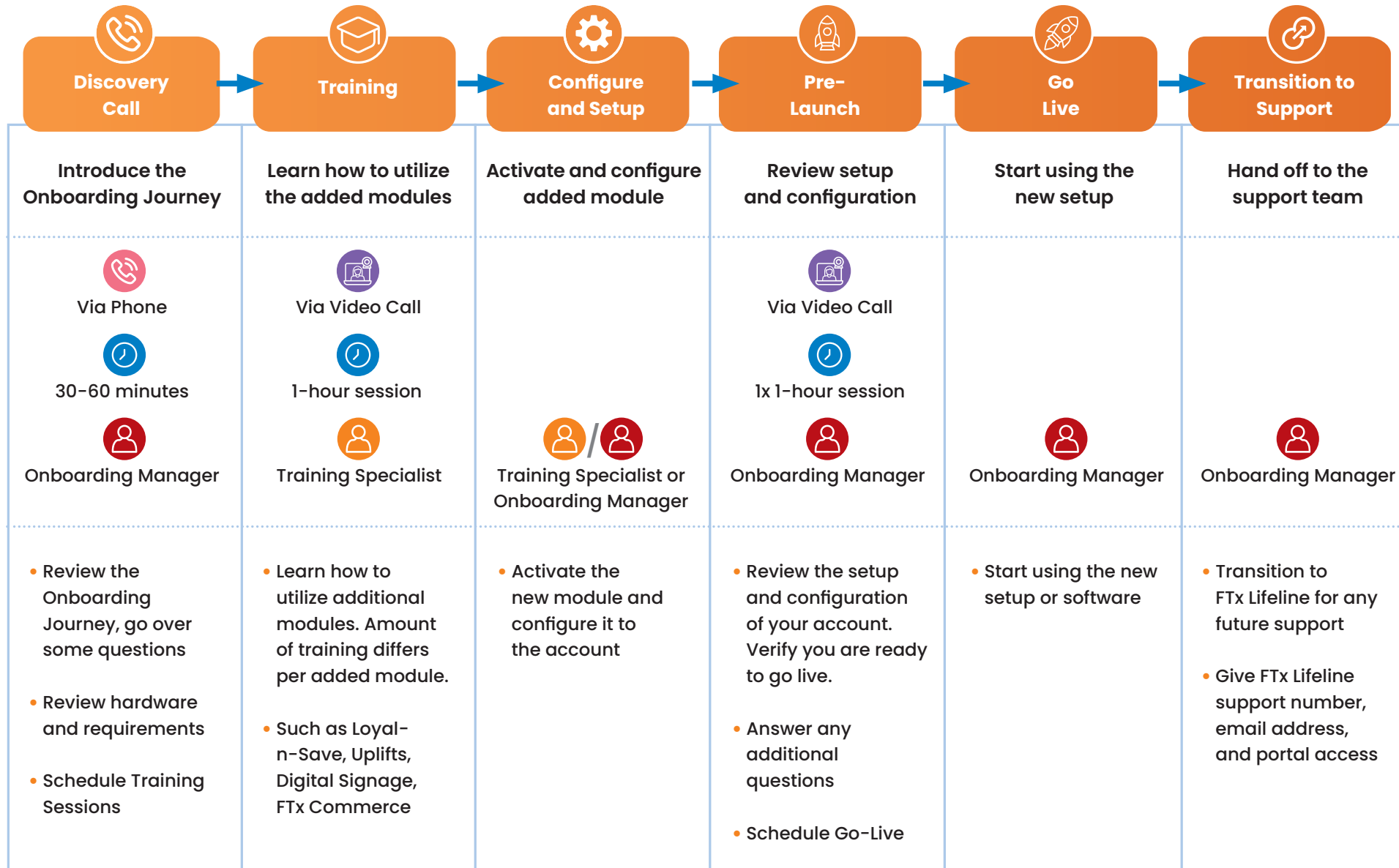


# Additional Products Flow

The purpose of this document is to dive deep into the process involved in activating the additional module along with the Cloud POS.

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.



## STEP 1: Discovery Call

The Discovery Call is the first and the initial step of the project after the terms have been agreed upon by you with the sales team to activate the product.

### Agenda:

The Discovery Call serves as an introduction to the onboarding team and is designed to “discover” key details about your business. During this call, we ask targeted questions to understand how you plan to use the system and what’s essential for your business operations and gather the information needed to set up your account. Additionally, we outline the onboarding process, discuss next steps, and schedule your training sessions.

### Duration:

30 minutes to 60 minutes

### Medium:

Via Phone Call or MS Teams Meeting

### Summary:

- The onboarding manager reaches out after the sales deal is finalized to introduce themselves as your project manager. They will guide you through the product activation process.
- During the initial kick-off call, the onboarding manager will educate you on the product that they have activated as well as understand the nature of your business and the problem that they are looking to solve using the product they have activated.
- The onboarding manager over the call will gather the information related to the hardware and devices in case it is required.
- The onboarding manager will check with you regarding your availability for scheduling the training sessions with the trainer.
- They will also issue the trial license of the products that they have activated so that you can explore the product and have access to the same.



Via Phone



30-60 minutes



Onboarding Manager

## STEP 2: Schedule Training Session



Once the kickoff call is completed with you, the onboarding manager will then allocate the trainer to the project, who will be training you on the product activated.

### Agenda:

To schedule the training session for you with the trainer.

### Duration:

Single 1-hour session

However, the number of training sessions or hours is subject to increase based on the complexity of the product or if you have purchased the additional training sessions.

### Summary:

The trainer will then start the training on the product that they have activated and help you set up your account. The trainer will go through the settings to be configured to effectively and efficiently use the product as well as how you can use the product.

The agenda, or the content of the training, will vary based on the product that has been activated.



Via Video Call



1-hour session



Training Specialist

## STEP 3: Configure and Setup



Once the training has started for you, during the same call, the trainer will be assisting you in setting up or configuring the product.

**Agenda:**

The agenda here is to make the product ready for you to use.

**Duration:**

Single 1-hour session

**Summary:**

The trainer here will be configuring and setting up the account based on the requirements from you for them to use the product effectively and efficiently. The trainer here will be collecting all the details from you over the call and shall be using the same in configuring the product.



Training Specialist or  
Onboarding Manager

## STEP 4: Pre-Launch



Once the configuration and training are completed, the onboarding manager will jump back here to verify the configuration and setup.

**Agenda:**

The agenda here is to ensure the configuration is correct and all the functionalities of the product are functioning.

**Duration:**

Single 1-hour session

**Summary:**

During this step, the onboarding manager will jump back into the project and get connected with you to review the configuration to ensure that everything is working as per the expectation and that there are no discrepancies.

During this call with you, the onboarding manager will also ensure all the open questions regarding the product that you have are answered and resolved.



Via Video Call



1x 1-hour session



Onboarding Manager

## STEP 5: Go-Live



Once we have received the green flag from the onboarding manager and you, they are marked live with the product.

### Agenda:

The agenda here is to activate the licenses to use the product.

### Summary:

Once the confirmation is received from you that you are good to start using the product as well as from the onboarding manager about the setup being correct and that all the functionalities are functioning, you will be transitioned from training to Go-Live by replacing the trial licenses of the product with the live licenses.



Onboarding Manager

## STEP 6: Transition to Support



Finally, once you have gone live with the product and you are in autopilot mode, you will be transitioned to support.

### Duration:

3 to 4 weeks from Go-Live

### Summary:

Once you are in autopilot mode and using the system at the optimum level with efficiency, you will be transitioned from Go-Live to support.

### REFRESH ON TRAININGS & EARN CERTIFICATIONS

  
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Onboarding Manager