

INSTANT ORDER

Outline of the 7 Steps Used in the Clients Dashboard. Used for instantorder.academy - (Our Onboarding Process)

This form is designed to guide a new InstantOrder customer through the process of setting up their online ordering system. Each of the bold green points is what the client is expected to provide. Each of the other blue points is what the InstantOrder team is expected to complete.

1. The necessary business information needs to be submitted to InstantOrder.
 - 🟢 **By using the New Client Signup form the client needs to give InstantOrder the desired information used to build the client's system.**
 - 🟡 The onboarding team at InstantOrder has received and reviewed all submitted information.
2. The InstantOrder team needs control over the DNS records of the clients' website so a subdomain can be added.
 - 🟢 **The client has given the onboarding team at InstantOrder control over the DNS records.**
 - 🟡 The onboarding team at InstantOrder has accessed the DNS records & added the subdomain (Order.ClientDomain)
3. The InstantOrder team needs to set up a new ordering system attached to the client's main website.
 - 🟡 The onboarding team at InstantOrder has created a link or button on the client's website that redirects to the clients new ordering system.
 - 🟢 **The client has checked out the link or button and is happy with its placement.**
4. There needs to be a static IP address that is installed and working at the client's business.
 - 🟢 **The client needs to contact their internet service provider and get a static IP address for their business.**
 - 🟡 The onboarding team at InstantOrder has tested the IP address and it works.
5. A smart printer needs to be installed and tested.
 - 🟢 **The client has received the printer and has connected it to their router using a Cat 6 Ethernet Cable.**
 - 🟡 The onboarding team at InstantOrder has configured & tested the new smart printer so that it works with InstantOrder.
6. The credit card merchant account needs to be connected to the back end of InstantOrder.
 - 🟡 The onboarding team at InstantOrder has gathered the credit card merchant's information and has inputted it into the clients new online ordering system.
 - 🟢 **The client has contacted the credit card merchant and set up an account so that the money from online orders automatically goes into the client's business bank account.**
7. Have all food pictures uploaded to client's new ordering system?
 - 🟢 **The client has submitted a food picture for every menu item that is on their menu.**
 - 🟡 The onboarding team at InstantOrder has connected each food picture to the proper menu item so that each menu item is properly represented.