Assigned to a representative • Representative marks it as "In Progress" Concierge • Rep encouraged to perform a "Google Discovery" check for website and social media resources not mentioned by the Sales Representative **Record Created** • Rep ensures that VAR (Processor Information) has been submitted to the Client sends • Menu/Inventory is formatted and put into the Silver Back Office All Menu/Inventory work should be recorded in the menu/inventory module (hrs worked, Menu/Inventory into the • If the client "declines" assistance on the menu/inventory, rep must mark in menu/ inventory module, inventory status is "Declined" Concierge Team • Client confirms looks good - Checkpoint "Menu/Inventory Input" is now "Complete" Concierge Rep Usually sent from youtube.com/ncrsilveruniversity sends Training • Appointment is set for a follow-up one-on-one training • Checkpoint "Inital Training" is now "Complete" Video Concierge Rep Performs followup one-on-one training • 3 calls/3 emails have been made/sent to the client in hopes of reaching the client so installation of their sysetm can occur • One Final email will be sent indicating the status change to both the client and the Sales Rep listed on the record Record Marked as Client has indicated that they do not "Declined" want any Concierge assistance Client wishes to

re-engage with Concierge Hardware Installation Appointment

• Checkpoint "One-on-one Training" is now "Complete"

- Concierge Rep has confirmed that all equipment is on site and is ready for install.
- All Devices are registered. Checkpoint "Registered Devices" is now "Complete"
- All other connected accessories are now connected (printers, cash drawer, scanners, etc...). Checkpoint "Hardware Installation" in now "Complete"

Final Checks

Confirms that Tax information is correct and applied to the right items. Checkpoint "Taxes" is now "Complete"
Confirms Store /Customer -facing receipt information is correct. Checkpoint "Store Information is now

Confirms merchant can enter Employee information. Checkpoint "Employees and User Roles" is now "Complete"
Confirms mechant has specified Credit Processor preferences. Checkpoint "VAR Submitted" is now "Complete"

- Client is asked to run a shift to ensure the menu looks good on the screen, POS settings are good, and that they can successfully run a credit card transaction
- Checkpoint "Verified Transaction" is now "Complete"
 - Client is asked if they'd like to sign up for Operational updated via trust.ncrsilver.com. If "YES", then checkpoint "Operational Updates Page" is now "Complete"

Record marked as "Complete"

- Client is encouraged to move onto Customer Support should any issues occur
- Client is promised 1 hour of additional trianing and 1 hour of menu/inventory assistance post-setup