

Are you ready for the go-live?

This checklist will help ensure your installation and go-live goes as smoothly as possible.

Windows Checklist	
<input type="checkbox"/>	Each terminal has the same Microsoft administrator user account and each terminal ONLY has this one user account.
<input type="checkbox"/>	Each terminal is configured to auto-logout to Windows Administrator account
<input type="checkbox"/>	Each terminal has the user account controls turned off
<input type="checkbox"/>	Each terminal has the LUA disabled in the registry
<input type="checkbox"/>	Each terminal has the Windows firewall turned off and the alert messages are disabled
<input type="checkbox"/>	Each terminal has the latest service pack for the operating system
<input type="checkbox"/>	Each terminal has all High-Priority / Critical / Important Windows updates installed
<input type="checkbox"/>	Each terminal is properly named through Windows
<input type="checkbox"/>	Each terminal's Performance Setting is set for "Adjust for Best Performance" and the processing scheduling is set for Background Services
<input type="checkbox"/>	Each terminal's virtual memory's paging file's initial and maximum sizes are set to the same value and set to a number higher than the recommended.
<input type="checkbox"/>	Each terminal has Microsoft .NET Framework 4.5 or higher installed
<input type="checkbox"/>	Each terminal has SMB 1.0/CIFS File Sharing Support enabled
<input type="checkbox"/>	Each terminal has 'Enable Services' in Windows for network browsing
<input type="checkbox"/>	Each terminal has the Ethernet profile changed to Private
<input type="checkbox"/>	Each terminal is set to "use TLS 1.2" only
<input type="checkbox"/>	Each terminal is set to a static IP address
<input type="checkbox"/>	Each terminal's Power Management tab has the following option <u>unchecked</u> : "Allow the computer to turn off this device to save power"
<input type="checkbox"/>	Each terminal's resolution is set to 1024x768
<input type="checkbox"/>	Each terminal's Power & sleep tab for Screen and Sleep is set to Never
<input type="checkbox"/>	Each terminal will not prompt for password when resuming from standby (under system settings)
<input type="checkbox"/>	Each terminal's Time & Language is set properly and has "Daylight saving changes" enabled, if applicable. Under Time & Language, set time and zone automatically is turned Off
<input type="checkbox"/>	Each terminal's update and security settings have the active hours set to a time window around the merchant's normal business hours (disables Windows from doing updates or restarting the terminal during that time)
<input type="checkbox"/>	Under Update & Security, the restart option is set to Off
<input type="checkbox"/>	"Use my sign in info to automatically finish setting up my device..." is Unchecked
<input type="checkbox"/>	Each terminal's Folder Options is enabled for "Show Hidden files, folders or drives" and unchecked for "Hide extensions for known file types". "Hide protected operating system files" is enabled.
<input type="checkbox"/>	Under Folder Options, Use Sharing Wizard is Unchecked
<input type="checkbox"/>	Under Startup and Recovery > System Failure, Write an event to system log is Enabled and Automatically Restart is unchecked
<input type="checkbox"/>	Each terminal has a "Windows Restore Point as a backup"
<input type="checkbox"/>	Each terminal has TeamViewer 15 installed
<input type="checkbox"/>	Each terminal has all proper printer drives installed (with a test page printed)
<input type="checkbox"/>	On the back-office terminal, the office printer is installed (if applicable). The printer is set as the default in Windows. If the office terminal does not have a printer, the virtual printer on the XPS port is installed. [IMPORTANT]

MicroSale Software Setup checklist

<input type="checkbox"/>	Each terminal has the same version of MicroSale installed
<input type="checkbox"/>	Each terminal's MicroSale folder is shared to all terminals with full read/write access
<input type="checkbox"/>	Each terminal has a valid and activated MicroSale license
<input type="checkbox"/>	Each terminal has a terminal name in MicroSale
<input type="checkbox"/>	All of the remote terminals are configured
<input type="checkbox"/>	Each terminal has SQL installed
<input type="checkbox"/>	Each terminal's MicroSale's register options are properly configured (quick bar, wait station, quick service, etc.)
<input type="checkbox"/>	Each terminal has the printers, escape codes and peripheral devices installed
<input type="checkbox"/>	The file service or main terminal has tax rates properly set and is dispersing to all terminals
<input type="checkbox"/>	Each terminal is properly configured for EMV
<input type="checkbox"/>	You have verified with the processor that the account is properly configured for restaurants and have verified that the account is set to accept tips (if applicable), as well as <u>adjust tips</u> .
<input type="checkbox"/>	A test transaction has been successfully ran through MicroSale
<input type="checkbox"/>	A tip has been successfully ran through MicroSale
<input type="checkbox"/>	The daily closeout is set to automatically run (unless requested otherwise by merchant)

Software setup & training checklist

<input type="checkbox"/>	The merchant has thoroughly reviewed the menu and all requested changes have been made. Merchant has given you a verbal or written approval of the menu
<input type="checkbox"/>	All discounts are properly setup
<input type="checkbox"/>	All employees are properly setup in MicroSale with a Job Title, Access Level and Access Number
<input type="checkbox"/>	Training for staff and management has been completed and the training checklist has been signed by a manager.

I have thoroughly gone through the proper procedures to setup and stage each terminal for my merchant's restaurant. All of the points listed above have been completed. I understand that failure to properly complete the checklist can be detrimental to the success of the installation and go-live.

Signature _____ Date _____

Dealer/ Representative of MicroSale