Aptify Mobile POS Event Readiness Checklist

The purpose of this document is to provide a checklist of tasks that should be performed to ensure that your Aptify Mobile Point of Sale (POS) solution is ready for use at an event.

> **Tip**:
> Aptify recommends that this checklist be used two or three times before the solution is used at an event.
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> In the first instance, this checklist would be used to evaluate your Aptify Mobile POS solution on a test environment at least two to three weeks before the event, so that there is a scope and time to fix or resolve any issues identified. All of the tasks and tests in this checklist should be performed rigorously when evaluating the test environment.
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> In the second instance, this checklist would be used to evaluate your Aptify Mobile POS solution on a production environment at least two to three weeks before the event, and after the testing has been completed on the test environment. The production environment does not need to be as rigorously tested as the test environment, where the test and verify Aptify Mobile POS functionality tasks could be abbreviated.
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> In the third instance, this checklist, along with other event checklists, should be used immediately prior to the event, when you are preparing for the solution to be used at the Event, on production environment.
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> Be aware that any orders or payments created as part of production testing should be cancelled and dealt with accordingly.

Note: This checklist is not comprehensive product documentation. It is important that this checklist and the procedures in the complete Aptify Mobile POS documentation are performed first on the test environment, before performing these on a production environment.

- ☐ Ensure that the **Event** is setup correctly:
    - ☐ **Status** is set to *Active*.
    - ☐ **Location** is set up appropriately (used as the shipping address for PayAndCarry Orders)
    - ☐ **Inventory Location** is set up correctly (used as the preferred inventory location for PayAndCarry Orders)
    - ☐ **Campaign** is set up as per the requirement
    - ☐ Conference/Meeting is set up as the Event **Meeting**
    - ☐ **GuestID** is set up as per the requirement (used for Anonymous checkouts)
    - ☐ **OrganizationID** is setup correctly (all orders and payments are under this organization)
    - ☐ **Default Order SourceID** is setup correctly (used as the Order Source for all POS Orders), also same should be setup as POS Order entity attribute
    - ☐ **Product Catalog** is set up as a POSProducts view that contains all of the products which will show up on the Aptify POS app.
    - ☐ **Attendee View** is set up as a POSAttendees view that contains all of the people who will show up on the Aptify POS app.

- ☐ If price override functionality is needed on the Aptify POS App**,** ensure that the **Is Price Override Allowed** option is selected,
- ☐ If member and non-member pricing is to be used**,** ensure that the **Use Catalog Price** option is cleared

- ☐ Ensure that the **POS Events Payment Types** are setup correctly:
    - ☐ All the payment types that will be used by the Aptify POS app have been added.
    - ☐ All the credit cards have the credit card type setup correctly
    - ☐ If required, the Check and Cash Payment have correct Cash Control Batch setup

- ☐ Ensure that the **POS Events Shipment Types** are setup correctly:
    - ☐ These Payment Types are available on ToBeShipped POS Orders
    - ☐ Default Shipping Type for PayAndCarry Orders is setup as a POS Orders Entity attribute

- ☐ Test and verify Aptify Mobile POS functions to ensure that the environment is working:
    - ☐ Test Login to Aptify POS app using multiple users on all iPads
    - ☐ Test Barcode Scanner on each iPad by scanning Products and Attendees
    - ☐ Test and verify creation and completion of orders
    - ☐ Test and verify Payment record creation
    - ☐ Test a sample of different types of products
    - ☐ Test and verify the Campaign Discount
    - ☐ Test and verify Tax Calculation
    - ☐ Test and verify Shipping Calculation
    - ☐ Test and verify Order History and other sample reports
    - ☐ Test and verify Guest Checkout
    - ☐ Test all the identified business cases that can be possible at the conference

- ☐ Ensure that related equipment in the Mobile POS environment works:
    - ☐ Check all the barcode scanners, credit card scanners, and iPads
    - ☐ Pair each scanner with a unique iPad
    - ☐ Label each scanner to identify the iPad to which it is paired
    - ☐ Verify that each iPad has at least 1 mbps upload/download speed at the conference
    - ☐ Instruct users that at no point should the same person be logged-in at multiple iPads
    - ☐ Chargers are available for iPads
    - ☐ iPad charging wires for pass through credit card scanners (if used)