Welcome to Lula!

This info document is intended to provide an overview of the time and tasks needed to complete onboarding with Lula. The details are only *estimates.* Unique interactions or setups could require additional time.

Program-Wide Setup Tasks

The following tasks apply to the overall program launch regardless of store count. Store-specific items are listed below.

I. **Account Creation / Store List**

    Who is needed: Franchisee Program Manager
    (Anyone designated by Franchisee as main point of contact)

    What to do:
    - Stripe payment account setup (email, credit card to be charged for each store's monthly fixed fee) OR bank draft setup (for alternative quarterly billing). Links and instructions are provided by Lula.
    - Store list submission - we will need a list of all stores to launch with address, store manager, phone, email, store hours, alcohol (yes/no), prepared food brand (if any), and an upload of the alcohol license for each store (share drive upload).

    Time Estimate:
    ~30 minutes total depending upon the store list availability and availability of licenses.

II. **Kickoff Call**

    Who is needed: Franchisee Program Manager

    What: 30-minute call to walk through the end-to-end process covering Delivery Service Provider setup, flow of funds, overview of the account management process (frequency of check-ins desired), menu setup, pricing update frequency, store manager training look-ahead, login credentials, tablet shipment (as needed) and setup, support contacts, timeline and answering any specific questions.

    Time: 30 minutes

III. **Integrations Work (SSCS or other)**
     Who is needed: Merchant Program Lead and/or IT support team. SSCS rep is often used for assistance.

     What: Pricing and Inventory syncing

Update inventory levels (one-way sync): Getting inventory and pricing updated from SSCS or other systems to the Lula System is set up as a small script that runs to extract inventory data and sends it directly into Lula.

Time Estimate: The time investment for IT and Program management are minimal and really only needed for providing credentials, links and for validation afterwards. This process is a one time setup no matter the store count assuming all stores use the same system. There is no charge for setup.

IV. Accounting Configuration

Who: Accounting Lead / Franchisee Program Manager

What: Video call to set up Lula as an accounts receivable vendor to receive payments (every two weeks). Lula supports custom reporting requirements (i.e., FTP data feeds, dashboards) to allow for ease of access to review transactions and aggregated payouts sent from Lula.

Time: 30 minutes
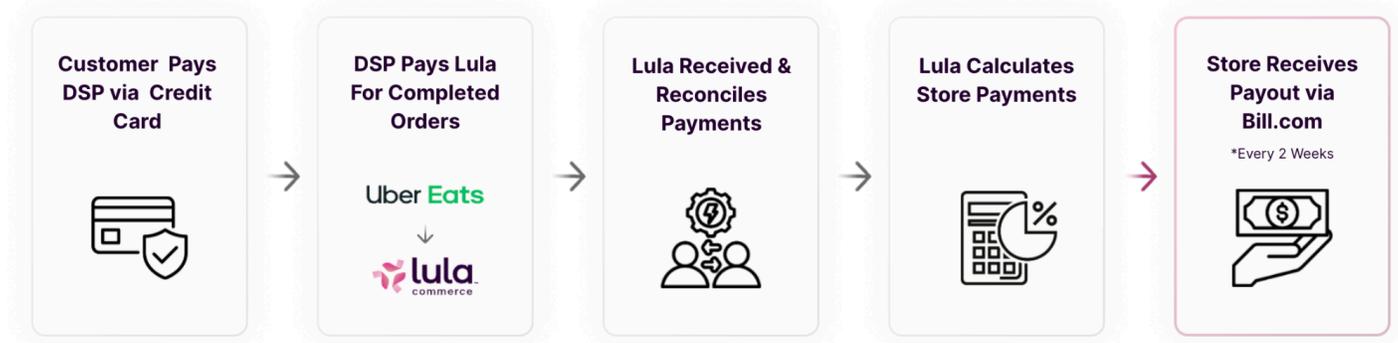
V. Final QA Testing

Who: Franchisee Program Manager

What: Video call to review the menu setup and tablet view, confirm network-wide training readiness, and finalize go-live.

Time: 30 minutes

Store-Specific Setup Tasks

The following tasks apply to each store that launches.

I. Receive tablets (10 minutes)
- Each store that requires a tablet will receive one via tracked shipment. The store contact will need to unpack and connect the tablet to WiFi.
- Each tablet will be pre-loaded with "Lula Store Platform" (LSP)

II. Tablet Log In (5 minutes)

- In some cases IT may need to unhide a WiFi network or manually allow for the tablet connection (>1hr)
- Each store manager will be provided with a unique log in over email
- The store manager will log in to the tablet (to LSP)
- Access to each module will be set according to desired access levels discussed in the onboarding call (Access to adjust store hours, open status, analytics etc).

III. **Store Manager Training (10 minutes)**
- Each store manager will be trained via a video provided online by Lula (watch at own pace).
- *Optional:* Store Managers wanting more training can view the Lula Help materials covering topics such as handing out of stocks, updating item availability (in between syncs), adjusting an order, etc.
- *Optional:* Store Manager training call(s) - we can host a video or audio-only call to answer any questions at a store level and go over common questions.

Ongoing

Post-launch ongoing commitments

Lula's dedicated account team will work with you on the ideal schedule. A typical schedule will be bi-weekly, but some merchants prefer monthly updates rather than more frequent. We can provide weekly or monthly email updates with reports to show progress.

Updated: 7/22/24