Installer Training:

Onsite Checklist

Volanté Systems, 49 Coldwater Road, North York, Ontario, M2L 2G2
t. 416.988.6333 / 1.866.490.6333 | www.volantesystems.com

Updated: 2023-03-30 Rev.2

Contents

Introductions & Attendance (at the start of each session)

I have confirmed that the following have been performed at the start of each training session:

- ❏ I have formally introduced myself as a representative of Volanté
- ❏ Provided a basic intro on what will be covered in the session (i.e. Backoffice, POS for Cashiers, or POS for Managers, POS Hardware troubleshooting)
- ❏ Provided details on how to contact their Implementation team during post go-live support
- ❏ Confirmed with the manager that all attendees are present
- ❏ Perform & Explain the steps, and allow the user(s) to practice and become comfortable
- ❏ Supporting video at: https://www.youtube.com/watch?v=tUOB0nMLwzg

Notes:

volanté

POS for Cashiers: Training Components for Standard users

I have confirmed that the Cashier team (CASHIER, HOST/HOSTESS, SERVERS & WAIT STAFF level job types) can perform the following:

- ❏ Can understand the information on the **Splash Screen** (starting page) for the Terminal Name & IP, as well as the connection status messaging.
- ❏ **Manager:** Can choose a transaction mode, and can explain sign in and use of the **Override Login Option**

User Screen:

- ❏ Can go into the **User Screen using either their Card Swipe** and:
  - ❏ Clock in as an appropriate job type
  - ❏ Start Cash drawers and assign to drawer
  - ❏ <mark>Start float</mark> *(if used)*
  - ❏ End float at end of shift *(if used)*
  - ❏ Unassign from Drawer at end of Shift *(if used)*
  - ❏ Clock out at end of shift
  - ❏ Can run reports from the Personal Reporting list *(if used)*

Notes:

Cashier Screen (if used):

- ❏ Can go into the **Cashier Screen using either their Card Swipe** and perform the following:
  - ❏ Understand the layout of the screen, including
    - ❏ **Menu Section** layout and navigation, reading the menu description & Price
    - ❏ Right side top and bottom button Cashier Function selections **(Screen config)**, using the **More/Main Options** button
    - ❏ How to read information in a basic transaction including cashier name, date and transaction number.
  - ❏ Can start a new transaction and
    - ❏ Add items into a transaction

- ❏ Can use and understand *Option Screens* on an item.
- ❏ Can use and explain *Size Selection Screens* on an item.
- ❏ Understands what a *Combo* does when applicable items are put into the transaction *(if used)*
- ❏ Explain the running tally of items on the right panel.
- ❏ Explain the application of Taxes onto an item when *Total* is pressed.
- ❏ Can complete a basic transaction with multiple tender types, including types in the *Payment* button section. Can explain tender type use including:
  - ❏ Cash Tender
  - ❏ Credit Card Tender
  - ❏ Debit Tender *(if used)*
  - ❏ Gift Card Tender *(if used)*
  - ❏ Customer Database including Meal Plan *(if used)*
  - ❏ Bill Discounts affecting Payment Method Discounts *(if used)*
  - ❏ Vouchers *(if used)*
  - ❏ Any other payment methods *(if used)*
- ❏ Can perform a split tender transaction by selecting a payment type from the *Payment Screen* and entering a different amount for that tender to apply.
- ❏ Can remove an item from a transaction when the item has not yet been committed to the sale (by hitting total, which sends the item to the kitchen printers)
- ❏ How to void an item from a transaction (once the item has been committed to a transaction, and use of a *Manager Override* if needed
- ❏ Knows the difference between these removes/voids
- ❏ *Bill Mod/Discounts:* Can perform:
  - ❏ A discount to an individual item by touching item and selecting Discount from the dropdown menu
  - ❏ Applying a bill mod from the *BillMod Button* to items in a transaction
  - ❏ Applying a *Payment Method Discount* from the *BillMod Button* as a payment type
  - ❏ Understands the difference between *Item & Bill Discounts (appears in Discount Reporting)* compared to *Payment Method Discounts* (treated as Media collected and appears in *Media Reporting*)
- ❏ Can add a note to an item
- ❏ Can add a customer into a transaction *(if used)*, and know the difference between plans, including:
  - ❏ Meal Count Plan (a number of meals available per day/week/month on s reset)

- ❏ Declining On-Account $ where a positive amount is added into the account on a reset and used until reaches $0)
- ❏ Charge/Incline Balance where the account starts at $0 and works into a negative amount until paid off, similar to a credit card)
- ❏ Can add a customer into a transaction *(if used)*:
  - ❏ Can add a *Customer (Payroll Employee or Resident)* into a transaction by scanning a card on RFID -or- Swiping a card on MSR -or- Scanning a barcode
  - ❏ Can click on the *Customer* button to access the CustomerDB, and search by First or Last Name
  - ❏ Can read the Customer Info panel including assigned accounts and balances.
  - ❏ Can complete a *Customer Transaction* by using the *OnAccount Button* or *MealPlan Button*
- ❏ Can perform a *Refund* transaction *(if used):* Can add items into a transaction and use either the *Popup Item Options* or onscreen buttons for *Refund(Full) / Refund(Partial) (if used, may require Manager Override)*

Notes:

```



```

POS for Managers: Training Components for Managers

POS Manager Functions:

- ❏ **User Screen:** I can access the *View Shift's Transactions Button* and do the following:
  - ❏ Change the date filter
  - ❏ Know the difference between
    - ❏ View Own (view my transactions on all terminals)
    - ❏ View Employee (view transactions by specific employee)
    - ❏ View All (view all transactions from all cashiers and all terminals)
  - ❏ Search By…
    - ❏ Table Transaction ID
    - ❏ Transaction ID

❏ Search by Customer and use the CustomerDB search
❏ From the ***Reopen Closed Transaction Screen results*** I can select a transaction and use:
  ❏ View Opts button to ***Print*** (which reprints a receipt)
  ❏ Void Order (which voids out the single transaction if run in Cashier mode, or voids all transactions on a Table)
  ❏ Reopen the transaction to make adjustments if needed
❏ **POS/Admin Options:** I know how to add a new employee through the 'Employee Setup' screen
❏ **POS/Admin Options**: I know how to add a barcode to an item using 'Assign Menu Item Barcode'
❏ **POS/Admin Options**: I can run reports from the 'Manager EOD' and 'EOD Reports'
❏ **POS/Admin Options**: I can explain and run a Close Day
❏ **POS/Admin Options**: I know how to exit or restart the software from this screen

Notes:

Hardware: General Training for Cashiers & Managers

The following section covers Hardware Troubleshooting Training intended for Managers & designated Cashiers:

- ❏ **Terminal:** Use and troubleshooting including:
  - ❏ Location of power button(s)
  - ❏ How to power on/off
  - ❏ Electrical plug-in location
  - ❏ Location of UPS and power connections
- ❏ **Printers:** Use and troubleshooting including:
  - ❏ General use of the Printer
  - ❏ Location of Power, Paper Feed, and how to open cover
  - ❏ How to replace the paper
  - ❏ Thermal Paper vs. Impact Paper *(if used)*
  - ❏ Changing ribbons on Impact Printers (most often Kitchen Printers) *(if used)*
  - ❏ What the beeping/LEDs mean
  - ❏ What to do if the thermal print starts to fade (clean strip with alcohol)
  - ❏ Basic troubleshooting when the printer is not working
- ❏ **Cash Drawer**: Use and troubleshooting including:
  - ❏ Cash drawer standard use
  - ❏ Opening drawer with the key *(if used)*
  - ❏ How to remove insert
  - ❏ How to check for drawer jam / lost money in drawer
  - ❏ Basic troubleshooting when the drawer isn't opening
- ❏ **Peripherals**: Use and troubleshooting including:
  - ❏ MSR Strip Reader *(if used)*:
    - ❏ How to swipe a card
    - ❏ What do the beeps/LEDs indicate
    - ❏ Basic troubleshooting power, what to do when swipe isn't working, and reconnecting (if USB accessible)
  - ❏ Barcode Scanner *(if used)*:
    - ❏ How to scan items, distance to items
    - ❏ What do the beeps/LEDs indicate
    - ❏ Basic troubleshooting power, what to do when scanning isn't working, and reconnecting (if USB accessible)

- ❏ RFID Reader *(if used)*:
    - ❏ How to tap a card or fob
    - ❏ What do the beeps/LEDs indicate
    - ❏ Basic troubleshooting power, what to do if tap of card isn't working, and reconnecting (if USB accessible)
- ❏ Customer Facing Screens *(if used)*:
    - ❏ Checking that item descriptions and prices are appearing
    - ❏ Confirming that the screen display looks correct (not overlapping or offscreen)
    - ❏ What to do when not working (location of power buttons etc.)
- ❏ Weigh Scales *(if used)*:
    - ❏ Sensitivity and setting items onto scales
    - ❏ Restarting the scale and scale power
    - ❏ Resetting Tare to 0
    - ❏ Basic troubleshooting of power and errors

Notes:

Training Sign-off

I certify that Volanté Systems or their Representative have completed on-site training to my satisfaction.

Site Location Name:	
Site Contact Name:	
Site Contact Signature:	
Volante Trainer Name:	
Volante Trainer Signature:	
Date:	

After training has been completed, you can contact support 24/7 at:

Toll-free: 1.877.490.6333

Toronto & GTA: 416.988.6333

Please reference the blue binder for all contacts and resources that can help you with ongoing questions or configuration assistance.