Evaluation Packet

Updated 11/13/17

Introduction

Dear Valued Customer,

Here is an overview of the evaluation packet process so you have a clear understanding of what is involved before you start. Scoping details for international support must be carefully coordinated. Your cooperation is critical to its success. Please be prepared to devote adequate time and energy to completing this paperwork and never hesitate to call us if you have any questions.

Thank you for your time and effort during this process. We at Big Hairy Dog are working hard to make sure everything is running smoothly for you. Please call 800-377-7776 if you have any questions regarding your upgrade process. Please sign below and fax this sheet along with completed upgrade packet to 916-368-1411. Thank you.

I have read this sheet and understand my part in the evaluation process.

Signature: _____ **Title:** _____

Print Name: _____ **Date:** _____

Company Name:_____

Contact Information

Please fill out the following information for your company. This will help us to confirm the contact and billing information that we may already have on file if you're considering an upgrade. This information is for corporate contact at your company.

Store Name: _____

Address: _____

City: _____ St: _____ Zip: _____

Billing Address: _____

City: _____ St: _____ Zip: _____

Country: _____ Time Zone: _____

E-Mail: _____ Web Address: _____

Primary Phone #: (___) _____ Fax #: (___) _____

RPRO System Operator: _____ Alt Sysop: _____

Store Owner: _____

Main Contacts: _____

Current on Retail Pro Software Assurance (formerly Membership)? ☐ Yes ☐ no

Retail Pro Version: _____ Original Month/Year of Purchase: _____

Original Dealer: _____ Current Dealer: _____

Total # of Stores: _____ Total # of Retail Pro Workstations: _____

Existing Problems

Please tell us, in as much detail as possible, about the problems and/or frustrations you are experiencing with your current version of Retail Pro. Please keep in mind that your input will help us to assess the best solution for these issues.

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CHECKLIST: Store Configuration

The following information will help us to determine your setup with Retail Pro. Please provide as much detail as possible so that we may properly assist you.

MAIN	Store #:

Store Name: _____

Address: _____

_____

_____

Phone: _____ Main Contact: _____

Retail Pro Information

# of Point of Sale PCs: _____ **EFT Integrated**: ☐ Yes ☐ No

# of Backroom PCs:_____ **EFT Type**: ☐ Cayan ☐ Other

Dedicated Server: ☐ Yes ☐ No Processor _____

Backup Media/Software: _____

REMOTE	Store #:

Store Name: _____

Address: _____

_____

_____

Phone: _____ Manager: _____

Retail Pro Information

# of Point of Sale PCs: _____ **EFT Integrated**: ☐ Yes ☐ No

# of Backroom PCs: _____ **EFT Type**: ☐ Cayan ☐ Other

Dedicated Server: ☐ Yes ☐ No Processor _____

Please print as many copies of this page as necessary for the number of remote locations that you have running Retail Pro.

REMOTE	Store #:

Store Name: _____

Address: _____

_____

_____

Phone: _____   Manager: _____

Retail Pro Information

# of Point of Sale PCs: _____   **EFT Integrated**: ☐ Yes ☐ No

# of Backroom PCs: _____   **EFT Type**: ☐ Cayan ☐ Other

Dedicated Server: ☐ Yes ☐ No   Processor _____

REMOTE	Store #:

Store Name: _____

Address: _____

_____

_____

Phone: _____   Manager: _____

Retail Pro Information

# of Point of Sale PCs: _____   **EFT Integrated**: ☐ Yes ☐ No

# of Backroom PCs: _____   **EFT Type**: ☐ Cayan ☐ Other

Dedicated Server: ☐ Yes ☐ No   Processor _____

CHECKLIST: Hardware

The information on page 8 should be filled out for each computer using Retail Pro in your company. Failure to submit complete information may delay the transfer/upgrade process. There should be one sheet for each of the "Total # of Retail Pro Workstations" noted on page 3 of this packet. If you have the original invoice of the computer(s) that includes hardware details you may submit those in lieu of this form.

Many technicals details of a PC may be found by:

1) *Right-clicking* on the "**COMPUTER**" icon on the desktop and selecting **PROPERTIES**
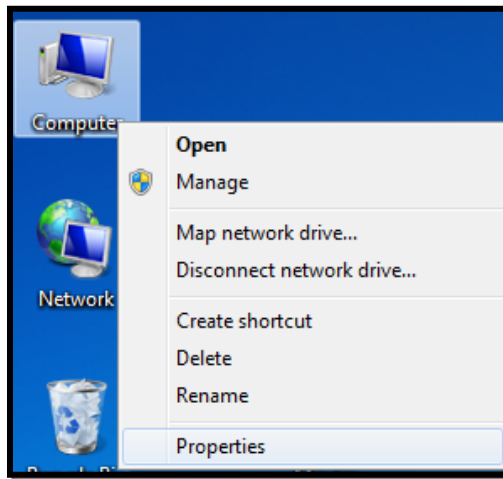
2) Note the details listed under Windows Edition and System
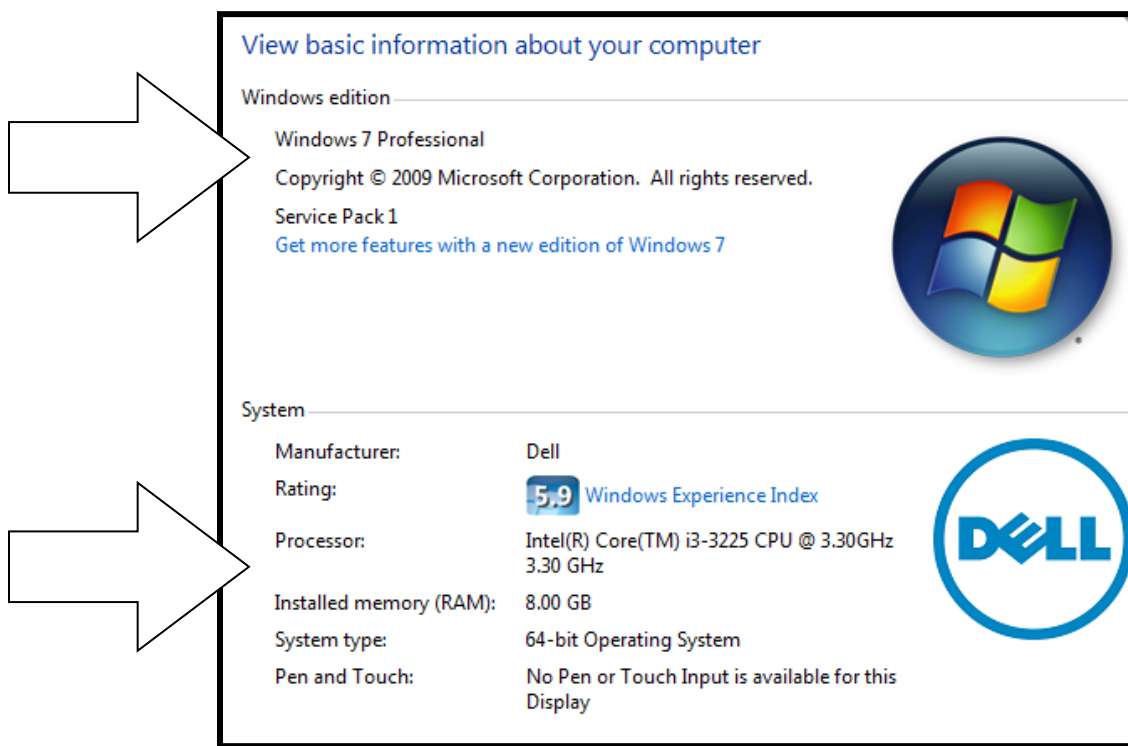
Store Name: _____ **Store #:** _____ **Workstation #:** _____

Please submit a separate page for each workstation running Retail Pro.

Primary Use of Computer: ☐ POS ☐ Receiving ☐ Dedicated Server

Is Retail Pro locally installed on this PC *(typically only one per location)***:** ☐ Yes ☐ No

Are the following EFT tenders accepted on this PC: ☐ Credit ☐ Debit ☐ Gift

Processor: ☐ Intel i3 ☐ Intel i5 ☐ Intel i7
☐ Core2 Duo ☐ Dual Core ☐ Pentium IV Speed: _____ Ghz
Other: _____

Memory: ☐ <2GB ☐ 4GB ☐ 8GB ☐ 12GB ☐ 16GB ☐ _____ GB

Hard Drive Capacity: Total Space _____ GB Free Space _____ GB

Operating System: ☐ 7 Professional (32-bit) ☐ 7 Professional (64-bit)
(Windows) ☐ XP Professional ☐ Server 20_____
☐ Other: _____

Network: ☐ 100mb ☐ 1GB ☐ Wireless **Anti-Virus:** _____

Peripheral Equipment: *(please check NA if the peripheral is not applicable for this workstation)*

NA	TYPE	MAKE / MODEL	
☐	*Receipt Printer:*	☐ Bixolon SRP-350 Plus II	☐ Other: _____
☐	*Tag Printer:*	☐ Zebra GK420T ☐ TLP 2844	☐ Other: _____
☐	*Report Printer:*	☐ Laserjet ☐ Inket	☐ Other: _____
☐	*Cash Drawer:*	☐ MMF ☐ AGP Connection Type: ☐ Serial ☐ Pass-through	☐ Other: _____
☐	*Scanner:*	☐ Honeywell / Welch-Allyn Connection Type: ☐ USB ☐ PS2	☐ Other: _____
☐	*Shopper Display:*	☐ Partnertech ☐ Cayan Genius Model #: _____	☐ Other: _____
☐	*EFT Device*	☐ Verifone MX915	☐ Other: _____
☐	*MSR:*	☐ Magtek USB ☐ Integrated Monitor	☐ Other: _____
☐	*Touchscreen Monitor:*	☐ Elo Screen Size: _____	☐ Other: _____
☐	*UPS (Battery Backup)*	☐ Yes ☐ No	

CHECKLIST: Software

The purpose of this page is to see how the Retail Pro software is configured in your company. We want to make sure that you're getting the most of the software, and using any tools or integrations that may benefit your company.

Are you using your back room (000) inventory *(v6 & v7 users)*?	☐ Yes ☐ No
Do you use UPC Codes?	☐ Yes ☐ No
Do you have a static IP Address at your MAIN location?	☐ Yes ☐ No
Do you have a static IP Address at your REMOTE locations?	☐ Yes ☐ No
Do you use miscellaneous or "jackpot" rows?	☐ Yes ☐ No

Accounting Software: ☐ Yes ☐ No   If Yes, please check on and note version.

☐ SAGE 100 _____   ☐ Business Works _____   ☐ QuickBooks _____

Other Accounting Software? _____

Do you use the Accounting Link to Retail Pro®? ☐ Yes ☐ No

Additional Modules: Do you use any of the following products/modules?

BI: ☐ Yes ☐ No	Bridge: ☐ Yes ☐ No	FlexQuery: ☐ Yes ☐ No
DSS: ☐ Yes ☐ No	ECAT: ☐ Yes ☐ No	RPRO Email: ☐ Yes ☐ No
ECI: ☐ Yes ☐ No	SwiftMT: ☐ Yes ☐ No	Retail Pro Prism: ☐ Yes ☐ No
EDI: ☐ Yes ☐ No	Presets: ☐ Yes ☐ No	Customer Loyalty ☐ Yes ☐ No
MCS: ☐ Yes ☐ No	UPS Worldship ☐ Yes ☐ No	Offline Mode ☐ Yes ☐ No
RDIce: ☐ Yes ☐ No	RPRO Planning ☐ Yes ☐ No	Foundry Logic ☐ Yes ☐ No

Physical Inventory: Have you used the physical inventory module in Retail Pro? ☐ Yes ☐ No

Do you own portable barcode readers for your physicals? ☐ Yes ☐ No

If yes, please indicate make/model:

☐ PT 2000   ☐ Janam (with SmartScan software)   ☐ Janam (with Foundry Logic software)

Do you have any **customizations** in Retail Pro? ☐ Yes ☐ No

If Yes, please provide a description of the customizations and any documentation that was provided with them.

REPORTS

If upgrading to Retail Pro 9, know that the Retail Pro 9 report viewer is significantly different than previous versions of reporting tools. The reporting capabilities are vast, but minor edits to canned reports that were easily made in prior versions now require the use of an external report writing program (Crystal Reports, for example).

<u>Please attach a copy of the first page of all reports that you have modified in prior versions of Retail Pro that you will plan to use in Retail Pro 9</u>. We will confirm that these reports are already created in Retail Pro 9, and in the event that we find one that needs to be remade we will give you an estimate of work to recreate or provide training on how to use Crystal Reports to modify these reports on your own.

This will be discussed in more detail during your Retail Pro upgrade training. The purpose of gathering this information now is to assess your reporting needs and to provide the most accurate estimate of work for the upgrade.