

## Quick-Key Installation & Training Checklist

### Installing Software

- Have someone assemble buttons
- Identify PC for software
- Install PC Interface
- Load Software (establish com port)
- Load Site Code

### Adding Controllers

- Setup global controller defaults in software: Groups ñchange names from defaults to staff, empty, agency, public Enable groups and charges for each and scrolling marquee
- Add controllers: click on I or II then click on white sheet of paper. Put in serial number (last 4 digits) and location, etc.
- Show customer how to perform data transfer with probe card
- Put controller back in original carton and mark location of controller on outside of box. Set aside for installation.
- Print out all Controller defaults for home office (click on series I/II controller then click on ñprinterî icon) Fax to High Tech 252-937-3847
- Warranty cards filled out

### Adding buttons

- Post Group Codes list on PC
- Program Key-Tags
- Ask customer how they want to configure staff and agency buttons:  
Staff \_\_\_\_\_ Agency \_\_\_\_\_
- Program buttons for staff (show customer first, then have them perform function)
- Program a couple of dummy patron buttons and show customer how to disable them (also explain the need to do a transfer when buttons are disabled/enabled)
- Show how to delete an account
- Show how to run reports
- Show how to back-up data (need floppy disk). Should back-up daily for first couple of weeks then every 2-3 days
- Explain free software phone support first 90 days
- Explain Extended Care plan (give customer copy)