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Real Deals Conversion Checklist

Store Name: _____ Contact for Conversion: _____

Legal Name of Business: _____

Phone: _____ Email: _____

Store Hours: _____ Days Open: _____

IMPORTANT:
I understand that in order to ensure the most current data is brought across during the conversion, all operations in POS and SOS must stop 24-48 hours prior to the conversion to POSIM. After going live with POSIM, POS will ONLY be used to reference history. Initial here: _____

Please list below all computers and requested information where POSIM EVO will be installed. If you don't know how to find the information requested, please call POSIM for assistance at 801.546.1616.

Network

1. A wired network is suggested, because a wireless network will be slower and less reliable.
2. High Speed Internet is required for credit card processing, remote assistance, & cloud reporting. (Minimum speed required 1Mbps up and 4Mbps down) To test your internet speed go to http://www.speedtest.net/

   Does your system meet both of these requirements? _____

Server Computer

1. Computer Username (must be administrator): _____

   Computer Password (administrator): _____

2. Operating System Version *(must be Windows 7 (64bit) or greater)*: _____
3. Memory *(must have a minimum of 4GB)*: _____
4. Available Hard Drive space: _____
5. Does this computer have Internet access: _____
6. Is Microsoft Excel installed on this machine: _____
7. We will need each computer to have Teamviewer installed. This is so we can remotely access each computer. To do this, please go to remote.posim.com Click on Teamviewer for Windows, download, and run. Once teamviewer opens you will see a 9-digit ID: _____

Client 1 Computer

1. Computer Username (administrator): _____

   Computer Password (administrator): _____

2. Operating System Version *(must be Windows 7 (64bit) or greater)*: _____
3. Processor: _____
4. Memory *(must have a minimum of 4GB)*: _____
5. Available Hard Drive space: _____
6. Does this computer have Internet access: _____
7. Teamviewer ID: _____

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Client 2 Computer

1. Computer Username (administrator): _____
   Computer Password (administrator): _____
2. Operating System Version *(must be Windows 7 (64bit) or greater)*: _____
3. Processor: _____
4. Memory *(must have a minimum of 4GB)*: _____
5. Available Hard Drive space: _____
6. Does this computer have Internet access: _____
7. Teamviewer ID: _____

Hardware Checklist:

QTY	MODEL
	Epson Receipt Printer (Not supported)
	Citizen Receipt Printer (Not supported)
	Star TSP100 Receipt Printer
	Cash Drawer (connected to the receipt printer)
	USB Barcode Scanner
	Zebra LP2824 or LP2824 Plus Label Printer
	MX915 Credit Card Terminal

General Store Questions

1. Do you have any additional computers or laptops you use in addition to the above computers that will run POSIM?

   _____

2. Do you have items in your store with a fractional qty? i.e ribbon or fabric

   _____

3. Would you like to setup automatic employee discounts?

   _____

4. Have you started the merchant account setup with NMA (National Merchant Alliance)? If so, is the account complete or what is the status? (See step 2 in original email.)

   _____

5. Have you ordered or received your MX915 credit card terminals? (These can be ordered directly from NMA #913-906-9595.)

   _____

6. Do you have any tax exempt customers?

   _____

7. Do you have any customers who have a balance that needs to come over to POSIM?

    _____

8. What is your current tax rate and set up? (County, State, and %)

    _____

9. What version of QuickBooks POS are you currently running?

    _____

10. How many employees will be using POSIM EVO software?

    _____

11. POSIM will setup automatic backups to run each night. Please specify which computer you would like these to run on, the time you would like them ran, and where you would like the backup saved?

    _____

12. Have you ordered and received your keyboard shortcut stickers? (See step 5 in original email.)

    _____

13. Have you and your employees watched the POSIM Training Videos and familiarized yourself with the software? (See step 3 in original email?) For additional training or questions please register for a Live Q&A Webinar. (See step 4 in original email.)

    _____

14. POSIM EVO is capable of sending receipts to your customers via email directly from check out. If you would like to use this feature please provide us your store email address and password. (If you need assistance with this please contact Real Deals IT.)

    _____

POSIM will need the following items emailed or completed prior to scheduling your conversion. Please initial the right column once you have completed each task. Once all tasks are completed, please submit this form to deborahs@posim.com

TASK	INITIAL FOR COMPLETION
An additional functioning network/ethernet cable at each register specifically for the MX915 credit card terminal. These are not USB devices and will only function over a wired network. If you don't have an available network cable at each register, you may need to purchase an ethernet switch and additional cables. IMPORTANT - If you have had any network or connectivity issues, you may need to setup these credit card terminals with static IP Address on your internal network/router. Contact your local network specialist for assistance with this.	
Clean up existing special orders, layaways, & held receipts to be brought over to POSIM. After clean up please provide POSIM the number of remaining special orders, Layaways and held receipts, so that we can determine the time needed for conversion.	# of Held Recipes: # of Layaways: # of Special Orders: Inital:
Submit or remove all potential Purchase Orders. We will only be converting your submitted Purchase Orders.	
Submit a logo image for Purchase Orders, Transfers, etc. to deborahs@posim.com For best results please send a color image no taller than 110 pixels. "File must be png or jpeg file"	