New Customers Set Up

Simplified Client Onboarding Process Flow



Aldelo Approval

Sales representative sends client for Aldelo approval.

Setting up of Payment Details.

Form Completion

Once Aldelo provides result, we let the client know.

If APPROVED, client is encouraged to sign Membership form.

System Integrations

Setting up of Payment Details in USAePay etc.

Content Creation

Creation of content and designs, according to client's preferences.

Curated content for submission to client review and approval.

Curated content for edit or revision, as needed.

Launch!

Client-approved content scheduled for publishing.

Customer engagement and Content interaction for published posts.

Social Media Management

Simplified Client Onboarding Process Flow



Refining and improving process along the way.

Customer Membership Cancellation

Simplified Client Offboarding Process Flow



Relieve of Liability Form

Client fills out Cancellation Form.

Assist customer as needed in filling out/completing the form.

Ensure to honor
Effective Date
specified by customer.

USAePay

Disable scheduled automatic deductions on USAePay.

Ensure to add
Cancellation date and
additional details on
the Notes.

All other Systems

Mark Customer Contact as "Inactive" on MethodCRM.

*Note: This will also automatically take effect on QuickBooks, as long as the Customer does not have any other overdue/unpaid invoices.

Group Chat & Labels

Update Group Chat labels to "CANCELLED" on the effectivity date specified by customer.

Within 30 days, all other PlanetPOS members may leave the group chat.

Email Confirmation

Send email confirmation to customer that the cancellation request has been completed.

Last Update: June 2021

Customer Service Cancellation

Simplified Offboarding Process Flow for Services



Relieve of Liability Form

Client fills out Cancellation Form.

Assist customer as needed in filling out/completing the form.

Ensure to honor
Effective Date
specified by customer.

USAePay

Disable scheduled automatic deductions on USAePay.

Ensure to add Cancellation date and additional details on the Notes.

All other Systems

On MethodCRM: Add Activity >> Notes on Contact about the Service Cancellation and all details such as effectivity date.

Group Chat & Labels

Update Group Chat labels, if or as needed.

Remove specific service code on the GC label such as:

SE - Social Edge MASA - MASA Support INT - Internet WEB - Web Creation

Email Confirmation

Send email confirmation to customer that the cancellation request has been completed.

Last Update: June 2021