

Pilot Onboarding Checklist

Customer and WyntIQ team checklist for a controlled evaluation

Before installation

- 01 Confirm pilot sponsor, administrator, users, roles, site, and success criteria.
- 02 Confirm Windows 10/11 x64 device, 8 GB RAM recommended, 1 GB free disk space, and local backup location.
- 03 Approve installer source and SHA-256 verification process; note that unsigned builds may show Windows SmartScreen/Unknown Publisher.
- 04 Confirm data classification and use only approved pilot data.
- 05 Confirm whether testing is standalone, LAN-assisted, or offline bundle based.

Install and activate

- 06 Download only from the official WyntIQ link.
- 07 Verify version and checksum.
- 08 Install WyntIQ and create the first Admin account.
- 09 Confirm the automatic 14-day trial status.
- 10 Record the machine ID and support contact.
- 11 For paid/pilot activation, apply only the code supplied by WyntIQ.

Configure

- 12 Set organisation, site, sector, and support contact.
- 13 Create named users with least-privilege roles.
- 14 Review password, emergency access, backup, and update responsibilities.
- 15 Import the demonstration dataset before customer data.
- 16 Configure email only with an approved app password/API credential.

Run the pilot

- 17 Raise a demand and complete approval/rejection.
- 18 Create procurement, vendor response, receipt, and stock update.
- 19 Scan or paste a QR value and verify the correct record opens.
- 20 Create/track an asset and record movement.
- 21 Generate a report, quotation/invoice sample, audit export, and backup.
- 22 Disconnect internet and repeat the agreed offline workflow.
- 23 Export/import an approved sync bundle if included.

Acceptance and handover

- 24 Record defects with screenshots, steps, version, and business impact.
- 25 Reconcile stock quantities and verify the audit chain.
- 26 Review user access and remove test accounts no longer required.
- 27 Confirm backup location and restoration owner.

- 28 Document integrations, production data volume, security requirements, and rollout plan.
- 29 Complete pilot scorecard and go/no-go decision.
- 30 If purchased, issue paid activation and move the contact from follow-up to customer updates.

Pilot contacts

Role	Name	Email / phone
Customer sponsor	[]	[]
Customer Admin	[]	[]
IT/security	[]	[]
WyntIQ pilot lead	[]	[]