Pre-Install

Before you begin a client installation, you must gather information about the client and capture it in the client checklist.

This information will be used in further installation steps.

a) Organization ID

An Organization ID should be determined for the client. The Organization ID is used as the base for naming many technical components, so that those components can easily be managed and identified using standard naming patterns. Examples are the names of AWS services that are provisioned for the client: by using a standard name based on the Organization ID, Fusion support personnel can readily identify the purpose of a service from the service name.

The Organization ID is generally based on the client's name, but with a few limitations:

- It can contain only alphanumeric characters.
- It must not start with a numeric character.
- It must be lower-case.
- It must be unique amongst other organization IDs (case-insensitive).

> The organization ID is used in the default host name for the service, e.g. xmsqa.fusionPOS.com. This may be visible to the public. For this reason, review and sign-off the organization ID with the client.

> The choice of Organization ID should be considered final. Changing an Organization ID after installation begins is difficult, and essentially requires a re-install of software and cloud services.

b) General Information

TODO Site Title

POS Hosting Domain name (optional)

ONL Hosting Domain name (optional)

Areas of Operation (e.g. for AWS region).

Legal requirements for hosting: e.g. privacy. Do we need to host under a particular jurisdiction?

c) Fusion POS

TODO: whether existing client

POS version

Database version, SQL version

d) OnLoyalty

Existing client?

ONL Version

ONL Features: Gift Card, Promotions,

e) Deployment Type

Determine the deployment type that we will use for the client. This will take into account:

- Whether the client is already running Fusion POS.
- Database size and transaction estimates.
- Whether the client already has a SQL Server license.
- The client's ERP, if any.
- Other considerations for the network

The current deployment types – referring to where the corporate database are located – are:

- Fusion Hosted
- Client Hosted

For full details, review the POS Deployment Scenarios document that is distributed internally.

The choice of deployment type must be made and recorded before installation begins, as installation steps will vary depending on the deployment type.

f) Features

g) Special Instructions

h) Data Characteristics

TODO: existing data size (inventory, customers, accounting trans, cash sales)

in same grid: estimates on future size and transaction # (3, 6, 12, 24 months)