

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



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



Georgina Cavendish

CFO in Residence

Role: Here to provide financial expertise

Years in restaurants: 15, most recently as CFO



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



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

🎧 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

ELITE PACKAGE

🎧 Chef's Table 🎧

Includes everything in the Full Course, 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
- **CFO In Residence Support**
 - 1-hour accounting & finance mastery session with our CFO in Residence
 - First close support – pre and post close check ins with our CFO in Residence

** 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

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

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!)



39 locations



8 locations



19 locations



23 locations



16 locations

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