

Professional Services Workflow

This pre-installation checklist contains action items that must be completed before ACDI begins any software implementation.

CONTACT

ACDI will reach out to the reseller's sales representative or designated point of contact listed on the original quote/opportunity no more than 2 business days after the purchase order is received and processed. If the sales representative or designated point of contact is not indicated, ACDI will attempt to contact the purchasing agent that submitted the purchase order.

PRE-INSTALLATION

After contact is made with the reseller's representative, ACDI will schedule a Pre-Installation call to discuss the end user's environment and goals and objectives of the software implementation. This call takes approximately 30 minutes and should involve all key project stakeholders, including the sales and technical lead from both the reseller and the end user. Once the Pre-Installation call is completed, a Statement of Work is prepared by ACDI and sent to the reseller for a commencement signature. The commencement signature is required from the reseller only. The software installation, remote or on-site, can be scheduled on or after the Pre-Installation call by the Project Coordinator (ACDI) contingent upon a signed Statement of Work completed by the reseller.

INSTALLATION

The size and complexity of the environment will determine the amount of time needed to complete the installation. ACDI will coordinate a timeline to work with the stakeholder's schedule. Multiple sessions may be required to fully install and configure the software. Product training is provided during the course of the installation. After the software is installed and configured, the SOW is again sent to the reseller for a completion signature. If the SOW is not returned to ACDI within 5 business days, the installation will be considered completed to satisfaction and the project will be closed.

POST-INSTALLATION

After the implementation is completed and the project is closed, the reseller or the end user may contact ACDI Software Support for further assistance. A satisfaction survey is emailed to the end user at least 3 business days after the installation is marked as completed.

DEALER RESPONSIBILITIES

- Sign and return the SOW
- Deliver copiers (if necessary)
- Assign IP addresses and other network settings to copiers (if necessary)
- Install appropriate OEM firmware
- Install copier modules (if necessary)
- Install card reader(s) and reader drivers
- Provide admin passwords for embedding MFPs
- Provide on-site presence during all Installation sessions

CUSTOMER RESPONSIBILITIES

- Select host server for application
- Install server updates
- Provide admin access to the necessary server(s)
- Install updated print drivers and create all print queues
- Deploy printers to workstations
- Open necessary firewall ports
- Provide embedded device IP addresses, locations, and device names (for Interface)
- Notify end users about project dates and scope
- Provide training documentation to end users
- Provide matter numbers in a .csv format if using Shared Accounts
- Provide Gmail addresses (if necessary)

TEAM RESPONSIBILITIES

(ACDI, Dealer, and Customer) - Develop Roll Out Plan

- Review and confirm order of Installation Items and dates
- Select testing install date, user group, and embedded devices
- Select order of remaining embedded devices
- Coordinate customer/dealer staff arrangement for training on go-live date(s)



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