New POS client account onboarding guide

Discovery call	Data sheet import	Initial account setup training	Backoffice/control center training	POS training for cashier/managers	Additional module training	Install POS	Pre-launch	Go live	Transition to support
Introduce the onboarding journey	Build and import data sheets	Learn and configure your account in control center	Learn how to use the backoffice functions in control center	Learn how to use the POS functions	Learn how to utilize additional modules	Install POS on register	Review setup and configuration	Start using the new setup	Hand off to the support team
Via video or phone call	Via video call	Via video call	Via video call	Via video call	Via video call	Via video or phone call	Via video call		
30-60 minutes	1x 1-hour session	3x 1-hour sessions	3x 1-hour sessions	1x 1-hour sessions	1x 1-hour session	30-60 minutes	1x 1-hour session		
Account manager	Training specialist	Training specialist	Training specialist	Training specialist	Training specialist	Training specialist or onboarding manager	Training specialist or onboarding manager	Training specialist or onboarding manager	Account manager
• Review the onboarding journey, go over some questions • Review hardware and requirements • Schedule training sessions	• Learn how to build the data sheets used to import data into the control center	• Learn how to and configure the setup of your account • General maintenance 1 • General maintenance 2 • Pricebook	• Learn how to use the backoffice functions in control center • Inventory • Reports • Lottery	• Learn how to use the POS functions • POS	• Learn how to utilize additional modules • Loyal-n-Save	• Install remote access software for helpdesk support • Install latest version of POS on register	• Review the setup and configuration of your account. Verify you are ready to go live • Answer any additional questions • Schedule go-live	• Start using the new setup or software	• Transition to helpdesk support for any future support • Give lifeline support number, email address and portal access

FTX POS™

Discovery call

The discovery call serves as your first meeting after the sales process.

During this session, you'll connect with your dedicated account manager, who will introduce you to your onboarding team and guide you through the entire process leading up to your target go-live date. To keep everything on track, you'll receive regular email updates and calls detailing next steps and addressing any questions or concerns along the way.

There are several purposes of the call:

1) To ask questions to help us and our trainers understand your business. For example, the system can handle doing Lottery, but you may not use that at this time. We will mention it so you are aware it can be handled but will move along because it is not something you will use at this time. Some of the other questions also help configure your account.
2) Introduce the flow and each step of the process.
3) Answer any questions you may have.
4) We will review your hardware for the registers to ensure they meet or exceed the minimum requirements.
5) And lastly, we will schedule the training sessions. We will work with you to best fit your schedule.
    a. These are typically done in 1-hour sessions, where we try to make them consecutive days and all at the same time slot.
    b. The trainings will be in a video call where we will share our screens and at points ask you to share your screen.
    c. You may invite others to the trainings that you feel will benefit from them.
    d. There will also be a call-in number in case your computer does not have speakers and a microphone. You can connect with both a computer and a phone.
    e. Most trainings will be covering Control Center and not needed to be in the office. As long as you have a good internet connection, you can be anywhere.

Via video or phone call | 30-60 minutes | Account manager

Data sheet import

The data sheets are the most efficient way of getting your products into the system. Some of the data points we use may be different from other POS systems, so we would walk through how those are used in our system to help avoid any issues with importing them.

There are many different datasheets that can import different data points. Some of which do overlap. The main one to be used is the PRODUCT.CSV, which will import the product details, including the cost, price, and reordering quantities. There are other sheets that can also be used to import details, but depending on your business size, it may be just as easy as entering them into Control Center instead of importing them.

Additional data sheets can include:

- **Employees**
- **Inventory quantities**
- **Customers**
- **Pricing for different zones**
- **Departments**
- **Vendors**
- **Vendor part numbers**
- **Gift cards**
- **And a few others**

If you prefer using the data import sheet over manual entry in Control Center, then you can download the sample template files and detailed instructions at: https://goftx.com/onboarding/

and watch this video for a quick demo: https://www.youtube.com/watch?v=QFaortrnE3I.

We can also offer a full training session so you are fully comfortable with building your pricebook.

Via video call | 1x 1-hour session | Training specialist

Initial account setup

The first group of training sessions is designed to set up the account. Our goal is to offer each training to build off from the last one. You would start off with building out your account and configure how you want it to operate. Then from there you will learn how to use the system. We will start off with General Maintenance 1, then 2, with setting up your account, then cover the Pricebook, which is your Product list, and Discounts. This is also where you will go to make item changes individually and in mass groups.

We will walk you through setting up your account and configuring the settings, along with training you on how and what the settings are, so if or when you change or grow, you can already be in the know.

1) **General Maintenance 1** covers:

   a. **Locations:** Where you can set up the store information like schedule and address.

   b. **Employee:** To create and give permissions along with assigning locations.

   c. **Vendors:** To specify the vendors' information and set up EDI for digital orders and invoices.

   d. **Departments:** Where you would configure department names, numbers, and only settings like discount levels and groups.

   e. **Taxes, Tax Groups, and POS Flags:** To configure the tax rates and assign age restriction requirements.

   f. **POS Panels:** Where you can set up and customize your point-of-sale buttons.

2) **General Maintenance 2** covers:

   a. **Settings:** All the configurations of how your store(s) will operate.

3) **Pricebook** covers:

   a. **Products:** Where to view and work with your products, like creating and making changes to them.

   b. **Mass Updates:** Our utility will allow you to change items in bulk, like a price change.

   c. **Product Links:** Is used to associate a parent/child relationship to 2 items.

   d. **Discounts and Buydowns:** Where you will set up all your system discounts and manufacturer-funded buydowns.

   e. **Vendor Parts:** Will allow you to keep track of the vendor's part number that is assigned to the specific UPC when you are ordering or receiving.

Via video call | 3x 1-hour sessions | Training specialist

Backoffice/Control Center training

Another group of training sessions. These are to walk through how to do inventory with creating orders and receiving invoices. How to run, schedule, and save favorite reports. All within Control Center.

As the back-office hub for your store(s), Control Center is where administrators will spend the majority of their time managing operations. We will go through every aspect of the software and how each module works so you can be comfortable performing every task with speed and efficiency.

1) **Inventory** covers:

   a. **Reorders:** how you order and reorder products from vendors

   b. **Receiving:** how to receive invoices

   c. **Counts:** like cycle counts and spot checks to ensure your inventory is accurate

   d. **Transfers:** between stores

   e. **Adjustments:** to manually adjust your quantity on hand

2) **Reports** covers:

   a. Running many of our vast built-in reports like:

      i. **Time Clock Entry:** for seeing your employees' hours at work.

      ii. **E-Journal:** the individual transactions.

      iii. **Department Sales:** Can be run as a summary to show each department's costs and retail prices over a given time period or as a detailed report to show it broken down by items in each department.

      iv. **Sales Tax:** useful to see what you collected.

      v. **Inventory Evaluation:** to see how much money your store holds in current on-hand stock, along with its retail potential.

   b. Scheduling them to be run automatically

   c. Saving favorites to be run quickly

Via video call | 3x 1-hour sessions | Training specialist

POS training for cashier/managers

Being in a retail store, you would expect to use a cash register to check out the customers. This section will go over all aspects on the register side.

We will go over ringing out a customer using various tenders, how to suspend and resume a transaction, and doing normal functions like manager override or manual discounts.

The POS training also includes the store-side functions that are similar in Control Center, such as receiving inventory and doing cycle counts.

The POS is equipped with a training mode function so you can be safe in teaching your new cashiers how to use the registers without the fear of completing real transactions and your inventory levels or sales being affected.

Via video call | 3x 1-hour sessions | Training specialist

Additional module training options

With the Cloud POS system being the heart of your business, we do offer additional modules that can be added on to create more sales opportunities, increase loyalty, and improve customer convenience.

These modules can be the following:

- **Loyal-n-Save:** Customers earn and track rewards seamlessly while enjoying personalized perks and exclusive offers with every purchase.
  - o Additional training: Typical training hours 3-4 hours
- **FTx Uplift:** Generate impulse sales with built-in employee scripts on the POS system and engaging ads displayed on the customer-facing screens.
  - o Additional training: 1 hour
- **FTx Digital Signage:** Create and schedule digital ads, manage promotions, and boost sales with engaging, automated displays.
  - o Additional training: 1 hour
- **FTx Commerce:** Launch a branded ecommerce site, sync inventory in real-time, offer flexible fulfillment options like curbside pickup or delivery, and seamlessly integrate online and in-store sales.
  - o Additional training: 3-4 hours
- **FTx Identity:** Ensure compliance by seamlessly verifying customer ages in-store or online using AI-powered tools, protecting your business and streamlining the checkout process.
  - o Identity EAIV – Additional training: 1 hour
  - o Identity Queue – Additional training: 2 hours
- **FTx Warehouse:** Track inventory in real-time, streamline multi-location operations, and automate purchasing for smarter, more efficient stock control.
  - o Additional training: 5-6 hours

If any of these are added on, you will be trained in these sessions.

Via video call | 3x 1-hour sessions | Training specialist

Install POS

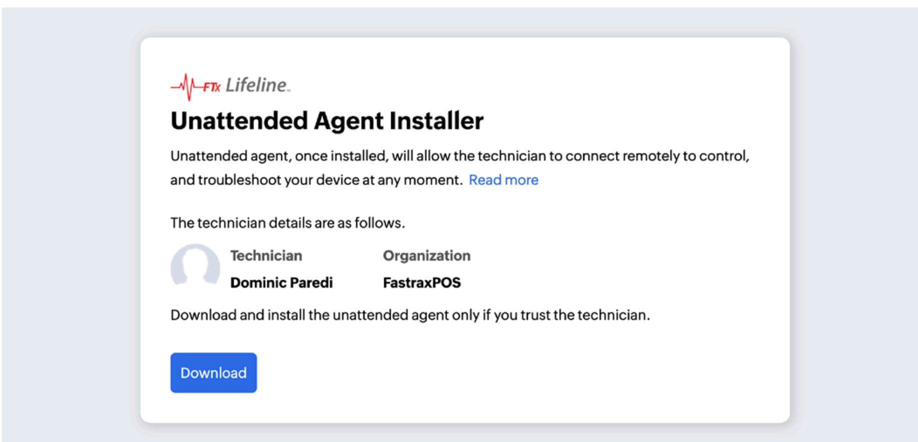
We take on the task of installing the POS application on the registers for you. We will first start by asking you to install a small piece of software for remote control access. This will be what we use to remote in and install the POS, and our Helpdesk will also use this during any support calls to fully help troubleshoot if needed.

Next, we install and test the POS application, including the peripherals, as long as they are seen by Windows.

If you will be using your existing register hardware and your store is active and unable to give us access during normal business hours, please inform us, and we may be able to accommodate off-hours installations.

Please find below the link to install the remote access program. Once done, please send us the Windows computer name and the register it will be assigned to. (e.g., DESKTOP-abc123 = Store1-reg1). Additionally, let us know if there’s a password or PIN required for login.

https://assist.zoho.com/org/767936559/app/deploy/unattended?en-capiKey=wSsVRa138hL1W6l1mDGqdu44kVtdAlj1EE910FCo63f4Hv3GoMdok-kafAwWnHPUdEjE6HTZB9bsqm0xW2zMIho8vwwlVCCiF9mqRe1U4J3x1p7rvlz-7JVm1dkxOILI4AxQ1pnQ%3D%3D&x-com-zoho-assist-orgid=767936559



Via video or phone call

30-60 minutes

Training specialist or onboarding manager

Pre-launch

The pre-launch is a meeting to go over everything with you to ensure the system is ready to go live.

In this meeting we will touch on all the normal aspects of running the system, like having a full list of products, having taxes configured, and if any age verification is activated. This is where we would point out any concerns or hurdles that you may encounter.

From here we will confirm your go-live date is within reach and what to expect that day.

We typically aim for a date at the beginning of the week so we have our complete staff, including our development team, available.

Via video call

1x 1-hour session

Training specialist or onboarding manager

Go-live

The go-live day is very exciting and can be overwhelming. Our goal is to smooth that transition from your old system to this new one. The onboarding team will be available for any questions or issues that may come up and work swiftly to correct.

A common call we receive on the first day is when there is a setting or permission that a client originally wanted on, and now they realize they'd rather it off. It could be because of efficiency or a change to the workflow that they are used to.

We will work with you to make the change so you can get back to business and also show you where the change was made for future reference.

These can be avoided or minimized by having the pre-launch meeting and going over all the settings you are using and testing the system ahead of time.

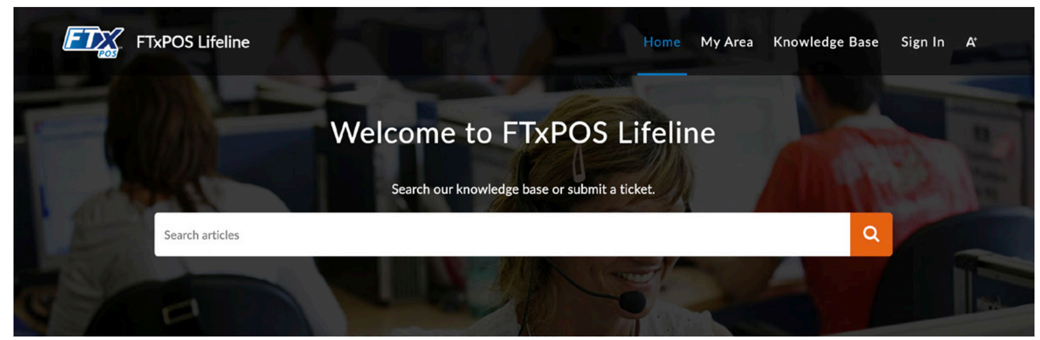
Training specialist or onboarding manager

Transition to support

After being live and operating with your new FTx POS software for 2 weeks, the last stage in the onboarding process is to transition over to support. We know that running your business is not always a 9-5 job, so we have several methods to support you with your questions or issues. If it is you as the owner or designated employees, there is an option to fit those needs.

The FasTrax Lifeline support team can be reached by:

- **Phone: 256-319-3470** – You will receive a live support agent to work with you.
- **Email: support@ftxpos.com** – To open a support ticket, and an agent will get back to you.
- Or direct access to the Lifeline portal to create and review tickets – https://lifeline.goftx.com



In addition to the help desk, we also have a few self-help avenues:

- Our knowledge base is full of documentation with flows and images explaining everything in the system. https://support.ftxpos.com/portal/en/kb
- FTx Academy contains training courses and certifications, which can be used to train new employees or as a refresher. https://ftx-academy.goftx.com/
- Visit our YouTube channel to see our ever-growing library, from quick tips to common scenarios and how to handle them. https://www.youtube.com/@FTxPOS

Account manager