**ONLINE ORDERING PROJECT INFORMATION FORM**

**COFFEE SHOP MANAGER POINT-OF-SALE INTEGRATION**

**This information will be used to set up your online ordering. It is essential that is correct. Incorrect or incomplete information will result in a delay in the Order Processing.**

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| **General Questions** | | | | | |
| Company Name: |  | | | | |
| Address: |  | | | | |
| City: |  | State: |  | Zip: |  |
| Owner Name: |  | Owner Email: | |  | |
| Approver (can be same as owner): |  | Title: | |  | |
| Contact Phone: |  | Contact Email: | |  | |

**The approver will be receiving instructions and information about online ordering via email, including the draft and the activation notice. Please make sure that you provide an address that is monitored regularly**.

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| **Store Status:** | | | | |
| Is the Shop Open? (Y/N) |  | If no, what is projected open date? | |  |
| Is this a multi-unit Install? (Y/N) |  | If yes, which location will be the “main” account? | |  |
| What POS System & version # are you currently using? |  | *Coffee Shop Manager 3.0 is required for OLO Integration* | | |
| What Windows OS and version are you running? |  | *Online Ordering is not compatible with Windows 2000. To check your version, click on the Windows icon bottom left of your monitor. Right Click on “My Computer” and choose Properties. Your version will be listed at the top.* | | |
| Do you have .net installed? (Y/N) |  | *Online Ordering requires .net 2 or higher.* | | |
| Do you currently have Broadband internet service now at the shop? (Y/N) |  | *If you do not have broadband internet service at this time then you must order this service now. Your orders CAN NOT be processed if there is no internet connection to the POS server.* | | |
| What service can we use to remotely access your system for setup? |  | *Logmein, gotomypc, etc.* | | |
| Do you want to promote “Likes” on your FaceBook page via OLO? (Y/N) |  | Please provide your Facebook Page Address: |  | |

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| **Website:** | | |
| Do you currently have a website we will link your online ordering to? (Y/N) |  | *If you do not have a domain name yet, you can purchase one now at www.godaddy.com* |
| What is the URL for your website? |  | |
| Please list all contact info for your webmaster &/or network administrator – we will need to work with them to link the online menu to your site: |  | |
| Do you want the current website design to guide the online setup? (Y/N) |  | |

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| **Credit Processing:** | | |
| Do you wish to process credit cards through your CSM POS integrated merchant account? (Y/N) |  |  |
| *If No, you can set up a separate merchant processing account just for online orders. This should be set up through Mercury Payment Processing. Please visit <http://bit.ly/106OQfg> to get this process started.* | | |
| Do you want to accept cash transactions? (Y/N) | | |

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| **Menu:** | | | |
| The menu that we will use for this project: |  | Can be found on our website | |
|  |  | Has been given to my account representative | |
| Are you planning to change this menu in the next 6 months? (Y/N) |  |  | |
| Do you charge a delivery fee? (Y/N) |  | $0.00 |  |
| Do you want to set up a 1st time online order discount? (Y/N) |  | If Yes, what discount would you offer? Enter % off or $ off order amount: |  |
| Please list & describe any other specials or coupons to be programmed in (or attach a flier/coupon page) |  | | |
| Your Logo, artwork and/or photos to be used: |  | Can be found on our website | |
|  |  | Have been given to my account representative | |

Our Basic Menu package includes 1 menu, up to 60 menu item and up to 10 coupons/combos. Any menu programming over this amount require an upgrade to our Premium package. If you need a larger menu or add-on packages, please consult your salesperson before proceeding.

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| **Store Information:** | | |
| What is your tax rate? |  | |
| What is your time zone? |  | |
| **Hours of Operation**: | **Opening** | |
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| --- | --- | --- |
| Day |  |  |
| Monday |  |  |
| Tuesday |  |  |
| Wednesday |  |  |
| Thursday |  |  |
| Friday |  |  |
| Saturday |  |  |
| Sunday |  |  |
| **Hours for Delivery Orders** | **Opening** | **Closing** |
| Day |  |  |
| Monday |  |  |
| Tuesday |  |  |
| Wednesday |  |  |
| Thursday |  |  |
| Friday |  |  |
| Saturday |  |  |
| Sunday |  |  |

**NOTE: This work will be performed and the menu built based on the information and criteria above. Billing will commence 7 business days from the time the first draft is provided. It is your responsibility to get the LetsGet link installed by your webmaster on your website and/or Facebook page.**

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*Thank You!*

*Please return your completed form to your sales representative via email or fax to:*

*866-808-7677!*