Training Checklist

Before you begin training

✔ **The full system must be installed or fully staged**
Including setup of all printers (receipt printers and remotes), credit card processing completed and tested, tax rate set, and terminals communicating properly

✔ **The menu must be completed and revised**

✔ **Employees must be entered with appropriate access levels and access numbers**

	Staff Training
	Time Clock and Audits
☐	Understands how to clock-in
☐	Understands a sales audit; how to start an audit
☐	How to close an audit
☐	How to enter cash deposits (if applicable)
☐	How to clock-out and declare tips (if applicable)
	Order Entry
☐	Start an order (new order, tab management, start a table, etc)
☐	Using phone order management (start/recall a phone order, use delivery (if applicable)
☐	Ringing in menu items, modifiers
☐	Using discounts and voids; the difference between both
☐	How to correct potential mistakes; delete modifiers, change modifiers, delete an item, etc.
	Sending Tickets to the Kitchen
☐	Understands how orders send to the kitchen
☐	Understands coursing works (if applicable)
☐	Understands how to use Hold Item, Send/Stay
	Check Management
☐	How to view open and closed checks
☐	How to accept payment for an order; with cash, credit card or gift card (including paying with more than one payment type; i.e. paying partially with cash or multiple cards)
☐	Understands how to find open checks and add to them
☐	How to split a check, split items and transfer single items
☐	How to merge a check or Unsplit
☐	Understands how to transfer a check to another server

Manager Training

Labor Management

- ☐ How to add employees into the system
- ☐ How to assign job titles to employees, where to set access numbers
- ☐ How to create new job titles that are not already saved in the system
- ☐ How to remove or terminate an employee in the system
- ☐ Understands access levels
- ☐ Understands that in the Employee Management section, the logged in manager can only view employees who are set with a lower access than themself.
Only a 9, or Supervisor, can view all employees' information (for security and privacy).
- ☐ Understands how to adjust employees' time
- ☐ Understands how to review labor reports and review payroll

Check Management

- ☐ How to find open or closed checks (transaction review)
- ☐ How to perform voids
- ☐ How to issue a refund and the difference between a refund and void

End of Day Management

- ☐ How to close audits
- ☐ How to put in deposits at the end of the day before the close out
- ☐ How to run a close out and settle the batch

Reporting

- ☐ Understands how to interpret reports and email reports
- ☐ Understands the most important end of day reports
- ☐ Understands the importance of ensuring the batch has been settled and close out has been ran before the next business day
- ☐ How to balance reports

Menu Management

- ☐ How to change a price
- ☐ How to edit an existing item and create a new item
- ☐ Knows how to check menu items' print settings and attached modifier groups
- ☐ How to add timed events, or change prices on timed events

Discount Management

- ☐ How to add, alter or delete discounts
- ☐ How to add discount reasons and void reasons

I have been trained on each of the training points listed on this document. I feel that I, along with my staff, can confidently use the system.

Signature _____ Date _____

Restaurant Manager/Operator