories

- What categories do you need?
- Who should have overall responsibility for the category (i.e. "the category manager")?
- Who will be assigned inquiries (i.e. "requests") from the category? (NB! This person must be a member of the category.)
- If requests are to be assigned automatically, will you be using a picking list or will the category manager assign the requests?

1.3 Contacts

- What information do you want to register about contacts/customers?
- Do you want to classify them? For example: contact, supplier, partner, etc.
- What markets are you operating in? Do your customers sort under industries, such as transport, IT, services and manufacturing?
- Do you want to obtain contacts from another customer file (integration)?
- What marketing activities and customer campaigns do you perform and how would you like to tag the customers to find your target groups? Example: tag customer with "newsletter", "product information" or "reference customer".
- Which contacts do you meet with and which contacts constitute your target group? For example: General Manager, Purchase Manager, Project Manager etc.

1.4 Companies

- What information do you want to register about companies?
- Do you want to classify them? For example: supplier, partner, etc.

- What markets are you operating in? Do your customers sort under industries, such as transport, IT, services and manufacturing?
- Do you want to obtain companies from another customer file (integration)?

1.5 Requests

- What information do you want to register about inquiries (we call these “requests”)?
- Do you want to classify them beyond their categorization? For example: request types such as phone inquiries, e-mail, etc.

1.6 Priorities

- What priorities do you need?
- How long should a request have one priority before it is escalated?
- Will all customers be prioritized in the same way or will there be different priorities for different customers?
- What are your opening hours?
- What holidays do you have over the calendar year?

1.7 Escalation actions

- Is there a need for escalation actions?
- Should someone be notified when requests are escalated?
- Should requests be reassigned?
- Deadlines? How much time should pass before escalation actions happen within a priority?

1.8 Request status

- Do you need your own statuses? If so, which?
- How should any own statuses be aligned with the system’s statuses?

1.9 E-mail

- What mailboxes do you need?
- Who will set these up? Service provider?
- What protocol, e-mail server, user name and password should be used?

1.10 E-mail filters

- What e-mail filters do you need?
- Do you need to filter out auto-replies from customers?

For more information and tips about how to get started go to our [Community site](#).