



Welcome to GoTab

Thank you for joining the GoTab Family. Here is what to expect next.

Getting Started

You will be working closely with your Onboarding Manager while getting set up in GoTab. Your Sales Representative will schedule a call shortly to introduce you to your onboarding manager.

The onboarding process will take 2-3 weeks upon completion of the three tasks below, which determine the timeline for your Onboarding Process and ultimately impact your go-live date.

1. **[Location Form](#)** - You will give us information about your location, menus, and select your QRs. Please allow up to 14 days for QR delivery, or you can print them locally on your own.
2. **[Merchant Application](#)** - If you have ordered PAX Payment Terminals with your GoTab Hardware, this application needs to be fully approved before the hardware can be shipped. Please allow up to 14 days for full approval of the application.
3. **Deployment Questionnaire** - A member of our team will reach out to you, if they have not already, to gather the information needed to



facilitate the deployment. Then, the deployment team will follow up with any clarifying questions, as well as schedule your installation, which will be done virtually.

Please have these tasks completed before the Hand-Off Call. If you are unable to complete them, please allow time at the beginning of your Hand-Off Call to complete them with your Onboarding Manager.

What can I expect at the hand-off call?

Your Onboarding Manager will review your forms and discuss any questions they may have, including:

- Talking through the finer details of your menus; i.e., things that may not be mentioned on the customer-facing menu (ex: Sauce on the Side, no onions, modifiers, etc) or additional menus (ex. Happy Hour or Brunch Menu) that you were not able to upload in the location form.
- Reviewing the equipment you have or will receive, and what the layout may look like to best serve your current flow.
- Training staff and planning the implementation of GoTab.
- Setting expectations for a more accurate timeline and planning a go-live date.

What can I do in the meantime?

- Send any additional menus/information to your onboarding team.
- Send any location photos you would like us to use in your GoTab build-out.
- Attend one of our demo training sessions to get a better understanding of GoTab, and to be better prepared with questions to ask your Onboarding Manager. [Book your session here →](#)
- Based on the 2-3 week timeline upon completion of the forms, decide what would be the best date to go live.