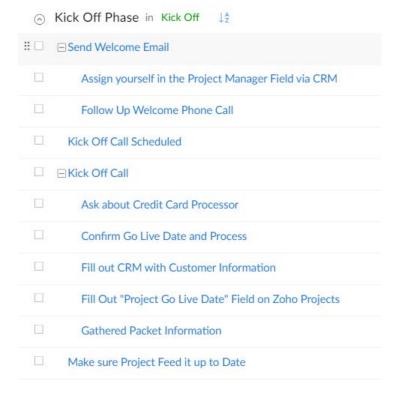
End User Project Manager Process

 Sales Closing Packet Information will be gathered by the Sales Agent Project Manager Assigned

\odot	Initial Project Set Up in Initial Set Up	↓å
	Menu Received and Given to Team	
	Internet Assessment Completed	
	VAR Info Received	
	Project Manager Assigned	

- 2. Kick Off Phase will be handled by the Project Manager 24hrs to Contact Customer
 - Initial Contact
 - Send a Welcome Email using the "LingaPOS Welcome Package" template
 - Assign yourself as the Project Manager in the CRM under the "Info" section
 - Follow up the Email with a Phone call
 - Schedule a Kick Off call If one cannot be performed at the time of call
 - During Kick Off Call
 - Ask/confirm who they are processing with need this for integrations
 - Confirm their "Projected" Go Live date for Zoho Project feed
 - 1. Mark your Outlook Calendar BLOCK OFF THAT DAY FOR GO LIVE
 - Fill out the CRM under the info section "Implementation Form STEP 1"
 - Confirm the Gathered packet information
 - 1. Menu
 - 2. Internet Assessment
 - Update your Project Feed with any notes gathered during this phase



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- Menu is Received from the Customer
 - 24hrs to Contact Customer for Meeting via Phone/ Email
- Initial Menu Meeting with the Customer is Schedule
 - Allows PM and customer to be on the same page
- Initial Menu Meeting with the Customer is Completed
 - Customer Agreed to Layout and design of menu
- Menu is Escalated to the India Programming Team
 - IF Menu is in EXCEL format SEND TO INDIA
 - If Menu is NOT in EXCEL formation PM WILL PROGRAM THE MENU
- Menu is Received from the India Team, or Completed by PM
- PM to Finalize any Menu Adjustments

	 Update your Project Feed with any notes gathered during this phase
	enu Phase One in Menu Adjustments 🎝
	Menu is Received from the Customer
	Initial Menu Meeting is Scheduled
	Initial Menu Meeting is Completed
	Menu is Escalated to India Programming Team
	Menu is Received from India Programming Team
	Last Menu Adjustments
-	Make sure Project Feed it up to Date
4.	Integrations Phase: (Typically Completed by Hardy/ Integrations Team) Integrations Form / VAR Sheet Received Customer File is Built Linga Admin Setup is Completed Download the File to the EMV/ PAX Devices Update your Project Feed with any notes gathered during this phase
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	Integrations Phase: (Typically Completed by Hardy/ Integrations Team) Integrations Form / VAR Sheet Received Customer File is Built Linga Admin Setup is Completed Download the File to the EMV/ PAX Devices Update your Project Feed with any notes gathered during this phase Integrations in Integrations Integrations Form / VAR Sheet Received Customer File is Built

5. Menu Phase Two:

- Revision Meeting with PM and Customer Scheduled
- Revision Meeting with PM and Customer Completed
- Update your Project Feed with any notes gathered during this phase

(Menu Phase Two in Menu Adjustments	↓A
	Revision Meeting Scheduled	
	Revision Meeting Complete	
	Make sure Project Feed it up to Date	

6. Hardware and Equipment:

- Hardware is Shipped Done and Update by Oscar/Shipping Department
- Hardware Set Up is Scheduled
- Hardware is Delivered
- Hardware is Set Up is Completed
- Update your Project Feed with any notes gathered during this phase
- Hardware and Equipment ↓½
 Hardware has been Shipped
 Hardware Set Up is Scheduled
 Hardware is Delivered
 Hardware Set Up is Completed
 Make sure Project Feed it up to Date

7. Training:

- BOH Training Scheduled
- BOH Overview Completed Send Customer Copy of Training via Box.com
- FOH Training Scheduled
- FOH Training Completed Send Customer Copy of Training via Box.com
- Training Sign Off Sheet Sent
- Customer Returned Signed Training Agreement Document
- Update your Project Feed with any notes gathered during this phase

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	BOH Training Scheduled
	BOH Training Completed
	Upload and Send Video of Training to Customer via Box.com
	FOH Training Scheduled
	FOH Training Completed
П	Upload and Send Video of Training to Customer via Box.com
	Training Sign Off Sheet Sent
	Customer Returned Signed Training Agreement Document
	Make sure Project Feed it up to Date

8. Menu Phase Three:

- Final Revisions Meeting Scheduled
- Final Revision Meeting Completed
- Menu Sign Off Sheet is Sent
- Customer Returned Signed Menu Approval Document
- Update your Project Feed with any notes gathered during this phase

\odot	Menu Phase Three in Menu Adjustments ↓2 4
	Final Revisions Meeting Scheduled
	Final Revisions Meeting Completed
	Menu Sign Off Sheet is Sent
	Customer Returned Signed Menu Approval Document
	Make sure Project Feed it up to Date

9. Go Live:

- Customer Goes Live with Software
 - Fill out "Date Live" Field on the Zoho Project Feed
- Project Manager Follows Up Next Morning
 - Project Manager Calls the Customer the Morning after the Go Live Date
- Project Manager Follows Up After First Week
 - Project Manager Calls the Customer the Week after the Go Live Date
 - Project Manager informs the customer to call technical support for further assistance
- Technical Support Takes Over After Week One
- Project Manager Follows Up at 30 Days
 - Project Manager Calls the Customer 30 days after the Go Live Date
- Make Sure Project Feed is Finalized
- Mark Project as COMPLETED
 - Move the Project to Archived

0	Go Live in Go Live ↓ ^A z
	Customer Goes Live With Software
	Project Manager Follows Up Next Morning
	Project Manager Follows Up After First Week
	Technical Support Takes Over after Week One
	Project Manager Follows Up at 30 Days
	Make sure Project Feed is Finalized
	Input the "Date Live" on the Project Overview
	Mark Project as Completed