Merchant Requesting a Tablet Workflow

If a merchant has reached out asking for a tablet, please check with the merchant if they are requesting a tablet for the first time or a tablet replacement:

Tablets take an average of 3-4 business days to ship.

If the mx is requesting a tablet for the first time:

Use this workflow if a Merchant inquires about receiving a tablet or not having a tablet.

Examples:

"I'm getting orders but I never got a tablet."

"I was supposed to get a tablet."

"The sales rep said they ordered me a tablet."

"I heard you guys give restaurants tablets. Can I get a tablet?"

"I don't want to use email/fax/phone anymore. Can I have a tablet?"

- If the merchant has a deck ranking of Enterprise or King or Ace, do not send "Tablet Fee" email macros these account types. They will receive a tablet free of charge. Please check to make sure they don't already have an equipment request <u>case</u>.
 - If not, create a <u>"Protocol Upgrade" request case</u> and let them know that once their tablet request is approved and shipped, they will receive the FedEx tracking information and an email letting them know their tablet is on the way if they provide a store-level contact email. Please put a note in the case notes that you are sending them a tablet and the tablet case #.
- If the merchant does **not** have a deck ranking of Enterprise or King or Ace, please send them the "Tablet Fee" email macro. Please make a note in the case notes that the merchant doesn't hit deck ranking.
 - If the merchant replies back and agrees to a tablet fee, please create the tablet case and escalate the case to the "Account Management" queue for the escalated team to add the tablet fee.
 - If the merchant pushes back on the tablet fee, please escalate the case to the "Account Management" queue

If the mx is requesting a tablet replacement:

Use this workflow if a Merchant is saying their tablet is broken, they want a new tablet, or they want a replacement.

Examples:

"My tablet isn't charging/turning on."

"My tablet screen isn't working."

"My tablet is cracked."

"We lost the tablet."

"The tablet was stolen."

"My tablet is broken."

"I want to replace my tablet."

"I need a new tablet."

"I have an iPad and it's not working."

1) Make sure the merchant is experiencing a hardware issue and not a software issue before replacing the tablet. Please do not replace for software issues. If the merchant is experiencing an issue not listed in the table, please do not replace.

Possible Reasons	Next Steps
Tablet isn't charging	 Please have the merchant check if: They've already tried other outlets and chargers (any tablet with a Unicorn Beetle case can use any generic micro-USB charger) They aren't using the tablet while it's charging. The tablet will not hold a charge if it's being used at the same time They are using a 2.4 amp charger

	block. If not, the block will not have enough power to charge the tablet
	 Please check if: The backend system for the tablet reports the tablet as charging
Tablet isn't turning on/unresponsive screen	 reports the tablet as charging Please have the merchant check if: Merchant has held down the power button for at least 5 seconds until they reach a black-and-white "Samsung Galaxy Tab E" introduction screen If the tablet was bricked and the merchant is seeing the below screen and says "Android is optimizing", have the merchant restart the tablet and let it sit for 20 minutes. If the tablet hasn't changed from below screen, replace the tablet.
Tablet is cracked because droppedTablet is water damaged	N/A

Tablet was lostTablet was stolen	N/A
 Have an iPad and want to replace it with an Android tablet 	N/A

- 2) Make sure the merchant doesn't already have a recent equipment request case.
 - a) **If yes**, let the merchant that once their tablet request is approved and shipped, they will receive the FedEx tracking information and an email letting them know their tablet is on the way if they provide a store-level contact email
 - b) If not, create a equipment <u>request case</u> and mark the request type accordingly. Please mark in the case notes that you have created a tablet replacement case and put the case number.

NOTE: All tablet replacements are free of charge to the merchant

Merchant Checking Equipment Status

Use this workflow if a Merchant inquires about the status of their tablet hardware request.

Examples:

"I asked for a tablet 7 days ago... is it coming? And if it is, where is it?"

"I was supposed to get a printer. Where is it?"

"Someone told me that they'd send me a replacement tablet... where is it?"

"The sales rep said they ordered a tablet for me. Where is it?"

Check to see if an equipment request has been submitted by checking the Merchant's cases in their account view page in SFDC.

- 1. Navigate to the merchant's Business Account Page
- 2. Open the full list of cases

Back to List: Email Templates <u>Cases (10+)</u>	ities [1] Related Contacts [3]	Open Act	vities [0] Activity Histor	(<u>10)</u> <u>Goo</u> g	le Docs, Notes	. & Attachments [0] Ad	ccount History (10) Lea	ids (0) <u>Approval</u>	History [0]
Business Account Detail		Edit Dele	te Submit for Approval	Log A Call	Send Email	Mx Marketing Request	Menu Team Request	Account Merge	Inverto 360
		Verify Addre	sses Nimda Store Page						
Store Information									
Account Name	The Cheesecake Factory (C	Chestnut Hill	- 0171) [View Hierarchy]	l.		Phone (6	17) 964-3001		
Store ID	1289					Account Status			
Parent Account	The Cheesecake Factory [F	Parent]			Acc	ount Record Type Pr	ospect [Change]		
Business ID	105								
Single Location (No Parent)									

3. Sort the **Case Record Type** so the arrow is pointing downwards. This will pull up all Case Record Types that are marked as "**Tablet Requests**." Look at the most recently opened Tablet Request case.

All equipment requests for tablets/printers will have the Case Record Type "Tablet Request" even if there's a printer/return label/etc.

Action	Case Number	Case Number	Case Record Type +	Contact Name	Subject Issue	e Category Priority	Date Opened	Status	Owner Name
Edit	29737518	29735484	Tablet Requests	<u>GM, CCF - 0171</u>	-	Mediur	2/15/2018	Received	New Partners (Activations)
Edit	29944835	29942801	Tablet Requests	<u>GM, CCF - 0171</u>	-	Mediur	1 2/23/2018	Shipped	Fama, Keith
Edit	34764090	34762056	Tablet Requests	CF (Chestnut Hill - 0171), The	-	Mediur	7/5/2018	Received	New Partners (Activations)
Edit	35417836	35415802	Tablet Requests	<u>GM, CCF - 0171</u>	-	Mediur	n 7/19/2018	Shipped	Sousa, Tyler
Edit	05681575	5679544	Support		The Cheesecake Factory (Chestnut Hill - 0171) - Dasher Live Forgot Items	Order - MX Mediur	4/7/2017	Closed	Aroche, Ruth

4. Click on the recent "Tablet Request" case and check the **Case Status.**

Case Detail	Edit Delete Clone	Submit for Approval Take Ownership	
Account Name	The Cheesecake Factory (Chestnut Hill - 0171)	Contact Name	CCF - 0171 GM
Management Type 🧧	EPM Managed	Contact Email	0171gm@thecheesecakefactory.com [M Gmail]
Opportunity	The Cheesecake Factory (Chestnut Hill - 0171)-	Contact Phone	(617) 964-3001
Account Deck Rank)		
		Case Owner	Tyler Sousa [Change]
Merchant has Wifi?	No	Case Owner Email	tyler@doordash.com
Product Type	Android Tablet (DoorDash Owns)	Last Modified By	Mark Johnson, 7/20/2018 6:58 AM
Request Type	Email to Merchant (Return Label Only)	Activate Centrally?	
Requested Tablet Delivery Date		Menu Completion Date	
Tablet Received Date		Menu Completed?	
Shipping Type	Expedited	SMS Activation Date	
Return Replaced Components?	2	Activation Notes	9
Broken Tablet Model			
Reason for Replacement			
Replacement Reason (Other)			
Charge for Replacement			
Include Marketing Kit?			
Track Fedex Status	Track -		
Track Status	Track -	Proposed Date of Activation	
Team Queue		Activated on First Attempt	
Case Age	360.00	Activation Date	
Status for Vendor	Legacy Partner Ready	Status	Shipped
Times Reopened	0	Delay Reason	
Menu Completed Date		Rejection Reason	9
Account Type		Rejection Reason Details	
Tablet Fee		Rejection Count	0
Language 🥥)	Date/Time Rejected	
		Ready for Activation	\checkmark

- a. Open or Approved: The request for a tablet has been approved by the Operational team. Explain that the request has been approved by the appropriate team and will be shipped out the day of approval with an average shipping time of 3-4 business days.
- b. **Shipped**: The new tablet is on its way to the merchant. Explain to the merchant their tablet request has been approved and shipped out. Provide the merchant with the FedEx tracking information.

- i. Note: If the **request type** is **Email to Mx (Return Label Only)**, **Shipped** as a **Case Status** just means a return label has been emailed to the merchant.
- c. **Received**: The new tablet has been received by the merchant. Provide the Merchant with the FedEx tracking link that will have the date it was received and who signed for the delivery.
- 5. Click on "**FedEx Track Status**" link for the tracking information. You can copy + paste the link to send to merchants.

Case Detail	Edit	Delete	Clone	Submit for Approval	Take Ownership		
Account Name	The Cheesecake Factory (Chestr	ut Hill - O	171)		Co	ntact Name	The CF (Chestnut Hill - 0171)
Management Type	EPM Managed				Co	ntact Email	0171gm@thecheesecakefactory.com [M Gmail]
Opportunity	The Cheesecake Factory (Chestr	ut Hill - 0	171)-		Con	tact Phone	
Account Deck Rank)						
					c	ase Owner	New Partners (Activations) [Change]
Merchant has Wifi?	No				Case O	wner Email	
Product Type	Android Tablet (DoorDash Owns)				Last M	Addified By	John Prilliman, 7/10/2018 2:09 PM
Request Type	Email to Merchant (Return Label	Only)			Activate	Centrally?	
Requested Tablet Delivery Date					Menu Comp	letion Date	
Tablet Received Date					Menu C	ompleted?	
Shipping Type	Standard				SMS Acti	vation Date	
Return Replaced Components?	Yes				Activ	ation Notes 🥑	
Broken Tablet Model							
Reason for Replacement	Other (please specify reason in n	otes)					
Replacement Reason (Other)	Mx received a replacement, neve 34492250	r got the r	eturn lat	bel. SFDC			
Charge for Replacement							
Include Marketing Kit?							
Track Fedex Status	Track - 354736070560553						
Track Status	Track - 354736070560553				Proposed Date of	Activation	
Team Queue					Activated on Fi	rst Attempt	
Case Age	600.00				Acti	vation Date 🥑	
Status for Vendor	Legacy Partner Ready					Status	Received
Times Reopened	0				De	lay Reason	
Menu Completed Date					Reject	ion Reason 🌀	
Account Type					Rejection Rea	son Details	
Tablet Fee					Rejec	tion Count	0
Language 🤅)				Date/Tim	ne Rejected	
					Ready for	Activation	✓

If you are unable to confirm any cases that have **Tablet Requests** in the **Case Record Type** field and you have checked that the merchant is <u>suited for an equipment request</u>, please <u>populate an equipment case</u>.

Merchant Printer Product Info & Troubleshooting Support

Use this workflow if a Merchant is having difficulties with their printer.

Examples:

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"My printer isn't working."
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"The printer isn't printing tickets correctly."
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If the merchant is having printer difficulty, please make sure the merchant is using a printer compatible with the Order Manager App.

Step 1: Ask merchant what printer model do they have?

- Bluetooth: Star Micronics (Model: TSP654IIBi2-24 GRY US T) (Part Number: 39481270)
 - Tell merchant to search for the model name on the printer. It will be located on the white flat surface at the front of the printer.



- Wifi: Epson Tm-u220b
 - The printer will have "EPSON" on the front of it.



If the merchant has an **Epson Tm-u220b wifi printer** and is having issues, please replace their printer. Please explain to the merchant why:

"We will no longer be supporting Epson printers moving forward. We can replace your Epson printer with a Star Bluetooth printer more optimized for our app. If you choose to replace your printer, you will receive a new tablet and printer. Our printers go out pre-paired with a tablet for easiest setup. You will also receive a return label with your tablet and printer. Please return your previous tablet and printer."

After merchant has approved replacement of their printer, please <u>create an equipment request</u> with "**Ship to Merchant (Tablet, Printer, Return Label)**" as the **request type** to get the old printer/tablet returned.

Not Receiving Orders

Use this workflow when the merchant says they aren't receiving orders.

Examples:

"My tablet isn't receiving orders."

"We have a tablet but we aren't getting orders on it."

Possible Reasons	Next Steps
Merchant is deactivated	 Go to store's nimda page Check permanent deactivations Check temporary deactivations Go to the Merchant Portal link on the Nimda store page Click on Business Hours tab Click on Special Closures/Hours Let the merchant know that they are deactivated and if they would like to
	reactivate
Merchant has wrong order protocol or confirmation protocol	 Go to store's nimda page Make sure their order protocol is: IPAD Make sure their confirmation protocol is: robocall_long_delay
Merchant has sound notifications turned off on their tablet	 Navigate to the Order Manager App settings (three stacked lines icon) Go to Settings tab in the Menu sidebar Make sure auto-confirm is toggled OFF, volume is on LOUD, and repeated ringing is ON
Merchant doesn't have Do Not Disturb override turned on for the app	 Swipe down with two fingers from the top of the screen for a mini dashboard Click on the gear symbol Scroll down on the left sidebar until you reach Sounds and vibration Toggle on "Do not disturb" so you don't receive order notifications for anything else besides the DD app Scroll down on the left sidebar until you reach Notifications Toggle "All apps" to be gray Toggle "Order Manager" to blue. This

	will ensure you receive tablet orders
Merchant is not receiving a lot of orders	Go to store's nimda page and check the date of activation and the thirty-day delivery count.
	If merchant has been activated for 30+ days and has a thirty-day delivery count below 30, they are not receiving enough order volume.
	If the merchant is interested in growing their orders and wants marketing/promotional opportunities, let the merchant know that there is a "Grow Your Sales" link at the bottom of every Weekly Recap email they receive.

If the merchant is not receiving orders and none of the above possible reasons are applicable, please either change the merchant's order protocol or temporarily deactivate them

Having Sound Issues

Use this workflow when the Merchant says their tablet isn't making noise.

Examples;

"My tablet isn't beeping."

"My tablet isn't notifying us of orders."

"My tablet isn't making noise."

Have the merchant navigate to the Order Manager App settings (clicking the icon with the three stacked bars)

Go to **Settings** in the menu sidebar

Once there, make sure auto-confirm is toggled **OFF**, the volume is on **LOUD**, and repeated ringing is **ON**.

Possible Reasons	Next Steps
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Auto-confirm is toggled ON (This will automatically confirm all orders and they will receive no order notifications)	 Have the merchant navigate to the Order Manager App settings (clicking the icon with the three stacked bars) Go to Settings in the menu sidebar Once there, make sure auto-confirm is toggled OFF/gray
Volume is set to Quiet	 Have the merchant navigate to the Order Manager App settings (clicking the icon with the three stacked bars) Go to Settings in the menu sidebar Once there, click the dropdown for "New order alert volume" and set it to Loud
Repeated ringing for new orders is set to OFF	 Have the merchant navigate to the Order Manager App settings (clicking the icon with the three stacked bars) Go to Settings in the menu sidebar Once there, make sure Repeated ringing for new orders is toggled on/blue
Do Not Disturb override is not turned on for the Order Manager App	 Swipe down with two fingers from the top of the screen for a mini dashboard Click on the gear symbol Scroll down on the left sidebar until you reach Sounds and vibration Toggle on "Do not disturb" so you don't receive order notifications for anything else besides the DD app Scroll down on the left sidebar until you reach Notifications Toggle "All apps" to be gray Toggle "Order Manager" to blue. This will ensure you receive tablet orders

Verizon Data

Use this workflow when the Merchant says that their LTE isn't connecting.

All of the DoorDash owned tablets are on Verizon data plans. If the merchant is having issues connecting to data, make sure that they are in a location with good Verizon data coverage.

Offline/Online

Use this workflow when the Merchant says that their tablet is offline.

Examples:

"The tablet is saying it's offline."

"The tablet is saying it's online and then it's offline."

If the merchant is saying that their tablet keeps flickering between offline and online or that the tablet says it's offline, that could mean three things:



Possible Reasons	Next Steps
Merchant isn't active on DoorDash	 Go to store's nimda page Check permanent deactivations Check temporary deactivations Go to the Merchant Portal link on the Nimda store page Click on Business Hours tab Click on Special Closures/Hours Let the merchant know that they are deactivated and if they would like to reactivate
Merchant has connectivity issues	 Ask the merchant if they have a Unicorn Beetle case on their tablet If YES: (This means it is a LTE tablet) Disable Wi-Fi from the tablet
	 Swipe down from the top of the screen for a mini dashboard

	 Locate the Wi-Fi icon. Tap the icon to disable the connection. Keep WiFi turned off Make sure "Airplane" mode is turned off as well
	If the above steps don't work, please verify sure that <u>Verizon data</u> works in their location.
	If NO:
	Enable Wi-Fi on the tablet
	 Locate the dashboard menu by swiping down (using two fingers) from the top of the tablet screen. Locate the Wi-Fi icon. Tap the icon to <i>turn off</i> the Wi-Fi signal connection. Tap the icon to <i>turn back on</i> the Wi-Fi signal connection.
Merchant is on phone order protocol	 Navigate to the store's nimda page Check their order protocol If it is PHONE order protocol, change their order protocol to IPAD order protocol Check their confirmation protocol Make sure it is robocall_long_delay confirmation

If the merchant is asking for their password

Use when the Merchant is inquiring about their tablet password

Examples:

"I forgot the tablet password."

"What is my tablet password?"

"Can you give me my tablet password?"

1. Go to the Salesforce Business Account for the merchant.

					127 1 22280					
Business Account Detail		Edit	Delete	Submit for Approval	Log A Call	Send Email	Mx Marketing Requ	Menu Team Request	Account Merge	Inverto 360
		Verify	Addresse	Nimda Store Page)					
Store Information										
Account Name	Frosty bear [View Hierarch	y]					Phone	(408) 737-2343		
Store ID	132417						Account Status			
Parent Account						Acco	ount Record Type	Prospect [Change]		
Business ID	76,936									
Cincle Longting (No Decent)										

2. Scroll down and locate the Tablet Details section.

▼ Tablet Details			
Tablet Username	6179643001@ipad.doordash.com	Portal Username	0171gm@thecheesecakefactory.com
Tablet Password	4031	Portal Password	OlqpvulSV0

3. This section will have the Merchant's **Tablet Username** and **Tablet Password** which is used to log into the **Order Manager** app.

▼ Tablet Details	3			
	Tablet Username	6179643001@ipad.doordash.com	Portal Username	0171gm@thecheesecakefactory.com
	Tablet Password	4031	Portal Password	OlqpvuISV0

- 4. Please provide the merchant with their login credentials.
 - a. Make sure you are not providing the merchant with their Merchant Portal login credentials
 - b. The Merchant Order Manager App password is a numerical 4-digit code

Resetting the Password

This should be the last resort after turning off WiFi and verifying their login details in the Business Account.

 Navigate to the Merchant's Store page in NIMDA > Stores - Locate the Merchant's Store page in NIMDA by searching for the Store name. Remember to double check to make sure you have the right location!

2. Click on the hyperlink that says "**Tablet merchant Profile**." This will navigate you to the Merchant's tablet profile in Nimda.

Commission rate:	20.000
Thirty day delivery count:	89
Composite score:	4.3
Tablet merchant profile:	Dickey's BBQ Pit Vienna Tablet (7032080777@ipad.doordash.com)
Tax rate:	6.0
Estimated dasher assignment to pickup latency:	900
Estimated dasher assignment to pickup latency time:	March 20, 2016, 1:10 a.m.

3. **Has Set Password Checkbox** - Once you are in the Merchant's tablet profile page, reference the "Has Set Password" checkbox. Is it checked? If so, uncheck the box.

User:	😳 Dickey's BBQ Pit Vienna Tablet (7032080777@ipad.doordash.com) 🥓 +
Store:	🖾 [id: 33673] Dickey's Barbecue Pit (Vienna) VA-0689 (city: Vienna) 🥖 +
Has set password	
Enable sound	
Enable push potification	op.

- 4. **Reset Password** After you have made sure that the "**Has Set Password**" is **unchecked**, click "**Reset Password**" in the top right hand corner of the Tablet page.
 - a. Click "OK" when the popup asks if you're sure you want to reset the password
 - b. A numerical password will appear. Provide this password to the Merchant.



5. Open a new internet browser tab. Go to the store's Business Account in Salesforce. Scroll down and locate the Tablet Details section. This section will have the Merchant's Tablet Username and Tablet Password. Please make sure that the new password in Nimda has flowed through into Salesforce. If it hasn't, please refresh the Salesforce Business Account page.

▼ Tablet Detail	5			
	Tablet Username	6179643001@ipad.doordash.com	Portal Username	0171gm@thecheesecakefactory.com
	Tablet Password	4031	Portal Password	OlqpvulSV0

6. Go back to Nimda and check the "Has Set Password" checkbox again.

Store:	😂 [id: 33673] Dickey's Barbecue Pit (Vienna) VA-0689 (city: Vienna) 🥒 🛨
🗹 Has set password	
Enable sound	
🕑 Enable push notific	ation
7. Click Save	

Save and continue editing

SAVE

Merchant iPad Troubleshooting

Save and add another

If the merchant calls in saying they have an iPad, please verify that they do have an iPad (some merchants confuse all tablets as iPads) by asking the merchant if there is an Apple icon on their tablet. Once verified, explain to the merchant that "We are no longer supporting

the iPad Order Manager App as we move to support all Android tablets. Will you be interested in receiving an Android tablet?"

- If yes they are interested in receiving an Android tablet, please file a <u>tablet replacement</u> request and don't do bottom troubleshooting
- If no and they would like to troubleshoot the iPad, please go through the following troubleshooting steps:

Possible Troubleshooting	Next Steps
Restart the application	 Double-click the Home button to see your most Recently Used apps. Swipe left/right to find the Order Manager App. Swipe up on the app's preview to close the app.
Restart the iPad	 Press and hold the Sleep/Wake button until the red slider appears. Drag the slider from left to right in order to turn your device off. After the device turns off, press and hold the Sleep/Wake button again until you see the Apple logo. This means the iPad is powering back on.
Uninstall & reinstall the app	 To remove the DoorDash Order Manager app directly from your iPad, press the icon on the device until all of the icons on the screen start to wiggle. left-hand corner of the app. Press the Home button Click on the X icon on the upper Make sure the iPad has a network connection to either Wi-Fi or Data service.

 Open Safari and type the following in the address bar: <u>doordash.com/merchant/app</u>
 Download the App by clicking the Install App button. (Do not click the Merchant Beta).
 Once you have started the download. You can close out of Safari.
 The App will start to download on the second home screen.
 9. Once the app is finished downloading. Go to Settings > General> Device Management > Palo Alto Delivery Inc → Trust Palo Alto Delivery Inc
10. Then, log-in to the App using your tablet username/password.