Checklist: plenigo Backend

Please note that the list is by no means complete and is for guidance only. As each project is individual, it is possible that some points are not required and can be ignored. Special features may not be listed here. (Status: May 2024)

Contracting Company					
Range	**Task**	**Status**	**Responsible**	**Note**	**Knowledge Base**
Templates: Mail Templates	Maintain mail templates (styling, wording, etc.)	☐		**If there are several clients, maintenance takes place at client level.**	Templates
	Maintain header/footer	☐			
	Optional: add further mail attachments	☐			
Contract Modules	Check whether all required and desired modules are activated	☐			
Settings: User Administration	Create user groups	☐			User Administration
	Create backend users and assign them to corresponding user groups if necessary	☐			
Settings: User Administration / Security Settings	Recommended: Define login security	☐			Security Setting
Settings: Mail Settings	Activate e-mail setup	☐		For the STAGE environment, it is recommended to restrict the sending of e-mails to your own company domain.	Mail Settings
	Optional: Set up BCC dispatch of customer emails	☐			
	Activate/deactivate selected system e-mails	☐			
	Set up e-mail delegation (sending from your own domain)	☐			
Settings: SMS Provider	Link SMS provider	☐		**Optional - only necessary if the customer is to verify himself via SMS token.**	SMS Provider
Settings: Global Settings	Specify whether the customer should assign a user name	☐			Global Settings
	Activate/deactivate recording of change histories (in the customer account)	☐			
Settings: SSO	Link external SSO provider	☐		**Optional - not necessary if the plenigo SSO is used and/or Sign-In-With-Google is irrelevant.**	SSO
	Activate "Sign-In-With-Google"	☐			
Settings: Modules	Configure address validation	☐		**Optional - not necessary if the modules are not used.**	Modules
	Configure IVW rules	☐			

Client (Company): Products					
Range	**Task**	**Status**	**Responsible**	**Note**	**Knowledge Base**
Products: Price Segments	Define and prioritize individual price segments	☐		**Necessary BEFORE creating price sheets (but optional).**	Price Segments
Products: Price Sheets	Define price sheets	☐		**Necessary BEFORE creating product contracts.**	Price Sheets
Products: Product Contract	Depending on the type of offer, time-based or issue-based product contracts are required.	☐		**Necessary BEFORE creating offers.**	Product Contract
Products: Access Rights	Define access rights	☐		**Required BEFORE offers are created.** Consultation with the CMS service provider to ensure that the correct Unique IDs are maintained.	Access Rights
Products: Bonuses	Define and create bonuses	☐		**Optional - Bonuses can be assigned to a product and can be either free or chargeable.** **Please note: plenigo only holds the data that is relevant for shipping. This data can then be passed on to relevant shipping service providers.**	Bonuses
Products: Wallets	Create wallets	☐		**Optional - only relevant for the "issue-based" offer type.**	Wallets
Products: Offers	Define product portfolio	☐		Time-based subscriptions can be created for multiple users (up to 100).	Offers
	Create offers • Time-based: Single product, time pass, simple and complex subscription • Issue-based: simple and complex subscription • Credit-based: Single product and subscription • Gift vouchers	☐			
Products: Shopping Carts	Optional: bundle individual offers into preconfigured shopping carts	☐		In contrast to bundles, the customer can manage and cancel the purchased subscriptions / offers individually.	Shopping Carts
Products: Sales Rules	Define sales rules • Misuse rules: protection against repurchases of free periods • Age-related rules: e.g. U30 subscriptions • Cross-Selling • Up-/Down-Selling	☐		Misuses rules must also be stored directly in the offer to be protected. The age and identity verification module is required for age-related rules.	Sales Rules
Products: IVW Rules	Create IVW rules	☐		The IVW Reporting module is required to use IVW rules. IVW rules must also be included in the product contracts.	IVW Rules
Products: Delivery Lists	Create delivery lists	☐		Delivery lists are also required for IVW reports. Created delivery lists must also be stored in the respective offers.	Delivery Lists
Products: Tags	Create tags • Cross-Selling • Up-/Down-Selling • Reporting: for external reporting tools	☐		You need to create tags for cross-selling and up-/down-selling BEFORE configuring the corresponding sales rules. These tags are maintained on offers and in the corresponding sales rules. Reporting tags are maintained directly in product contracts.	Tags
Products: Accounting	Maintain individual thresholds and delivery thresholds (if available)	☐		The tax table is maintained automatically by plenigo. After a manual change by the customer, automatic maintenance is permanently discontinued and the tax rates must be managed independently.	Accounting

Client (Company): Templates & Settings					
Range	**Task**	**Status**	**Responsible**	**Note**	**Knowledge Base**
Templates: Gift Voucher Templates	Upload and configure PDF for gift vouchers	☐		The PDF(s) must be attached BEFORE the offer is created.	
Templates: Mail Templates	Maintain mail templates (styling, wording, etc.) Maintain header/footer Optional: add further mail attachments	☐ ☐ ☐		See page 1 Contracting company, possibly irrelevant if maintenance is carried out centrally in the contracting company.	Templates
Settings: Company Data	Enter the correct e-mail addresses (contact, support and billing address)	☐			Company Data
Settings/Applications: SSO	Set token dispatch Define permitted, parallel logins & query of first and last names Set extended user name, query of terms and conditions and opt-ins during registration	☐ ☐ ☐		SSO settings relate purely to login and registration. SMS token optional - only necessary if the customer has to verify himself via SMS token	SSO
Settings/Applications: Self Service	Define design/display (standard changes or own programming) Define advanced cancellation settings Allow/restrict subscription and delivery interruptions	☐ ☐ ☐		The settings relate purely to the Self Service and its snippets.	Self Service
Settings/Applications: Checkout	Configure checkout with payment methods (query opt-ins & addresses and allow payment methods) Define design/display (standard changes or own programming)	☐ ☐		**Please note: The variant is only active and played globally if the "Active" checkbox is ticked.** The settings relate purely to the checkout.	Checkout
Settings/Applications: GTC	Configure the terms and conditions to be displayed to the customer at login/registration and at checkout.	☐		**Please note: Only the GTC that are marked with the "Active" checkbox are displayed to the customer.** If the GTC are changed at a later date, all customers who have already accepted the GTC in the past will be shown them again AFTER registration, to accept the new GTC.	GTC
Settings/Applications: Opt-ins	Configure opt-ins to be displayed to the customer during login/registration and checkout.	☐		**Please note: Only the opt-ins that are marked "Active" are displayed to the customer.**	Opt-In
Settings/Finances: Payment Methods	Link and activate payment service providers (PSPs) Select and link between Stripe and PAYONE For PayPal use: Request & approve PayPal Reference Transactions For Stripe use: Activate SEPA Mandate Reference For migration with increased payment volumes: Check transaction limit for SEPA direct debits and increase if necessary Activate linked payment methods for individual sales and subscriptions Define failed payment process (how should plenigo behave and when)	☐ ☐ ☐ ☐ ☐ ☐ ☐		**Attention: Invoice payers are not taken into account by process control** Explanations with details on how the linking of the PSPs works can be found in the Knowledge Base.	Payment Methods
Settings/Finances: Invoice Settings	Design invoice PDF Manage data for electronic invoices (XRechnung) Set invoice dispatch and invoice number range	☐ ☐ ☐			Invoice Settings
Settings/Finances: Order Confirmation	Design order confirmation PDF	☐			Order Confirmation