Terminal Install Checklist

Customer: _____

Terminal: _____

Installer: _____

Date: _____

DO NOT WRITE DOWN STORE CREDENTIALS!!!!

Scheduled Time:	Start Time:	Time Completed:
Make:	Model:	Serial Number:

Windows		System: Verify Operating System meets PCI requirements!!!
		Equipment Info: Get make, model, serial numbers for Terminal, Printer, display, scanner and cash drawers
		Windows Updates: Settings - Windows Update - Install of Microsoft updates. Enable automatic updates. Adjust business hours accordingly if applicable for updates download
		Date and Time: Set correct time/time zone with daylight savings time (if applicable). Select Internet Time tab- uncheck 'Automatically synchronize time with Internet Time Server'
		Devices and Printers: Click "Add Printer", Select "Local Printer" using LPT1, for driver select Generic-> "Generic/Text only". Check "Keep Existing" (leave Generic/Text only name), don't test and click finish. Make sure Generic Text is the default printer
		Display: Windows 7/8 – Click Adjust Resolution and set the resolution to the highest available. Windows 10 – Settings in the Start Menu, click System>Display>Advanced display settings and set the resolution to the highest available.

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Terminal Install Checklist

Windows		Internet Options: Install Google Chrome. Setup tonicpos.com as the home page for both. Pin Chrome to the taskbar
		Network & Sharing Center: select Connections, Properties and uncheck tcp/ip version 6. Open up Properties, click configure, power management and uncheck Allow the Computer to Turn Off This Device To Save Power
		Personalize: and set screensaver to "Photos" with 10 minutes as wait before screensaver shows. Uncheck 'On Resume, password...'
		Power Options: Change Plan Settings. "Put Comp to sleep" to Never. "Turn off display" to Never. "Dim the display" to Never. ChangeAdvanced Power Settings - Turn Off Hard Disk After - Set to "0/Never". Choose What Power Buttons Do Under Power Options – Uncheck "Sleep" and "Lock". Change the following: When I press the power button –"Shut down" When I press the sleep button – "Do nothing"
		Programs and Features: Disable or Remove any remote access software (i.e., VNC, LogMeIn, TeamViewer) as well as any anti-virus (i.e. Norton)
		System: For Computer name enter "(Store #)-TS1" example 0999-TS1 (0999 being the store number) Advanced Settings -Set to "Adjust for Best Performance". Advanced – Virtual Memory – Select "Custom Size" Initial size is the recommended provided, and the max is 2x's the recommended
		User Accounts: Delete all admin accounts except 1. Disable Guest Account. Select "Change user account control settings", set 'Never Notify' for User Account Control Settings
		Windows Firewall: Turn off Firewall for both "Home or Work" and "Private" Group policy > Protect all connections > Pub/Priv disable. Next go to "Security and Maintenance" and turn off the warning message for the Firewall
		Touchscreen: Install touch utility if missing, set Drag Delay to middle (For Elo & PartnerTech: select "Click on Release")
		PartnerTech: From 'Start' - All Programs'- Startup' - Drag 'osk' out and onto desktop, rename as 'On-screen keyboard'
		Tonic Public: Download and Run Epson Utility from tonicpos.com, download Ordyx Misc. and Master App

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Terminal Install Checklist

Tonic		Tonic Public: Download "OrdyxMisc.zip" move the Tonic logo or customer's logo if provided into "My Pictures". Add OSK to Desktop
		Tonic Public: Download the latest version of "OrdyxMasterApp" installation .exe". Example. 3.76
		Version: Request upgrade to same latest version or same version as other terminals OrdyxOne
		Windows Defender: Start > Settings > Updates & Security > Windows Security (on the left) > Virus & Threat protection > Virus & Threat protection settings > Add or remove exclusions > Select the C:/ drive and then select users>click user being used for terminal>click .ordyxone and Click Add. Also look for OrdyxOne under C:\Program Files(x86 as well) and click add
		Cleanup: Delete downloaded files "OrdyxMisc.zip", "OrdyxMasterApp". Empty Recycle Bin
		Shortcuts: Exit Toinic. Move "Tonic POS" Icon, the touchscreen tool icon, as well as the shortcut for "On-Screen Keyboard" found in "OrdyxMisc.zip" to the center of the desktop. Test "On-Screen Keyboard"
		Reboot Computer for name change to go into effect
		Start Tonic and Test:Swipe a magnetic card on the Login screen verify error message 1. Login to Tonic and verify all connectivity from System Status 2. If using a pole display, verify store name shows 3. If using a scanner, scan an item and verify it is added to an order 4. If using a receipt printer, connect printer to terminal and confirm it can print from Tonic 5. If using EMV, verify connectivity to the device and run a test transaction.
		Tonic Sticker: Place sticker on monitor or have customer place it if remote installation
		Open IE and make sure it works and that settings are put in place: Language – English, Express install.