

Retail Pro

New Client Guide

Hello, and welcome to One Step Retail Solutions' New Client Guide. Below you will find everything you need to get started, useful resources, and a list of contacts so you can easily find exactly who you need to give you the help you're looking for.



Double Check Shipping Address

Sometimes in the rush of signing paperwork, simple things like verifying shipping address information can easily be overlooked.

Please take a moment to look at your paperwork and ensure the shipping address information is accurate.



Retail Pro Specific Payment Set Up

Setting up your credit card processing can take up to 30 days to get approved and completed so please jump on this ASAP.

Contact The Bart Group at **212-465-3137** and ask for Michael Dattoma as he is completely familiar with what needs to be done for a smooth credit card processing rollout.



Travel Arrangements

If you purchased onsite services and your business is far enough from our offices, then travel arrangements will be required.

Travel arrangements can be performed in one of two manners; 1) You coordinate with our Project Administrator on dates and you book all necessary travel. 2) Our Project Administrator coordinates with you on dates and we book all necessary travel.

If we book the travel, then please note we charge a travel coordination fee of \$150 per destination and all estimated airfare, hotel, rental car and per diem costs must be paid in advance. We will, of course, provide you with a breakdown of these costs for your review before paying.



Construction Alert!

We have seen one too many times that equipment can actually walk off and disappear forever.

If your store is still under construction, we highly suggest shipping equipment to an existing permanent address for security of equipment.



Network Wiring

Nothing slows down an installation faster than not having network wiring correctly installed in the exact locations required. Even if you have existing wiring, it is imperative that a wiring expert compares what you have in place with your new system's requirements.

Due to strict laws and regulations surrounding wiring, OSRS does not provide this service. You can hire any reputable network wiring company you choose.

Carefully read Network Cabling Specification located in the resource section of the page. It is critical that you supply this information to your wiring company. They can call us with any questions.



Testimonials Are Always Appreciated

After your system has been fully implemented, your Implementation Specialist will request a written testimonial. These testimonials are the most important tool we use to know we are doing a great job for you.

It is very common to have a punch list of items at the end of the Implementation which, depending on what is on the list, can take anywhere from a few days to weeks or even months to complete. Typically, as you gain more experience with the software, you may think of new ideas to personalize your software to serve you more efficiently. We call this the “Polish It Up” phase, which is considered independent from the initial Scope of Work. As such, we would appreciate a testimonial at the end of your official Implementation, if you feel we have earned it.



Retail Pro Terms

- Be sure to read and understand the terms of your system purchase. In order for us to ship any merchandise or spin up your system environment, we will need the terms of your purchase in place.
- If your terms are 50/50, please note that the second 50% is due at the time we ship or spin up your environment.
- Sales Tax and Shipping Billed Separately:
 - IMPORTANT! Please remember that we do not collect sales tax or shipping charges as part of the proposal you signed with your salesperson.
 - Our sales tax system in the U.S. can be complex. As such, our Finance Department carefully determines if you are required to pay sales tax and ensures you will only pay what is required. Because of this, you will receive a separate invoice for your sales tax obligations.
 - Shipping costs are calculated at the time we box your equipment up and weigh it. You will receive a separate invoice for any freight costs.



Who To Contact:

Sales

Existing OSRS clients have an Account Manager available to assist them in making any necessary changes to their system setup. This includes:

- Changes to your Service Agreement
- Add or Remove User Licenses
- Purchase Additional Products or Enhancements
- Discussing Professional Services Consulting Engagements

Robyn Longmire: (623) 580-8181 ext 4171 | rlongmire@onestepretail.com

Joanne Kelley: (623) 580-8181 ext 4156 | jkelly@onestepretail.com

For Support and Product Subscription Renewal, contact

Matthew Leaman: (623) 580-8181 ext. 4144 | mleaman@onestepretail.com

Implementation

The OSRS Consulting Services team is ready to help. We are dedicated to helping you assess your business by sharing industry best practices that can increase your success, and by teaching you how to use your system to your best advantage.

info@onestepretail.com Or [Contact Us Here](#)

Support

Need assistance with an error message you're receiving in between implementation appointments? Feel free to reach out to support to assist you with quick how-to questions, error messages, etc. Any training or best practice questions should go to your Implementation Specialist.

1 (800) 266-4915 | support@onestepretail.com

Quality Assurance

Not getting the response you are looking for? Not sure who to call? Our customer service team will be able to assist in getting the right people involved or pointing you in the right direction.

1 (800) 266-4915

Accounting

Issue with your invoices or making a payment? Our accounting department will be the ones who will be able to assist you in this area.

1 (800) 266-1328 | accounting@onestepretail.com