Multi-unit Onboarding

with MarginEdge

Your long term growth and success is our #1 priority, and it starts with an extraordinary onboarding experience. We offer bespoke Multi-unit Onboarding Packages to strategically set you up to maximize the power of MarginEdge.

Meet your team 👋

With a combined 60 years of restaurant experience, our team facilitates your onboarding with product expertise and a deep understanding of the nuances of your job.

Kim Brooks
Senior Implementation Manager

Role: Here to support you in setting up your account and connecting your tech stack

Years in restaurants: 7 as a host, admin and bookkeeper

Mary Patterson
Senior Implementation Manager

Role: Here to support you in setting up your account and connecting your tech stack

Years in restaurants: 14, most recently as a multi-unit group GM

Myhi So
Manager, Multi-unit Onboarding

Role: Here to set your accounting and operations teams up for success

Years in restaurants: 15, most recently as Operations Director

Ali Ivy
Multi-unit Onboarding Specialist

Role: Here to set your accounting and operations teams up for success

Years in restaurants: 24, most recently as an F&B Controller

See onboarding packages on next page

"Our goal in running an operation of this size, was to find partners we can trust, depend on, and ultimately grow with. The onboarding process with Myhi and Kim has given us confidence in choosing the right company as their timeline and vision for us hit on every level … **It's been a great experience for our company, and we look forward to seeing what else MarginEdge has in a partnership with Wolfpack Restaurant Group**."

Alec Wolf
Co-owner / Director of Operations
Wolfpack Restaurant Group

Multi-unit Onboarding
Package Menu

❧ Full Course ❧

- **A dedicated onboarding team**
- **Kick-off meeting** to define your onboarding timeline
- **Up to 8 training sessions** on topics relevant to your restaurants
- **Up to 3 project status**/general Q+A meetings
- **30 days** of invoice back processing
- **Integration setup support** for your POS and accounting system
- *New!* **Vendor Statement Reconciliation and Bill Pay*** white glove setup support
- **Up to 3 rollout phases**** each with:
  - 1 project status meeting
  - Any additional POS and accounting system integration support
- **150 recipes** per commissary and concept built by our expert team

❧ Chef's Table ❧

The Chef's Table package includes everything in the Full Course, plus:

- **Initial count sheet creation** for up to 7 inventory count sheets per restaurant
- **The Theoretical Reporting Setup Service**:
  - 2 calls per concept with our industry expert to show you how to map your POS buttons to product and recipes in MarginEdge (PMIX Mapping)
  - Copying PMIX to your other locations
  - Theoretical report training

* Bill Pay and Vendor Statement Reconciliation are only available in the U.S. (for now!)

** For 15+ unit restaurant groups, we offer up to 6 rollout phases for the both onboarding packages

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ADD-ON SERVICES
Side Dishes

Additional Virtual Training with your onboarding team	**In-person Training** for a full day for up to 20 attendees	**Theoretical Reporting Setup Service**	**Additional Rollout Phases**	**Recipe Setup Service** for an additional 150 recipes per concept

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PRICING
❧ Let's Chat! ❧

Depending on your group's size and complexity, prices may vary. We'll work closely with you to determine the best fit.

Multi-unit Onboarding Packages can either be paid in 12-month installments or in full the first month for a 10% discount.

OVER 100 MULTI-UNIT GROUPS ONBOARDED (MORE THAN 800 LOCATIONS!)

MAMAN COFFEE. BAKERY. KITCHEN	ALTAMAREA GROUP	N·R·G	SORTIS	PLANTA
39 locations	**8 locations**	**19 locations**	**23 locations**	**16 locations**

Chat with your rep to determine your custom onboarding package.

[me] marginedge