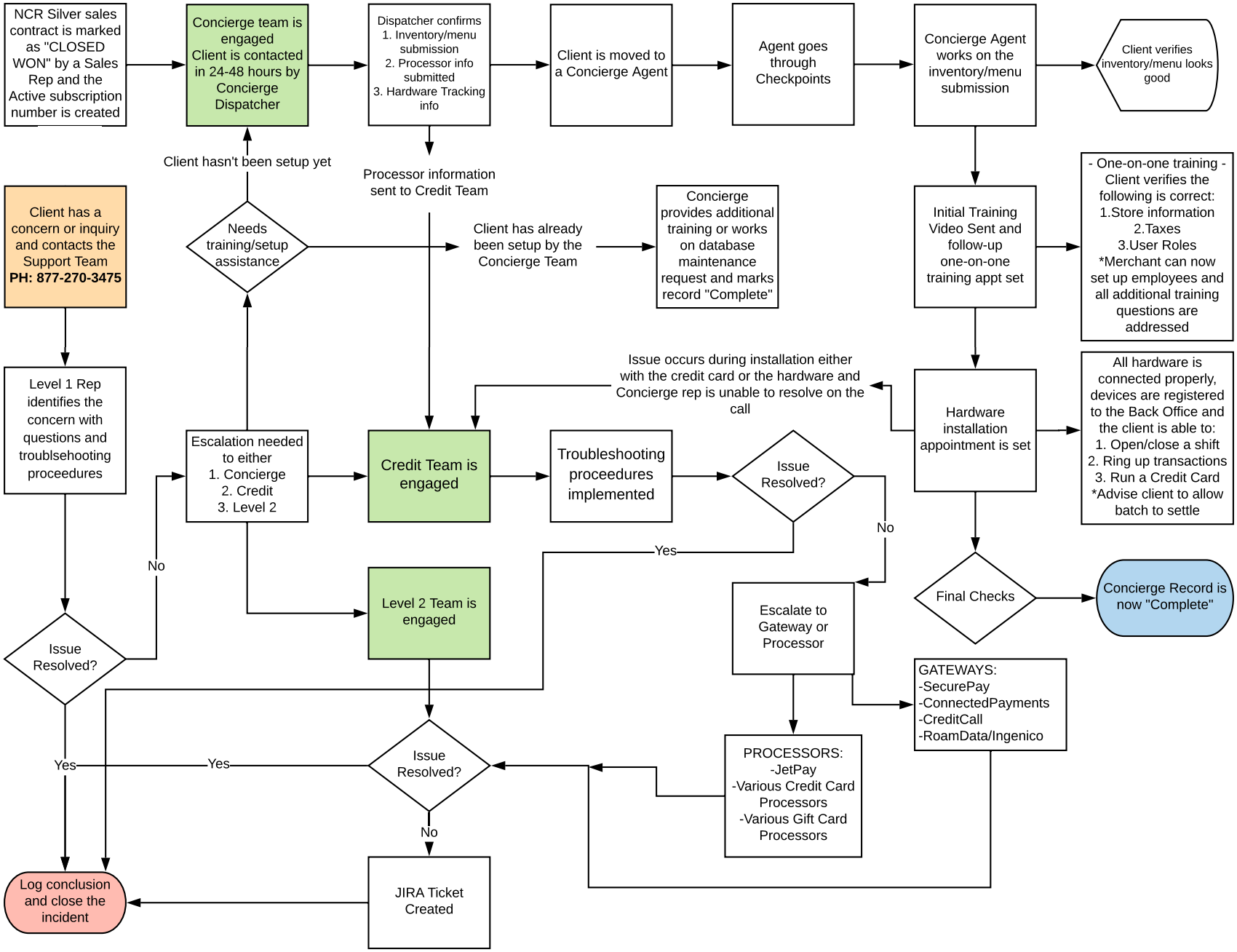
NCR Silver sales contract is marked as "CLOSED WON" by a Sales Rep and the Active subscription number is created
Concierge team is engaged Client is contacted in 24-48 hours by Concierge Dispatcher
Dispatcher confirms 1. Inventory/menu submission 2. Processor info submitted 3. Hardware Tracking info
Client is moved to a Concierge Agent
Agent goes through Checkpoints
Concierge Agent works on the inventory/menu submission
Client verifies inventory/menu looks good
Client hasn't been setup yet
Processor information sent to Credit Team
Client has a concern or inquiry and contacts the Support Team PH: 877-270-3475
Needs training/setup assistance
Client has already been setup by the Concierge Team
Concierge provides additional training or works on database maintenance request and marks record "Complete"
Initial Training Video Sent and follow-up one-on-one training appt set
- One-on-one training - Client verifies the following is correct: 1.Store information 2.Taxes 3.User Roles *Merchant can now set up employees and all additional training questions are addressed
Issue occurs during installation either with the credit card or the hardware and Concierge rep is unable to resolve on the call
Hardware installation appointment is set
All hardware is connected properly, devices are registered to the Back Office and the client is able to: 1. Open/close a shift 2. Ring up transactions 3. Run a Credit Card *Advise client to allow batch to settle
Level 1 Rep identifies the concern with questions and troublsehooting proceedures
Escalation needed to either 1. Concierge 2. Credit 3. Level 2
Credit Team is engaged
Troubleshooting proceedures implemented
Issue Resolved?
No
Yes
Final Checks
Concierge Record is now "Complete"
Level 2 Team is engaged
Escalate to Gateway or Processor
Issue Resolved?
No
GATEWAYS: -SecurePay -ConnectedPayments -CreditCall -RoamData/Ingenico
Yes
Yes
Issue Resolved?
PROCESSORS: -JetPay -Various Credit Card Processors -Various Gift Card Processors
No
Log conclusion and close the incident
JIRA Ticket Created