



Ongoing Assistance Checklist

Using the Ongoing Assistance Checklist

Presented by:	FACTS Implementation Consultant
Completed by:	FACTS Implementation Consultant
Purpose:	To provide a list of activities that should be completed during your periodic audits of the system.
How it is used:	Formal reviews of the system should be completed every three months, six months and one year after the system goes live. Complete each activity on the checklist. Note any problems or open issues in the Open Issues Log.
When it is used:	During Ongoing Assistance
Who uses it:	Local FACTS Office and Customer
File under:	After the Installation/Ongoing Assistance
Last revised:	05/01
File:	<p>Ongoing Assistance Checklist.exe</p> <p>This is a self-extracting zipped MS Word document and must be printed/viewed through MS Word. This file is located in the Software Solutions Nexus – Facts/Documentation and Education/PIA.</p> <p>Note: The Software Solutions Nexus is a private extranet and is available for local Facts personnel only.</p>

Ongoing Assistance Checklist

Three Months After Live Date:

- ☐ Complete open tasks on Project Plan.
- ☐ Review daily, weekly, and monthly processing including execution of reports and registers.
- ☐ Review and discuss system usage (disk, memory, terminals, printers, etc.). Perform tuning as required.
- ☐ Identify any future application requirements with timeframes.
- ☐ Continually review Open Issues Log. Resolve open action items, provide specific resources where necessary, and follow-up to ensure satisfaction.
- ☐ Assess the need for additional training, including advanced training and/or training on new FACTS features and functionality.
- ☐ Read Software Solutions newsletters and distribute to appropriate personnel. Helpful tips and techniques are included in every issue.
- ☐ Find out if the Customer is referenceable. If so, let the Sales Organization know. If not, identify what is keeping the Customer from being satisfied, and enter the issues on the Facts Open Issues Log. Work to get the issues resolved.
- ☐ _____
- ☐ _____
- ☐ _____

Six Months After Live Date:

- ☐ Remind Customer to anticipate Customer Satisfaction Survey, complete and forward to Software Solutions, Inc.
- ☐ If going live on Gordon Graham replenishment:
 - ☐ Read Distribution Inventory Management - G. Graham
 - ☐ Distribution Survival in the 21st Century - G. Graham
 - ☐ Attend FACTS Inventory Replenishment Class or arrange 2-day on-site training
 - ☐ Start with one product line to feel comfortable with processing
- ☐ Identify any future application requirements with timeframes
- ☐ Continually review Open Issues Log. Resolve open action items, provide specific resources where necessary, and follow-up to ensure satisfaction.
- ☐ Assess the need for additional training, including advanced training and/or training on new FACTS features and functionality.
- ☐ Read Software Solutions newsletters and distribute to appropriate personnel. Helpful tips and techniques are included in every issue.
- ☐ Find out if the Customer is referenceable. If so, let the Sales Organization know. If not, identify what is keeping the Customer from being satisfied, and enter the issues on the Facts Open Issues Log. Work to get the issues resolved.
- ☐ _____
- ☐ _____



Ongoing Assistance Checklist

One Year After Live Date:

- ☐ Review annual processing
- ☐ Review and discuss system usage (disk, memory, terminals, printers, etc.). Perform tuning as required
- ☐ Identify any future application requirements with timeframes.
- ☐ Continually review Open Issues Log. Resolve open action items, provide specific resources where necessary, and follow-up to insure satisfaction.
- ☐ Assess the need for additional training, including advanced training and/or training on new FACTS features and functionality.
- ☐ Read Software Solutions newsletters and distribute to appropriate personnel. Helpful tips and techniques are included in every issue.
- ☐ Attend bi-annual Software Solutions Customer Conference.
- ☐ Review new FACTS features and update FACTS to the newest release.
- ☐ Find out if the Customer is referenceable. If so, let the Sales Organization know. If not, identify what is keeping the Customer from being satisfied, and enter the issues on the Facts Open Issues Log. Work to get the issues resolved.
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