



STAGING CHECKLIST

Are you ready for go-live?

Congratulations on your sale! This checklist will help ensure your installation and go-live goes as smoothly as possible. The system needs to be fully configured before the go-live. Unless you are installing MicroSale on existing hardware in the restaurant, equipment should **NEVER** be staged and configured on site.

Windows Checklist (complete all steps before moving on!)

- Each terminal has the same Microsoft administrator user account and each terminal ONLY has this one user account.
- Each terminal is configured to auto-logon to Windows Administrator account
- Each terminal has the user account controls turned off
- Each terminal has the LUA disabled in the registry
- Each terminal has the Windows firewall turned off and the alert messages are disabled
- Each terminal has the latest service pack for the operating system
- Each terminal has all High-Priority / Critical / Important Windows updates installed
- Each terminal is properly named through Windows
- Each terminal's Performance Setting is set for "Adjust for Best Performance" and the processing scheduling is set for Background Services
- 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.
- Each terminal has Microsoft .NET Framework 4.5 or higher installed
- Each terminal has SMB 1.0/CIFS File Sharing Support enabled
- Each terminal has 'Enable Services' in Windows for network browsing
- Each terminal has the Ethernet profile changed to Private
- Each terminal is set to "use TLS 1.2" only
- Each terminal is set to a static IP address
- Each terminal's Power Management tab has the following option unchecked: "Allow the computer to turn off this device to save power"
- Each terminal's resolution is set to 1024x768
- Each terminal's Power & sleep tab for Screen and Sleep is set to Never
- Each terminal will not prompt for password when resuming from standby (under system settings)
- 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
- 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)
 - Under Update & Security, you the restart option is set to Off
 - "Give me updates for other Microsoft products when I update Windows" is Unchecked
 - "Use my sign in info to automatically finish setting up my device..." is Unchecked
 - "Updates from more than one place" is set to Off
- Each terminal's Folder Option's 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.
 - Under Folder Options, Use Sharing Wizard is Unchecked
- Under Startup and Recovery > System Failure, Write an event to system log is Enabled and Automatically Restart is unchecked
- Each terminal has a "Windows Restore Point as a backup"
- Each terminal has Team Viewer 11 installed
- Each terminal has all proper printer drives installed (with a test page printed)
 - 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

MicroSale Checklist

- Each terminal has the same version of MicroSale installed
- Each terminal's MicroSale folder is shared to all terminals with full read/write access
- Each terminal has a valid and activated MicroSale license
- Each terminal has a terminal name in MicroSale
- All of the remote terminals are configured
- Each terminal has SQL installed
- Each terminal's MicroSale's register options are properly configured (quick bar, wait station, quick service, etc.)
- Each terminal has the printers, escape codes and peripheral devices installed
- The file service or main terminal has tax rates properly set and is dispersing to all terminals
- Each terminal is properly configured for EMV
- 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 adjust tips
- A test transaction has been successfully ran through MicroSale
- A tip has been successfully ran through MicroSale
- The daily closeout is set to automatically run (unless requested otherwise by merchant)

Pre- Go Live Checklist

- 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
- All discounts are properly setup
- All employees are properly setup in MicroSale with a Job Title, Access Level and Access Number
- Training for staff and management has been completed and the training checklist has been signed by a manager.
 - Staff can login, logout and declare tips
 - Understands sales audits; starting and closing; entering deposits
 - Understands order entry
 - Understands phone orders and the difference between Go and Express Orders
 - Understands how to modify menu items
 - Understands check functionality; splitting, merging and transferring checks
 - Understands how to take payments; including split payments using multiple payment medias
 - Manager can add/edit employees
 - Manager can adjust tips and edit employee times
 - Manager can perform discounts and voids
 - Manager understands important reports
 - Manager can run the closeout and properly deposit cash
 - Manager understands how to do refunds and when to do a void vs refund
 - Manager can make minor menu changes (change name, change price, change printer assignments)
 - Manager can make adjustments to discounts

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