Shift4 Prelaunch Process	Department	Pipeline
	Document No. & Version	1.1.5
	Last Updated	September 2, 2026

Purpose

This page documents the SkyTab pre-launch process from deal submission through installation and post-launch handoff. It is written to be copied into external documents when needed.

Ownership and Communication Rules

Who owns what

- Pipeline Manager: Ingrid Arban
  - Owns deal acceleration, missing items, coordination with Shift4, and moving deals through the pipeline.
- Shift4 Pre-Launch Specialists (PLS): assigned by Shift4
  - Own orders from application through installation, including menu programming and launch communications.

Contact rules (critical)

- Do not contact or work with PLS directly.
- Shift4 prefers one point of contact: the Pipeline Manager.
- If the Pipeline Manager or PLS includes a rep on an email thread and requests a response, the rep may reply-all in that thread.

- For underwriting "hold note" resolution: CC Ingrid and the PLS when emailing underwriting.

Data accuracy (Lighthouse)

- Double-check merchant email and details.
- Only one email can be used to register a Lighthouse account.
- Incorrect details can delay orders because account changes take time.

Deal tracking (spreadsheet expectations)

- Shift4 owns the tracker updates.
- Reps have view-only access.
- Check the tracker regularly for status and next steps.
- Provide requested information to Ingrid quickly.

Account Status (Shift4)

- 100 (New Account) = Account has not been reviewed by Underwriting yet.
- 200 (Declined) = Underwriting has declined this application.
- 300/325 (Cancelled/Terminated) = Shift4 Account was cancelled/terminated and closed.
- 330 (Seasonal Account) = Account was approved and merchant is only open for business seasonally.
- 425 (UW Hold) = There is a hold by Underwriting that needs to be resolved before the order can move forward.
- 500 (MID Build) = Account has been approved by Underwriting, but the Shift4 Account is still being finalized/built out.
- 600 (Approved/Not Live) = Account has been approved by Underwriting, but the merchant has not processed any credit card transactions.
- 700 (Processing) = Account has processed credit card transactions.

Inputs Required to Move Forward

Onboarding form

- The onboarding form must be complete and accurate.
- List the merchant's main contact as the primary contact.
    - If a sales rep must be the point of contact, document that exception clearly in notes.
- Include contact preferences:
    - Best times and days
    - Time zone
- Call out Spanish-speaking needs clearly (PLS and/or installer). Document any availability-driven changes.

Menu documentation

- Menu documentation standards and acceptable inputs are defined in Operational Checklists → Menu documentation rules (common delay drivers) below.
- Tax information must be accurate.
    - Shift4 will not guess tax rates or categories

Menu Requirements and POS Conversions

Existing merchant installed with no menu

Use this when a MID was installed with no menu because the merchant originally planned to use the POS as a cash register, but later needs a menu programmed.

This follows the path for the team that handles menu requests for existing merchants: the Re-Launch team.

Steps

1. Have either the rep/team or the merchant complete the Menu Request Form.
2. Include the menu programming details.
3. Submit the menu along with the form.
4. Include the request details for a menu presentation, including:
   - Merchant availability
   - Best contact information

Timeline expectation

- Menu requests have an approximate 3–4 week turnaround.
- The team will follow up once the submission has been reviewed and is in progress.

Toast conversions

- For Toast conversions, access may be required via a Toast user created for Shift4 using the email address skytabprogramming@gmail.com.
- Create a user using the Shift4 email address.
- The name can be anything.
- Setup can be with or without PIN.
- Job should be set to General Manager or Owner.
- After user setup, confirm menu permissions are enabled.
- Best practice: ensure permissions under "Admin Settings" are enabled (menu permissions are nested there).

Toast and Clover exports (when appropriate)

- Data exports (Toast/Clover) can help capture complete menu information, but do not position them as a 1:1 replication of the prior POS setup.
- Clover merchants: always include the Clover export with the order, even if the merchant wants the menu reprogrammed. Note on the order whether that export is being used.

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Scheduling and Timeline Expectations

Install date expectations

- Install dates entered on the application are requests, not guarantees.
- Do not treat installation as confirmed until a technician is assigned.
- Preferred days of the week are often more useful than a specific date for setting expectations.

Standard timeline expectation

- Set the typical timeline expectation to 4–6 weeks.

Two-day installs (policy)

- Merchants processing $150,000+ per month in volume receive two-day installations automatically.
- White glove and high-profile merchants may receive exceptions regardless of volume.
- Multi-location accounts may qualify for a two-day install even if individual locations do not meet the $150k threshold.

$150K+ white glove deal submission

- For $150K+ deals, email Travis instead of the meeting host and copy Ingrid, the host, and Angela.
- Include DBA name, MID, menu/install details, and any PLS or installer requests.
- White glove options may include requesting a specific PLS, specific installer, or extra coverage days.
- *Requests are subject to schedule and availability.*

Coverage expectation

- Full-day installer coverage can be requested, but open-to-close coverage is not guaranteed and depends on technician availability and merchant hours.

High-Level Timeline (Typical)

1. Application and onboarding form submitted
2. PLS assigned and initial outreach
3. Menu programming and validation
4. Menu presentation
5. Equipment shipment and delivery verification
6. Installation and training
7. Post-launch follow-up and ongoing support

Delivery Tracking and Post-Launch Handoff

- Verify delivery using all tracking numbers (not only one package).
- A handoff email introduces the post-launch contact:
    - Working hours
    - What post-launch supports
- Post-launch typically reaches out 1–2 days after install.
- Route immediate issues to 24/7 support.

Operational Checklists

On-site checklist (during the restaurant visit)

1) Timeline and install expectations

- Follow the Scheduling and Timeline Expectations section above (install-date expectations, 4–6 week standard timeline, two-day install policy, and coverage expectations).

2) Lighthouse setup and Launch Control (first steps)

- Have the owner open the Shift4 "Welcome Email."
- Help the owner set up Lighthouse.
- Help complete the first three Launch Control tasks:
  - Contact Info
  - Menu
  - Restaurant Info

3) Menu documentation (for programming)

- Follow Menu documentation rules (common delay drivers) below and submit the required menu documentation to Ingrid.

4) Physical gift card (if applicable)

- If the merchant uses physical gift cards, obtain one.

5) Team photo (optional)

- A photo with the owner and staff is optional but encouraged.

Launch Control: "Contact Info" (who to add)

Enter all relevant contacts so the right people receive updates.

Suggested contact list

- Merchant
- Rep

- Ingrid
- Partner (if applicable)
- Trainer (if they want notifications)

Menu documentation rules (common delay drivers)

Preferred inputs (fastest for programming)

- Customer-facing menu photos are the default.
- Include *all* menus:
    - Alcoholic
    - Non-alcoholic
    - Kids
    - Modifier lists (what modifiers apply to + cost)

Shift4 will not accept

- Links to online menus
- Photos of POS screens used as "menu documents"

If the restaurant only has an online menu

- Copy the full menu from the website into a Word document.
- Confirm all items, prices, and descriptions are included.
- Export to Word or PDF and submit.

Toast and Clover conversions (use only when necessary)

- Conversions can add up to ~2 weeks.
- Use conversions only if the merchant insists on a very close replication.

Launch Control caution

- Do not click "Complete Launch Control" until the rep is finished working in the tiles and has uploaded the menu.
- After completion is clicked, tiles cannot be opened.
- Route any menu updates through Ingrid and Pre-Launch.

Menu presentation scheduling rule-of-thumb

- If the merchant has not been contacted to schedule a menu presentation by 5 business days before the scheduled install, ask Ingrid for an update.
- If installation is more than 5 business days out, allow time for programmers to reach out.

Clover menu export (as described)

- In Clover, navigate to Inventory on the web page.
- Open Items.
- Click the three dots (upper right, below Account).
- Choose Export.
- Check each tab, then Export.
- Send the unedited Excel export to the Shift4 programming email (as listed above).

Post-visit checklist (after the rep leaves the restaurant)

1) Announce the deal

- Post in Slack in the "New Deals" channel.

2) Submit required forms

- Vendor New Deal Form (linked on the source page)

- Shift4 Dine Onboarding Form (linked on the source page)

Multi-location onboarding note (single email)

If multiple locations share the same owner and one Lighthouse email:

- The merchant should sign up for one location first.
- The merchant should send Ingrid the other locations and MIDs.
- Pre-Launch adds the additional locations to Lighthouse.

3) What happens next (pipeline routing)

- After form completion, Ingrid routes the deal to the assigned Shift4 PLS and coordinates next steps.

4) Internal Equip form (internal tracking)

- The Equip Internal New Deal Form is also required (linked on the source page).

5) Gift card conversion (if needed)

- Follow the additional information link.
- Email gift card details to Shift4 with the Shift4 Gift Card Conversion Form filled out.

6) Check the tracker

- A few days after submission, check the tracker and pin it.
- The "Orders" tab contains current deals.

7) Questions and support

- Check the tracker before asking Ingrid.
- Use the Equip email address listed on the source page if needed.

8) Finding the assigned PLS (visibility only)

- Merchants (and reps) can view the assigned PLS name, phone, and email in Lighthouse via Launch Control using the headset icon.
- Reps can access merchant Lighthouse via Partner Portal and the "Lighthouse login" button.
- Do not initiate direct contact with PLS unless explicitly asked to respond in-thread. Use Ingrid as the point of contact.

Equipment Changes and Add-Ons (Exhibit A)

Glass availability note: SkyTab Glass is currently "stock is limited". Many orders are switching Glass → Air before shipment, and over time Air is expected to replace Glass as the primary mobility device.

Rule: Use the Updated Exhibit A Form

- For additional equipment orders or equipment change requests, use the Updated Exhibit A Form.
- Email requests to the address listed on the source page.

Exhibit A guidelines

- New orders: no Exhibit A needed (auto-generated with the application)
- Additional equipment (pre-install): submit Exhibit A listing all desired equipment before installation
- Add-on equipment (post-install): merchant should order via Lighthouse if possible
    - If not possible, reps may use Partner Portal (with Partner Manager help if needed)
- Changing equipment (pre-ship): submit a new Exhibit A showing all updated equipment
- Changing equipment (post-ship): submit Exhibit A listing only the additional equipment

- Removing equipment (post-ship): no Exhibit A; follows a separate return process (merchant contacts Customer Service for return labels)

Optional Installer and Programming Certification

- Reps can choose to take Shift4 installer training and get certified.
- Access via Shift4 Partner Portal:
  - Learning
  - Learning Paths
  - "SkyTab Installation and Programming Certification"

Install-Day Guidance

- Confirm end-of-day processes are explained:
  - Open tickets
  - Adjusting tips
  - Clocking out
  - Printing reports
- Advise the owner not to update the system mid-shift.
- Confirm batch time and funding.
- Review core tools:
  - InCharge app
  - Lighthouse
- Review integrations:
  - Connect required integrations (DoorDash, Uber Eats, Grubhub)
  - Remove prior POS integrations

Requests for a Specific Installer

- Install dates are requests.
- Exception: for a $100k+ volume restaurant, or when an installer has history with an additional location, request a specific installer by emailing Ingrid.
- Requests cannot be guaranteed.

Installer Contact Guidelines

- Do not call, text, or email installers or service techs directly.
- Route scheduling changes and non-emergency requests through Ingrid.
- Limit direct contact to true emergencies and last-minute changes.

Remote Guided Install (RGI) Program Expansion — September 14th

- The RGI program is rolling out **system-wide on September 14th**, expanding beyond the prior pilot.
- **Volume threshold raised** from $20,000 to **$30,000 average monthly processing**.
    - Merchants processing **under $30K**: only remote install option available; onsite options grayed out.
    - Merchants processing **$30K or more**: complimentary on-site install at no cost.
- **Equipment tiers:**
    - **1 terminal:** always remote guided, no onsite option.
    - **2–3 terminals:** choice of remote guided or onsite (**$599 fee**).
    - **4+ terminals:** complimentary onsite install.
- **Handhelds, tablets, and KDS** are now eligible for remote guided install and no longer disqualifying hardware.

- **Kiosks and wall-mount workstations** count as workstations in the equipment count.
- **$599 onsite fee** is charged via ACH debit; waived if the merchant processes **$30K+ in any of the first three calendar months after go-live**.
- **60-day / billing tracking window:** tracking starts on the **1st of the month following installation**, regardless of install date.
- **Edge cases:** If volume warrants onsite but the system only shows remote, or unusual hardware configurations arise (e.g., 1 terminal + 15 handhelds), email the team for manual review.
- **Reps can assist on-site** during remote guided installs for merchants who struggle with the process.
- An **official slide deck** on hardware specs is pending; a partner portal / forum post is also expected but awaiting legal clearance.
- Reference: Remote Installation Partner Guide

Blank Orders and Menu Imports/Copies

- When a blank order is confirmed, the PLS team member submits it and the order drops off their queue. They are no longer assigned to it, even though their email still shows in Partner Portal.
- Requesting a menu import or menu copy from that PLS contact after a blank order is submitted will get pushback.
- Fix: if a menu import or menu copy will be needed, choose order type Shift4 Programming – Partner Install or Shift4 Programming – Shift4 Install instead of blank.

Wall-Mountable Workstations

- Wall-mountable workstations are available (model 1401s) at the same $29.99/month as standard workstations.

- Not yet selectable in Sales Center. Submit as standard workstations, then flag which units need to be wall-mounted on the onboarding form and/or in an email to the PLS team.
- Shift4 will process wall-mount units as add-on orders on the backend. No extra merchant paperwork if the fee is the same.
- Merchant responsibility: source and pre-install the wall mount before the technician arrives. The tech only attaches the device.

Equipment ordering vs Inactivity Fees

- Inactivity fees are charged per TID and are $150 effective September 1, 2026 (up from $75).
- If go-live may be delayed, order only 2–3 terminals to get the merchant running, then add the rest after install. Idle devices still accrue inactivity fees.
- Merchants can also add devices later in Customer Hub / Lighthouse.

Shift4 Inactivity Fee Risk (Install Timing)

- There is an ongoing issue where the inactivity fee clock may start when the application is signed (not when approved).
- If a site is not installed after 90 days, the inactivity fee may be charged weekly until the site is installed.
- To reduce surprises, plan an internal check-in around day 45 after signing for any deal that has not installed yet.

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Change Log			
Date	**Description of Change**	**Comments**	**Initiated By**
May 15, 2025	SkyTab/SkyTab POS into Shift4 Dine SkyTab Glass into Tablet SkyTab Air into Handheld		Hyah Takiang
June 22, 2026	Lighthouse to Customer Hub		Hyah Takiang
June 29, 2026	Added Existing Merchant Installed with No Menu		Ryan Raymundo
August 10, 2026	Removed Glass Stocks Old Update		Travis Damme
August 28, 2026	$150K+ white glove deal submission details added		Ryan Raymundo
September 2, 2026	Remote Installation (Coming Soon — US Rollout) section replaced by Remote Guided Install (RGI) Program Expansion — September 14th		Ryan Raymundo