













Additional Location / Register Flow

The purpose of this document is to dive deep into the process involved in creating the new location or adding the register to the existing store.

The document summarizes the roles and responsibilities of the Onboarding Manager involved at every stage of the project.

Let's look at the steps involved during the entire project.

Discovery Call	Control Center Setup	Install POS	Pre-Launch	Go Live	Transition to Support
Introduce the Onboarding Journey	Configure your account in Control Center	Install POS on register	Review setup and configuration	Start using the new setup	Hand off to the support team
 Via Phone		 Via Phone	 Via Phone or Email		
 30-60 minutes		 30-60 minutes	 30 minutes		
 Onboarding Manager	 Merchant	 Training Specialist or Onboarding Manager	 Onboarding Manager	 Onboarding Manager	 Onboarding Manager
<ul style="list-style-type: none"> Review the Onboarding Journey, go over some questions Review hardware and requirements 	<ul style="list-style-type: none"> Configure additional locations and settings that are being added Store location, settings, panels, employees, etc. Pricebook 	<ul style="list-style-type: none"> Install remote access software for Helpdesk support Install latest version of POS on register 	<ul style="list-style-type: none"> Review the setup and configuration of your account. Verify you are ready to go live. Answer any additional questions Schedule Go-Live 	<ul style="list-style-type: none"> Start using the new setup or software 	<ul style="list-style-type: none"> Transition to FTx Lifeline for any future support Give FTx Lifeline number, email address, and portal access

STEP 1: Discovery Call

This is the first and initial step of the project after you have agreed to the terms to add the register or location with the sales team.

Agenda:

The agenda of the Discovery Call is to connect with you and introduce ourselves as the Project Manager who will be managing the project to add the location or register to the existing store.

Duration:

30 Minutes to 60 Minutes

Medium:

Via Phone Call or MS Teams

Summary:

During this call, the Onboarding Manager will introduce themselves as the Project Manager who will be assisting you with adding the location or register to the existing store.

The Onboarding Manager will connect with you to understand the nature of your business and gather the information about the location and hardware details so that the same can be set up in Control Center.

During this call, the Onboarding Manager will share the required links with you to have the tools installed on your systems so that we can have access to your system for POS installations.

If the hardware hasn't been purchased yet and you are looking for the options, the Onboarding Manager will connect you with the sales team and help guide you through the available choices.



Via Phone

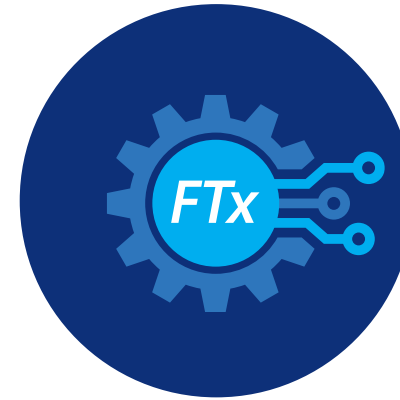


30-60 minutes



Onboarding Manager

STEP 2: Control Center Setup



Once the information is received from you, the first step that the Onboarding Manager follows is to set up Control Center.

Agenda:

The agenda of this step is to set up Control Center based on the information received from you with respect to the scope of the project.

Duration:

1-2 Days

Summary:

The Onboarding Manager will start setting up Control Center based on the information that is received from you, who is setting up the location, taxes, products, etc., as well as adding users and employees affiliated with that location.



Merchant

STEP 3: Install POS

The next step in the process is to have the POS installed on the registers that will be used at the new location.

Agenda:

Install the POS in new registers with supported devices

Duration:

60 Minutes to 120 Minutes

Summary:

The Onboarding Manager will get connected to the register using Zoho Assist to install the POS. Before starting the installation, the Onboarding Manager will review the system and configure the missing prerequisites.

Once the same are configured, the Onboarding Manager will then install the POS and connect it with the new location created in Control Center. Once the installation is completed, the Onboarding Manager will then sync the data.

Once the data sync is completed, the Onboarding Manager will then install the drivers for the supported devices that need to be configured. Once the drivers are installed, the Onboarding Manager will be configuring it on the POS side and testing it to ensure everything is working as expected.



Via Phone



30-60 minutes



Training Specialist or
Onboarding Manager

STEP 4: Pre-Launch



The next step is to go soft live, which means testing the system to ensure everything is working as expected.

Agenda:

The agenda of this step is to ensure that testing of the entire system is completed before you go live with the system.

Summary:

During this step, the Onboarding Manager will test the system by ringing the dummy transactions as well as scanning the products and printing the receipts to ensure that all the functionalities of the system (POS) are working as expected.

The Onboarding Manager will also ensure that the data is getting synced and ensure that everything configured is efficient and should be able to go live.



Via Phone or Email



30 minutes



Onboarding Manager

STEP 5: Go-Live



The next step of the process is to ensure that you are going live with the new system.

Agenda:

The agenda is to issue the production license and replace the trial licenses.

Summary:

The Onboarding Manager will be issuing the production license for you to have you go-live. This will ensure that you are able to ring sales on the new machine at the new location.



Onboarding Manager

STEP 6: Transition to Support



Once you have started using the system effectively and efficiently, you will be transitioned to support.

Agenda:

The agenda here is to move you to support.

Summary:

Based on your performance and system usage, you will be transitioned from the Go-Live stage to support.

REFRESH ON TRAININGS & EARN CERTIFICATIONS



Onboarding Manager