

Slide 1



Thank you for coming to, we appreciate your attendance!

Slide 2



My Name is Traci Shumaker, I am an integration specialist here at Mirus.
I have been with Mirus since 2012, which in my opinion was the best incoming class!
I have been in the Food and Beverage industry for over 20 years.
I was an operating partner at Sharkys Café in Latrobe PA.
Since I am addicted to the industry and just cant seem to leave, I am currently working part time at local restaurant State Fare Kitchen and Bar. I feel this helps with keeping me in touch with the issues, pains and advancements of the industry today and what the operators are currently faced with.

A couple things about me, I am from Pennsylvania, and being from PA you must know I am a huge sports fan and have an amazing city to back that up!
I love all of my hometown teams

The sun rises and sets around my Niece Sophia who clearly has me wrapped around her princess finger!

And I love all animals, 2 – this is our account coordinator Anna’s little pug, we had him dressed for her birthday, and this is nimba my little sweet one.

I am happiest when I have a combination of any of these things, Dogs and Steelers, Sports and Penguins, Sports and Sophia

Enough about me, and relax, this of course will be my longest slide!
So what are we talking about today...

Slide 3



Converting to a new POS system and teaming with Mirus for a smooth transition.

Right now, we have several clients that have OR ARE in the process of converting to a new POS completely, OR adding a new POS to their mix and they want to see consolidated data.

Using what we learned through these conversions, my presentation, will give you a couple things to think about when making the decision to move forward with this large undertaking.



I will also walk you through what this process looks like with your existing integrations in Miurs.

Client Conversion

- Conversions – 8 Client months
- Successful Conversion of converting stores to successfully complete

currently in the process /stem and 4 have

process in the past 12



As mentioned we have teamed with several clients as they went through this transitions.

As of late we have seen an uptick of conversion. I believe this has to do with so many 'new' systems breaking on to the scene and offering so many different solutions. There are now so many options available; options that offer a design that may be geared more directly to your business model. Options that offer more accessibility or detail, these new models are offering faster and more streamlined systems with capabilities that we have not seen in POS versions of the past.

In the past 12 month we have started 8 Client Conversions and successfully completed 4, leaving 4 clients still in this process.

I see a couple faces here that fit into both of these categories.

By a show of hands_ how many of you have gone through a POS conversion or added a new POS to your business while continuing to run the existing?



2 or more?

Prize!

We have Rikky that from Willies that has completed a conversion and Ashley Heartland is currently in the process, please get in touch with them if you have any questions.

Agenda

- Why Switch and What to consider
- The Mirus Process
 - Existing POS System
 - New POS System
- Behind the Scenes
- Tie Out
 - Internal
 - Client
- Roll Out

Lets get started. Whats on our Agenda today

We will review Why to switch and what you may want to consider prior to switching.



We will be discussing the Mirus Process for conversions into one of our standard POS integrations or into a 'new to Mirus' POS System

We will give you a little insight on what happens behind the scenes, then we will visit the tie out process.

We will end with discussing what a successful roll out is to you and answer any questions.

Why Switch

- Outdated System
- Accessibility
- Flexibility
- Cost
- Integrations with 3rd Parties
- Support and Ease



So Why Switch,

Well there are several reasons


- You may have an outdated Systems and it is no longer keeping up with your business or it may have been discontinued.
- There may be limitations to your old system that does not support the business growing.
- You may be a Franchise operator that is being forced into a global business system
- You may have Accessibility/Data Flexibility concerns. With today's growing interest of data awareness, data use and security, Your current system may not have the access needed and the flexibility to change existing permissions.
- You may have data rights concerns and security issues.
- Of course there is the Cost issue, is your current system not returning your investment. Are the hardware and software maintenance of your old system could be becoming unwieldy.
- Again with so many different systems now available to help with business growth and cost reductions, like Inventory systems, survey data, loyalty programs and enterprise solutions(the only one I am aware of is Mirus for that one) Your current system may not support 3rd Party integrations.
- The current support contract may have run out or has been discontinued.
- Or Updating they system and training could be difficult and putting strain on your staff and the system itself.

I am sure you can add to my list, however these are a few of the points that are usually at the top of the list.

As we move forward on WHAT to consider when investing in a new POS, you should expect to see overlap with the Why Switch.

What to Consider

- Your Business Model
- Cloud or Server
 - Data Storage
- Data Rights
- Data Transfer
- Set Up/all third party
- Cost
- Ease of Use/Training
- Growth Plan
- Support



You want to ensure, that what you decided you wanted in a new POS is actually being provided to you, the reasons and bullet points of why you want to switch should be check marks on the list of things you need to consider.

For instance, if you are switching because your current system does not offer support module, and you look at a model that has a couple other 'wants' .. and if you decide to move forward with that POS. AND only after you implement, you notice that it does not have that support module... then what...New system/NO support. Make sure your needs are being met.

So what should you consider,

- Again we have the system itself, does the new system support your business model
- Data Storage, Does this matter to you and your team
 - Are you going with a Cloud or Server Base? Quick TIL
 - Cloud – is a off site server that is owned/hosted and maintained by a third party. This typically has alternative ways to access data.
 - Server – Hardware, Leased or Owned by you, Maintained by you, this is usually accessed through a direct path/VPN to the server
- Does the system work with Mirus and I guess any other 3rd party solution
- Cost – Can you save money, where can you save money with this implementation
- Who owns this data, who can see this data, how much data is stored?
 - Who here has requested data from a system only to be told that it is not available or their information is proprietary to the system company
 - Is your information shared with other systems or solutions

- How much data is stored with the new system, we see with Xpient usually 60/90 days where Aloha is usually unlimited
- Will this new system waste hours on training, is it easy to implement at the store level
- Does the system support your growth plan and budget as you grow and expand?
- Support – is there software and hardware support, is there limitation to support and how is support offered?

Im sure there are a number of other things to consider however, just these few will get that ball rolling on the conversation.

Any questions or additional input on what you may want to consider or why your company plans on switching?

Slide 8



Alright, You've done the research, you have decided on what POS fits your model and brand.


You have signed the deal and you are ready to go

**Congratulations,
You're back in Integrations**

- Discovery
 - Expectations vs Reality
 - Lab or Live First Store
 - All Stores or Select
 - Data Transport
 - Connect
 - License
 - Support
 - Roll Out Plan

Expectations → *Reality*

Keep Moving Forward!!!



Many times we have a preconceived expectation on how things should go and how we want them to go.

Is this just a flip of a switch.. Is it as simple as installing MirusConnect and now data is available?

Not so fast! This is where we begin your integration process all over again. This is working with our team to develop a plan

We start with a simple discussion, the Discovery process...

What are your expectations and what is our reality –

This is a partnership and is largely dependent on our ability to work together. We ask questions because through the years we have become a little more than familiar with the nuts and bolts of the process. We are not trying to sabotage your timeline by asking What your transport schedule is, we want to set you up for success now, and not waste time by going back and fixing errors that could have been avoided by answering a simple question. One of the most important things to keep in mind is to Keep Moving Forward!

What are some of the questions that we will ask?

- **Lab or Live first Store** – Do you have a testing environment or sandbox we can play in to learn the lay of the land and prepare for the integration
- Are you converting or adding a **new POS** to the mix?
- **Are all stores transitionins**, or a select brands? Are you converting or adding a new POS to the mix?
- **We will ask about Data Transport** –

- how is data transferred? Is this an API? Are we connecting to the Store or an off site server?
- Will we be using the system that the majority of you are familiar with, which is **MirusConnect?**
 - Who does not know what MirusConnect is? Mirus connect is our proprietary software that gathers, encrypts and transports your data.
 - Those using connect will use either the License version or the support version.
 - License – This is where you and your team install, troubleshoots and runs recovery through the connect system
 - Support – With support, Mirus has access to your stores on this one, we will install, trouble shoot polling. and run recovery on data
- **Speaking of Recovery, we will ask** what is the recovery process for your new system?
 - do you need to request a date to be recovered through an API
 - Is this an function you can complete through MirusConnect?
 - Those who have the license version of connect, who has had to run recovery,
 - For those who have your hands raised and those who do not, do you have recovery documentation?
- In discovery, We will also discuss your roll out plan, are you expecting that once data is tied out at the first store, All Stores will be converted in a month or will you take a more relaxed approach and take 6months to a year. With Mirus and our ability to blend data from multiple systems, we allow you to customize this plan.

During the discovery process it will be determined if you have chosen a system that is currently one of our Standard Systems or is a 'new to Mirus' system.

Converting to Mirus Standard

What is Mirus Standard?



What is Mirus standard, I hear you whisper...

Mirus Standard is any of the existing POS systems we are integrated with

At this time we have #

Standard POS Models



Converting to Mirus Standard

- Transport Method/Schedule
- Mapping
 - Our Goal is to post new data to your existing Dimension and Measures
 - Adding or changing Data points
 - Adding New Metrics that were not a part of the old system
 - Standardizing Naming Conventions



Here we will be going into more detail of our Integration process, and what we discuss as our teams move forward with a standard implementation, again you will see some overlap on our discussion points between Standard and New.


With Standard, we talk about

- Transport – How is Mirus accessing your data is this an API or our MirusConnect Package.
 - What is your transport schedule? does your current system close the day at 4:00 am with available data at 4:15, while the new system doesn't have data until 6?
 - When would you like this data to be posted, typically we post data as we get it, however there may be a reason that you want all data at the same time. You may have another process on the backend that needs to be posted against transaction data and we need to wait until all POS Data is gathered to post.
- Lets talk about Mapping:
 - Mirus will map the new system into the existing measures and dimensions of your existing data base.
 - If there is disparate data Mirus will blend the data, posting to a single naming conventions. This will standardize your measures and dimension
 - Any New Metrics that are available will be created and mapped during the implementation process

Any questions on what Mirus standard is and if that applies to you?

Converting to a 'New' System

<p>POS Documentation</p> <ul style="list-style-type: none">• Transport Schedule• Data Availability <p>Compare</p> <ul style="list-style-type: none">• Data Granularity• Existing/New Metrics	<p>Mapping Standard Model</p> <ul style="list-style-type: none">• Map to existing Measures/Dims <p>Report Examples</p> <ul style="list-style-type: none">• Tie Reports for Mapping• Level of Detail
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You will see some similarities between the Existing and New POS Models. Like Transport Schedules and Data availability/Data metrics

- In addition for new pos we will request POS Documentation – We will ask for any gather instructions including access paths, access tokens or methods and calls for an API transport. Can you provide any samples of the data, whether it be a table format, xml format or text file.
- Transport – How is Mirus access your data is this an API or our MirusConnect Package.
 - What is your transport schedule? Again what time is complete data available?
 - When would you like this data to be posted
- A new discussion will be Comparing Data
 - What data is available, are all the same metrics available? Is Revenue Center Available, does it mean the same thing? In Brinks set up, revenue center actually points to an Item Major Cat.
 - Is Discount Name available, we have seen systems where this data is only available at the day/store level causing some clients the loss of Discount Naming.
 - Comparing data will lead to the question -- Will you be losing or adding new metrics?
- For New to Mirus systems, Mirus again will map to our standard model data base.. Only Adding when and if necessary.
- During this discovery process for both the new and existing will request tie reports prior to the implementation to ensure we are providing you with all the data points that are available in reporting. We will want to see the data at the level that is important to you.

So the existing and new are very similar in content, the new being little more detailed.

Any question on what the process looks like for converting to a new Pos in mirus

Lets move behind the scenes...



A couple lines of code, some magic dust and a wave of the wand
Poof – You have data.

You are now in....

Tie Out

What is Tie Out

- Internal
- Client



MIRUS

What is Mirus Tie Out – Process where you and I work together to come to an agreement on data validation

How do we tie out?



Mirus will begin the process on our side, Internal Tie Out. Using the test Store data against reports generated from the POS

Once a complete validation is done on our side, we then hand the tie out process over to you to begin Your validation

Tie Out

Why Tie Out

- Validation and Accuracy
- Build Team Confidence
- Builds foundation for move forward data



Why do we tie out, why is this so important?

Tie out will allow both teams to get familiar with the data posted and confirm its accuracy


This will build you and your teams confidence in the numbers. This is important with the roll out process. We want you to have trust in the Data that is being consumed by your users.

Tie out will also build a foundation for move forward data and future integrations. As your relationship builds with Mirus and your business grows, there will be added data points that may effect the current values posted. Is there a new Promo that you would like deducted from Net Sales? Is there Check Sales associated with a certain Tender that should no longer be included in Net? A validated base foundation is important piece of the success of Mirus.

Tie Out

Starting tie out and what is needed

- 1 Store multiple days
- Tie Reports
 - Detail of Granularity
 - What data/reports you look at today



Now that we know why we tie out, lets talk about How we tie out

At this point of the integration you have your single test store on line. With the Mirus Agent and gathers you should
Have multiple days online.

As Mirus was working its magic a couple slides back a member of the Mirus team requested tie report for the test Store/Dates posted.

What are tie reports???

Tie reports are reports that are generated directly from the POS system at the Store, like a DSR(detailed Sales Report) Timesheet, like Punch Detail Reports.

These reports will allow us to match your expected values directly from the source of the data.

How do we want to look at the data? At what level?

We are concerned about what you as a team are concerned about, Do you concentrate on Revenue Center Totals, Major Cat Details?

Give us reports of both? Do you drill down on Comp Totals and Discounts? Provide those too. Labor is a key reason for Mirus, Give us a detail punch report.

We want to look at the data as you want see it.

Internal Tie Out

Based on Reports Provided by You

- Compares directly to your POS reports_ apples to apples
- Ensures all Measures and Dimensions are posting
- Build Tie Dashboards and Reports
- Blends new data with existing POS



MIRUS

The Internal Tie Out Process – Again once the data is successfully Mirus will begin our tie out process.

We will use the Reports provided previously for the test store so we are comparing apples to apples. The importance of this is so we are using the source data to ensure the accuracy of data.

During tie out we will ensure that all of your Standard Measures and Dimensions are posting. The Standard dimensions and measures will be part of the Data matrix that is provided to you for any of our Standard integrations.

We will build a tie out Dashboard that will be filtered to your single test store, this will utilize the data metrics already available from your original POS.

We will ensure that all data points that are available from the new system are blended with your data and added to data base if previously not reporting.

Client Tie Out

We need your buy in

But, **Why?**



Mirus has completed the internal validation process and we are ready to give this back to you to get you to begin the client side of the tie out process.

This is a crucial point in the implementation, this is where we build your confidence and we are at a standstill until we have your thumbs up!
Why is your buy in so important?

How do you tie Out

- You are your own data expert
- What does that mean
 - What drives your business
 - How do you look at your sales/ business logic
 - Who will be viewing data
- Data granularity
 - Summary
 - Detail



 **MIRUS**

Because you are your data expert!
You know your data better than anyone!

What does that mean?

You know what drives your business, you know what your team considers the pain points and the must haves!

We are validating that Mirus is matching the source system. You are ensuring there is a strong solid base and configuring your specifics.

This may mean changing business logic, Updating calculations – Net/Gross. Assigning Different Names, creating New measures or dimensions.

This is where you will see the consolidation or the practice of fitting any newly named measures or dimension into an existing bucket.

For example, your original POS was implemented with Destination assignments and the New POS uses Revenue Center naming. Mirus will use the existing destination assignment to report your revenue



Why – so you can see a single report with the existing destination(including the 'new' revenue center

Any questions regarding the tie out process? And why it is so crucial?

Blended Data

Multiple Sources

- Job Schedules
 - Processing data
 - Data availability
- Reporting – Filters and Granularity
- Intraday



Thinking ahead, Now you have data posted from multiple sources:
What are you going to be looking at and what should you consider?

Job Schedules – What are they for each System, how do they effect one another. When is data available, is the data from the multiple systems dependent on one another.

Do you have a District Operator that is running 3 stores on Aloha and 4 Stores on Toast and the data is posted at different times? Should your alert times change while conversions are in process?

Reporting – How does this new data effect my existing filters and granularity or data levels. We will be walking through examples of this next.

Another point is Intraday – Your current POS has intraday, the new POS system will not have enabled intraday until the tie out process is complete and we have your final validation approval.

Now lets take a look at those report examples.

Report Filters

Major Category Filter - Commission

Filters: Major Cat Num = Beer
Time Selection = Custom

Store Num	Store Name	POS Type Name	Major Cat Num	Major Cat Name	Net Sales	Discount Amt
22001	Town And Country	Aloha	1	Beer	3,343.00	5.40
		Brink	84221200	Beer	6,998.00	0.00
Total					10,341.00	5.40

Major Category Filter - Commission2

Filters: Major Cat Num = 3
Time Selection = Custom

Store Num	Store Name	POS Type Name	Major Cat Num	Major Cat Name	Net Sales	Discount Amt
22001	Town And Country	Aloha	3	Beer	3,343.00	5.40
Total					3,343.00	5.40



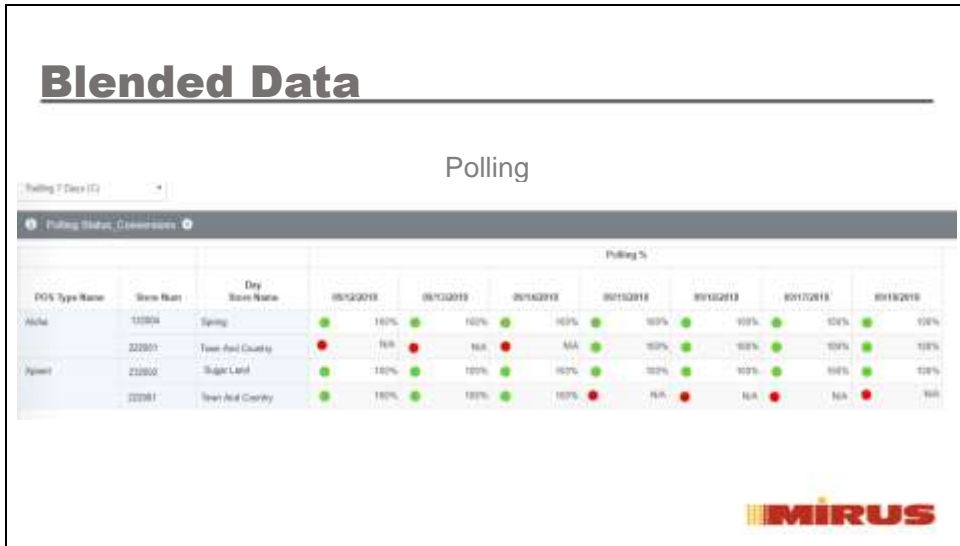
As discussed, When bringing on a new system and working through the conversions, there are things that need to be vetted. Do you have existing Reporting Filters that may exclude data?

The scenario presented here is that for your Town And Country store, you have recently converted to the POS System Brink.

Looking at a report showing the Major Cat Name = Beer and running across a time selection of the conversion. You will notice that the Major Cat Num from each system is Different – Aloha Has a Major Cat Num = 3 and the Brink System has Major Cat Num of some random 12 numbers. Totaling your 9000.00 for the time frame.

Now looking at your existing reports, when you only had the single system, are filtered by Major Category Num, in this case = 3. When the new system comes on line at Town and Country your existing reports will still only show the Major Category = 3, cutting out the new system entirely. This is shorting your reporting by 6000.00.

It is a best practice to look through your existing reports and permission to check and see when you are viewing the blended data you are getting the data from both systems.



Another reporting example to look at for blended data is your polling example. You will see some variances in the way your polling report looks and you will notice the Stores in both POS Type breakouts. You should also consider how you can use Mirus Polling reports to track and investigate polling as your Stores convert.

Looking at this report we have an Xpient client that is converting to Aloha, You can see the first part of the week Town and Country is Polling as an Xpient location, as the week continues and the conversion is successful you see the KPI from Xpient turn to red as not polled and the as Aloha they are showing a polled location.

How does this help, you can keep an eye on when the conversions are complete and successful

Blended Data

Granularity



POS Type Name	Store Name	Tender Name	Tender Amt.	Tender Count
Aloha	127	AMEX	57.00	0
		Cash	11,732.29	5,200
		Discover	170.36	15
		Gift Card	67.42	0
		MasterCard	5,167.45	402
		Visa	4,824.35	421



Now lets take a look at your blended data when it comes to granularity or levels of data. I mentioned earlier about systems having differing naming conventions, or the way they handle specific data points could be different. How can or do we handle that in Mirus.
Lets Look - As you see here this Aloha Store/POS has a single tender = Cash

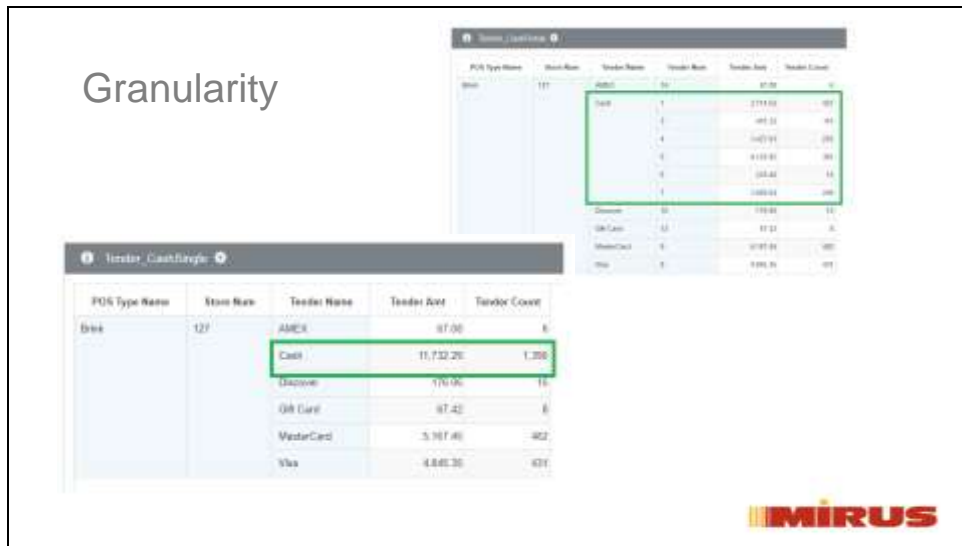
Blended Data

Granularity

POIS Type Name	Store Num	Tender Num	Tender Name	Tender Amt	Tender Count
Brink	127	1	Cash	3,714.52	427
		3	\$5	416.32	116
		4	\$10	1,427.63	203
		5	\$20	4,125.82	201
		6	\$50	218.46	15
		7	Exact \$ Amount	1,629.54	248
		8	Visa	4,845.75	431
		9	MasterCard	5,167.45	462
		12	Gift Card	67.42	8

When we take a look at the new system coming in, in this case Brink. They treat their cash handling with 4 plus Tenders that all speak to Cash.

Are you going to have to know and sum all of the Cash Tenders to get accurate reporting? What does this look like for your future reporting?



This is what we can do, We can simplify and assign a single tender name that includes all of your Tender Nums, from both systems. In this case you are seeing both systems in the first report. The Cash Tender Num = 1 was equal to the Name 'Cash' and you can see here we assigned the other 'Cash' Tender Nums to the same Name.

For the second report you see that we have removed the Tender Num to provide a single row Cash Tender that simplifies and condenses your report.

Does any one have any questions regarding reporting with filters, polling or implementing multiple POS systems into streamlined reporting?



We are almost across the finish line!!!
Our last topic is roll out!

Once you have completed validation and we are successfully polling and posting your test Store, we begin the roll out.

This is your plan on the conversions...this is your timeline that you set, and we follow. You set the pace

We depend on you on to keep us updated with your roll out schedules and your future business plan growth.

Partnering with Mirus

- Coordinate Store Conversion
 - What we need for a new Store Set Up
 - When do we need this information
 - How do you pass this information
- Continued Tie Out
 - Issues not seen yet
 - Additional Logic Updates



Our partnership starts and at the first handshake over the contract and continues throughout.

Communicating with us during your roll out will be a key in making this transition efficient and effective. Once we have the plan on conversions we will need certain things from you.

What we need for Store set up

- Store Num
- Any credentials needed to access the Store(API Access Tokens/SFTP locations)
- The Conversion Date, of course we will need this! And for reasons other than the obvious! Which of course is knowing the effective date of the switch. This may also effect your labor posting. In typical Mirus gathers labor and repost a trailing 15 days, so what happens when you convert and we begin to polling a new Store and we are getting labor from a second source that doesn't have the labor. We change the posting logic ensuring that the existing data does not get edited. We begin by growing the trailing days to the total of 15 on the new system

When do we need the set up information, we will want this as soon as possible, at a minimum a week in advance. Of course we understand that things happen and there is always a chance of this changing. We just ask any changes to the roll out plan are communicated as they are known,

How do you pass this information, contact your account coordinator, if they are not available you can reach out to Helpdesk with the needed information.

What else will be needed from you and your team, your eyes on the project. You are in tie out as long as we are active in conversions. This will address issues that may not have been seen in the first store or capture different handling of data. This may result in additional business logic updates

Conversion Success

- Researching
- Discovery
- Communication
- Reporting
- Best Practices



We did it! We're done!

What made this a success

- Proper research from the beginning, is what you decided you wanted in a new POS is actually being provided to you. Yes!
- Discovery – was all of the information needed provided, did we set realistic goals? Yes
- Communication – Were we able to work on a team and depend on one another to keep moving forward? YES
- Reporting – Did we consider, existing filters and naming conventions, did we address this issues prior to them effecting reporting negatively? YES
- Best Practices – Were we proactive in our roll out plan, did we keep our operators in the loop of what changes are coming? YES

There we go! That simple! 😊

Questions



Does any one have any questions or some experiences they would like to share?

Emily and Traci



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UP NEXT:

Tips on Operational Reporting

By Terri Pham Gonzalez

