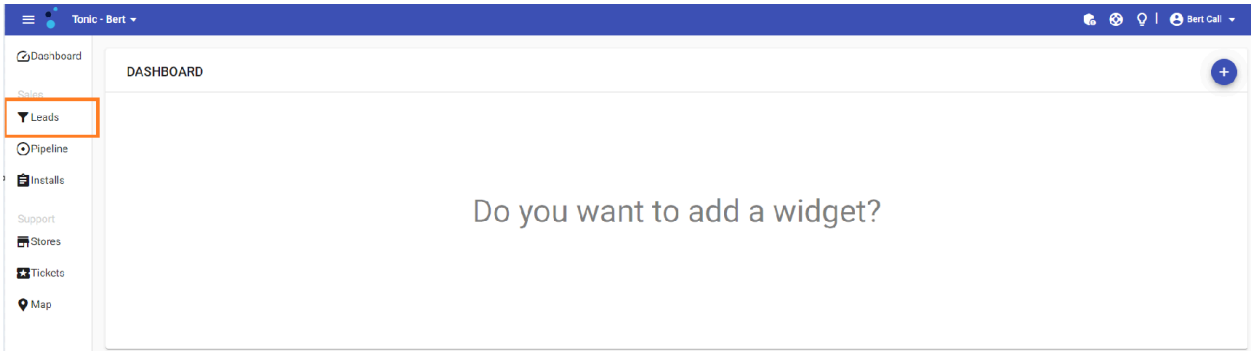
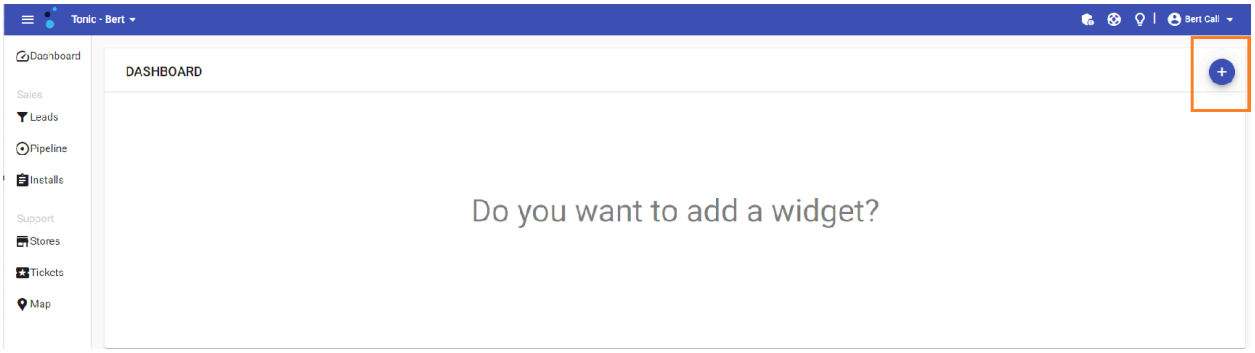
Partner Portal: Store Creation

1. From the Dashboard, choose Leads

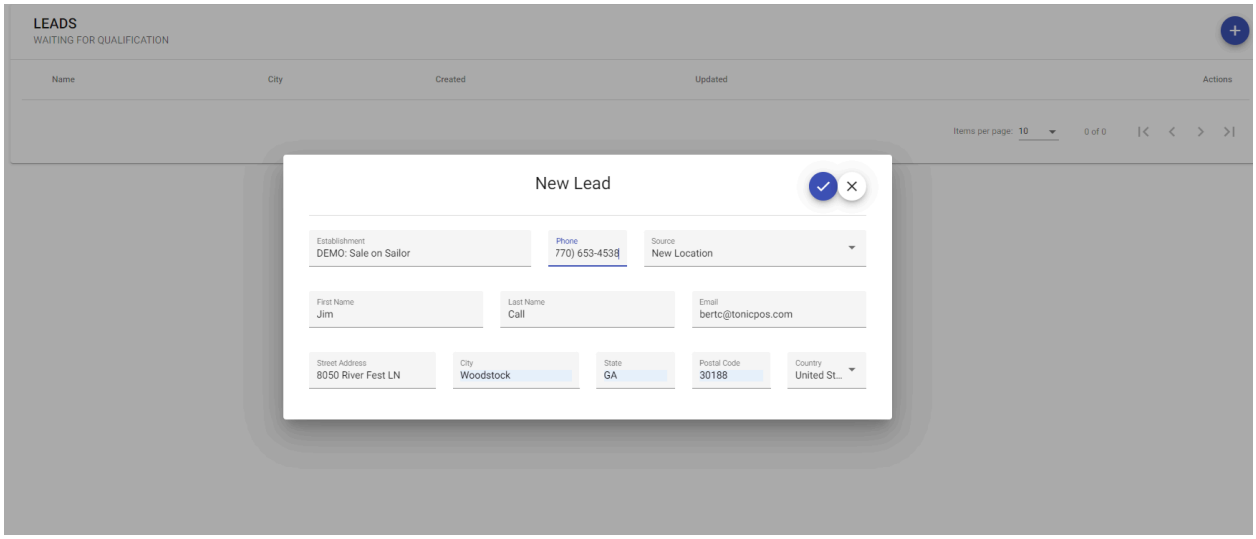


2. Click on Add +

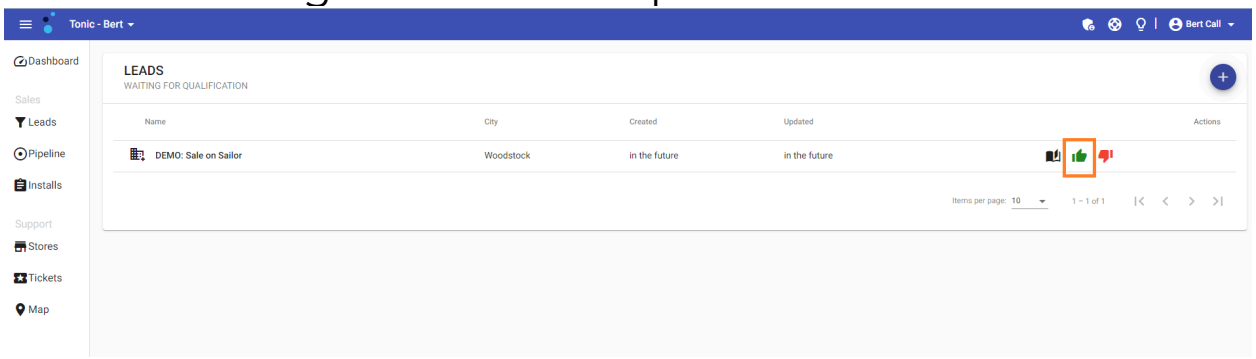


Partner Portal: Store Creation

3. Complete all fields in the New Lead box

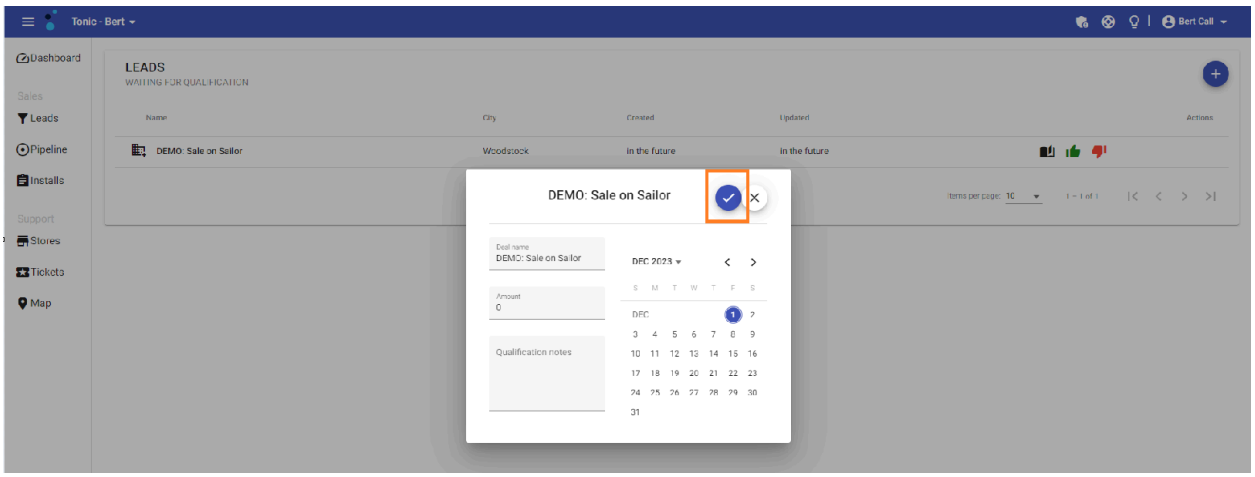


4. Choose the green thumbs up to validate the Lead

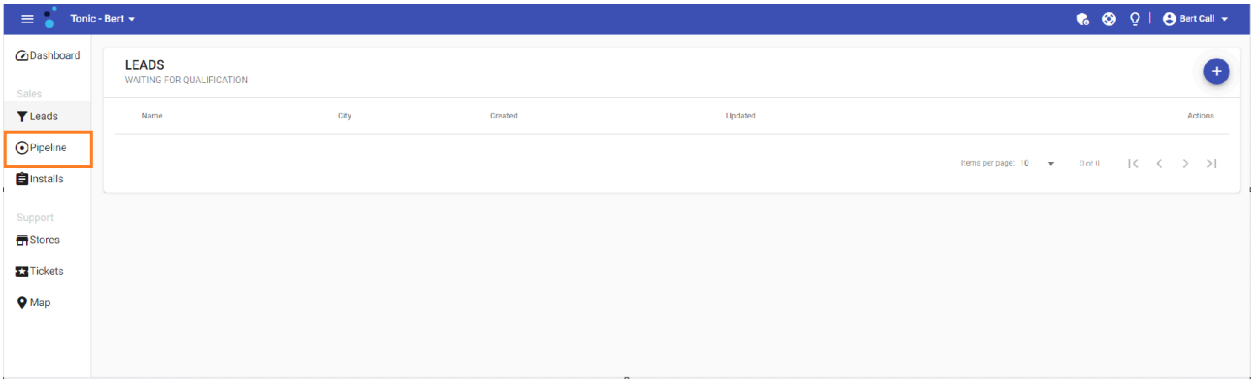


Partner Portal: Store Creation

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

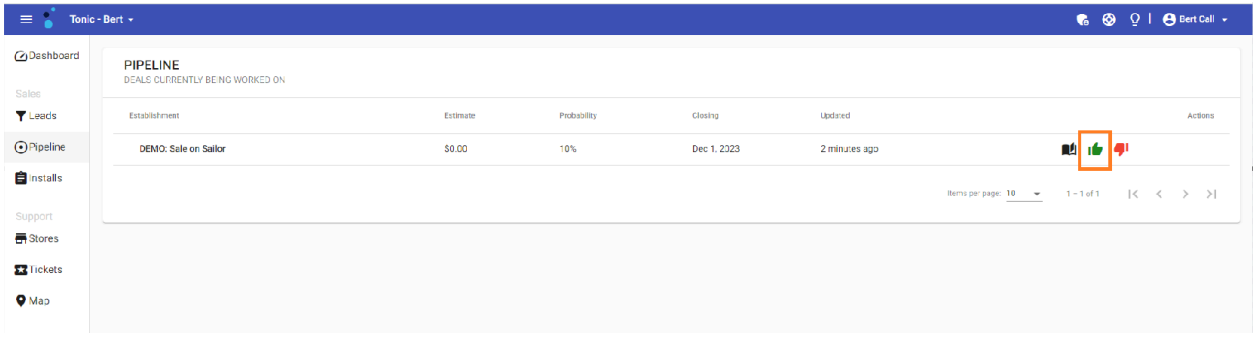


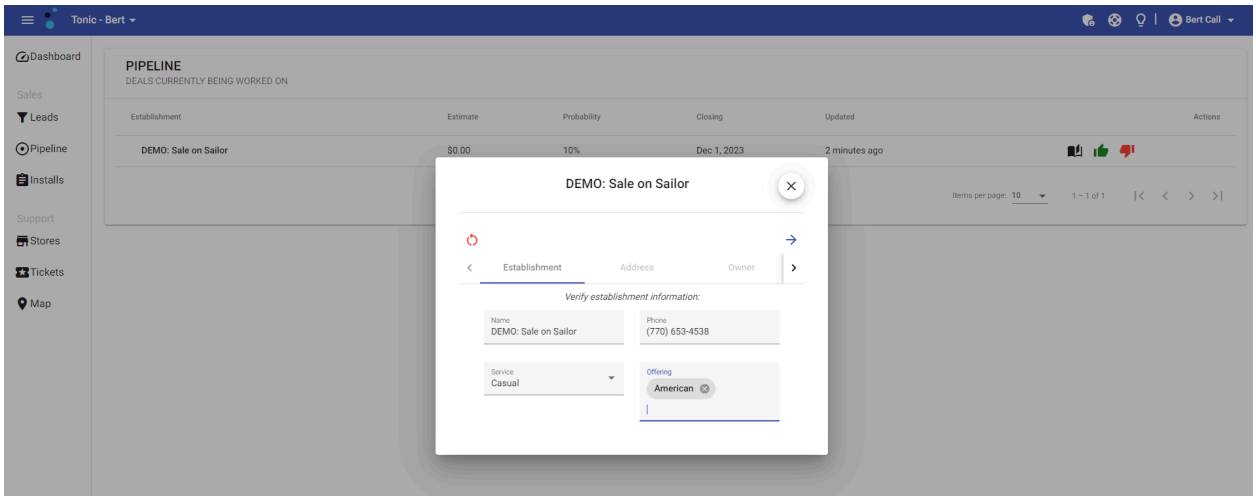
6. Choose Pipeline

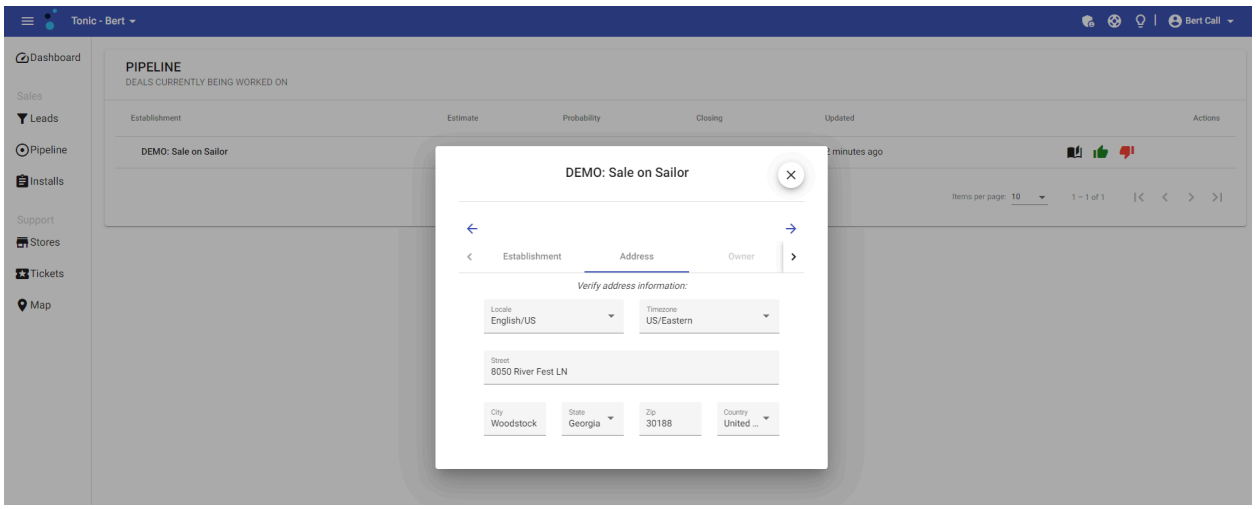


Partner Portal: Store Creation

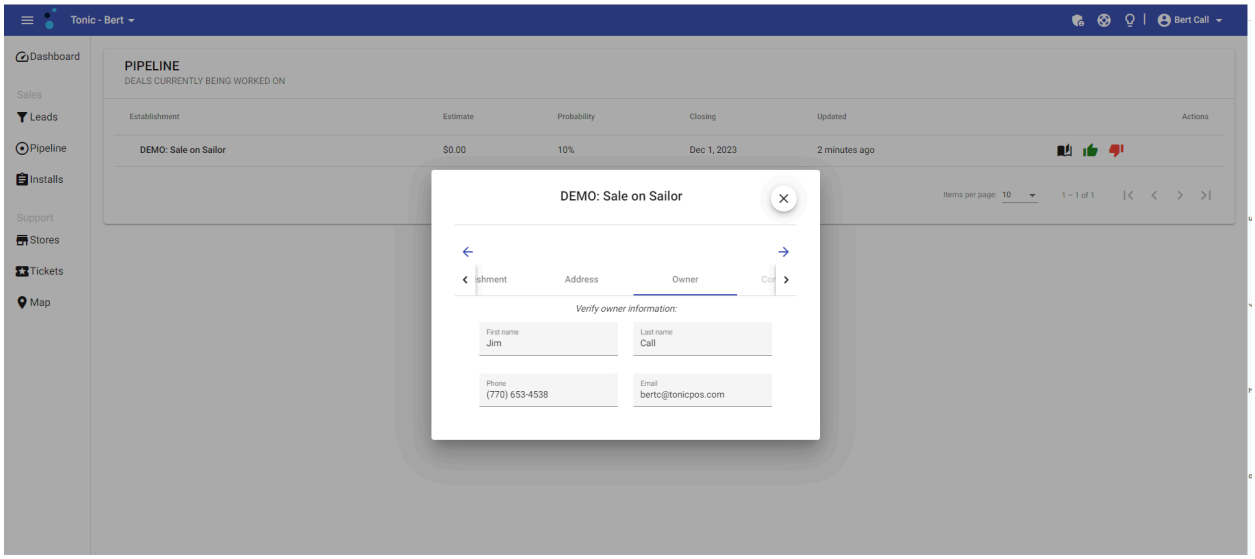
7. Choose the Green thumbs up to verify the establishment information. In the summary box, verify the items and click Submit. Choose Yes or No to provision the store.

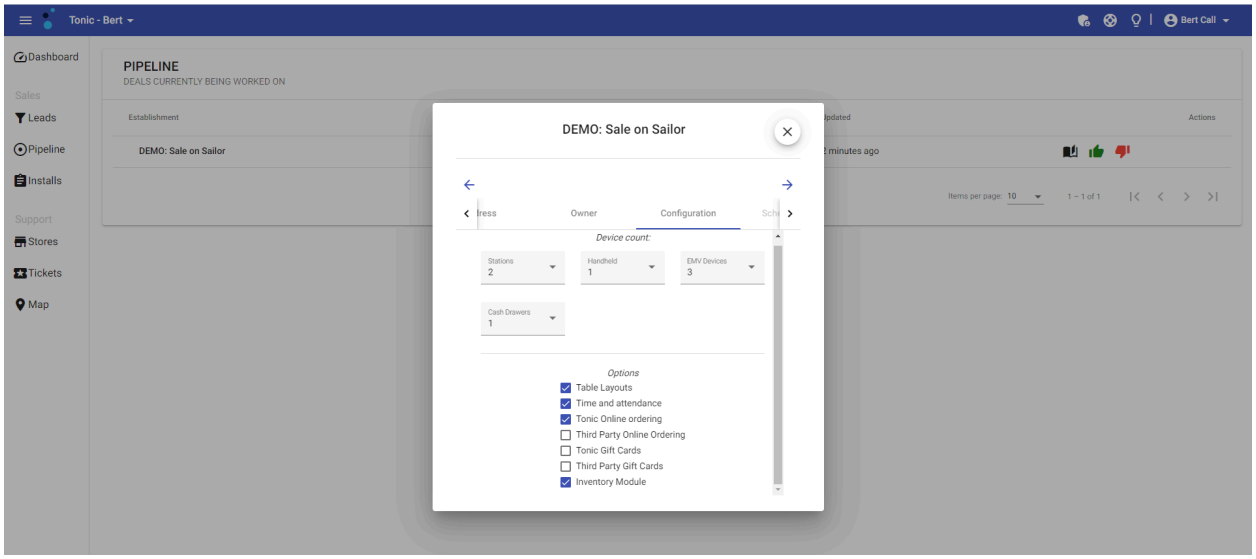




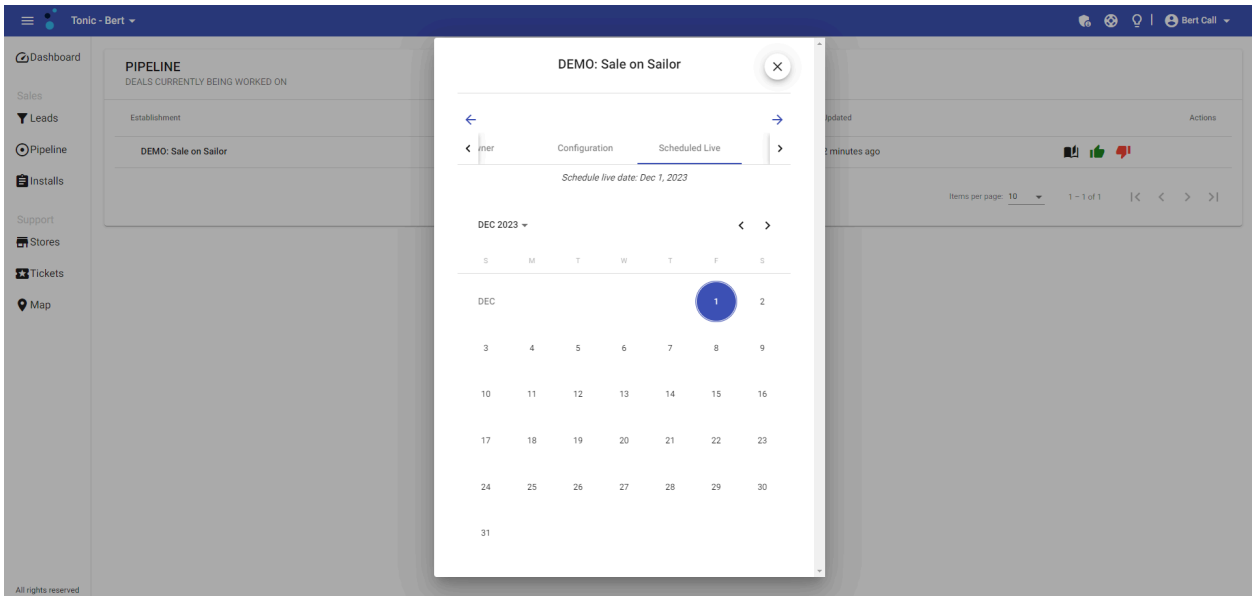


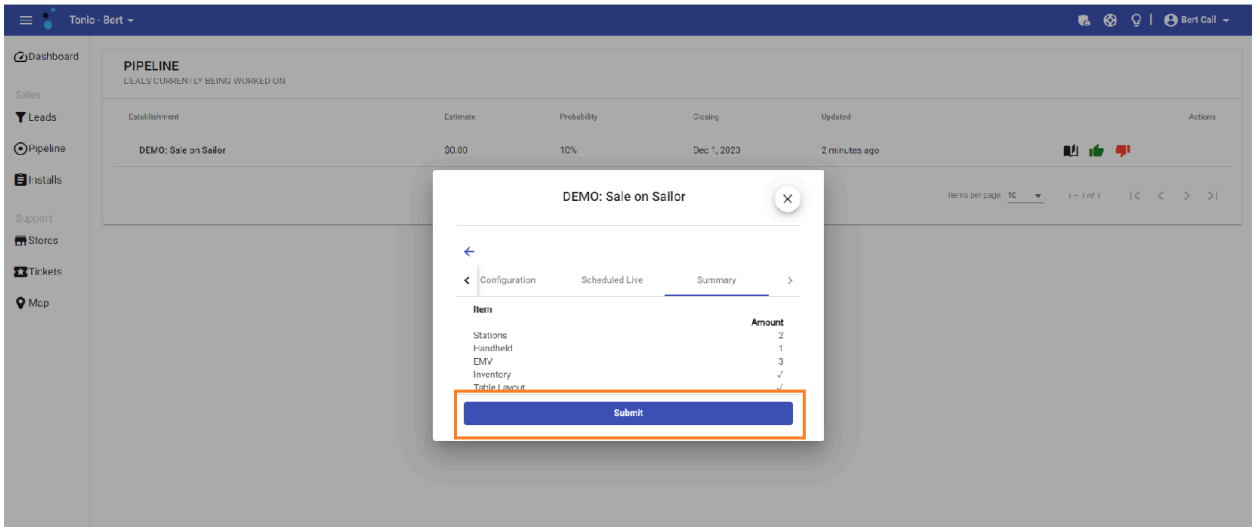
Partner Portal: Store Creation





Partner Portal: Store Creation





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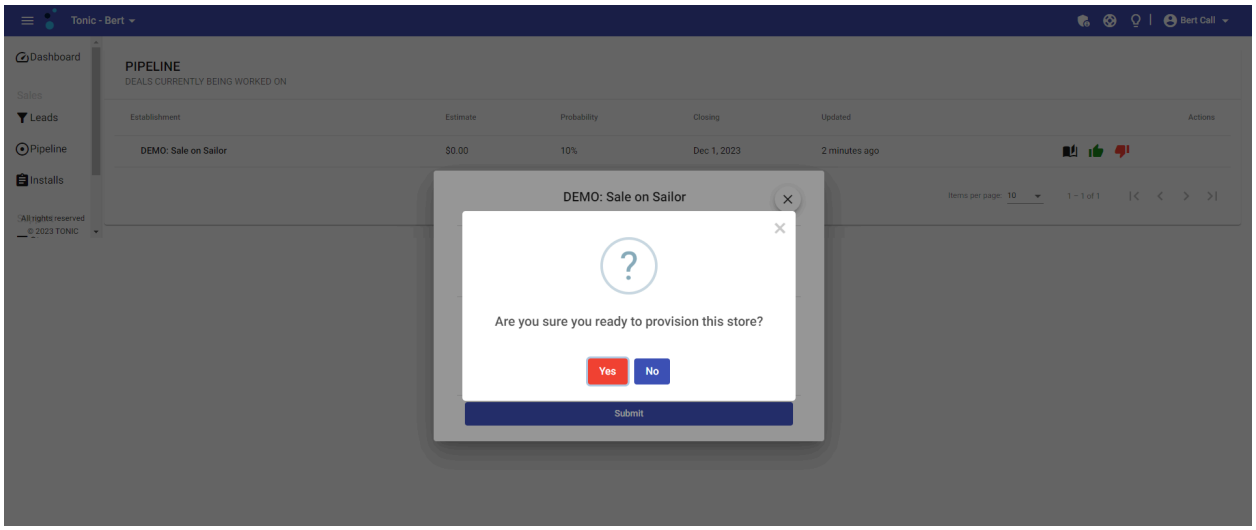
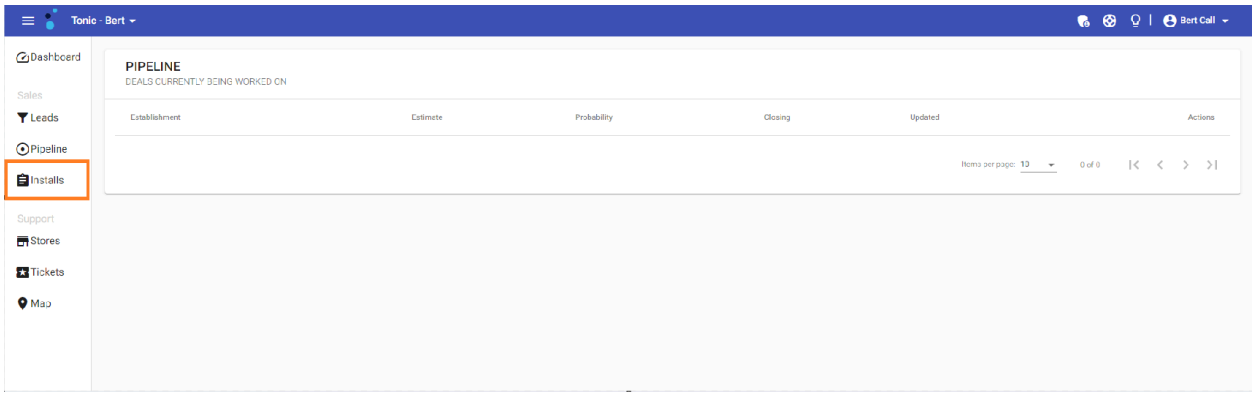
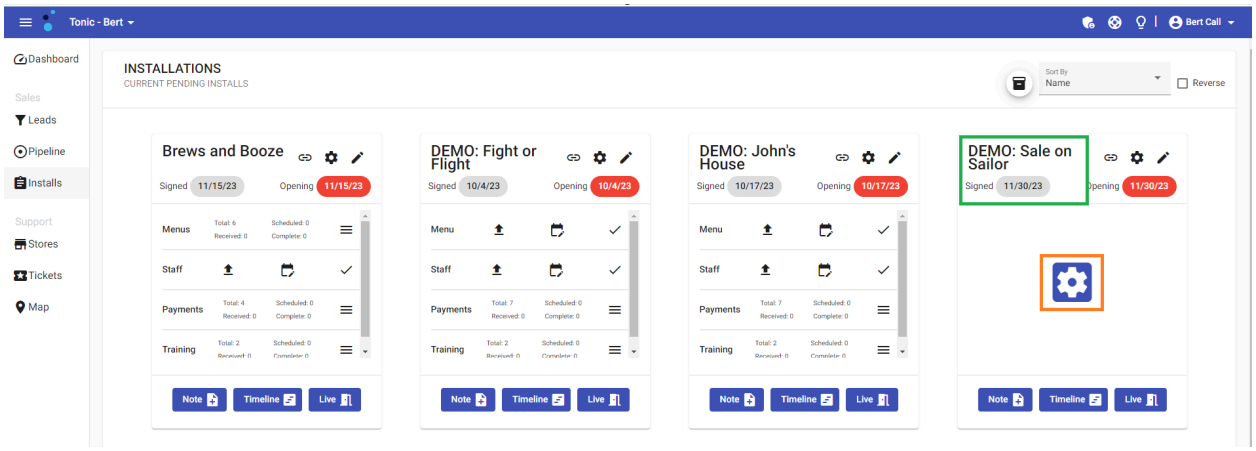
Atlanta, GA 30346

Partner Portal: Store Creation



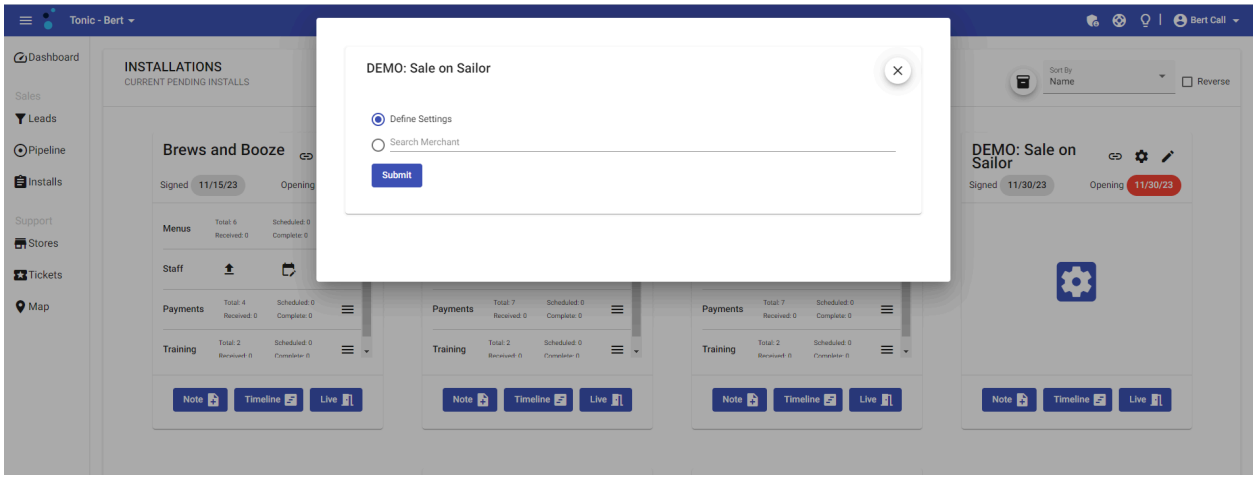
8. Choose Installs. Find the store you just created and choose the settings gear to define the store settings.

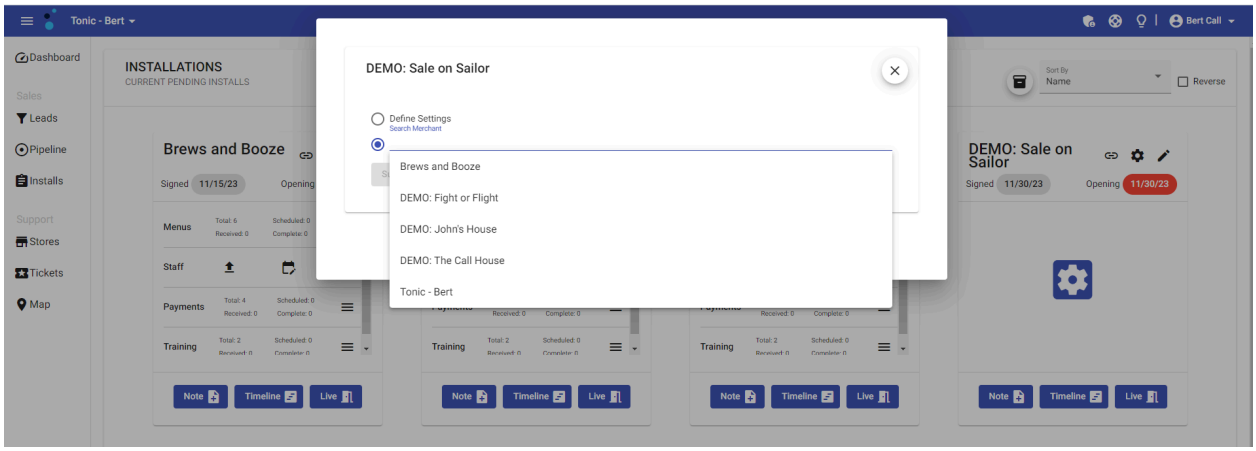




Partner Portal: Store Creation

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)



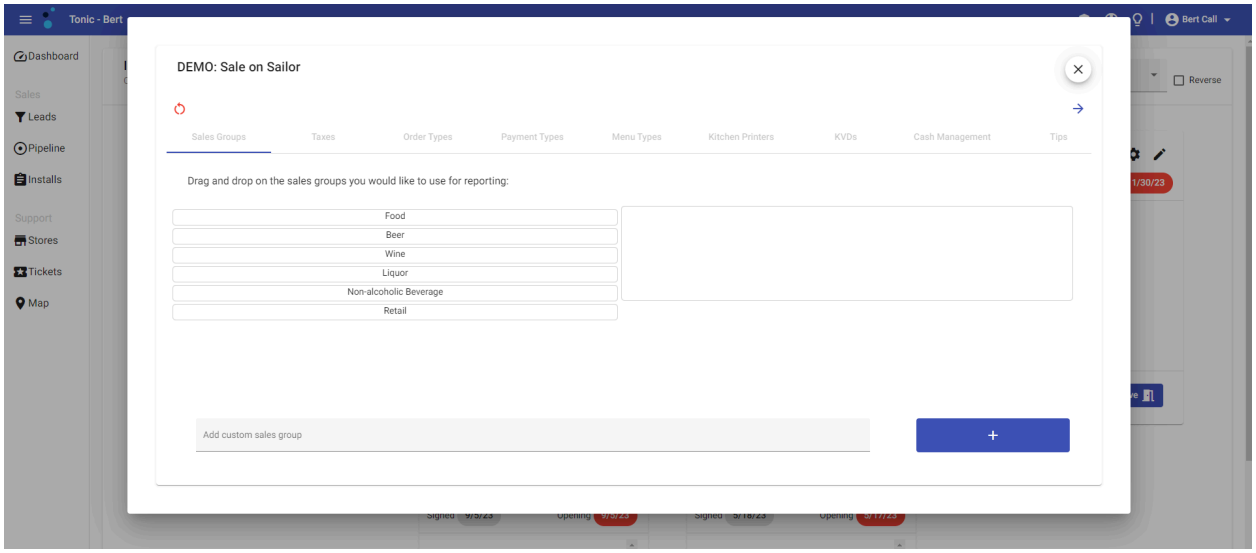


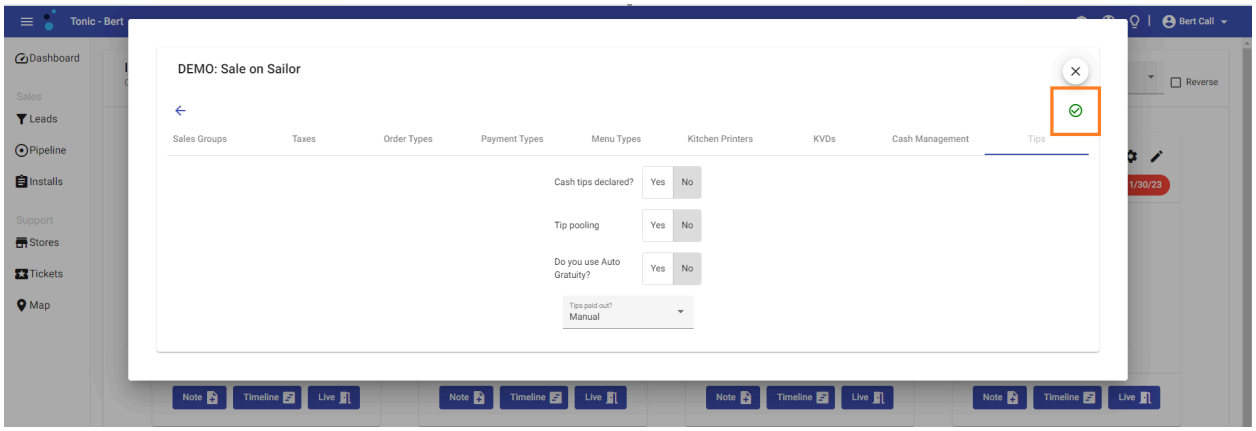
Partner Portal: Store Creation

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.

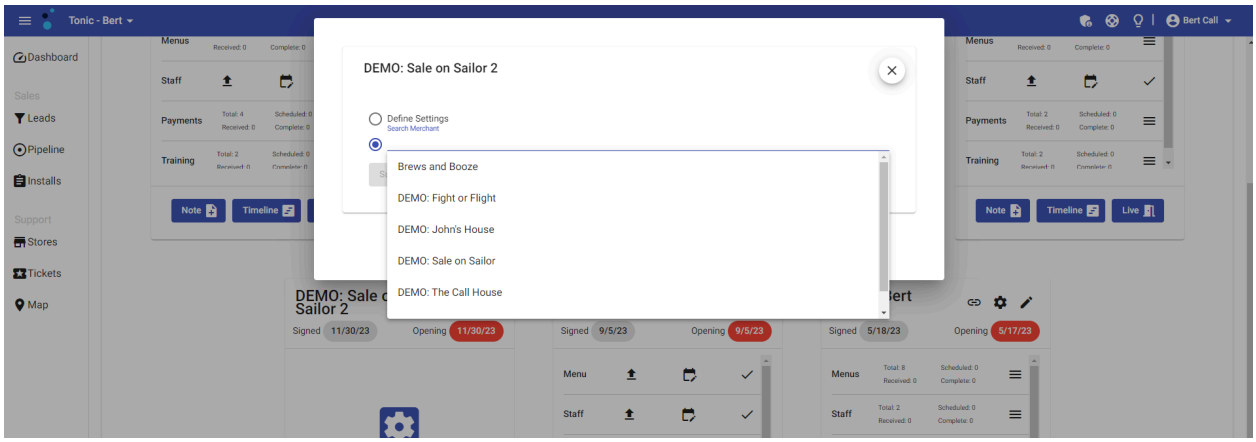


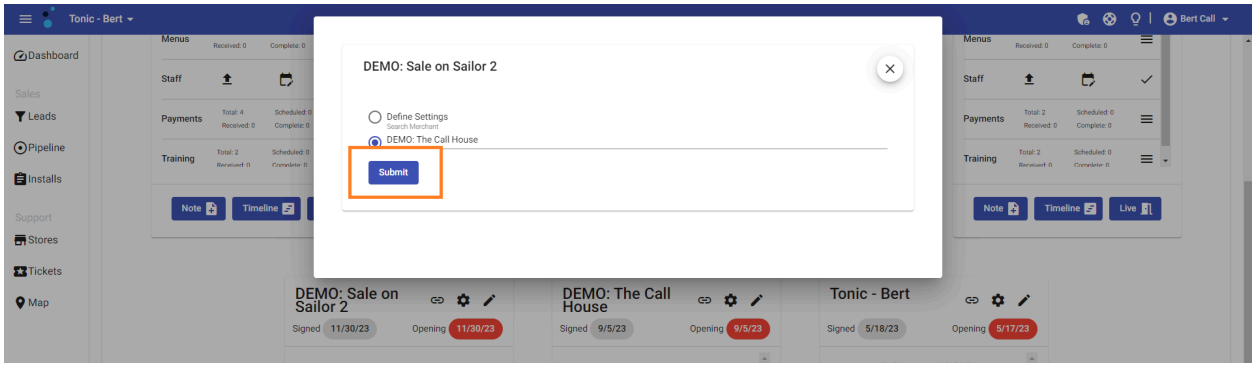


Partner Portal: Store Creation

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.

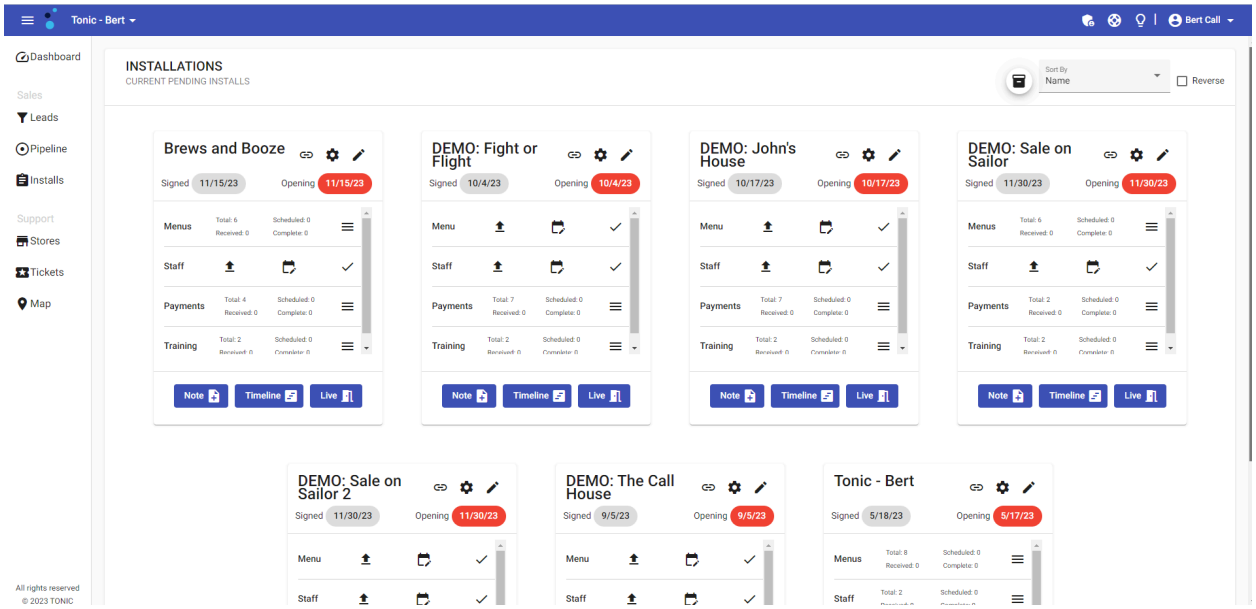
The store's settings are now defined based on your chosen store and ready to be viewed in the Tonic back office.



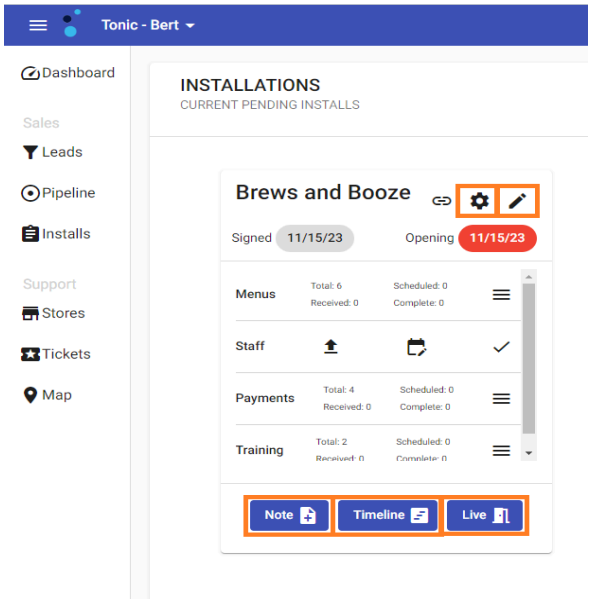


Partner Portal: Store Creation

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

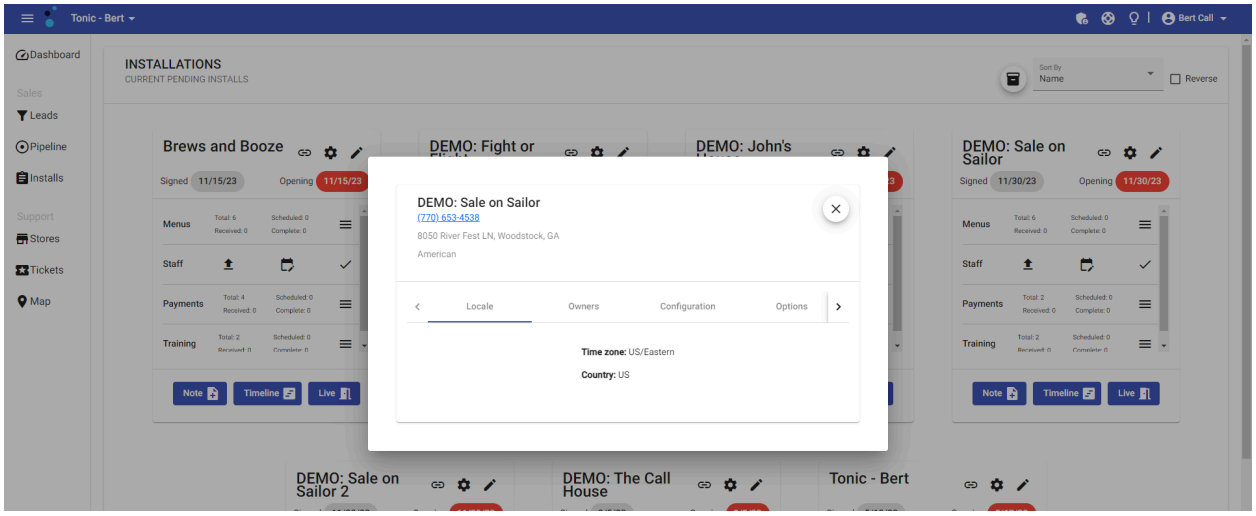


11. Icons: Gear, Pencil, Notes, Timeline, Live



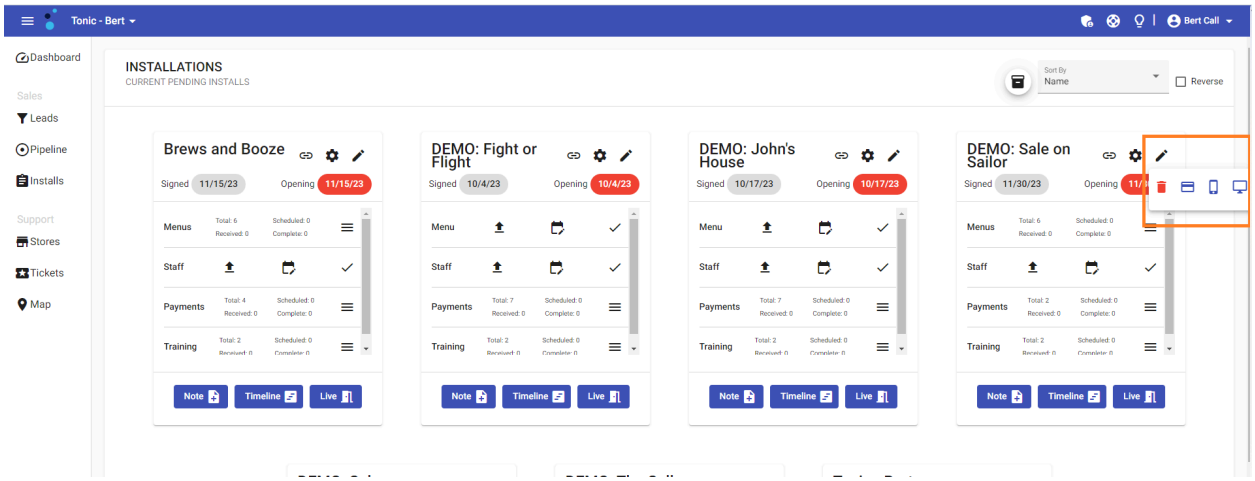
Partner Portal: Store Creation

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

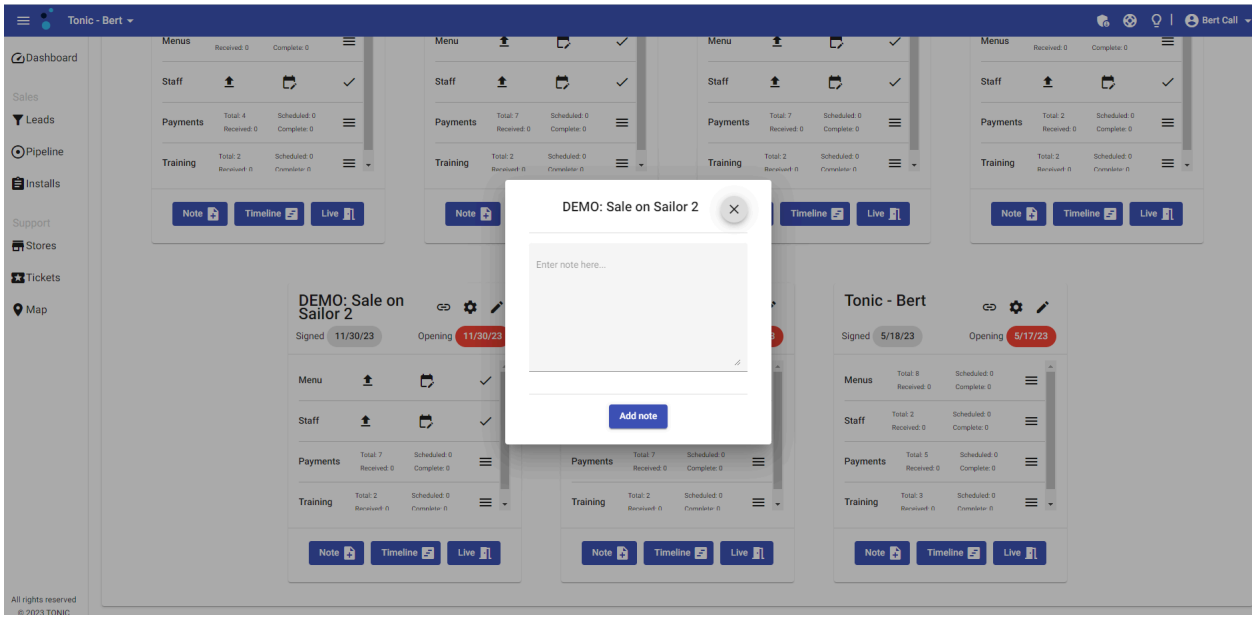


Partner Portal: Store Creation

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



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.



11.4. Timeline Icon: Shows the timeline of the store from inception to Live.

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.