



Evaluation Packet

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Updated 5/29/19

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: _____

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: _____	
<i>Retail Pro Information</i>	
# of Point of Sale PCs: _____ EFT Integrated: <input type="checkbox"/> Yes <input type="checkbox"/> No # of Backroom PCs: _____ EFT Type: <input type="checkbox"/> Cayan <input type="checkbox"/> Other Dedicated Server: <input type="checkbox"/> Yes <input type="checkbox"/> No Processor _____ Backup Media/Software: _____	

REMOTE	Store #:
Store Name: _____ Address: _____ _____ _____ Phone: _____ Manager: _____	
<i>Retail Pro Information</i>	
# of Point of Sale PCs: _____ EFT Integrated: <input type="checkbox"/> Yes <input type="checkbox"/> No # of Backroom PCs: _____ EFT Type: <input type="checkbox"/> Cayan <input type="checkbox"/> Other Dedicated Server: <input type="checkbox"/> Yes <input type="checkbox"/> 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: _____							
<i>Retail Pro Information</i>							
<table style="width: 100%; border: none;"> <tr> <td style="width: 50%; border: none;"># of Point of Sale PCs: _____</td> <td style="width: 50%; border: none;">EFT Integrated: <input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> <tr> <td style="border: none;"># of Backroom PCs: _____</td> <td style="border: none;">EFT Type: <input type="checkbox"/> Cayan <input type="checkbox"/> Other</td> </tr> <tr> <td style="border: none;">Dedicated Server: <input type="checkbox"/> Yes <input type="checkbox"/> No</td> <td style="border: none;">Processor _____</td> </tr> </table>		# of Point of Sale PCs: _____	EFT Integrated: <input type="checkbox"/> Yes <input type="checkbox"/> No	# of Backroom PCs: _____	EFT Type: <input type="checkbox"/> Cayan <input type="checkbox"/> Other	Dedicated Server: <input type="checkbox"/> Yes <input type="checkbox"/> No	Processor _____
# of Point of Sale PCs: _____	EFT Integrated: <input type="checkbox"/> Yes <input type="checkbox"/> No						
# of Backroom PCs: _____	EFT Type: <input type="checkbox"/> Cayan <input type="checkbox"/> Other						
Dedicated Server: <input type="checkbox"/> Yes <input type="checkbox"/> No	Processor _____						

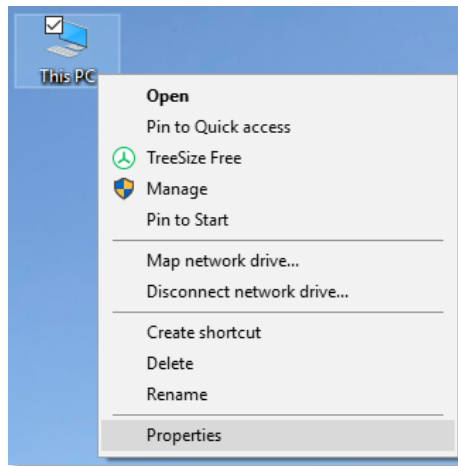
REMOTE	Store #:						
Store Name: _____ Address: _____ _____ _____ Phone: _____ Manager: _____							
<i>Retail Pro Information</i>							
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# of Backroom PCs: _____	EFT Type: <input type="checkbox"/> Cayan <input type="checkbox"/> Other						
Dedicated Server: <input type="checkbox"/> Yes <input type="checkbox"/> 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 “**This PC**” icon on the desktop and selecting **PROPERTIES**



- 2) Note the details listed under Windows Edition and System

 A screenshot of the Windows 'System' information page. Two large white arrows with black outlines point from the left towards the 'Windows edition' and 'System' sections. The page displays the following information:

- View basic information about your computer**
- Windows edition**: Windows 10 Pro, © 2018 Microsoft Corporation. All rights reserved.
- System**:
 - Processor: Intel(R) Core(TM) i7-7700 CPU @ 3.60GHz 3.60 GHz
 - Installed memory (RAM): 16.0 GB (15.9 GB usable)
 - System type: 64-bit Operating System, x64-based processor
 - Pen and Touch: No Pen or Touch Input is available for this Display

 Logos for Windows 10, Dell, Energy Star, and TCO are visible in the bottom right corner, along with a 'Support Information' link.

Store Name: _____	Store #: _____	Workstation #: _____
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Please submit a separate page for each workstation running Retail Pro.

Primary Use of Computer: POS Receiving Dedicated Server

Is there a Retail Pro Oracle database on this PC? (typically one per location): Yes No

Are the following EFT tenders integrated 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: 10 Professional (32-bit) 10 Professional (64-bit)
 (Windows) 7 Professional (32-bit) 7 Professional (64-bit)
 Server 2012 Server 2016
 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
<input type="checkbox"/>	<i>Receipt Printer:</i>	<input type="checkbox"/> Bixolon SRP-350 Plus III <input type="checkbox"/> Seiko Cube <input type="checkbox"/> Other: _____
<input type="checkbox"/>	<i>Tag Printer:</i>	<input type="checkbox"/> Zebra GK420T <input type="checkbox"/> Ö[å^ø <input type="checkbox"/> Other: _____
<input type="checkbox"/>	<i>Report Printer:</i>	<input type="checkbox"/> Laserjet <input type="checkbox"/> Inkjet <input type="checkbox"/> Other: _____
<input type="checkbox"/>	<i>Cash Drawer:</i>	<input type="checkbox"/> MMF <input type="checkbox"/> APG Connection Type: <input type="checkbox"/> Serial <input type="checkbox"/> Pass-through <input type="checkbox"/> Other: _____
<input type="checkbox"/>	<i>Scanner:</i>	<input type="checkbox"/> Honeywell / Welch-Allyn Connection Type: <input type="checkbox"/> USB <input type="checkbox"/> PS2 <input type="checkbox"/> Other: _____
<input type="checkbox"/>	<i>Shopper Display:</i>	<input type="checkbox"/> Partnertech <input type="checkbox"/> Cayan Genius Model #: _____ <input type="checkbox"/> Other: _____
<input type="checkbox"/>	<i>EFT Device</i>	<input type="checkbox"/> Verifone MX915/925 <input type="checkbox"/> Other: _____
<input type="checkbox"/>	<i>MSR:</i>	<input type="checkbox"/> Magtek USB <input type="checkbox"/> Integrated Monitor <input type="checkbox"/> Other: _____
<input type="checkbox"/>	<i>Touchscreen Monitor:</i>	<input type="checkbox"/> Elo Screen Size: _____ <input type="checkbox"/> Other: _____
<input type="checkbox"/>	<i>UPS (Battery Backup)</i>	<input type="checkbox"/> Yes <input type="checkbox"/> 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 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 _____ 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: <input type="checkbox"/> Yes | Bridge: <input type="checkbox"/> Yes | FlexQuery: <input type="checkbox"/> Yes |
| DSS: <input type="checkbox"/> Yes | Decisions: <input type="checkbox"/> Yes | RPRO Email: <input type="checkbox"/> Yes |
| ECI: <input type="checkbox"/> Yes | SwiftMT: <input type="checkbox"/> Yes | Retail Pro Prism: <input type="checkbox"/> Yes |
| EDI: <input type="checkbox"/> Yes | Presets: <input type="checkbox"/> Yes | Customer Loyalty <input type="checkbox"/> Yes |
| ECAT: <input type="checkbox"/> Yes | UPS Worldship <input type="checkbox"/> Yes | Offline Mode: <input type="checkbox"/> Yes |
| RDice: <input type="checkbox"/> Yes | RPRO Planning <input type="checkbox"/> Yes | Foundry Logic: <input type="checkbox"/> Yes |

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)

Dolphin (with Foundry Logic software) Other _____

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).

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. 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.