



NEW ACCOUNT PLANNING MEETING AGENDA

Preferred Attendance: Owner/GM (person making final decision), Customer's delegated Site Rep for Install, and DCRS Sales Manager, Installation & Support Specialist & Project Manger.

1. Review the New Account's expectation of the System purchased.
2. Review **ALL LINE ITEMS** of **Sales Order** and **Riser Diagram** (to insure configuration).
3. Review **Dedicated POS Server requirements**: NO OTHER SOFTWARE should be loaded (if applicable) and Server put in a secure location with restricted physical access.
4. Review **Extended Support Plan Offer** (Accept or Understanding the decision not to)
5. Review **Customer Information** document:
 - a. Site Preparation (include **AC Power Requirements** document)
 - b. Warranty.
 - c. Support Plan (discuss **SupportServicesUserGuide**, support post-live, post-warranty).
 - d. Training.
 - e. Supplies (needed that are not part of the Sales Order).
 - f. Documentation (electronic; most products have no hard copy manuals).
 - g. Hardware Placement & System Care Considerations.
 - h. System Implementation Schedule (include **Tentative Schedule** document). Tentative Schedule's Review must include site prep's deadlines (that must be met to fit the schedule), the responsibilities (who does what by what date), and the rescheduling impact (should any delays occur with the scheduled dates). Show/Review the current **Installation Schedule** with Account to help them understand the impact of delays.
 - i. Cabling (for network).
 - j. Cable/DSL or Phone Lines (for Routers or Modem) and IP address. Review: A Serial Modem and a dedicated Phone Line must be installed to backup any Internet Network Credit Authorization system.
 - k. Security (Viruses and the Internet: A Customer Responsibility). Review: The Customer is solely responsible for keeping the maintenance up-to-date for both Norton Antivirus Virus Definitions and SonicWALL device Security Subscriptions, immediately after installation.
 - l. PCI Data Security Standard: A Customer Responsibility. **Provide PCI Data Security Standard document, required for all Credit Authorization users.** Review: The Customer is solely responsibility for the security of using an Internet Network for any purposes, including high speed Credit Authorization, ant that those responsibilities include preventing unauthorized access to data and for any damage as a result of unauthorized access.
6. Schedule dates for the following:
 - a. Electrical inspection.
 - b. Network Cabling pulled.
 - c. Cable/DSL or Phone Line installation (for router or modem).
 - d. Program and database information received.
 - e. Program review.
 - f. Final inspection of Electrical, Cabling, and Cable/DSL/Phone Lines.
 - g. Network cable connectors installed.
 - h. Physical Delivery.
 - i. Training.
 - j. Live Support.
7. Tax Rate & Database Programming: Customer is solely responsible for the accuracy of all Tax rate and Database programming, and must insure all are properly checked, in advance of use.

DCRS HAS ADEQUATELY COVERED ALL THE ABOVE TOPICS.

Business Name

Customer Signature

Date

Updated: 2/15/2007