

This form is required to be completed in by the current business owner and new business owner. For any questions relating to any part of this form please contact us on 1800 796 722.

SECTION 1 - Pages 1 to 4 must be completed and signed in full by the Current owner.

Current Owners	Current Ownership Details (Section 1A)
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Changeover Date Required	
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Current Business Details:

Company/Entity Name:	
Trading Name:	
Forwarding Address	
Buying Group/Code:	
ACN/ABN:	

Current Contact Details:

Title	Contact Name	Phone/Mobile	Email
Owner			
Manager			
I.T			

Look Up System:

A look up system allows the Current business owner access to a one user SYM-PAC system which will allow reprinting of invoices and statements, collection and processing of debtor payments and processing of creditor payments.

Is a lookup system required	<input type="checkbox"/> Yes <input type="checkbox"/> No
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<u>Lookup System Details</u>	
Terminal Lookup System to Be Installed on	
SYM-PAC to supply PSQL Database Manager	<input type="checkbox"/> Yes <input type="checkbox"/> No
Operating system on the lookup machine must be windows 10 professional or above	

Please note the computer SYM-PAC is installing the lookup system on MUST have a licenced copy of PSQL Pervasive for workgroups SYM-PAC will supply this.

The look up system is to be paid by the current owner in advance for their specified term required.

Current Owners **Current Hardware / Database Information (Section 1B)**

Do you have a dedicated Server:	<input type="checkbox"/> Yes <input type="checkbox"/> No
Windows Operating system running on the server?	
Excluding the Server how many terminals are on your network	
Version of PSQL Pervasive Zen Contract	

Current Owners **License Details (Section 1C)**

<p>Current Sympac Licence Details</p> <p>Core SYMPAC Modules Included - <input checked="" type="checkbox"/></p> <ul style="list-style-type: none"> ▪ Point of Sale ▪ Customers ▪ Inventory ▪ Purchase Ordering <div style="border: 1px solid gray; padding: 5px; margin-top: 10px; text-align: center;"> <i>Please tick below the additional modules currently being used.</i> </div>	
Number of SYMPAC Licenses	
SYMPAC Creditors	SYMPAC Online
SYMPAC General Ledger	SYMPAC Solo Assist
SYMPAC Bank Reconciliation	SYMPAC GO - Specify #
SYMPAC Payroll	SYMPAC Integrated EFTPOS - Specify #
SYMPAC Margin Magic	SYMPAC Signature Pad - Specify #
SYMPAC EPG Builder	SYMPAC Group Invoicing
SYMPAC Multi Store	Mighty Rewards
SYMPAC Pro Forma Invoicing	IHG Interface

Current Owners **Debt / Customers (Section 1D)**

1	Who is keeping the Debt Please note if the current owner is to retain the Debt all balances will be reset to zero.	<input type="checkbox"/> Old Owner	<input type="checkbox"/> New Owner
2	Who is collecting the Debt	<input type="checkbox"/> Old Owner	<input type="checkbox"/> New Owner
3	I authorise all remaining transactional , historical and statistical data to remain active in the system for the new owner	<input type="checkbox"/> Yes	<input type="checkbox"/> No
		Go to Section 1F	Go to Section 1E

Current Owners		Debt / Customers (Section 1E)	
1	Debtors / Customers Name and Address	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear
2	Emails / Auto Contacts This includes all sales history	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear
3	Transactions This includes all sales history	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear
4	SYM-PAC Loyalty transactions and vouchers <i>Mighty rewards / HTH loyalty points are NOT held within Sympac</i>	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear
5	Customer documents <i>Quotes, customer orders, rainchecks, job dockets, laybys, CODs, group invoices and proforma invoices</i>	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear
6	Tills / Tendering Information	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear

Current Owners		Inventory System (Section 1F)	
1	Inventory System Do you authorise all master records and transactional / statistical data to remain in the system for the new ownership. Examples of this data can be referred to in 1H	<input type="checkbox"/> Yes Go to Section 1H	<input type="checkbox"/> No Go to Section 1G

Current Owners		Inventory System (Section 1G)	
1	Product File	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear
2	Stock on Hand Figures	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear
3	Promotions	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear
4	Stock Transactions	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear
5	Purchase Orders	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear
6	Product Reconciliation	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear
7	RRP / Cost Logs	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear
8	EPG's	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear

Current Owners		Creditors / Suppliers (Section 1H)	
1	Is the Current owner using the Creditors financial system	<input type="checkbox"/> Yes	<input type="checkbox"/> No Go to Section 1J
2	Who is keeping the Liability Please note if the current owner is to retain the Liability all creditor balances will be reset to zero.	<input type="checkbox"/> Old Owner	<input type="checkbox"/> New Owner
3	I authorise all remaining transactional , historical and statistical data to remain active in the system for the new owner	<input type="checkbox"/> Yes Go to Section 1J	<input type="checkbox"/> No Go to Section 1I

Current Owners		Creditors / Suppliers	(Section 1I)
1	Creditors Transactions This includes all purchase history	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear
2	Creditor Balances	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear
3	Names and addresses		
4	Emails / Auto Contacts This includes all history	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear
5	Contacts	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear
6	Attachments	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear
7	Notes (General)	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear
8	Notes (Accounts)	<input type="checkbox"/> Clear	<input type="checkbox"/> Do not clear

Current Owners		General Ledger	(Section 1J)
1	Is the Current owner using the General Ledger financial system	<input type="checkbox"/> Yes	<input type="checkbox"/> No Go to Section 1K
2	Is the New owner going to be using the General Ledger financial system	<input type="checkbox"/> Yes	<input type="checkbox"/> No Go to Section 1K
3	I authorise all General Ledger transactions and balances including the bank reconciliation to be cleared from the system.	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Current Owners		Payroll	(Section 1K)
1	Is the Current owner using the Payroll system	<input type="checkbox"/> Yes	<input type="checkbox"/> No
2	I authorise all Payroll transactions and balance data to be cleared from the system. Please note this includes all superannuation transactions PAYG reporting, Group Certificates, All payroll and historical transaction records.	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Current Owners		Stocktake (Section 1J)	
1	What device is used for stocktake?	<input type="checkbox"/> PDA Unit	<input type="checkbox"/> PDE Unit <input type="checkbox"/> Zebra Go

Signature: _____ / _____ / _____
 Print Name in full _____ Date: _____

I have completed and fully understand, the data ticked above will be cleared or retained as per the business change over request form completed. Please note any data cleared that requires restoration or rebuilding will be quoted and charged at the current rate per hour.

SECTION 2 Pages 5 to 6 **MUST** be completed and signed in full by the **NEW OWNER**

New Owners

New Ownership Details (Section 2A)

New Business Details:

Company/Entity Name:	
Trading Name:	
Address	
Buying Group/Code:	
ACN/ABN:	

New Contact Details:

Title	Contact Name	Phone/Mobile	Email
Owner			
Manager			
I.T			

New Bank Details:

Bank account name:			
Bank:			
BSB:		Account number:	

New Buying Group Account / Store Number – If Applicable:

New buying group account / store number:	
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New License Details:

Do you require additional Sympac Licenses:	
Do you require additional Sympac software modules:	
Do you require remote access to the Sympac dataset:	

New Owners Forms Logo's (Section 2a)

Email a copy of the New Logo to sales@sympac.com.au		Please outline where logo changes are required below	
1a	Point of sale Logo	<input type="checkbox"/> Yes	<input type="checkbox"/> No
1b	Statement Logo	<input type="checkbox"/> Yes	<input type="checkbox"/> No
1c	Purchase Order Logo	<input type="checkbox"/> Yes	<input type="checkbox"/> No
1d	Remittance Logo	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Email a copy of the New Terms & Conditions to sales@sympac.com.au		Please outline where changes are required below	
2a	Point of sale terms and conditions	<input type="checkbox"/> Yes	<input type="checkbox"/> No
2b	Purchase Order terms and conditions	<input type="checkbox"/> Yes	<input type="checkbox"/> No

New Owners Integrated EFTPOS (Section 2B)

1a	Does the store use Integrated EFTPOS / Presto	<input type="checkbox"/> Yes	<input type="checkbox"/> No
1b	Do you require Integrated EFTPOS to be setup	<input type="checkbox"/> Yes	<input type="checkbox"/> No
1c	Which bank do you currently use		
1d	Have you contacted the bank to arrange new pin pads	<input type="checkbox"/> Yes	<input type="checkbox"/> No
1e	Has a PC EFTPOS user name and password been applied for through your bank	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	Please ensure the EFTPOS Units are ordered and available for the change over		

Integrated EFTPOS:

PC EFTPOS User Name:	
PC EFTPOS Password	

Stocktake:

<input type="checkbox"/>	Please provide pricing on the Sympac Zebra Go Unit for stocktake purposes
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Internal Management / Ownership / Operations Training:

How long will the current owners be staying with you to pass on operations knowledge?	
Please provide as part of the BCO Sympac operations training or masterclasses	<input type="checkbox"/>