



**Welcome to TrashBolt, by SalesStryke Software!
Preface and Implementation Guide**

Welcome to TrashBolt, by SalesStryke Software. It is our honor to have earned your business. We look forward to serving you and helping your company achieve its online sales objectives. Before we discuss your implementation, let's complete some contact information so our two companies can communicate effectively.

Implementation and Billing Contact Information

We have several points of contact within SalesStryke Software. We can all be reached by calling our main number: (612) 605-6800

Phase	Contact	Email
Mapping	Chad Johnson	chad.johnson@salesstryke.com
Online Agreements	K. Ryan Hasse	k.ryan.hasse@salesstryke.com
Deployment/Technical	Martin Euerle	martin.euerle@salesstryke.com
Billing	Contact	Email
Billing	Lisa Wagner	lisa@salesstryke.com
Billing	Sharlene Molck	shar@salesstryke.com

Your main points of contact

Please fill in the individuals in your company to contact for the following:

Phase	Contact	Email	Phone
Mapping			
Online Agreements			
Deployment/ Technical			
Billing	Contact	Email	
Billing			
Billing			

Invoice Options

Please select how you would like to receive invoices from SalesStryke

Request paper invoice by mail

Mailed invoice address: (Company, Street, City, State, Zip Code)

Request emailed invoice

Email Contact Info only if different from above: (Contact Name, Email Address)

Implementation Outline and Schedule

The following information and the rest of this Implementation Guide is devoted to outlining what you can expect during your TrashBolt implementation. Each TrashBolt implementation consists of 3 primary phases: Mapping, Online Agreements, and Deployment. After these 3 phases, there are other actions and activities we may complete, such as integrations/data management (moving data from TrashBolt into your other software systems), SEO/Marketing, Website Design, Social Media Management, etc. The initial concentration, however, will be on the first 3 phases.

TrashBolt Implementation Phase	Business Days
Mapping: Creation of Operations, Sales, and Marketing Polygons	14-30
Online Agreements: Pricing, Terms/Conditions, Fine Print	7-14
Deployment: Placing TrashBolt on your website	5-10
Post Deployment (each optional and separate)	
Integration(s): moving data from TrashBolt to other software systems	
SEO (Search Engine Optimization): driving buyers to your website	
Website Design: Maximize SEO and TrashBolt self-service purchases	
Marketing Polygons: Create separate marketing polygons for targeted marketing campaign (we pull the addresses from those polygons)	
Managed Marketing: TrashBolt creates multiple marketing campaigns to drive business to your company	
Best Practices: PCI Compliance, accelerated response times, key performance indicators to maximize marketing and sales	

Phase I: Mapping

14-30 Business Days

During this phase of your TrashBolt implementation, we will be focused on mapping. The maps we create during this phase will represent where your company would like to sell its services via your TrashBolt system (“Sales Polygons”). These Sales Polygons might be the same or different than where your company currently has customers and/or routes (“Operational Polygons”).

The creation of Sales Polygons is the longest phase of your TrashBolt implementation. Depending on the complexity of your routes, your access to data, and turn around times for our data requests, this phase can take anywhere from 14 to 30 business days to complete (this varies based on your company’s ability to provide data and make sales area decisions).

To jump start the creation of Sales Polygons, we begin with your current Operational Polygons. By creating maps of where you currently have routes, we can then work with you to edit/expand those routes to represent 1) where you would like to sell, 2) what services you offer in each Sales Polygon, and 3) at what price you will offer each service (more on services and pricing later).

Phase I, Step 1) Operational Polygons

The fastest and easiest way for us to represent your current service areas as a map is for you to provide us with the following data:

- Excel or CSV file of all customers with the following information (CUSTOMER LIST):
 - Address Information
 - House Number
 - Street Name
 - Street Type
 - City
 - State
 - ZIP
 - Service day for each address
 - Route name for each address
 - Service types provided at each address

- Link(s) or scan(s) or any existing mapping that you uses as part of their sales or operations

- Any RFP/exclusion information (i.e., municipalities that should be excluded,
- Spreadsheet of all service types and prices per service per route
- Copy of any existing contract templates

Once the Customer List is received, creating the initial Operational Polygons can take between 14 to 30 business days depending on multiple factors including but not limited to the format of the data received, quantity of records, percentage of discrepancies in the customer data, routing layout, etc.

- Based on need, there may be multiple conference sessions via Join.me to sort out discrepancies in the data and geographic polygons that cannot be resolved via phone and email communication
- Once complete, the Operational Polygons will represent a general geographic area for each daily route (as defined by you)
- Operational Polygons should be created for every service type you intend to sell via TrashBolt's online system

Phase I, Step 2) Sales Polygons

After the initial Operational Polygons are complete, they will need to be converted to Sales Polygons which will be the final definition for where you want your services to be available and at what prices. Due to your intimate knowledge of day-to-day operations, neighborhoods, desired service areas to expand into, etc., you will take the lead in directing us as to how you want to edit/expand your Operational Polygons.

There are multiple ways that the Operational Polygons can be converted to Sales Polygons, listed below in order of recommendation:

- Sales Polygons provided to you via an editable Google Map with detailed, step-by-step instructions on how to edit the polygons
- We make recommended edits based on your requirements
- Screenshare meeting with you to go through each route/polygon so we can edit them individually while you direct the edits.

The time for converting Operational Polygons to Sales Polygons can vary dramatically based on number of routes and size of service territory, but should generally take about 10% of the time it took to create the Operational Polygons in hour-by-hour editing time. Sales Polygons will be created for every service type you intend to sell via TrashBolt's online system.

Phase I, Step 3) Pricing

If your prices are the same no matter where a person lives, that's easy; we will use the Sales Polygons as-is. If your prices vary based on customer/service address location, then we will work with you to further edit the Sales Polygon structure so as to differentiate the pricing based on location. This will result in Price Adjusted Sales Polygons.

The best place to start in creating Price Adjusted Sales Polygons is by answering the question: how do you do it now? If your sales team has a process by which they establish pricing, what is that process? What tools do you use? Do you have a map (even a paper map)? Please remit these data to us. We will work with you to create the final Price Adjusted Sales Polygons.

On to Phase II: Online Agreements!

Once we've completed these steps, we will be ready for Phase II of your TrashBolt implementation: Online Agreements

Phase II: Online Agreements

7-14 Business Days

Now that your (Price Adjusted) Sales Polygons are complete, it's time to create your Online Agreement(s). The Online Agreement is the form your customers will see to 1) select available products/services, 2) view a quote for their selection, 3) view/agree to terms, and 4) pay. These Online Agreements can differ/vary based on location, as discussed in Phase I.

TrashBolt has many Online Agreement options. We will work with you to maximize your Online Agreement's potential.

Phase II, Step 1: Data Request

The best place to start in creating an online agreement is to use/reproduce all of the current sales documentation you currently use. Some sales document examples:

- Paper agreements
- Welcome packets
- Price lists (organized by route/location)
- Terms/Conditions
- Other information conveyed to customer while on the phone
- A high definition copy of your logo(s) (for multi-company implementations)

We will use this information to create a First Draft Online Agreement Template. We will send it to you for review and comments.

Phase II, Step 2: Refinement

Once we've created the First Draft Online Agreement Template, we will begin refining the Online Agreement based on your input. It is here where we will work with you to establish some best practices. Some examples of Online Agreement best practices:

- Display all pricing for all services
- Offer long-term agreement discount pricing
- Show all fees, taxes, surcharges in order to quote an accurate price
- Communicate cart delivery windows
- Show terms and conditions
- Allow customer to choose service start date
- Allow customer to choose e-bill, auto-pay, or other available billing options
- Consider offering a Right of Recission

- Consider offering a Hauler Cancellation Form that gives you authority to cancel a current hauler agreement

While there is such a thing as too much information, and we strive to create Online Agreements that are short and as easy to use as possible, it's important to strike a balance between too little information (which will result in fewer self-service sales and too many call-ins for additional information) and too much (which may confuse a customer/viewer). Establishing the Final Draft Online Agreement Template ("Master Template") will be an iterative process, often with multiple passes back and forth between you and us.

Phase II, Step 3: Service and Pricing Variations

Once the Master Template has been agreed upon by you, then we will work on the variations of the template. Variations derive from service and pricing differences that may exist based on your customer's service location. Each location-based difference will result in a variation of the Master Template.

We can establish the down payment/deposit amount based on many criteria. Payment amounts can be the same as the Master Template, or vary with each template variation.

Phase II, Step 4. Online Payment Portal

After each variation of the Online Agreement are created, it's time to set up the online payment portal. Currently, TrashBolt supports the following payment portals/gateways:

- Authorize.net
- Stripe
- Square (Apple)
- QuickBooks
- PayPal
- ACH (via Stripe only)

Setting up the portal involves us logging into your chosen payment portal and retrieving a "token" that links the Online Agreement to the portal. You will need to provide us with those login credentials for a one-time use. We do not need ongoing access to your account, so changing the credentials after our setup and testing is recommended.

Once the portal link is established, we will run 1 or more test documents through the system with a small payment. We will send you the document, and you will test the portal. Once tested,

you will login to both the portal site and your bank to see if the transaction was successful. Upon success, we will be ready to go live with the TrashBolt system!

Going Live! One more Phase

The final Phase of your TrashBolt implementation is deployment. For deployment on your website, you will be contacted by TrashBolt's deployment team. The TrashBolt Deployment Instructions document will guide you.

Note: If there are integrations/data transfers to 3rd party software systems (CRM, billing/operations/routing), those integrations generally follow live deployment of TrashBolt (so you can maximize TrashBolt's sales potential asap!). If you desire for your 3rd party software systems to be integrated before Go-Live, that's an option as well.

Phase III: TrashBolt Deployment Instructions
5-10 business days

Now that the Mapping and Online Agreements phases are complete, you're ready for the final phase: Deployment. A typical company can be deployed in as little as 5 business days. The main Deployment steps are 1) website access, 2) button type, and 3) button location.

Phase III, Step 1: Website Access

The first step to getting a "buy now" button on your website is for us to be in direct contact with your website administrator, or to become a temporary administrator whereby we will add the "buy now" button to your website directly.

If you have a website administrator, please enter their contact information below:

If you would like us to temporarily administrate your website for the purposes of adding the "buy now" button, please enter your website's login and password information here:

User Name

Password

Phase III, Step 2: Button Type

We commonly refer to the button on your website as a "buy now" button. But, the button is fully customizable. If you have staff to create the button, or if you'd like us to create the button for you, please choose below:

If you've chosen to create the button yourself, please remit the button to martin.euerle@salesstryke.com.

What would you like your button to say? Your button can say "View Quote and Sign Up for Service" or "Signup Online", or anything else you choose. Please enter what you'd like your button to say here:

What color would you like your button to be? If you have a color code, you can enter it here as well:

Phase III, Step 3: Button Location

You may want your button to be exactly where you currently direct people to contact you for service. Or, you may want to add more buttons, or buttons in different locations. This is where you will be in direct contact with the Deployment team. There are some best practices to think about:

- Place button above the “fold” (the viewable part of the website without scrolling)
- Place button on every relevant page pertaining to the services sold via the button
- Explain that you offer online signup -no phone call required!

Phase III, Step 4: Reporting

Your TrashBolt system will generate leads in addition to paid agreements. You can receive leads as an email or have them sent directly to a CRM system. Signed/Paid Agreements can be sent to you in the form of a PDF. All Signed/Paid Agreements will be compiled in a daily sales report. Where would you like this information sent?

Leads: A lead is generated when a customer geolocates (i.e. when the customer enters an address into your TrashBolt system) . Your TrashBolt system will send you the lead 1) whether or not the customer lands inside or outside of a service area, and 2) even if the customer eventually completes/pays for a service. The idea is to receive the lead as quickly as possible. Leads outside of service areas may help guide you as to what areas into which you may choose to expand your Sales Polygons into Marketing Polygons.

Note: As a matter of best practice, you may want to wait 15 minutes before contacting a lead, as the customer may be in the process of completing the agreement.

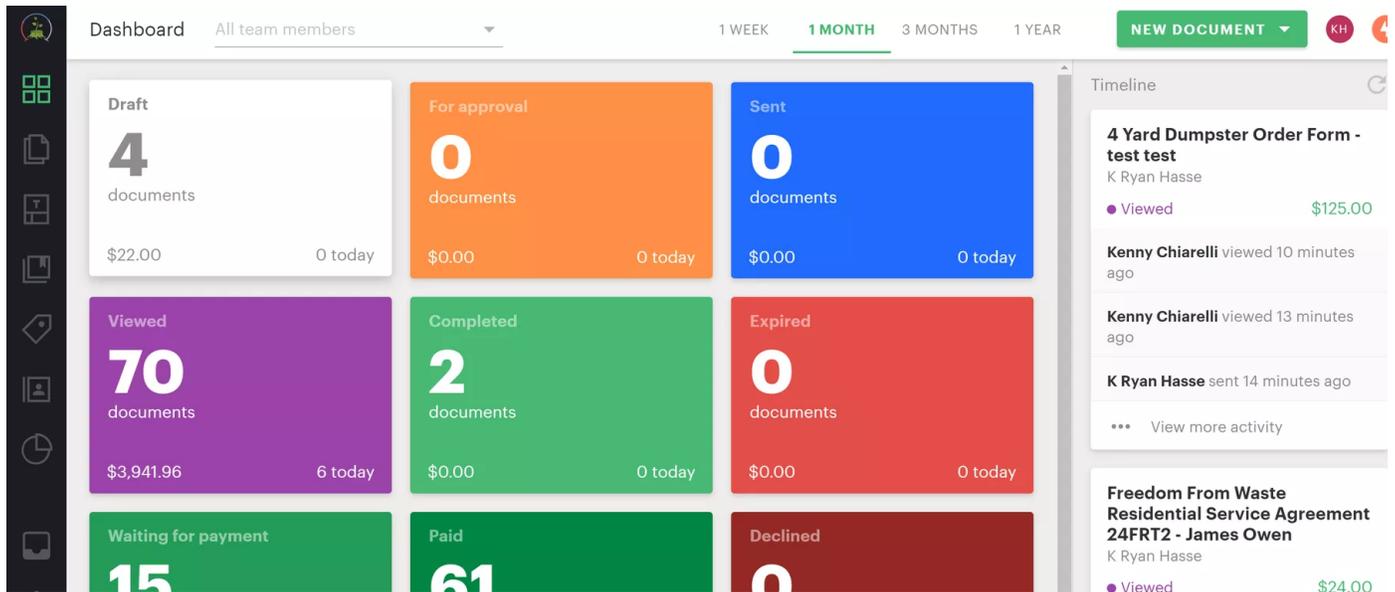
Signed/Paid Agreements: is the result of a customer geolocating within a Sales Polygon, viewing a quote, signing the agreement, and paying. Signed/Paid Agreements will generate a PDF for your customers (emailed to them automatically), and for you (emailed to you from us). We need to know to what email address you want to receive these PDF attachments.

Daily Sales Reports: are generated the day after sales are Signed/Paid by your TrashBolt system. You will receive a .xls report. You have a couple choices here: 1) Receive only signed agreements that are also paid, 2) Receive signed agreements that are unpaid, 3) Choose the email address to which Signed/Paid and/or Signed agreements are sent.

Integrations: Sales and transaction data can be sent to a CRM, billing/operations/routing software system. Leads sent to a CRM can be utilized for marketing and follow up. Sales and transaction data can be sent to your billing/operations/routing software. We have already

integrated to many systems. Please let us know if you use software systems to which you'd like lead and sales/transaction data to be sent:

Dashboard: Some TrashBolt users want to see the system DashBoard. This is an additional product that is not required. Here is a view of the DashBoard.



With a seat to the DashBoard, you will be able to: 1) See Viewed, Signed, Paid agreements, 2) Use the system to create documents to send to customers manually (not via the online portal), 3) Setup templates/documents for all of your Service Types (i.e. residential pick up service, dumpsters/rolloff, commercial, porta potty, etc.).

If you want a seat(s) to the DashBoard/document management system, please contact chad.johnson@salesstryke.com

You're done! Or are you?

After these 3 phases, your TrashBolt system will be live and operating. You can expect sales to begin nearly immediately upon deployment. But, there are other tasks ahead.

Drive buyers to your "buy now" button!

TrashBolt offers SEO/Website design and other services that will drive customers to your "buy now" button. Self-Service customers are wonderful for an organization, lowering cost of sale, and often speeding up the sales process itself. To learn more, [click here](#).

Integrations

TrashBolt can integrate to 3rd party software systems. If you'd like lead information to flow to a CRM system, or sales data to flow to your billing/operations/routing software, let us know! We will work to get our data into each system! To learn more, [click here](#).

Managed Marketing

Now that you have Sales Polygons, let's market to the addresses inside those polygons! TrashBolt offers a multitude of marketing campaigns. To learn more, [click here](#).

Conclusion

It's been our pleasure working with you! We sincerely appreciate your business and will strive to service you in every way possible.

Sincerely,

The TrashBolt Implementation Team