**Checklist for account managers. What information do I need to ask my customer to set up a customer environment:**

It is important to ask the following questions from the customer for the implementation of a new customer portal:

1. Which employment types are there?
2. Which functions are there?
3. Set compositions based on employment, gender and function.
4. Are you going to work with a start set?

No

Yes, which and how many products will be included in the start set based on employment, gender and function?

Personal data, e-mailaddresses.

1. Addresses, which addresses will be used?

Home address (person)

Shipping address (person)

Work address (person)

Company address (department)

Manual address (manual)

1. Departments, are we working with multiple departments?

No

Yes 🡪  Department name

Address

Hierarchy

1. Are budgets used?

No

Yes, request budgets.

1. Are personal products used?

No

Yes, which products are personal and for whom?

1. Are we working with validation rules (for example a maximum of 3 trousers per year)?

No

Yes, for which products should there be a validation rule?

1. Will be worked with order costs?

No

Yes, what order costs are there (for example freight costs?)

1. Are people going to work with Mollie?

No

Yes 🡪  iDEAL

PayPal

Creditcard

Partial payments with points / Mollie

1. Are there known person sizes?

No

Yes

1. Who may receive a confirmation email when an order is placed?

Consignee

Group leader

Buyer

**The following information is important for the sheets / layout:**

Base data

Employment type

Functions

Departments

Consignee

Person id.

Gender

First name

Lastname

Middle name (optional)

Email address from the consignee

Username

Budget (Perhaps the remaining budget that needs to be read in, or the new budget)

Who gets which role (consignee, group leader, buyer etc.)

Optional fields. If you want to work with Title, Suffix and Prefix, these must also be requested.

Address information consignee

Street

House number

Additional (optional)

Zip code

City

Sets

Which sets should be included (Start set, normal set, personal set and/or bulk set)

Which products are in the set(s)

Are there validation rules

Person measures

Person id and assortment id.

**Note:** This is the basic data that must be requested from the customer. During implementation it may turn out that details are missing. These will still have to be determinated in cooperation with the customer.