

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 73 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



Aislin Kavaldjian

Multi-unit Onboarding Specialist

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

Years in restaurants: 11, including as a GM, Area Manager and Director of Operations



Matt Taylor

Multi-unit Onboarding Specialist

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

Years in restaurants: 26, from dishwasher to most recently COO



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



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

See onboarding packages on next page

Chat with your rep to determine your custom onboarding package.

[me] **marginedge**

Multi-unit Onboarding Package Menu

PREMIERE PACKAGE



- **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*** setup support
- **Up to 3 rollout phases**** each with:
 - 1 project status meeting
 - Any additional POS and accounting system integration support
- **50 recipes** per commissary and concept built by our expert team

ELITE PACKAGE



Everything in Boost, plus:

- **1:1 session** to get your count sheets ready for your first inventory
- **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
- **Strategic finance support**
 - 1-hour accounting & finance mastery session with our in-house experts
 - First close support – pre- and post-close check-ins

** Bill Pay and Vendor Statement Reconciliation are only available in the U.S.*

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

ADD-ON SERVICES Side Dishes

Recipe setup service
If you need more than 50 recipes built

Commissary setup support

Theoretical reporting setup service

Invoice back processing
If you need additional months

QuickBooks Online setup support

PRICING



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

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



43 locations



8 locations



19 locations

SORTIS

23 locations

PLANTA

16 locations

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