

Congratulations and welcome to the HALO Community! We have designed the Halo implementation process to be efficient and cost-effective. By leveraging our market-leading remote training and support tools, we have eliminated the need for high-priced trainers and technical consultants to visit your location.

This document lists the key activities to implement Halo. **Please read this document carefully as there are some important tasks that you must complete in order to keep your implementation moving forward and on schedule.** Working together, we will get Halo integrated into your business as quickly and as smoothly as possible.

Your Implementation Coordinator is there to help, and will be happy to answer your questions. You can reach your coordinator at 1-866-512-2033 during normal business hours.

PLEASE READ THIS DOCUMENT CAREFULLY

1	<p>COMPLETE PAPERWORK</p> <ul style="list-style-type: none"> <input type="checkbox"/> Complete and return the Halo Work Order along with valid payment information. <input type="checkbox"/> Complete and submit all lease paperwork (if applicable). <input type="checkbox"/> Complete all 'merchant services' account paperwork to setup integrated credit/debit account and processing service (if applicable).
2	<p>WELCOME PHONE CALL</p> <ul style="list-style-type: none"> <input type="checkbox"/> Your Implementation Coordinator will contact you within three business days of completing Step 1 to discuss your implementation and answer any questions you may have. <input type="checkbox"/> Forward your menu information to your Implementation Coordinator, who will then schedule the Menu Review call with you (Step 4).
3	<p>HALO INSTALL PREPARATION</p> <ul style="list-style-type: none"> <input type="checkbox"/> Order and install High Speed (DSL or Cable) Internet, and verify that it is fully operational. <input type="checkbox"/> Install network cables for your Halo system. CAT-5 network cables will be required for each Halo terminal and Ethernet based printer, following the PCI Compliant Network Setup.
4	<p>MENU REVIEW CALL</p> <ul style="list-style-type: none"> <input type="checkbox"/> During this 1 hour appointment, you and your Implementation Coordinator will discuss layout, structure, and content of your touch-screen menus. <p><i>*Approximate time to your Halo 'go-live' date: 3 weeks from completion of this step</i></p>
5	<p>HARDWARE SET UP</p> <ul style="list-style-type: none"> <input type="checkbox"/> Unpack all Halo hardware and set it up by following the Halo Set-up Guide included in your terminal box, ensuring all network cables set up in Step 3 are properly connected to your Halo devices. <input type="checkbox"/> Ensure your Halo Terminal is plugged into the Halo Router, and the router password is updated.

6	<p>HALO DATABASE DOWNLOAD</p> <ul style="list-style-type: none"> <input type="checkbox"/> Contact Halo Community Support between 9:00am and 5:00pm (Pacific Standard Time) Monday-Friday at 1-888-778-HALO (4256) and request your database download. <input type="checkbox"/> Halo Community Support will download your database and ensure Halo is fully operational and ready for your 'go-live' date. <input type="checkbox"/> If we have received your Merchant Services information, your integrated credit processing will be set up and tested at this time.
7	<p>DATABASE REVIEW CALL</p> <ul style="list-style-type: none"> <input type="checkbox"/> Your Implementation Coordinator will receive notification that your Halo system has been downloaded, and contact you to schedule a 10-15 minute database review call. On this call we will review the configuration in preparation for training. <input type="checkbox"/> Your Implementation Coordinator will schedule three 1.5 hour training sessions with you. <p><i>*Approximate time to your Halo 'go-live' date: 1 week from completion of this step</i></p>
8	<p>POS TRAINING</p> <ul style="list-style-type: none"> <input type="checkbox"/> With your key staff present during this 1.5 hour session, your Implementation Coordinator will go over all the functions of the Halo POS terminal. <input type="checkbox"/> This session is at your Halo terminal connected to the internet, with a speakerphone.
9	<p>ENTERPRISE MANAGER TRAINING</p> <ul style="list-style-type: none"> <input type="checkbox"/> Over two 1.5 hour sessions, your Implementation Coordinator will go over all the functions of the Halo Enterprise Manager. <input type="checkbox"/> For these sessions you must be at a PC or laptop with internet connection and a phone. <ul style="list-style-type: none"> ▪ Enterprise Manager (session #1): Managing your Halo database (items, pricing, buttons) ▪ Enterprise Manager (session #2): Managing your staff roster and viewing reporting
10	<p>HALO 'GO-LIVE'</p> <ul style="list-style-type: none"> <input type="checkbox"/> Once you have received training, and feel ready to 'go-live' please call your Implementation Coordinator who will clear all sales tracked during practice and training. <input type="checkbox"/> Run a Close Day procedure on the terminal the night before going live; do not ring in further training sales after the Close Day procedure has been run. <input type="checkbox"/> Halo Community Support is available 7:00am to 7:00pm (Pacific Standard Time) and 24/7 for emergencies at 1-888-778-HALO(4256)