

Help Desk Setup Checklist

1. Configure Customer Service Channels

- Support Inboxes configured
- Knowledge Base setup completed
- Live Chat setup completed

2. Build a Community for Loyalty Program Subscribers

- Support request forms checked
- All Inboxes checked
- Contact us page tested

3. Team Management

- Support Agents added
- Departments added

4. Workflow Management

- Rules created
- Roles & Permissions reviewed

5. Outgoing Support Messages

- Email best practices followed
- Canned responses checked & updated

6. Get Ready for Launch

- Agents training completed
- Internal Knowledge Base created
- Systems tested to handle support queries