



***Customer
FACTSheet***

Customer FACTSheet

Using the Customer FACTSheet

Completed by:	FACTS Sales Representative
Purpose:	To transfer information gathered during the sales process from the Sales Representative to the Local FACTS Office Implementation Team.
How it is used:	You should complete this form after the sale is complete and pass it on to the Local FACTS Office Implementation Team. They will review the information during Project Definition to prepare for the Project Strategy Meeting.
When it is used:	Complete after the contract is signed. Use during Project Definition.
Who uses it:	Local FACTS Office only
File under:	Planning/Project Definition
Last revised:	11/98
File:	08imcfs.exe

Customer FACTSheet

Company name Phone number Fax number

Address

City State Zip code (+4)

Directions

Company Type or Distributor of

Key personnel:

Owner Phone/Ext. President Phone/Ext.

Vice-President Phone/Ext. Operations Phone/Ext.

Accounting Phone/Ext. Purchasing Phone/Ext.

Sales Phone/Ext. CPA or outside consultant Phone/Ext.

Project leader Phone/Ext. System Administration (HW & O/S) Phone/Ext.

Contact Branch 1 Phone/Ext. Contact Branch 2 Phone/Ext.

Contact Branch 3 Phone/Ext.

Applications purchased: AR AP GL IC JC JS MC OA PO PR SA SO RW FL TF (please
circle) Other: _____

Services Purchased

Customer FACTSheet

# of Hrs.	Phase	Notes:
<hr style="border: none; border-top: 1px solid black; width: 100%;"/>	Project Strategy	<hr style="border: none; border-top: 1px solid black; width: 100%;"/> <hr style="border: none; border-top: 1px solid black; width: 100%;"/>
<hr style="border: none; border-top: 1px solid black; width: 100%;"/>	Project Plan	<hr style="border: none; border-top: 1px solid black; width: 100%;"/> <hr style="border: none; border-top: 1px solid black; width: 100%;"/>
<hr style="border: none; border-top: 1px solid black; width: 100%;"/>	Operations Analysis	<hr style="border: none; border-top: 1px solid black; width: 100%;"/> <hr style="border: none; border-top: 1px solid black; width: 100%;"/>
<hr style="border: none; border-top: 1px solid black; width: 100%;"/>	Delivery & Setup	<hr style="border: none; border-top: 1px solid black; width: 100%;"/> <hr style="border: none; border-top: 1px solid black; width: 100%;"/>
<hr style="border: none; border-top: 1px solid black; width: 100%;"/>	Cabling	<hr style="border: none; border-top: 1px solid black; width: 100%;"/> <hr style="border: none; border-top: 1px solid black; width: 100%;"/>
<hr style="border: none; border-top: 1px solid black; width: 100%;"/>	Modifications (Custom Forms?)	<hr style="border: none; border-top: 1px solid black; width: 100%;"/> <hr style="border: none; border-top: 1px solid black; width: 100%;"/> <hr style="border: none; border-top: 1px solid black; width: 100%;"/>
<hr style="border: none; border-top: 1px solid black; width: 100%;"/>	Data Conversion (What Files?)	<hr style="border: none; border-top: 1px solid black; width: 100%;"/> <hr style="border: none; border-top: 1px solid black; width: 100%;"/> <hr style="border: none; border-top: 1px solid black; width: 100%;"/>
<hr style="border: none; border-top: 1px solid black; width: 100%;"/>	FACTS Training (Formal/on-site?)	<hr style="border: none; border-top: 1px solid black; width: 100%;"/> <hr style="border: none; border-top: 1px solid black; width: 100%;"/> <hr style="border: none; border-top: 1px solid black; width: 100%;"/>
<hr style="border: none; border-top: 1px solid black; width: 100%;"/>	Readiness Assessment	<hr style="border: none; border-top: 1px solid black; width: 100%;"/> <hr style="border: none; border-top: 1px solid black; width: 100%;"/>
<hr style="border: none; border-top: 1px solid black; width: 100%;"/>	First 30 Days	<hr style="border: none; border-top: 1px solid black; width: 100%;"/> <hr style="border: none; border-top: 1px solid black; width: 100%;"/>
<hr style="border: none; border-top: 1px solid black; width: 100%;"/>	Ongoing Assistance	<hr style="border: none; border-top: 1px solid black; width: 100%;"/> <hr style="border: none; border-top: 1px solid black; width: 100%;"/>
<hr style="border: none; border-top: 1px solid black; width: 100%;"/>	Other	<hr style="border: none; border-top: 1px solid black; width: 100%;"/> <hr style="border: none; border-top: 1px solid black; width: 100%;"/>
<hr style="border: none; border-top: 1px solid black; width: 100%;"/>	Total Hours	Prepaid Or Billed as service is rendered

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Existing Hardware:

	<u>Type</u>	<u>Qty</u>	<u>Location</u>
CPU:	_____	_____	_____
CRTs:	_____	_____	_____
	_____	_____	_____
PCs:	_____	_____	_____
	_____	_____	_____
Printer Type			
(Serial/Parallel):	_____	_____	_____
	_____	_____	_____
Network:	_____	_____	_____
Modem:	_____	_____	_____
Media Type			
(Tape/Diskette):	_____	_____	_____
Other:	_____	_____	_____

Existing Hardware Purchase Source:

Name

Contact

Phone number

Existing Support/Service Providers:

Hardware support vendor

Contact

Phone number

Operating system support vendor

Contact

Phone number

Existing Software:

_____	_____	_____
Vendor	Application package name	Release level
_____	_____	_____
Language	Contact	Phone number

New Hardware:

	<u>Type</u>	<u>Qty</u>	<u>Location</u>
CPU:	_____	_____	_____
CRTs:	_____	_____	_____
	_____	_____	_____
PCs:	_____	_____	_____
	_____	_____	_____
Printer Type			
(Serial/Parallel):	_____	_____	_____
	_____	_____	_____
Network:	_____	_____	_____
Modem:	_____	_____	_____
Media Type			
(Tape/Diskette):	_____	_____	_____
Other:	_____	_____	_____

New Hardware Purchase Source:

Name

Contact

Phone number

New Support/Service Providers:

Hardware support vendor

Contact

Phone number

Operating system support vendor

Contact

Phone number

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Dates: Expected hardware ship date: _____ Expected software ship date: _____
Delivery date: _____ Delivery date: _____
Setup date: _____ Setup date: _____

Requested implementation _____ Expected completion of: _____
Start date: _____ Custom modifications _____
Requested live date: _____ Data conversion _____

Contract issues: _____

Key concerns of customer: _____

Key assurances from us to customer: _____

Key assurances from customer to us: _____

Additional comments/observations/expectations: _____

Issues from existing H/W or S/W providers: _____

Prepared by: _____ Date: _____
(FACTS Sales Representative)