

# SkyTab POS Onboarding Sales Interview

*Downtown*

Please attach this document in Sales Center under Checklist, other supporting papers for new orders. For upgrades please submit via email to your CSM. Your CSM and programming team will use this information during the onboarding process. This document is not intended to be a substitute for the information submitted on the Merchant Application or POS Order forms. For upgrades to SkyTab from Legacy software only blue and red fields are required. If you are providing an upgrade program, please indicate the date of the upgrade.

Today's Date: 12/27/23 Concept Type: Mac's Downtown Restaurant/Bar Upgrade to Skytab: Yes  
 Business Name (DBA): \_\_\_\_\_ Business Phone: \_\_\_\_\_

**Individual at the site that will be working with our team for Onboarding POS**

Name: Rob Lenhardt Email: macsdowntownalton@gmail.com Best Contact Number: 613-670-8415  
 Contact prefers to be contacted by: Rob Lenhardt Best contact time: \_\_\_\_\_  
 Job Title: Owner

**Site Information**

Site Condition: Ready Current POS: ALOHA Internet Installed?: Yes  
 Current POS: ALOHA Day of the week installation is preferred: MON Morn  
 POS Terminals: 10 Kitchen Printers or KDS: 6 Glass Device(s): \_\_\_\_\_ Caller ID: \_\_\_\_\_  
 For glass devices is this a large location that may need multiple wifi devices: Yes

Has Merchant been made aware that Shift4 will need all in wall/ceiling wires run before installation: Yes

Is this site providing their own network router or switches: Yes

Are you boarding multiple MDS for the same site for Food and Beverage: Yes Different Menus?: Yes

What Menu options will the site be using ( select all that apply )

Tax% Tax Type: 7.85 Tax% Tax type: \_\_\_\_\_ Tax% Tax Type: \_\_\_\_\_

Full Liquor, Beer and Wine	<input checked="" type="checkbox"/>	Beer and Wine Only	<input type="checkbox"/>	No Alcohol	<input type="checkbox"/>
Breakfast Menu	<input checked="" type="checkbox"/>	Lunch Menu	<input checked="" type="checkbox"/>	Dinner Menu	<input checked="" type="checkbox"/>
Late Night Menu	<input type="checkbox"/>	Pizza on Menu	<input checked="" type="checkbox"/>	Dessert Menu	<input checked="" type="checkbox"/>
Banquet Menu	<input type="checkbox"/>	Happy Hour Menu	<input type="checkbox"/>	Same Menu All Day	<input type="checkbox"/>

Tax liquor as: 7.85

**Site Needs**

Site menu information:

Menu not completed with follow up

Gift Cards  Yes

Moving Gift Cards from current POS

Yes

If the site needs to convert gift cards from their existing POS please confirm that you have collected a sample gift card and will mail it to Shift4 with the Gift Card Conversion documentation or you have provided these instructions and document to the Merchant. The Gift Card conversion document can be obtained from the Partner Portal

(?)

For Gift Card conversion I have

provided guidance to merchant

Online Ordering requested

Yes

Online Ordering 3rd Party Integrations requested

Yes

Is rush configuration of Online Ordering required

No

Provide a current OLO website URL if available when advanced programming needed

macsdowntown.com

Online ordering is suggested to be completed after installation of SkyTab POS to allow for proper menu configuration before STOLO is configured. In some limited cases STOLO may be required to be configured by installation date

Does the site Require Integration to a Property Management System?

No

Confirmation of support for Merchants property management system should be completed during the sale process to ensure compatibility.

No

Please give a brief description of the POS installation project to be performed

Mac's Pizza & Poker will be starting 1st & then Mac's Downtown will then be next

Please describe any need to know items about the Merchants and/or information received during the sales process that your CSM should be aware of.