

System3 POS Canada Inc.

Restaurant Checklist

Restaurant Name _____	Ph/Fax _____
Contact Person _____	
Estimated Open _____	Est. Cabling _____
Est. Hardware Inst. _____	Est. Go-Live _____

Time of Sale

- ☐ 1. Confirm Sale with Client and finalize payment option. _____
- ☐ 2. Collect deposit, or Lease papers. *Amount \$* _____
- ☐ 3. Give Client a copy of Menu-Build List. *Return* _____
- ☐ 4. Collect existing menu info from client.
- ☐ 5. Collect Purchase Agreement from client. Determine a suitable go-live date as per Client/Dealer schedules, and confirm availability of System3 technicians for pre-install, menu-build, and go-live. Assign appropriate tasks with deadlines.
- ☐ 6. Figure out an appropriate time for cable/wire installation.

Menu-Building Process/Manager Training

- ☐ 7. Initial meeting with contact concerning menu. First sign-off.
- ☐ 8. Arrange time for Manager Training. _____
- ☐ 9. Call customer to arrange time for second meeting. _____
- ☐ 10. Complete the second phase of the menu-build. Second sign-off.
- ☐ 11. Make necessary menu changes.
- ☐ 12. Call customer to arrange time for a meeting Phase 3 _____
- ☐ 13. Complete Phase 3 of the menu-build. Final sign-off.
- ☐ 14. Make final menu changes.
- ☐ 15. Client signs-off on final version of the menu.

Pre-Installation

- ☐ 16. Order necessary hardware and peripherals as per Work Order. ETA _____
- ☐ 17. Receive the hardware and/or peripherals, noting any backorders.
- ☐ 18.a. *Record All Serial Numbers clearly and completely.* Fax to lease co.
- ☐ 17. Bench test the hardware/peripherals in the office
 - o Install NIC's on all terminals.
 - o Install and test **PC Anywhere**.
 - o Install ELO-Touch Drivers on each Terminal.
 - o Install LAN products (Client for MS Networks, TCP/IP)
 - o Enable File and Print Sharing
 - o Assign network Computer names (T1, T2, T3, etc.)

- Assign network workgroup name, WORKGROUP.
 - Share Hard Disk on all terminals and share it as ROOT.
 - Share all CD-ROMS and floppy drives.
 - Disable Power Management settings.
 - Install printer drivers on all terminals (generic on LPT! For receipt printers and generic on COM2 for kitchen printers)
 - Install share names to Kitchen & Bar printers in Windows 95/98/ME/NT
 - Go into Display Settings and change scheme to WINDOWS EXTRA LARGE, additionally, increase the scrollbar size, etc.
- ☐ 18. Install System3 POS software on each terminal.
 - ☐ 19. Start System3 POS print spooler and set-up necessary printers.
 - ☐ 20. Verify print spooler and other System3 POS icons are located in Windows startup. (Auto Clear and Store, Auto Reporter, etc.)
 - ☐ 21. Add report printer to all terminals. Make it the default printer for Windows based programs.
 - ☐ 22. In Terminal Numbering (Terminal Options), set the 'Backup History to', to any terminal besides T1.
 - ☐ 21. Edit Dealer.inf file in System3 POS folder. Include our name, phone # and appropriate terminal number.
 - ☐ 22. Collect final Employee info from customer (including security levels...)
 - ☐ 23. Register all terminals with 30 Day temporary codes. Date_____
 - ☐ 24. Install latest System3 POS Update disk.
 - ☐ 25. Install **WinZip** and **WinAce** on all terminals.
 - ☐ 26. Rename the menu in the System3 POS folder to something other than 1m1.mdb and copy the FINAL menu into the folder.
 - ☐ 27. Navigate through the System3 POS folder on the manager side and access the Setup tab. Here you want to set-up proper tax groups and verify percentages. Also set up proper discount types, department info and then RECORD the numbers. Finally, set-up the proper payment type info.
 - ☐ 28. Edit the menu and assign the dept. numbers, and taxes. Double check that the printers are correctly assigned to each machine.
 - ☐ 29. Verify that the pricing is correct for all item buttons on menu, including the modifiers.
 - ☐ 30. **Test full operation, including ordering, sending, printing, cash drawers and tendering. Check receipt printers for items printing AND totaling the way you set it up in the menu.**
 - ☐ 31. Set-up ScanDisk and DeFrag to run weekly on each machine.
 - ☐ 32. Verify that all test data is deleted. Eg. Product Inventory, House Accounts, Promos, etc. ***Note: You must leave at least one entry in all of the above as databases cannot be left empty!!***
 - ☐ 33. Place System3.exe in the Startup folder on all terminals. On office terminal only, place the Auto Clear & Store/Auto Reporter in the Start-up folder.
 - Start and Execute the System3 Utility monitor.
 - ☐ 34. Box all components **using checklist**, and verify delivery date, and live date (if different) with customer._____/_____

Installation/Post-Installation

- ☐ 35. Deliver and unpack the hardware/peripherals on site.
- ☐ 36. Set-up neatly in proper locations, and wire-tie all loose cables wires.

- ☐ 37. Do some vigorous and rigorous testing. Test printing items and their respective totals, tendering, discounting, sending, etc.
- ☐ 38. Go into the BIOS settings and turn on ignore keyboard. This will prevent the computer from stopping at a reboot.
- ☐ 39. While in DOS, open the msdos.sys. You will need to change the file from hidden, and open it in notepad. At this point you need to either change the "Autoscan=1" to "Autoscan=0" or add "Autoscan=0". This must be done on all workstations to prevent the computer from scanning the hard drive after an improper shutdown or power blip
- ☐ 40. Perform a manual Clear and Store, then check to make sure it worked properly. Check to see if the proper folders and files were created. Delete the Reports1999 and Reports2000 folders.
- ☐ 41. Have the customer verify the employee information, including the permissions. If they received cards, make sure to double-check the ID's. Print out a security info report from the employee setup side and check passwords.
- ☐ 42. Set up terminal options as discussed with client. Make copies of 1m1.mdb, and terminal.mdb.

Live Day - Testing and Real Time:

- ☐ 43. Make sure the Client will be present as well as the servers. (30 minutes before open if possible.)
- ☐ 44. Do a few tests to ensure nothing has 'hiccupped' since delivery date.
- ☐ 45. Manually delete data (emergency clear and store) and begin to gather everyone for training. Set the appropriate Hold Till hour.
- ☐ 46. Make sure that everyone can log-in with cards, or manually, or both.
- ☐ 47. Begin to train servers by allowing them to input orders. Show the servers certain functions as splitting orders, transferring orders, splitting tenders, attaching messages, etc. Answer all questions patiently and completely, while trying to make the staff feel comfortable. Have fun and GO LIVE. Hope you're comfortable, as you'll be there a while.
- ☐ 48. Make sure the Manager is around for the mgmt training. This should only be a review at this point, as managers should have had at least a 4 hour training block prior to this. Again, review as much as possible. Show them the Auto Clear and Store as well as the AutoReporter. Show them enough to cover themselves, but try not to overwhelm them. Stay with them and assist in the process of interpreting reports. Make sure to help them balance their cash and sales.
- ☐ 49. Set a time for the next day of training. You will use this day as the advanced training day for servers, as well as managers. Let them know that there will be an intense training period, so absorb as much of System3 POS as possible, and formulate any questions.
- ☐ 50. Reassure the manager and customers that if they need any help, ask away.
- ☐ 51. Have customer sign-off on lease equipment signoff. In the event of other payment options, finalize and formalize (ie signatures) details of these options. Complete Exit Profile, System Configuration, and have customer sign **Exit Agreement**, upon completion of live coverage
- ☐ 52. Keep in touch with the new clients. Call periodically, to make sure that they are okay, as well as to let them know that we are there if they need anything.