



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 ExchangeSM Restaurant Solution. This knowledge will enable the First Data Clients to educate merchants about how they can benefit from the First Data® POS Value ExchangeSM 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

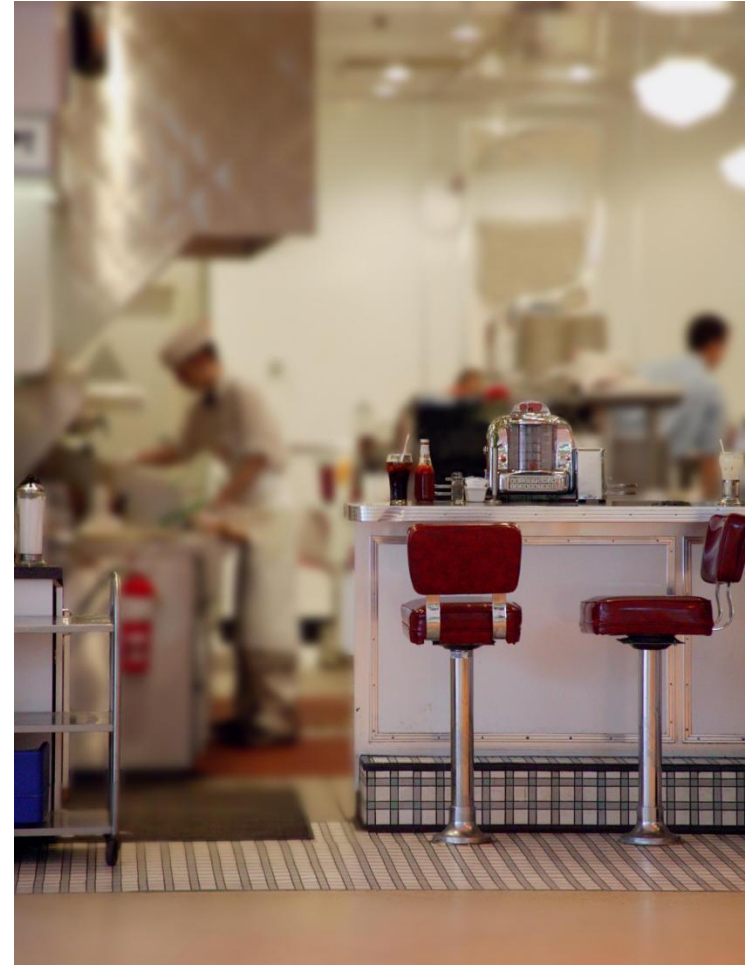
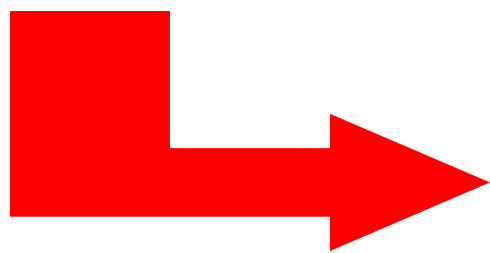
Objectives

- 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



DINERWARE DEMO

3/6/2008 - 8:44:21 AM

Welcome. Use 1111 for manager access.
This is a basic design that you can expand
and customize. Rename objects for your
own use.

Enter PIN

7	8	9
4	5	6
1	2	3
CLR	0	
<<		

Fresh Sheet

10 oz Ribeye

8

2.9.0.2864 (brain: L-C9HMSD1 10.238.8.153)

Copyright 1999-2007, Dinerware, Inc

The screenshot shows the Dinerware POS interface. At the top, it displays 'FIRST DATA' and 'Demo User (Manager) 2:18 PM'. Below this is a grid of menu items with buttons for 'Draft Beer', 'Bottle Beer', 'Pub Grub', 'Salad - Seafood', 'Entree', 'Sandwiches', 'Glass Wine', 'Bottle Wine', 'Whiskey', 'Vodka', 'Rum', 'Pasta of the Day', 'Porterhouse', 'Sirloin', 'Ribeye', 'Chicken Fried Steak', 'Hawalian Sirloin', 'Chicken Strips', 'Chicken and Jo', and 'Wings and Fruit'. The 'Entree' button is highlighted. At the bottom, there are buttons for 'All Tickets', 'List View', 'Hide Authorized', 'New Ticket', and 'Cash Drawer'.

2:18 PM	Bar 2	00.01
2:17 PM	Inie	011.95
2:17 PM	Mike	022.26
2:17 PM	Dining 1	06.45
2:16 PM	Bar 1	02.12

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 software



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

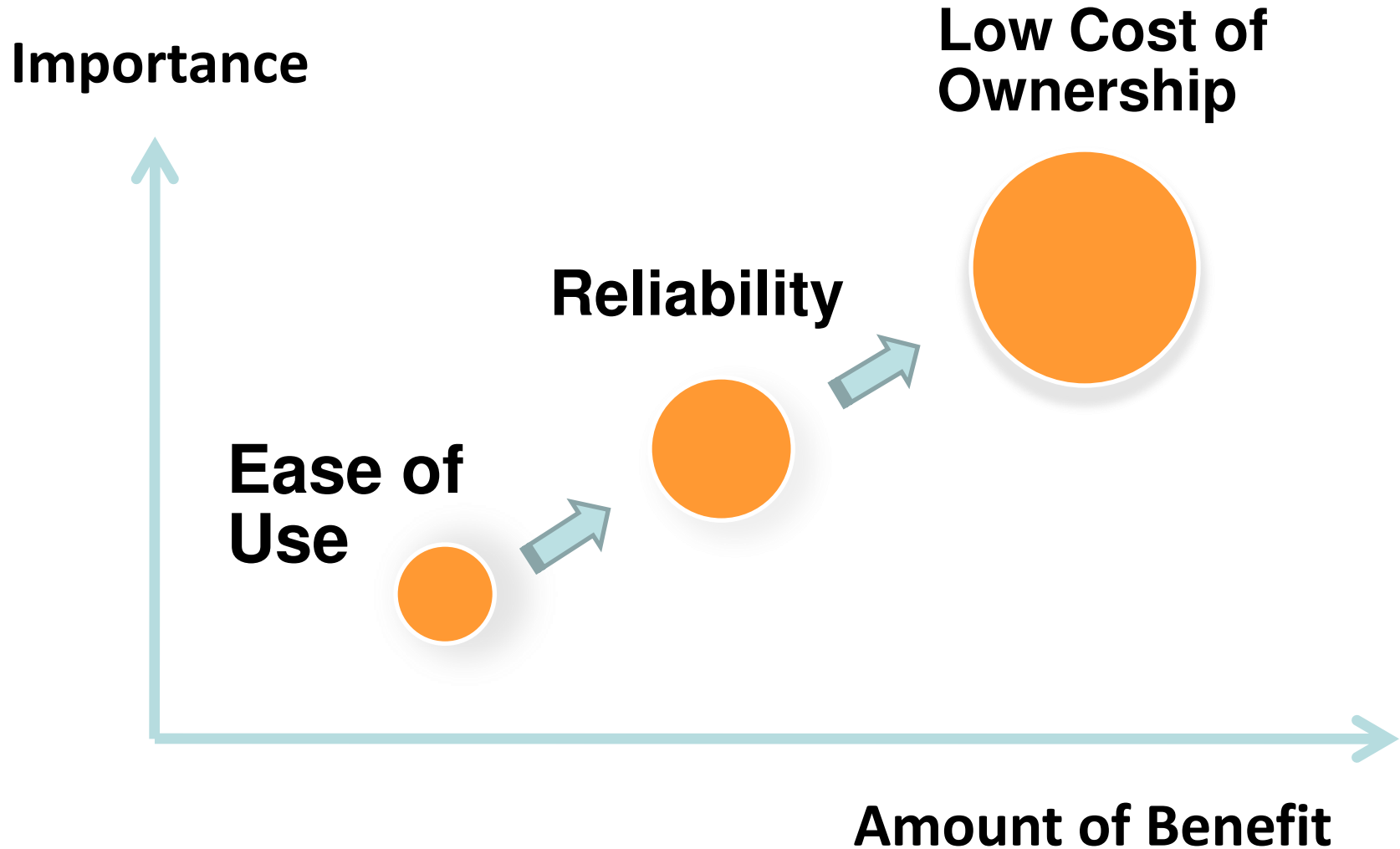
Why Dinerware?

- 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

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

Food Service from A to Z



Hot Dog Cart



Hotel



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

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

....And Not so simple

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

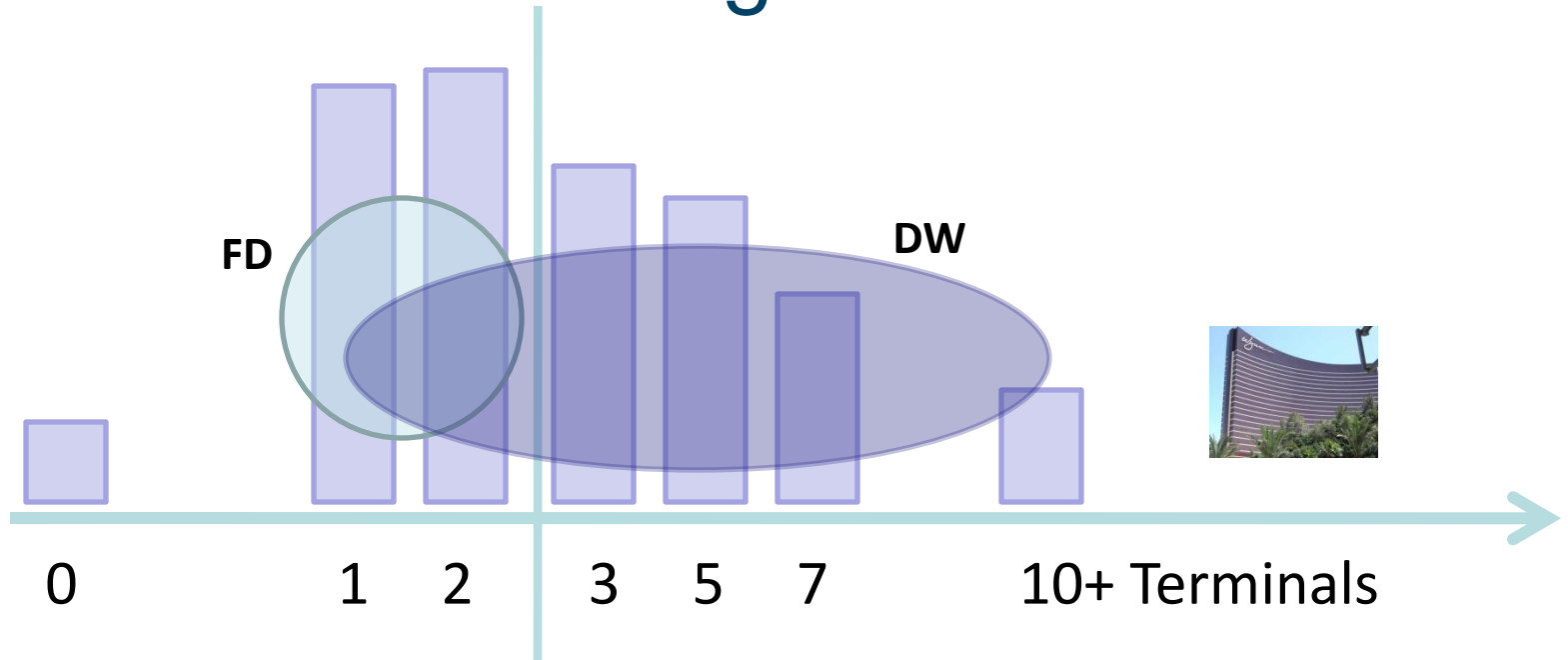
Target Markets for 1 to 2 Terminal Establishments

- Fine/Casual Dining
- Bars/Pubs
- Nightclubs
- Coffee/Cafe
- Quick-Service
- Pizza*
- Diner
- Health Food/Juice Bar

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

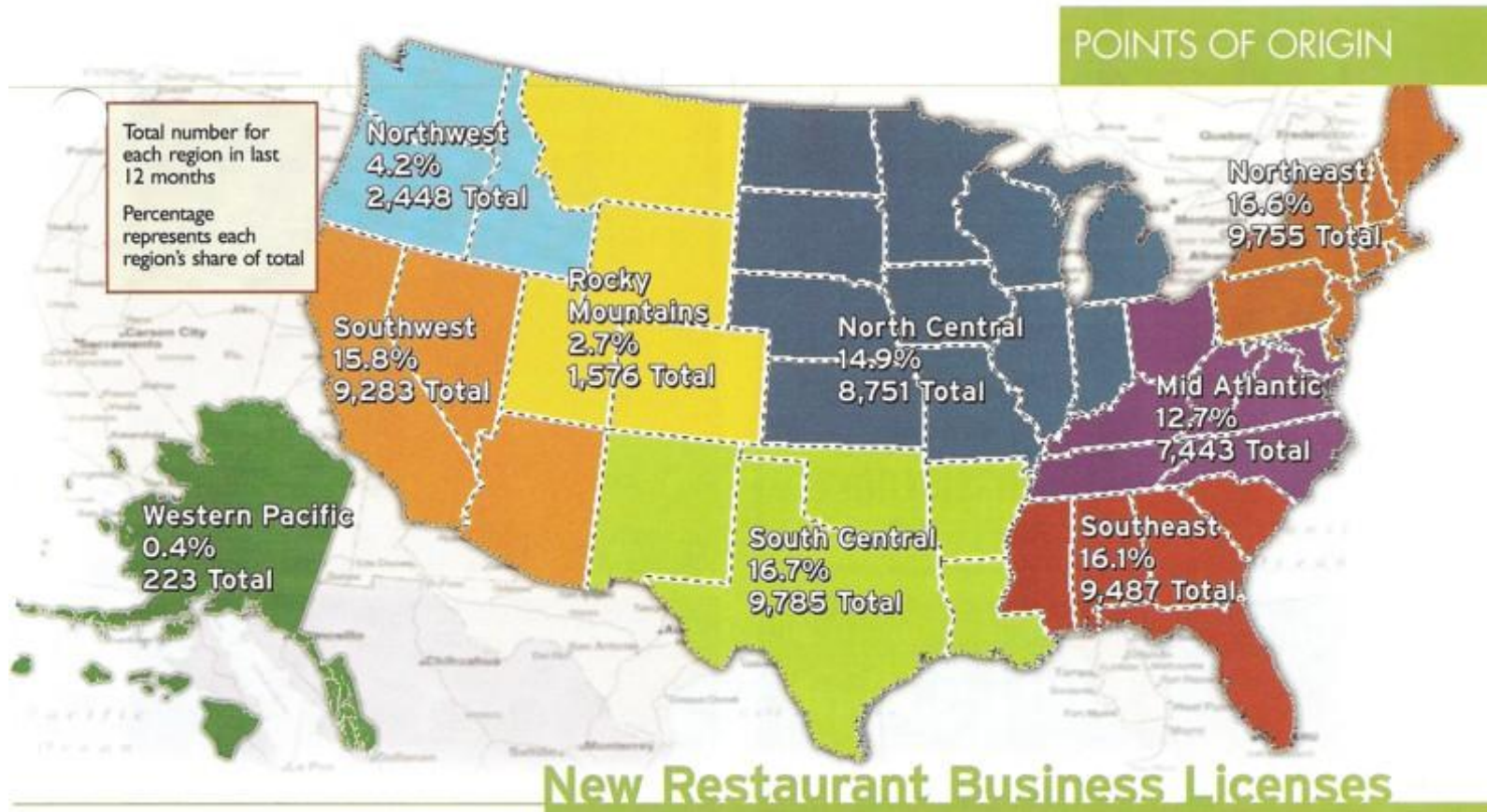


Market Opportunity Favors 1-2 Terminal Sites

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 ExchangeSM 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

•1 – 2 Terminal Locations

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

•Legacy Competitors

•3 Plus Terminal Locations

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

Supported Transaction Types

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

Sample Receipts

*Alternate
Kitchen Names*

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

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”.

FIRST DATA Setup Credit Card System

Use Integrated Credit Processing
Configure your merchant account using the Brain application.

Tip Reduction Percentage % *

Use this option to charge your staff for credit card fees on tips.

Finalize credit cards immediately as a Sale with no tip.

Print Signature line on CC sale slips

Include Guest Check detail on sale slip

Show Tip Hints on Slips

Do not print a Slip on postauth.
Leave this unchecked to print a postauth slip.

Refund money to a credit card.
NOTE: Normally, do this by re-opening the ticket and choosing the payment to refund.

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.

The screenshot displays the First Data Manager interface. At the top left is the First Data logo. A green arrow button labeled "Back to Tickets" is at the top center. A red power button labeled "Exit" is at the top right. The main area contains a grid of menu items, each with a description:

Menu	Set up your Menus, Categories, Pricing, Costs, Choices, Revenue Classes, Taxes, kitchen/bar printing, and other options concerning the items you sell.	Daily	Daily tasks and reports such as close of business.
Employees	Manage information about your employees, including PIN codes and access to restricted functions.	Fresh Sheet	Fresh sheet quantities and ordering.
Jobs	Set up jobs for your employees.	Labor	Manage Employee Timesheets and Tips.
Sections	Define Sections of your restaurant such as Dining Room, Bar, and Carry Out.	Batch	Manage Credit Card Batches.
Discounts	Discounts are used to set up happy hours, coupons, and standard customer or employee discounts.	Report	See timely reports about your business.
Void	Define the particular reasons allowed at your establishment for the voiding of tickets or items.	Tickets	See all tickets and reopen closed tickets.
Advanced	Enable and configure Delivery.	Messaging	Manage Messages.
		System	General options for receipt headers, business hours, automatic gratuity, login security, and credit cards.
		Printers	Set up and name devices such as printers and cash drawers connected to this computer.

At the bottom right, there is an "About" button. The bottom left corner shows "Version 2.9.0.2939" and the bottom right corner shows "Copyright 1999-2008".

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
- POS Value Exchg Rest Kitchen Printer Pwr Cond
- POS Value Exchg Rest Installation
- POS Value Exchange Restaurant Software
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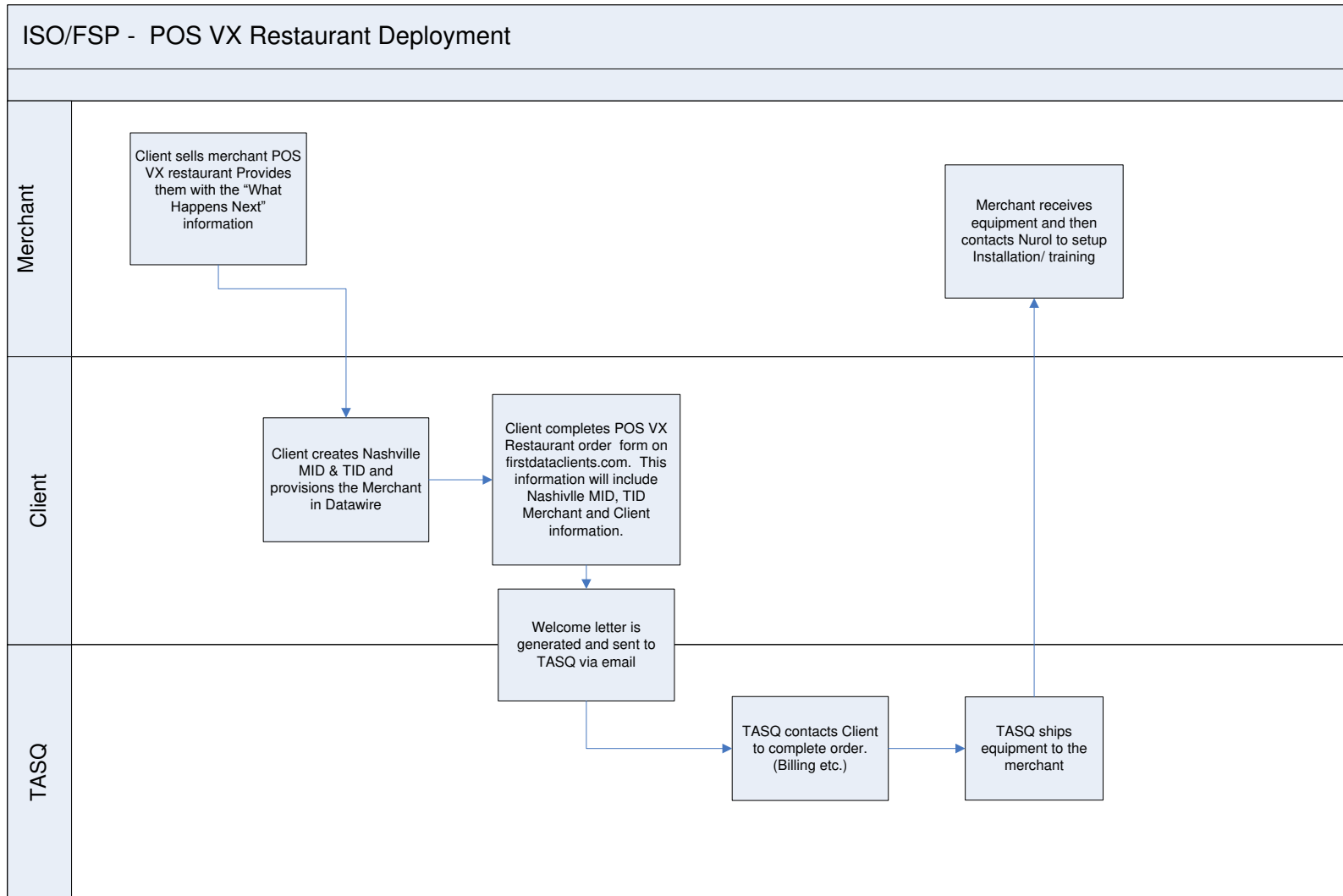
Optional Peripherals

- 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





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

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

Note: You need to provision the account through Datawire.

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Please complete the fields on the following form to request deployment of the POS Value Exchange Restaurant product bundle. Questions related to this form should be addressed with your Account Executive.

* Indicates required fields

General Information

* Client Name:

* Client Representative eMail:

* Client Representative Phone: () -

* Omaha SYS/PRIN: /

* Omaha Merchant Number:

Purchase POS Value Exchange Restaurant

Request Optional Accessories

Base Mount Pole Display: Yes No

Cash Drawer:
(requires Cash Drawer Splitter Cable) Yes No

Dot Matrix Kitchen Printer:
(requires Kitchen Printer Power Conditioner) Yes No

Additional Station Bundle: Yes No

Additional Server Cards: Yes No

Select Purchase Type:

Cash


First Data Global Lease

Merchant location Information:

* Merchant DBA Name:

* Merchant Address:

* City:



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 at each Point of Sale Station as well as each Kitchen Printer location.**
 - **High Speed Internet must be supplied at the system router location (a NetGear router is included). Dial-up and wireless will not work. 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. Be sure to use only the CAT5E 568B Standard (RJ45 Ethernet Cable). 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. Be sure to use only the CAT5E 568B Standard (RJ45 Ethernet Cable). 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 at least 2” in diameter.**
- **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.**

What Happens after the Sale is Closed?

Customer Initials: _____

- **What to Expect Now**

- **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 DO NOT OPEN THE BOXES. 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.

- No training is provided at this time.

- 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.

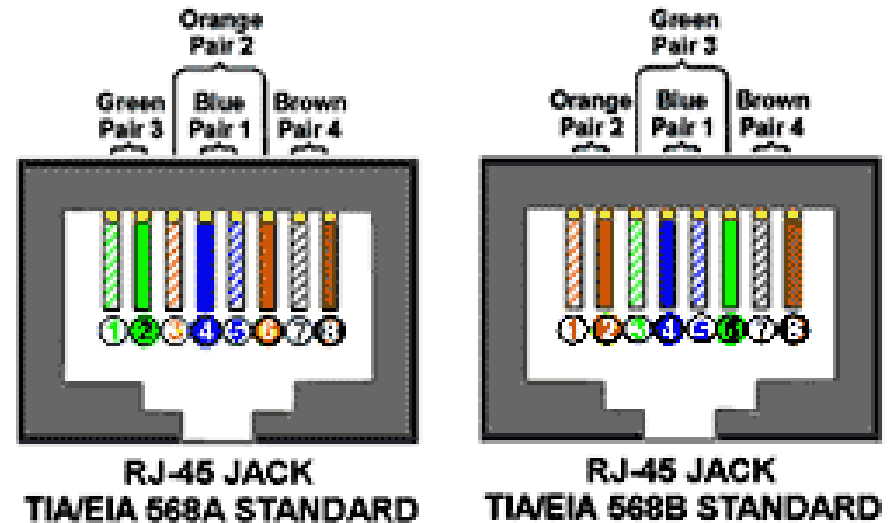
What Happens after the Sale is Closed?

- **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.

Site Walk Through: Network Cables

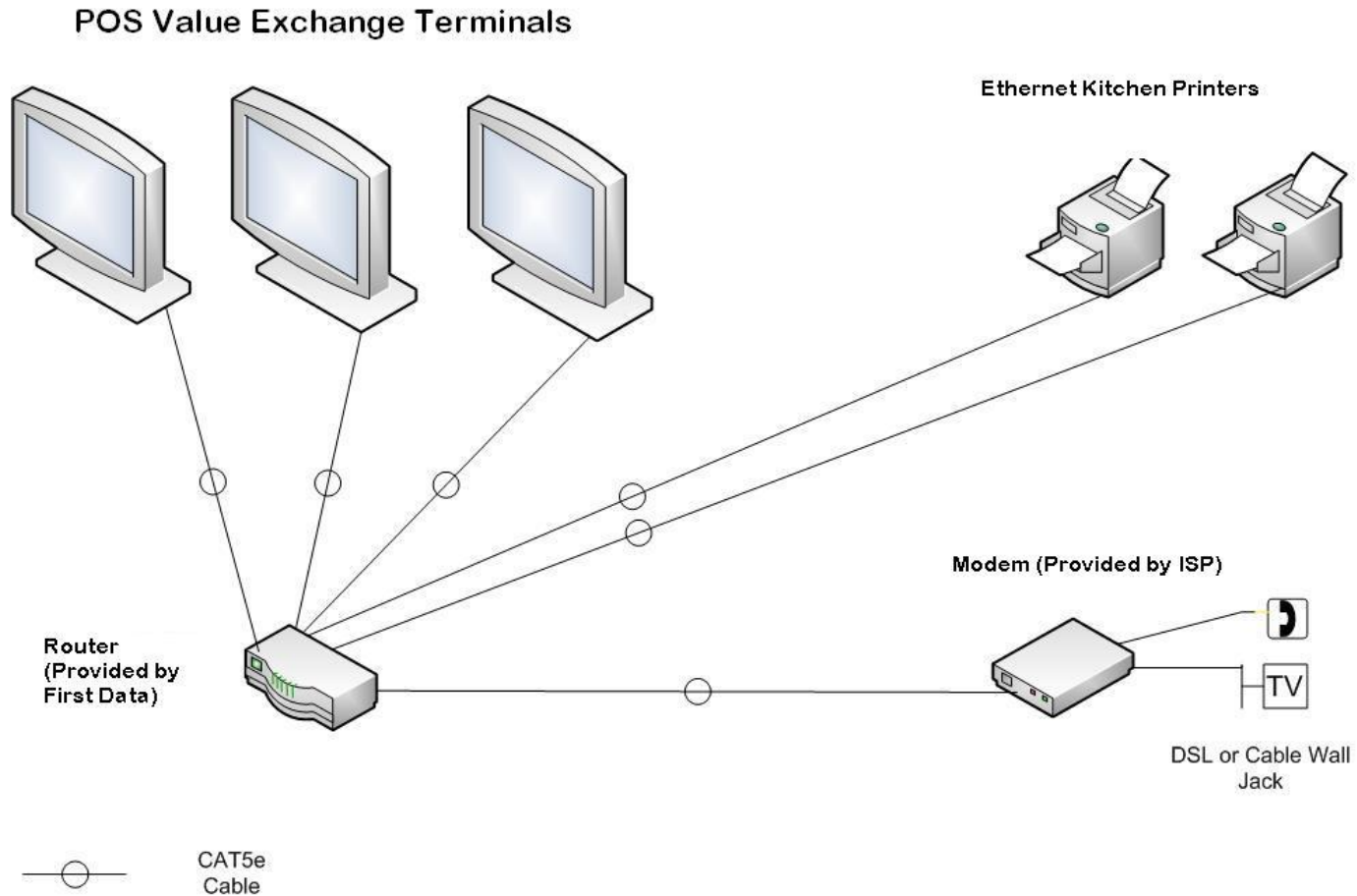
This MUST be setup prior to Ingram doing Install!!!!

- Installation
 - Electricians
 - CAT5E, 568B Standard
- Inspection
 - Possible interference
 - Placed strategically
- Testing
 - Fluke



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.

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."

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.
 - Call during the proper hours of operation
 - Prompts:
 - English or Spanish options (1=English 2 = Spanish)
 - Enter MID (merchant will need to enter their 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

