First Data® POS Value Exchange™ Restaurant Solution

Introduction

- This course provides an overview of the First Data® POS Value Exchange™ Restaurant Solution.

- This course provides First Data Clients the with the necessary information needed to gain knowledge of the First Data® POS Value Exchange^SM Restaurant Solution. This knowledge will enable the First Data Clients to educate merchants about how they can benefit from the First Data® POS Value Exchange^SM Restaurant Solution.

  – Merchants are embracing technology

  – Independent Restaurateurs want a better customer experience combined with a low total cost of use

Agenda

- Overview
    - How Does it Work?
    - Bundle Package
    - Why Dinerware/Posiflex
    - Terms
- Selling Points
    - 3 Pillars Solution/Solution Differentiators
    - Feature Strengths
    - Target Markets
    - Pitch/Probing questions
    - Cost of Business
    - Scenarios
    - References, Lead Generation, Networking
    - Competitor/Legacy Information
    - Inventory
    - What's included in Bundles?
    - Paperwork, Boarding Process, Mercury, AMA
    - Boarding Flow
- Support
    - Configuration, Shipment, Deployment and Installation
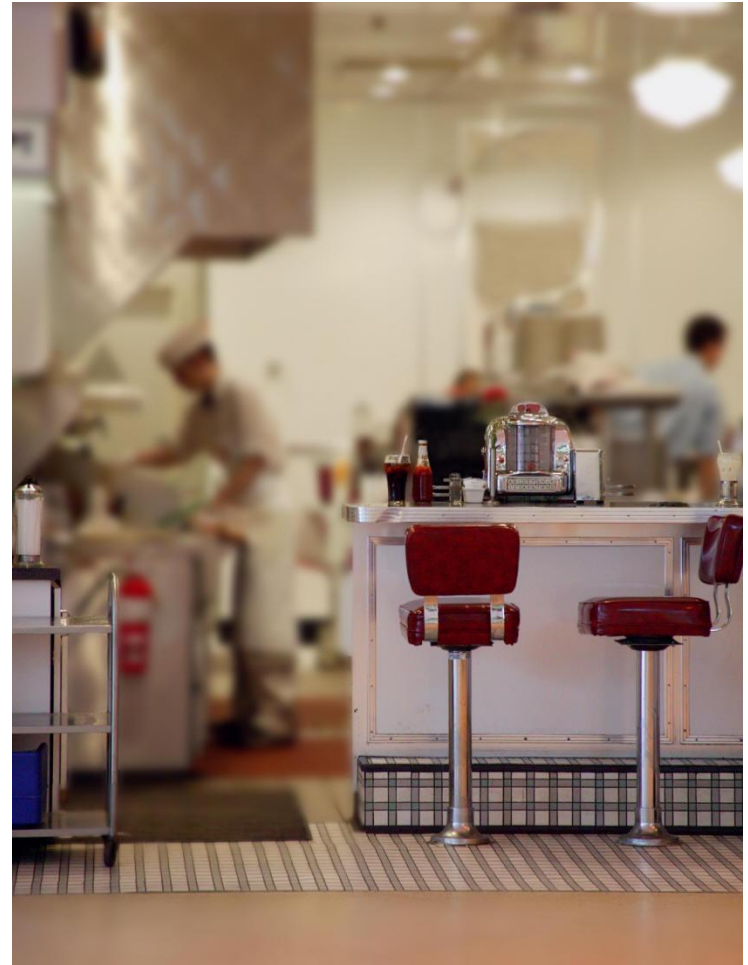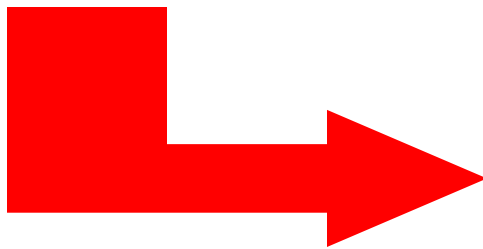   - Support Numbers

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Objectives

- With the First Data® POS Value Exchange™ Restaurant Solution, the sales team will have the ability to help merchants improve their business. Participants will be able to:
  - Describe key features and functions
  - Identify merchant benefits
  - Identify potential customers and target markets
  - Recognize selling
  - Review the processes for boarding a merchant

Do you Know These Terms???

- FOH
- BOH
- "86"
- Combine Tickets
- Server Banking
- Fast Pay
- 4-Top
- Work Flow

How's Your Handwriting???

Old School vs. Technology

Customer Value Proposition

Relax…we have it covered!
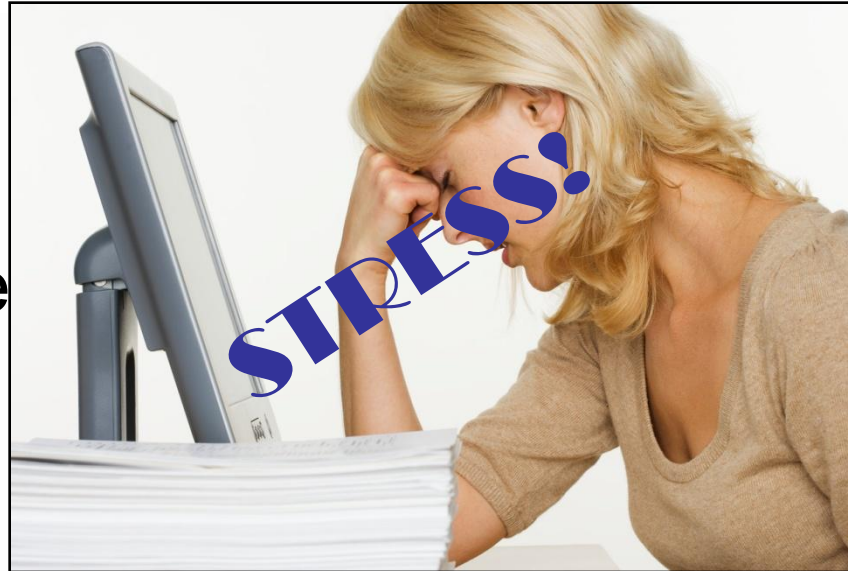
How does it work?

- The First Data® POS Value Exchange™ Restaurant Solution consists of four restaurant-designed components:
  - A Posiflex computer at the point-of-sale powered by an Intel® processor
  - A Epson Thermal Receipt Printer and Impact Remote Kitchen Printer
  - A software package leveraging Dinerware technology that focuses on Front of House management
  - A First Data system that will allow you to process Credit Cards and Gift Cards
- You can use the intuitive Dinerware software to quickly implement the restaurants menu, train staff, and get your store up and running smoothly. You can even set up fresh sheets to highlight availability of menu items.

The Bundle Package

- Hardware, software, peripherals, cables
- Integrated credit card & gift card processing
- Training
- Equipment warranty
- Hardware/software support
- First Data financing options
- Nashville Network
- High speed transactions through Data wire

First Data® POS Value Exchange™ Restaurant Solution - Outstanding Value

- Built around the Posiflex POS computer and Dinerware softwa

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3 Components of the First Data® POS Value Exchange™ Restaurant Solution

- 3 major components of the FDPOSVx Restaurant Solution system

  - Microsoft SQL → stores and organizes data

  - Brain → processes data exchange

  - Workstation → presents GUI to the end user

Why Dinerware?

- Company Incorporated in 2000

  – Started by Ex-MSFT Executive Carl English

  – Born from the Need to find a Good POS for Restaurants

  – 2 Separate Businesses
    - We are a software company
    - We are a local Hospitality VAR

  – Very Different Business Model from Legacy Providers

- Dinerware installed on 5 Continents

  – 500+ Sites in the NW; Many more World Wide

- Open Platform Philosophy

  – Works really well with 3rd party developers

Why Posiflex?

- 3yr Warranty –includes Cash Drawer and Printers

- Can be found in many prominent national Chains

- Used by competitive software vendors due to reliability and durability

- Worldwide presence

- Provide Hardware solutions for the US Government

- Founded in 1984 and located in Hayward, CA

- Grown to 27 subsidiaries worldwide

- Offers the most comprehensive line of hardware in the industry

- 4 time winner of the "The Symbol of Excellence" award and other industry awards

The 3 Pillars of First Data® POS Value Exchange™ Restaurant Solution
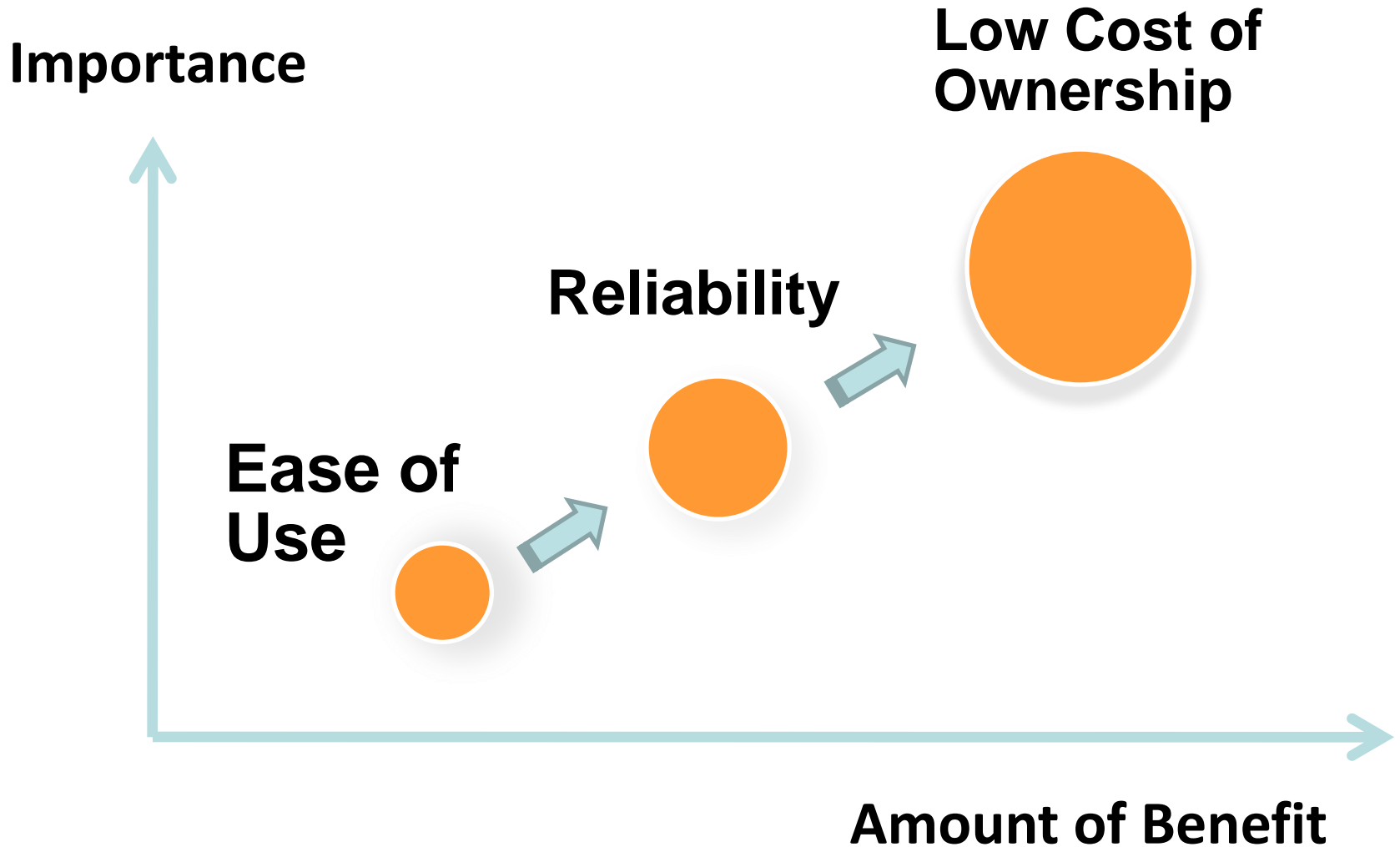
First Data® POS Value Exchange™ Restaurant Solution Differentiators in a Legacy World

- Simplicity

- Reliability

- Owners have Control

- Low Total Cost of Ownership (TCO)

- No Back Office Server required

- Menu changes on the fly

- Customer tracking history

- Fast pay – 2 touch tender

- Labor tracking

- Messaging for employees

- Automatic updates/NO downtime

- Spend more time with customer

- 8am – 10pm tech support – most competitors only 8am–5pm

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First Data® POS Value Exchange™ Restaurant Solution Feature Strengths

- Ability to Make System Changes
  - Menu, pricing, employees, etc.
  - Empowerment and liberating

- User Interface Design
  - Fewer touches is more time taking orders
  - Less time training employees

- All-Inclusive
  - Easily configure the product to fit your needs
  - No separate modules to purchase

First Data® POS Value Exchange™ Restaurant Solution Feature Strengths

- Security Functionality

  - Access levels per employee/job role

  - PCI Compliant

- Hardware Reliability

  - Fanless Unit—Restaurant Atmosphere Dirty

  - Touch Screen Resistant to Spills

- Report Management

  - 70 Reports Available

  - Quick Access to your Data from any Workstation

  - Export Reports to Excel**

  -
        **Excel software not part of bundle

What can the First Data® POS Value Exchange™ Restaurant Solution do for your Restaurant Merchant?

- A Process Improvement Tool
  - Maximizing Workflow
  - Improving Communications
  - Eliminating Costs
- A Customer Service Tool
  - More time with your customers
- Accounting Tool
  - Saves Time on Administrative Work
  - Time Clock to Track Employee Hours

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Food Service from A to Z

Hot Dog Cart → **Hotel**

Food Service in it's simplest form....

    ....And Not so simple

No Tables/Seats
Limited Menu
No Kitchen Printing
Simple Process
One "Revenue Center"
No Credit or Gift Cards

Multiple Restaurants
Extensive Menu
Several Kitchens
Different Processes
"Revenue Centers"
Extensive Tender Types

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Target Markets for 1 to 2 Terminal Establishments

- Fine/Casual Dining

- Bars/Pubs

- Nightclubs

- Coffee/Cafe

- Quick-Service

- Pizza*

- Diner

- Health Food/Juice Bar

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Target Market Segment Characteristics

- One – two stations; Mostly single location

- Some Delivery or Take Out

- Rely on paper or Electronic Cash Register

- Large Percentage of Ethnic establishments

- Hands-on Owner

- Do business with trusted partners

- Limited Budget; Price sensitive

- Low level of computer & tech experience

- Do not require extensive back-office features

First Data® POS Value Exchange™ Restaurant Solution Target: Casual/Fine Dining

FD

DW

0 1 2 3 5 7 10+ Terminals
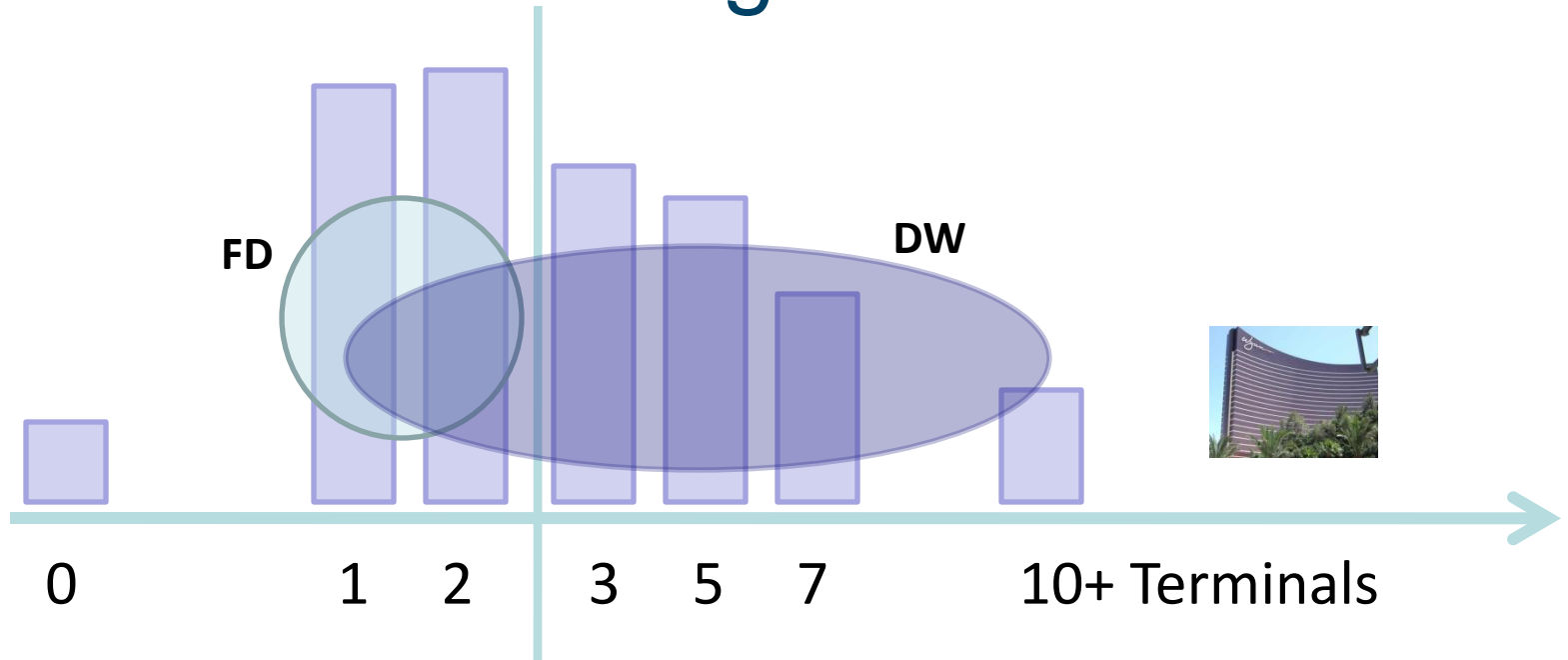
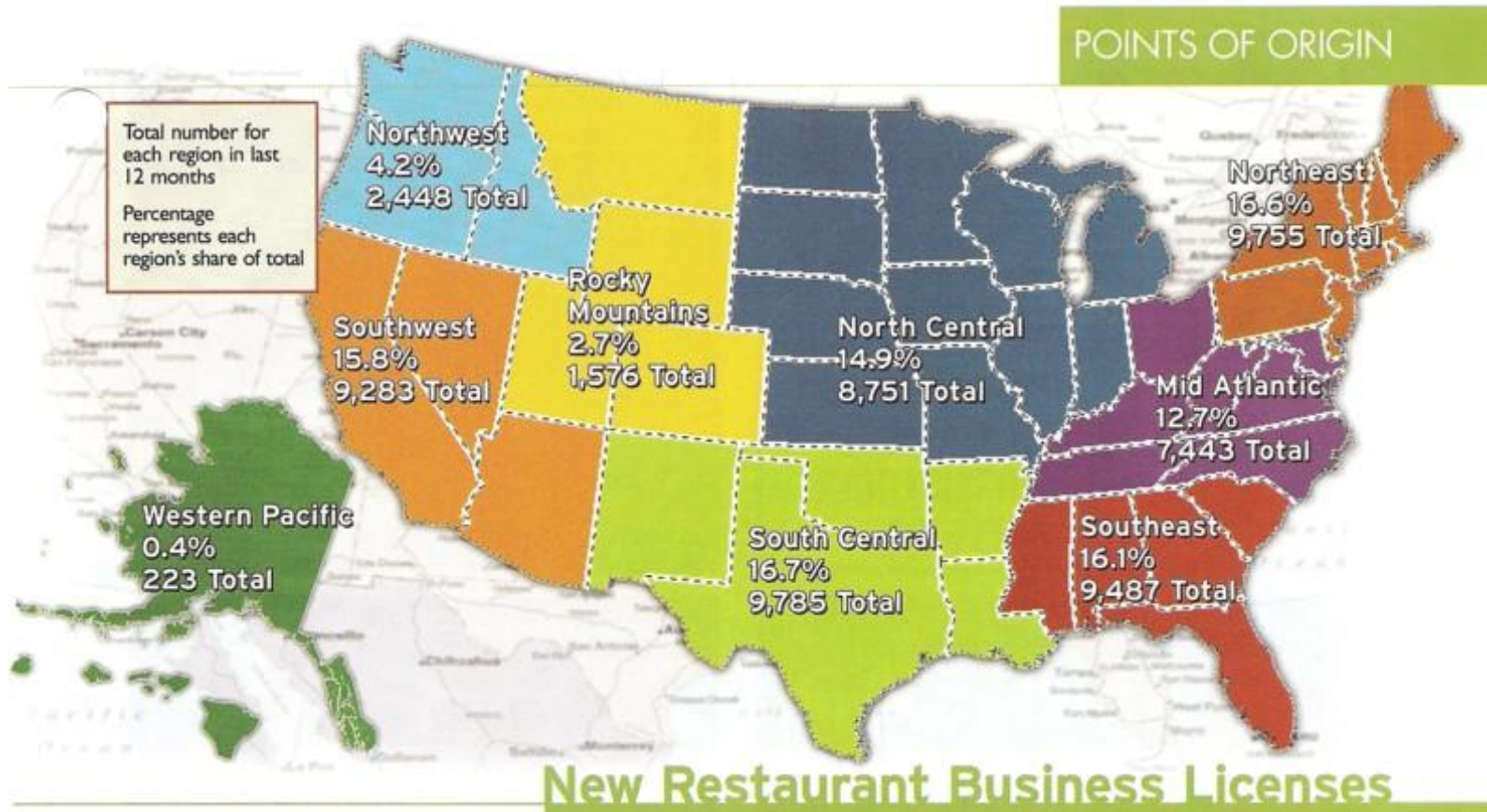## Market Opportunity Favors 1-2 Terminal Sites

Markets to Avoid

- Dinner Theater
- Hospital
- Golf Club
- Winery
- Hotel
- Custom Development

New Restaurant Licenses

Source: Restaurant Startup & Growth Magazine

Sample Elevator Pitch

- "Wouldn't it be nice if POS vendors focused more on small and mid sized restaurants instead of just concentrating on selling and developing for high end restaurateurs'? Seems to me, family owned and independents should get the same money saving efficiencies that larger chains take advantage of without sacrificing user friendly options or their life savings. That is why First Data designed the First Data® POS Value Exchange℠ Restaurant Solution with just this segment in mind. Imagine a system designed for ease of use, low total cost of ownership, and reliability. Partnering with Posiflex and Dinerware, First Data created a bundled unit that provides hardware, software, credit, gift card processing, installation support, and merchant training included. We did all the legwork and development to make it more convenient for you to run your restaurant."

Probing Questions---

- How much time do you take setting up menu changes or happy hour time limits? What if I told you our system provides menu changes on the fly and happy hour set ups quickly and easily?

- How long does it take you to train your staff on your system? What issues do you encounter when a new server is hired?

- How is communication between managements and your employees? What are you currently using to communicate with your staff?

- How do you identify your best customers? If you lose any staff, will your new servers know what the "usual" is for your customers?

- How long does it take servers to complete their close out at end of shift? Is the process manual?

Restaurant Scenarios

- John's Coffee Shop serves coffees, lattes, and pastries in a sit down environment with servers. John is currently a laggard and believes that while his store is progressive in the sit down coffee casual dining environment the cost of a POS system will never reap any of the cost saving benefits he keeps being told about. The systems seems way too complicated and 3 days of training (being told by his Restaurant owner friends) is way too much time to invest not to mention the cost of the systems themselves.

    - How do you position our system to John?

    - Go thru the sales process: opening, probing, understanding needs, presenting solutions and closing to obtain John's business

    - John currently has a Vx570 terminal

The Importance Of References

"Dinerware is the most user friendly system we have worked with. Managers can do their own programming of menu items - without needing to call for technical support - and floor staff can easily navigate their way through ordering from the first time they use the system. With Dinerware, we are better able to meet the needs of our guests because the system facilitates fluid communication which is vital to our business"

Barry Rogel, Owner

The DeLuxe Bar and Grill, Capitol Hill, Seattle

Lead Generation

- Cold calling/Canvass Existing Businesses
- Local/Regional/National Trade Shows
- State Business/Liquor License Databases
- Networking within Industry
- Direct Mail

Competitor/Legacy Information

•**Regional Competitors**	•**Legacy Competitors**
•**1 – 2 Terminal Locations**	•**3 Plus Terminal Locations**

•Dell/PC America	4K approx.
•Aldelo	4-5K app.
•Two Touch	" "
•Focus POS	" "

•Micros	7-8K
•Aloha	7K
•Squirrel	4K
•Maitre'd	5K
•Digital Dining	7K
•Positouch	6-7K

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Supported Transaction Types

- Visa®
- MasterCard
- American Express®
- Discover®
- Gift Card

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Sample Receipts

Alternate Kitchen Name

Kitchen   2/21/2008 3:17 PM
D 3   Ollie Owner
4 Guests

    T Bone (P1)
        Extra Lettuce
        Medium
        Salad
        Vinaigrette
    Sandwich (P2)
    T Bone (P2)
        Med Well
        Fries
    Medium Pizza (P2)
        RIGHT HALF
        Fresh Tomato

===============================
Kitchen   2/21/2008 3:17 PM
D 3   Ollie Owner
4 Guests

Print By Item Group

Kitchen   2/21/2008 3:00 PM
D 6   Ollie Owner

========================= Steaks
10 oz Ribeye (P3)
    Medium
    Fries
T Bone Special (P1)
    Extra CHILI
    Extra Lettuce
    Medium
    Rice
========================= Pizza
Small Pizza (P2)
    Whole Pizza
    Cheese
===============================
Kitchen   2/21/2008 3:00 PM
D 6   Ollie Owner

Kitchen Receipt Example

Kitchen   2/21/2008 2:52 PM
D 10:2   Ollie Owner

======================= Person 1
House Salad
    Italian
===============================
Kitchen   2/21/2008 2:52 PM
D 10:2   Ollie Owner

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Configuring Payment Processing

•Merchant logs in as the Manager, chooses System on the Bottom Right of the screen, then choose CREDIT on the next screen upper right.

- – Make sure Box is checked that says "Use Integrated Credit Card Processing".

- – Suggest checking 2 boxes that say "Print Signature line on CC receipt" and "Include Guest Check Detail on Sales Slip".

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Merchants Batching Process

- **To get to the batch screen, go into Manager and click on BATCH.**

- **Once you click on batch--you have the option to Batch out the CCs still in the system or to look up Batch History.**

Inventory

- Most food distributors have tools for restaurants that connect to their systems for automatic ordering

- Restaurant owners looking for a POS system to track oz of milk, # of sugar packets—need to find another software vendor

- Remember there is Spoilage in Restaurants—

- Who will track and count each inventory each and every item every day??

- Too time consuming for most restaurant owners

- Importance should be on FOH and customers in this environment

Menu Creation

- Contracting of this service is between the end merchant and NuRol directly and can be requested anytime following the installation process by contacting NuRol at 866-669-5280.

- Base menu creation pricing starts at $299.

- Final price is based on the size and complexity of menu.

- Menu creation completion can be expected in as few as three days, depending on menu size.

- One review session and adjustment will be included to assure satisfaction.

- Any further changes after the Menu Creation process will be billed at $120/hr with a minimum of 1 hr.

- Final pricing will be delivered after NuRol reviews the customer's paper menu.

- Payment to NuRol will be due prior to the start of menu creation.

What's included in the Bundles?

•One Station Bundle

•POS Value Exchg Rest CPU Monitor Brain

•POS Value Exchg Rest Thermal Receipt Printer

•POS Value Exchg Rest Dot Matrix Kitchen Printer

•POS Value Exchg Rest Cash Drawer

•POS Value Exchg Rest Mag Stripe Reader

•POS Value Exchg Rest 8-Port Router

•POS Value Exchg Rest Main Station Pwr Cond

•POS Value Exchg Rest Kitchen Printer Pwr Cond

•POS Value Exchg Rest Installation

•POS Value Exchange Restaurant Software

•POS Value Exchg Rest 2-hours Training

•Temporary Keyboard included for installation and training purposes

•One Station Bundle plus Additional Location Bundle

•POS Value Exchg Rest CPU Monitor Brain

•POS Value Exchg Rest CPU Monitor Workstation

•POS Value Exchg Rest Thermal Receipt Printer

•POS Value Exchg Rest Dot Matrix Kitchen Printer

•POS Value Exchg Rest Cash Drawer

•POS Value Exchg Rest Mag Stripe Reader

•POS Value Exchg Rest 8-Port Router

•POS Value Exchg Rest Main Station Pwr Cond

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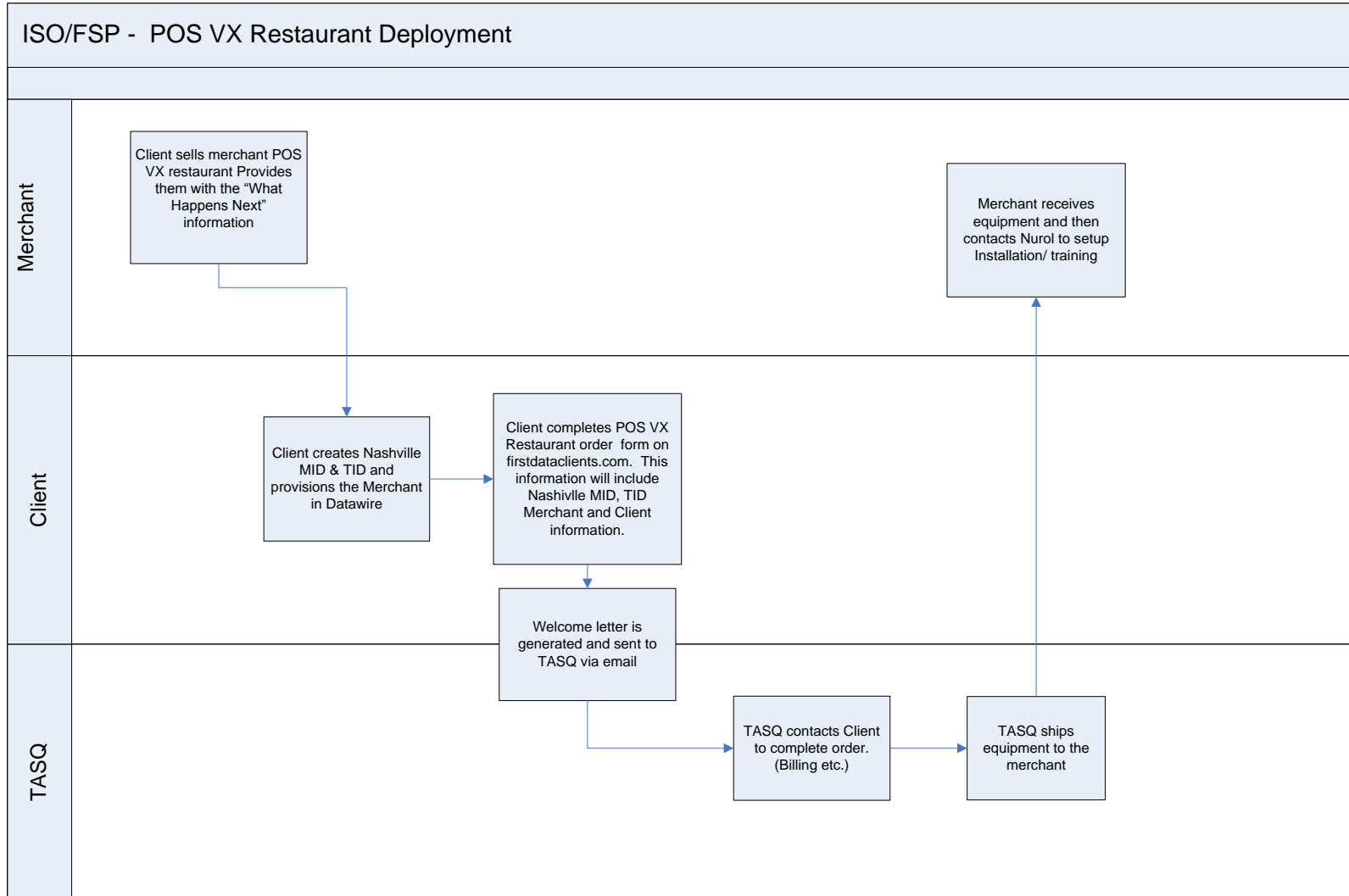**First Data.** | Independent Sales

Optional Peripherals

- POS Value Exchg Rest Base Mount Pole Display

- POS Value Exchg Rest 1-hour Training (purchased through NuRol)

- On-site installation support (purchased through NuRol)

Pricing

- Contact TASQ

First Data® POS Value Exchange™ Restaurant Solution Boarding Flow

ISO/FSP - POS VX Restaurant Deployment

Merchant

Client sells merchant POS VX restaurant Provides them with the "What Happens Next" information

Merchant receives equipment and then contacts Nurol to setup Installation/ training

Client

Client creates Nashville MID & TID and provisions the Merchant in Datawire

Client completes POS VX Restaurant order form on firstdataclients.com. This information will include Nashivlle MID, TID Merchant and Client information.

TASQ

Welcome letter is generated and sent to TASQ via email

TASQ contacts Client to complete order. (Billing etc.)

TASQ ships equipment to the merchant

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Boarding Process

- Client requests a Nashville MID and TID
- Client provisions the merchant and datawire
- Go to www.firstdataclients.com and complete the online ordering form
- TASQ receives order and contacts client to complete the sale
- Order ships out from TASQ – merchant contacts NUROL to schedule training

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Once you hit submit, an email is automatically sent to TASQ

Note: You need to provision the account through Datawire.

What Happens after the Sale is Closed?

- **Leave a copy of this document with the customer and ask them to initial each section of your copy.**
- **POS Value Exchange Restaurant Solution Sales Confirmation Check List – BEFORE YOU ORDER**
- **Customer Initials: _____**
- **The following pre-wiring should be completed by an approved contractor prior to scheduling the installation of your new POS Value Exchange Restaurant Solution:**

  - **An electrical outlet must be supplied <u>at each Point of Sale Station</u> as well as each <u>Kitchen Printer</u> location.**

  - **High Speed Internet must be supplied at the system router location (a NetGear router is included). <u>Dial-up and wireless will not work.</u> Internet should be sourced directly from a modem, not through another existing router.**

  - **Ethernet cable must be run from each POS Station location to the NetGear router (Internet) location. <u>Be sure to use only the CAT5E 568B Standard (RJ45 Ethernet Cable).</u> CAT5E 568A will not operate the system properly.**

  - **Additionally, Ethernet cable must be run from each Kitchen Printer location to the NetGear router (Internet) location. <u>Be sure to use only the CAT5E 568B Standard (RJ45 Ethernet Cable).</u> CAT5E 568A will not operate the Kitchen Printer properly.**

  - **You must have adequate counter space available (see your sales representative for system dimensions); any old systems should be removed from the area prior to installation.**

  - **For any under counter wiring, the countertop must have a grommet hole drilled <u>at least 2" in diameter.</u>**

- <u>**All of the above items must exist for a successful installation to take place. If any of the above items are not in place, the installation may not be completed resulting in a billable follow-up installation.**</u>

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What Happens after the Sale is Closed?

- **What to Expect Now**   Customer Initials: _____
- **Timing**
- It will generally take up to 5 business days to process your application.
- After approval, allow up to 5 business days for delivery of your new POS system.

- **Product Delivery**
- Someone must be present at the time of delivery to sign for the package.

- **Installation**
- **When you receive your system <u>DO NOT OPEN THE BOXES</u>. Once all of the pre-wiring requirements (noted above) are complete, contact our installation partner, NuRol, at (866) 669-5280 to schedule your "Getting Connected" over-the-phone installation.**
- NuRol will confirm that all of your pre-wiring and Internet requirements are complete prior to approving the installation.
- If you desire an On-site technician to be deployed to your location to assist with the installation in person, this can be coordinated with NuRol. Additional charges for an on-site technician will apply and be payable via credit card directly to NuRol.
- <u>No training is provided at this time.</u>
- Please do not add unsupported peripherals or software to the system. Unsupported peripherals (i.e. MP3 players, PDA's, additional printers, etc.) may impact system performance and reliability.
- **Training**
- **Once your system is installed, work with Nurol again at (866) 669-5280 to schedule your "Getting Started" telephone/Internet training session.**
- If additional training is required beyond the free telephone/Internet training session included with your system purchase, you may contact Nurol at the number above to request additional fee-based training.
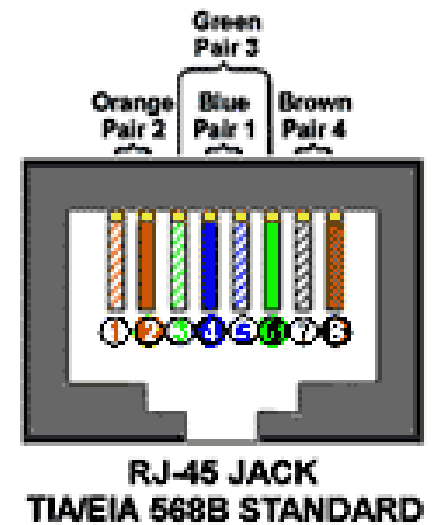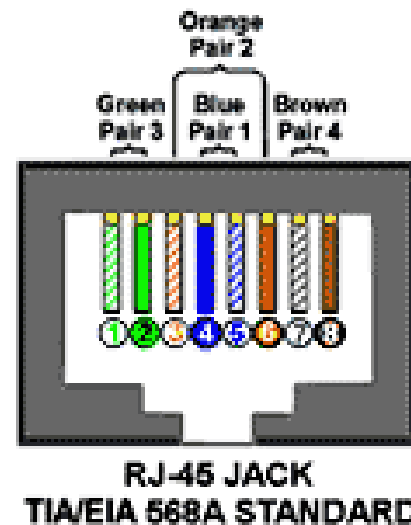- You will be contacted for Gift Card Training, if applicable.

What Happens after the Sale is Closed?

- **Customer Support and Information Resources**   **Customer Initials: _____**
- **For POS Value Exchange Restaurant Solution system questions and assistance, the First Data POS Help Desk is available to assist you from 8:00am to 10:00pm Eastern Time, Monday-Friday at 800-211-2711.** The POS Help Desk number is listed on the first page of the Important Reference Materials book included with your product shipment.
- **Have your Merchant ID available to ensure the most efficient routing of your call.**
- Wired network connections between the Internet, router, and the POS Station(s) & printer(s) in the store are not supported by the First Data POS Help Desk.
- For 24x7 transaction processing Customer Service call the number located on the first page of the Important Reference Materials book included with your product shipment. This help desk does not troubleshoot hardware and software questions related to your POS Value Exchange Restaurant Solution system.
- Additional supplies may be obtained by calling TASQ Technologies at (866) 669-5280.

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Site Walk Through: Network Cables

This MUST be setup prior to Ingram doing Install!!!!

- Installation

  Electricians

  CAT5E, 568B Standard

- Inspection

  Possible interference

  Placed strategically

- Testing

  Fluke

Orange
Pair 2

Green
Pair 3

Blue
Pair 1

Brown
Pair 4

**RJ-45 JACK
TIA/EIA 568A STANDARD**

Green
Pair 3

Orange
Pair 2

Blue
Pair 1

Brown
Pair 4

**RJ-45 JACK
TIA/EIA 568B STANDARD**

Terminal Wiring Diagram

2-3 Terminal Wiring Diagram
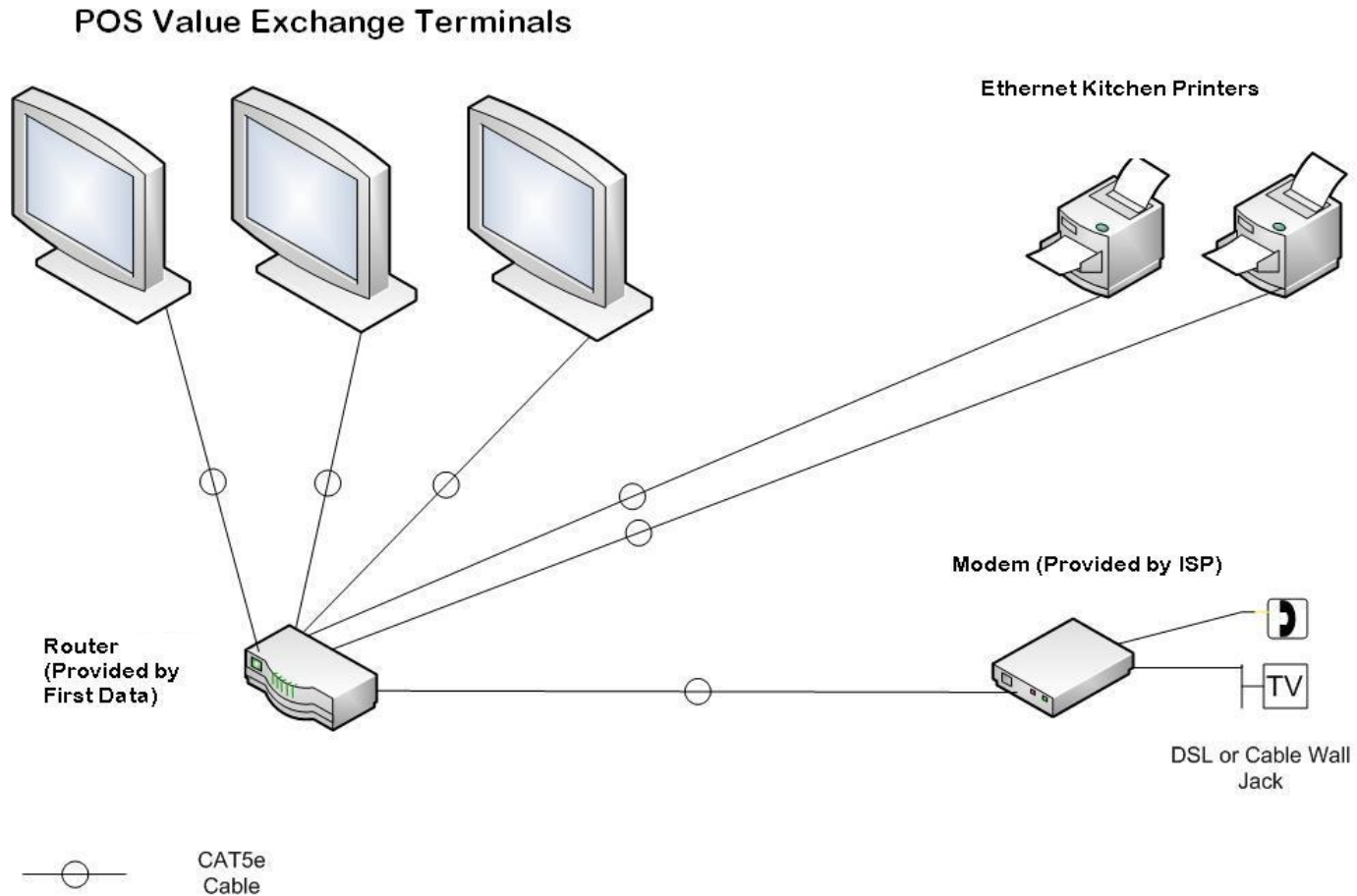
Configuration, Shipment, Deployment & Installation

- TASQ Configuring System, Shipping, and Deployment
- Installation - (866) 669-5280
1. Included: Over-the-phone installation with NuRol. AEs can be on-site with their merchant to assist in this process if they would like, but otherwise it will be the merchant installing the system with Nurol over the phone.
- 2   Optional: On-site support at Merchant's Expense : The merchant may request the deployment of an on-site resource to assist.   NuRol will then coordinate the deployment of an on-site resource through the partner OnForce. This transaction, and related fees, will be between the merchant and NuRol. Additional charges will be payable by credit card, and should range between $150-$350 depending on size of install and proximity to a major metropolitan area.   NuRol will still be on the phone conducting a "phone installation" even when an OnForce technician is deployed to ensure proper set-up and full completion.

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Software License Exception

- "One other group of scenarios that needs to be understood are license change scenarios where a restaurant owner decides they want to change the name of their restaurant, or move it. We charge $100 if a customer wants to change the phone number and or address, or if they want to change the restaurant name. They can either change the address/phone, or the name, but not both. If they want to change both, we consider that a license transfer and that is against our licensing policy – they would need to purchase a new license at that point. Similarly a customer can not sell their system to another restaurateur for any reason."

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Support Numbers

- First Data Tech Help Desk (8:00am–10:00pm Eastern 7 days/week) 1-800-211-2711

  - First point of contact for all FDVXR issues – merchants must
    - Follow the correct prompts
    - Use the correct MID
    - Have the correct product.
    - Callduring the proper hours of operation

  - Prompts:
    - English or Spanish options (1=English 2 = Spanish)
    - Enter MID (merchant will need to enter there 12 digit MID)
    - Merchant will need to select the option for technical assistance (Option 2)
    - Merchant should select option 2 for Tech Desk Support (at this point the system will verify if the MAI is for Rest and will send to skill 331)

Support Numbers

- Gift Card Support

  - 800-707-5129

- Account Executives, Installers, Dinerware, TASQ (partners who need immediate assistance and do not have a merchant number available)

- 800-429-1504 (DO NOT GIVE THIS NUMBER TO MERCHANTS)

- Refer to your Relationship Manager for any additional questions