Launch Stage 4 & 5 Client Check List

Stage 4 Check List

- ☐ **Company Logo:** Upload your Company Logo **[Settings > General Setup].**
- ☐ **Refund Policy:** Enter your Refund and Exchange Policy to print on all invoices **[Settings > Point of Sale > POS Defaults > Printing].**
- ☐ **Help Files:** Log into the RQ Help files found in **[Support > Help Files]** using your email address as entered in your Employee Profile and your RQ password.

  Note: If you can't get into this, email launch at **launch@iqmetrix.com** or call support at 1-888-888-8170 Option 1.
- ☐ **Email Setup:** Create the SMTP Server connection **[Settings > SMTP Server Setup]** and set up each employee's personal email settings in their Employee Profiles.
- ☐ **Employee Passwords:** Set employee passwords and create employee username / password list if required.
- ☐ **Employee Security Settings:** Set up employee security roles to your satisfaction **[Settings > Human Resources > Security Screen Setup]**.
- ☐ **Role Management:** Only if you have the H/R module or RQ Grow package or higher. Set up employee widget role to your satisfaction and assign to employees [**Settings > Human Resources > Role Management** and in the Security Screen Setup where required].
- ☐ **Store Hours:** Set store hours so they can be used by the Scheduler Widget [Settings > Location Setup] if you have the H/R module or RQ Grow package or higher.
- ☐ **POS Defaults:** Additional settings changes are available in **Settings > Point of Sale > POS Defaults**.
- ☐ **Workstation Settings:** Set up all workstations with printers, cash drawers, credit card swipers (where necessary) on each computer, then link to RQ in **Settings > Workstation Settings > General**.

Stage 5 Check List

- ☐ **Install RQ:** Download and install RQ on each Workstation prior to Go Live.
- ☐ **Integrated Solutions:** Complete setup of all Integrated Solutions that require client setup such as Payment Integration, Precash, Handset Protection, etc. (See Help Files for specific instructions).
- ☐ **Categories:** New Categories for products can be added in **Settings > Inventory > Product Category Setup**.
- ☐ **Add Inventory:** Add any new product in Inventory using **Right Click > Create Similar** or send in an MS Excel template to Launch team at **launch@iqmetrix.com** to import for you.

Note: Any new phones must also be added with prices to the Carrier Pricing Sheet [**Inventory > Tools > Update Carrier Pricing Sheet**].

- ☐ **Remove Inventory:** Remove any obsolete product using **Inventory > Tools > Inventory Removal**.
- ☐ **Inventory Quantities:** Use purchase orders (POs) to update your inventory quantities:
  - **Create PO / Add Quantities**: Go to **Inventory > Purchase Order > New Purchase Order**, add products and quantities, & click **Commit**.
  - **Receive PO / Enter ESNs**: Go to **Inventory > Purchase Order tab > Receive** to receive all inventory. ESNs and IMEIs will be entered here.
  - **Quick Adjustments**: For last minute adjustments, use the **Inventory > Tools > Quantity Adjustment** tool.
- ☐ **Cashin / Cashout:** Ensure that you can cash in and out.
- ☐ **Training**: Use the following training tools for yourself and your employees:
  - **Training Videos**: **RQ Videos > RQ Basic Training 4.5**.
  - **iQmetrix Campus:** campus.iqmetrix.com**- Basic Training Levels 1 & 2.**
  - **Reconcile Vendor Rebates Training**: **Available on live webinars at 2 pm CST on the 2nd Tuesday of each month. Register at** **iqmetrix.webex.com/training.**
  - **Help Files**: RQ Help Files found in **Support > Help Files**.