citruslime

Switching systems made simple.

Your Citrus-Lime onboarding journey starts here.

Every independent specialist retailer is different, so onboarding with Citrus-Lime is built around understanding what works for your business. Here's how we work together: from your very first call, right through to the long-term support you can expect.

01 Welcome call

Meet your dedicated Onboarding Manager. Together you'll confirm a go-live target, agree a work schedule and build in milestone dates that suit your business. Ask any questions, flag any concerns and get to know each other – this is your go-to person right through until go-live!

02 Setup and paperwork

We'll send all the necessary forms for your POS, ecommerce and SIM setup and help you get them completed. Your Onboarding Manager will introduce you to our support team and give you access to the Knowledge Base.

03 Data import training

A dedicated session where we walk you through importing your product and customer data into the POS back office, including a review to make sure everything goes in correctly, right from the start. We'll record the session too, so you and your team can refer back to it any time.

04 Systems training

Live, tailored training delivered by video call, covering the modules that matter to your operation: Point of Sale, Back Office, Reports, Workshop (if you run a bike shop). Individual task sheets track each staff member's progress, so you can see who's confident and who might benefit from a little more time before go-live.

05 Website and additional features

If your package includes an ecommerce site, we'll introduce you to your designer at this stage. We'll also help you configure any additional features included in your package: shipping options, courier integrations, booking tools, loyalty programs.

06 Pre-go-live checklist

Before anything goes live, we work through a structured sign-off checklist with you covering your inventory, your data and your team's readiness. Nothing gets marked ready until you're happy it is.

07 Go live

Your Onboarding Manager is on hand throughout the day. We'll also introduce you to your Support Buddy a little ahead of time, so there's no gap in cover from the moment you start trading.

08 Continuing support

Your Support Buddy checks in weekly for around six weeks. After that, you can always jump on a call with our Success Team for ongoing support and guidance. Plus our Knowledge Base is there for answers to almost anything, any time.

Ready to make the switch?

We'd love to hear from you. Get in touch.

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