**CRM Discussion Points**

***Product Data Fields for collection:***

* Product - Examples include (FDN640; FDN40; FDN Gaming; Access Points; licenses; services; etc.)
* System serial number
* Hardware part number
* Module serial number
* Module 1 serial number - Slot 1 on FDN640
* Module 2 serial number - Slot 2 on FDN640

These items are only related to FDN640

Product

* Module 3 serial number - Slot 3 on FDN640
* Module 4 serial number - Slot 4 on FDN640
* Module 5 serial number - Slot 5 on FDN640
* Module 6 serial number - Slot 6 on FDN640
* Switch base MAC address
* Software version
* Firmware version
* Power supply serial number
* SFP serial number
* Manufacturing date - Ulterius products (Not sure if this would apply to products such as Access points)
* Cost
* Price
* Date sold
* Sold to customer

***Customer Data Fields for collection:***

* Business name
* Contact name
* Work number
* Cell number
* Email address
* Mail address
* Ulterius notes on customer
* Ulterius direct customer or Reseller/distributor customer?
* Did the customer or Reseller/distributor purchase warranty/support?

***Processes to review***

* How does inventory get loaded into CRM?
* How do customers get loaded into CRM? Do all prospects get loaded and become a customer once a purchase is made?
* Does a quotation function exist in CRM?
* How are sales reflected in CRM? Need to consider Product; licenses; services; etc.
* What is the product registration process?
* How do we interface with Quickbooks financials?

***Reports to consider***

* # of incidents reported by customer and by product (0-90 days); (91-180 days); after go-live. This will help us forecast support costs going forward by customer and product volumes.
* Report by customer by date of all products, services, licenses, etc. with price and registration date.
* Number of incidents opened vs. closed by product, by severity/priority, by week; by month; by qtr; by year
* Number of incidents opened that generate a change request by product, by week; by month; by qtr; by year
* Response time reporting vs. SLA by severity/priority by week; by month; by qtr; by year
* Resolution time reporting vs. SLA by severity/priority by week; by month; by qtr; by year