### 1. From the Dashboard, choose Leads

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<b>Tickets</b>			
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#### 2. Click on Add +

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### 3. Complete all fields in the New Lead box

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	Establishment DEMO: Sale on 1	Sailor	Phone 770) 653-4538	Source New Location			
	First Name Jim	Last Na Call	sme	Email bertc@tonicp	os.com		
	Street Address 8050 River Fest	LN Woodstock	State GA	Postal Code 30188	Country United St 👻		

### 4. Choose the green thumbs up to validate the Lead

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5. Choose the check mark validating the date of store creation. The store will be sent to the Pipeline.

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			17 18 19 20 21 2	12 23	
			24 25 26 27 28 3	9 30	
			31		

### 6. Choose Pipeline

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7. Choose the Green thumbs up to verify the establishment information. In the summary box, verify the items and click Submit. Choose Yes or No to provision the store.

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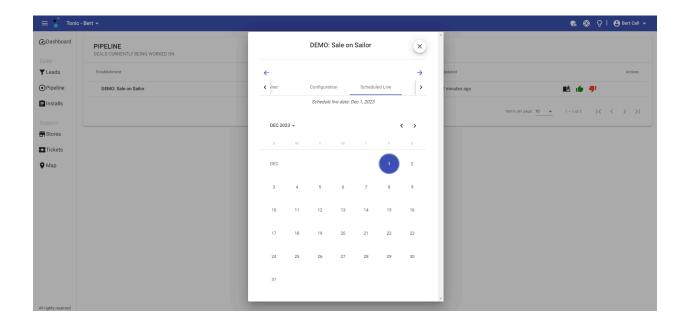
# **Partner Portal: Store Creation**

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		(770) 653-453	8 bertc@	onicpos.com			

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# **Partner Portal: Store Creation**



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# **Partner Portal: Store Creation**

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8. Choose Installs. Find the store you just created and choose the settings gear to define the store settings.

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9. After choosing the settings gear, you will face the option to Define Settings (manually defining settings) or to Search Merchant (choose from an existing store in your partner group to copy settings from)

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9.1 Define Settings option: Choose the options from the categories listed (Sales Groups, Taxes, Order Types, Payment Types, Menu Types, Kitchen Printers, KVDs, Cash Management, Tips) to define your store's settings manually.

Once complete, choose the Green checkmark in the top right corner.

The store's settings are now manually defined and ready to be viewed in the Tonic back office.

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line	Sales Groups	Taxes	Order Types	Payment T		Types	Kitchen Printers	KVDs	Cash Manageme		Tips	a /
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301 Perimeter Center N. Atlanta, GA 30346

Note 😫 Timeline 🖃 Live 👔

9.2 Search Merchant options: Selecting Search Merchant will provide a dropdown menu of your current stores. Choose which store you would like to copy settings from and click submit.

The store's settings are now defined based on your chosen store and ready to be viewed in the Tonic back office.

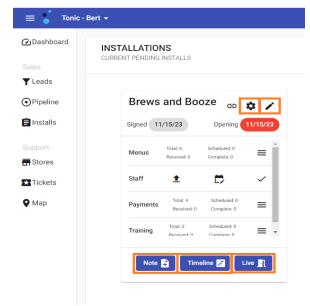
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Support	- Received: 0 C	Submit			Beceived: 0 Conneliete: 0
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Support	- Received: 0 C	DEMO: Sale on Sailor 2	DEMO: The Call 🕫 🏚 🌶	Tonic - Bert	
Support Stores Tickets	- Received: 0 C		DEMO: The Call CD	Tonic - Bert Signed 5/18/23	Note Difference Differ



10. Each store in your partner group will show under Installs in the partner portal.

Signed 11/15/23     Opening 11/15/23     Opening 11/15/23     Opening 10/17/23     Opening 10/17/23     Opening 10/17/23     Signed 11/15/23	INSTALLATIONS CURRENT PENDING INSTALLS			Sort By Name
Signed       11/15/23       Opening       11/15/23				
Signed       11/15/23       Opening       11/15/23	Brews and Booze 😑 🌣 🖍	DEMO: Fight or 🛛 🖙 🌣 🖍	DEMO: John's 🖙 🌣 🖍	DEMO: Sale on 🖙 🌣 🖌
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11. Icons: Gear, Pencil, Notes, Timeline, Live





11.1. Gear Icon: Allows the partner to view the store's configuration.

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Dashboard	INSTALLATIONS		Sort By
	CURRENT PENDING INSTALLS		Name Reverse
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🖹 Installs	Signed 11/15/23 Opening 11/15/23	3	Signed 11/30/23 Opening 11/30/23
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Tickets	Staff 🟦 🛱 🗸	American	Staff 🟦 🛱 🗸
🛛 Мар	Payments         Total: 4         Scheduled: 0           Received: 0         Complete: 0         E	< Locale Owners Configuration Options >	Payments Total 2 Scheduled: 0 Received: 0 Complete: 0
	Training Total: 2 Scheduled: 0 Revolued: 0 Complete: 0	Time zone: US/Eastern	Training Total: 2 Scheduled: 0 Received: 0 Committer: 0 = •
	Note 🛐 Timeline 🔄 Live 🛐	Country: US	Note 🛐 Timeline 🛐 Live 🛐
	DEMO: Sale of Sailor 2	DEMO: The Call GD C Tonic - Bert	© ¢ /



11.2 Pencil Icon: Allows the partner to cancel the installation, add additional payment devices, handhelds, and terminals.

Sales	INSTALLATIONS CURRENT PENDING INSTALLS		Sort By
F1			Name Rever
Pipeline	Brews and Booze 😞 😄 🌶	DEMO: Fight or 🛛 🕫 🗘 🖌	DEMO: John's 🐵 🌣 🖌 DEMO: Sale on 🐵 🏚 🖌
Installs	Signed 11/15/23 Opening 11/15/23	Flight         Description           Signed         10/4/23         Opening         10/4/23	House         Sailor           Signed 10/17/23         Opening 10/17/23           Signed 11/20/23         Opening 11/2
Stores	Menus Total: 6 Scheduled: 0 Enceived: 0 Complete: 0	Menu 🟦 ট 🗸	Menu 🛨 ট 🗸
Tickets	Staff 🛓 🛱 🗸	Staff 🛨 🛱 🗸	staff ± C ✓ staff ± C ✓
Мар	Payments Total: 4 Scheduled: 0 Received: 0 Complete: 0	Payments Total: 7 Scheduled: 0 Received: 0 Complete: 0	Payments         Total 7         Scheduled 0           Received 0         Complete: 0         Payments         Total 2         Scheduled 0         E
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11.3. Note Icon: Allows the partner to take and track useful notes about the store - for internal use only, will have no bearing on the function of the store.

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@Dashboard	Menus	Received: 0	Complete: 0		Menu	1		~	Menu	±		~	Menus	Received: 0	Complete: 0		
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Sales T Leads	Payments	Total: 4 Received: 0	Scheduled: 0 Complete: 0	=	Payments	Total: 7 Received: 0	Scheduled: 0 Complete: 0	=	Payments	Total: 7 Received: 0	Scheduled: 0 Complete: 0	=	Payments	Total: 2 Received: 0	Scheduled: 0 Complete: 0	=	
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Stores																	
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🛛 Мар			DEN	10: Sale o or 2	on 🖙 🌣	1					Tonio	- Bert	cə 🏚	1			
				11/30/23	Opening 11/30	/23					Signed	5/18/23	Opening 5/	17/23			
			Menu	±	<b>D</b> ~	/			11	-	Menus	Total: 8 Received: 0	Scheduled: 0 Complete: 0	=			
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11.4. Timeline Icon: Shows the timeline of the store from inception to Live.

🚍 🏅 Tonic - Bert 👻															⊗ 🄊		😫 Bert Call 👻
Dashboard	Menus	Received: 0	Complete: 0		Menu	1		~	Menu	1		~	Menus	Received: 0	Complete: 0	=	
	Staff	±	Ð	~	Staff	±	Þ	~	Staff	±	ø	~	Staff	±	Þ	~	
<b>T</b> Leads	Payments	Total: 4 Received: 0	Scheduled: 0 Complete: 0	=	Payments	Total: 7 Received: 0	Scheduled: 0 Complete: 0	=	Payments	Total: 7 Received: 0	Scheduled: 0 Complete: 0	=	Payments	Total: 2 Received: 0	Scheduled: 0 Complete: 0	≡	
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E Installs		Received: 0	Complete: 0											Received: 0	Complete: 0		
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- Stores					Qualified (Bert Call	) on Dec 1, 20	23	Τ.									
Tickets								Won	(Bert Call) on Dec 1,	2023							
🗣 Мар			DEM Sailo	10: Sal or 2								ert	c> 🗘	1			
				11/30/23	Payment (Bert Call	) on Dec 1, 20	23					23	Opening 5/1	7/23			
			Menu	<u>+</u>				Prov	sioned Store (Bert Ca	all) on Dec 1, 2	023	tal: 8 ceived: 0	Scheduled: 0 Complete: 0	-			
													Patrophilade 0				
			Staff	1	Store Settings (Ber	t Call) on Dec	1, 2023	•					Complete: 0				
			Paymer	nts Rec								Total: 5 Received: 0	Scheduled: 0 Complete: 0	=			
			Training	Total: 2 Received: 0	Scheduled: 0	-	Trainin	g Received: 0	Scheduled: 0 Complete: 0	= -	Training	Total: 3 Received: 0	Scheduled: 0	= -			
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11.6. Live Icon: Used to mark the store as live on the go-live date. \*Notes - this is a support function. The partner should contact support to mark the store as live.

