



























# Onboarding Flow Migration

The purpose of this document is to dive deep into the process involved in migrating the customers who are using Legacy POS to Cloud POS.

The document summarizes the roles and responsibilities of the onboarding manager involved at every stage of the project.

Let's look at the steps involved during the entire project:

Discovery Call	Migrate Data to Cloud	Initial Account Setup Training	Back-Office/Control Center Training	POS Training for Cashiers/Managers	Additional Module Training	Install POS	Pre-Launch	Go Live	Transition to Support
Introduce the Onboarding Journey	Copy all data from Legacy to Cloud	Learn and configure your account in Control Center	Learn how to use the back-office 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 Phone		 Via Video Call	 Via Video Call	 Via Video Call	 Via Video Call	 /  Via Video or Phone Call	 Via Video Call		
 30-60 minutes		 3x 1-hour sessions	 3x 1-hour sessions	 1x 1-hour session	 1x 1-hour session	 30-60 minutes	 1x 1-hour session		
 Onboarding Manager	 Onboarding Manager	 Training Specialist	 Training Specialist	 Training Specialist	 Training Specialist	 /  Training Specialist or Onboarding Manager	 Onboarding Manager	 Onboarding Manager	 Onboarding Manager
<ul style="list-style-type: none"> <li>Review the Onboarding Journey, go over some questions</li> <li>Review hardware and requirements</li> <li>Schedule training sessions</li> </ul>	<ul style="list-style-type: none"> <li>Move all data from Legacy up to Control Center</li> </ul>	<ul style="list-style-type: none"> <li>Learn how to configure the initial setup of your account</li> <li>General Maintenance 1</li> <li>General Maintenance 2</li> <li>Pricebook</li> </ul>	<ul style="list-style-type: none"> <li>Learn how to use the back-office functions in Control Center</li> <li>Inventory</li> <li>Reports</li> <li>Lottery</li> </ul>	<ul style="list-style-type: none"> <li>Learn how to use the POS functions</li> <li>POS</li> </ul>	<ul style="list-style-type: none"> <li>Learn how to utilize additional modules</li> <li>Such as Loyal-n-Save</li> <li>Uplifts</li> </ul>	<ul style="list-style-type: none"> <li>Install remote access software for FTx Lifeline</li> <li>Install latest version of POS on register</li> </ul>	<ul style="list-style-type: none"> <li>Review the setup and configuration of your account. Verify you are ready to go live.</li> <li>Answer any additional questions</li> <li>Schedule Go-Live</li> </ul>	<ul style="list-style-type: none"> <li>After store(s) close for the night, move data to Cloud and sync with new POS version</li> <li>No data will be missing, and the stores will have a seamless experience</li> </ul>	<ul style="list-style-type: none"> <li>Transition to FTx Lifeline for any future support</li> <li>Give FTx Lifeline support number, email address, and portal access</li> </ul>

## STEP 1: Discovery Call

The discovery call is the first step of the project after the terms have been agreed upon with the sales team.

### Agenda:

The agenda of the discovery call is to educate you about the steps involved in the data migration and understand the nature of your business.

### Duration:

30 minutes to 60 minutes

### Medium:

Vonage Call or Teams Meeting

### Summary:

- The onboarding manager connects with you to introduce themselves as your project manager during the project to migrate your Legacy POS to Cloud POS.
- During the call, the onboarding manager will educate you about the entire migration process.
- The onboarding manager will work with you to collect information about the hardware, including POS systems and peripherals.
- The onboarding manager will gather the information, like store timings, how soon you are looking to go live with the Cloud POS, etc., and accordingly check the availability for scheduling the trainings.
- The onboarding manager will also get the availability from you to install the necessary tools that support data migration.



Via Phone



30-60 minutes



Onboarding Manager

## STEP 2: Migrate Data to Cloud

The second step of the project is to initiate the migration process, typically carried out after hours once the store has closed.

### Agenda:

The agenda of this step is to copy all the data recorded in FTX Director (Legacy POS) to Control Center (Cloud POS) using the FTX Migrate tool during the off hours.

### Duration:

Depends on the amount of the data that needs to be migrated. Usually, the migration is completed before the store opens the next day in case there is some error that might have caused the migration tool to fail.

### Tools Involved:

- FTX Migrate
- Zoho Assist or ConnectWise

### Summary:

- The onboarding manager will connect with the store using Zoho Assist or ConnectWise once the store closes.
- The onboarding manager investigates the database and corrects the incorrect tax names and rates and assigns them to the proper columns.
- Once the taxes are corrected, the onboarding manager then sets up the migration tool with the API user. This information is available on Control Center.
- Once the account is set up and configured with the FTX Migrate tool, the onboarding manager runs the tool in batches of three to ensure the smooth migration of the data.
- Once the migration is completed, the onboarding manager logs into Control Center to validate the data.



Onboarding Manager

## STEP 3: Initial Account Setup Training

Once the migration using the tool is completed, the next step is to schedule the training for you for using Control Center instead of FTx Director.

### Agenda:

The agenda of this step is checking your availability and scheduling the training for the Maintenance and Pricebook modules.

### Duration:

3 1-hour sessions

### Medium:

Video Conference using MS Teams

### Training Breakdown:

- **Session 1:** Configure and set up the account (1 hour)
- **Session 2:** General Maintenance (1 hour)
- **Session 3:** Pricebook Module (1 hour)

### Summary:

- The onboarding manager, after completing the migration, will then check your availability and schedule the training sessions with the trainer.
- The agenda or the structure of the training will be shared with you so that you have the day-wise plan handy with you.
- The onboarding manager will then share the meeting invite using Outlook Calendar with the respective stakeholders.



Via Video Call



3x 1-hour sessions



Training Specialist

## STEP 4: Back-Office/Control Center Training



The next step in the process is to train the back-office members on your side to use Control Center functions.

### Duration:

3 1-hour sessions

### Medium:

Video Conference using MS Teams

### Training Breakdown:

- **Session 1:** Inventory (1 hour)
- **Session 2:** Reports (1 hour)
- **Session 3:** Lottery (1 hour)

### Summary:

- The trainer will then train you or your back-office staff members on various modules of Control Center, such as Inventory, Reports, Lottery, etc.
- These training sessions are 1 hour and are conducted via MS Teams video conferencing.



Via Video Call



3x 1-hour sessions



Training Specialist

## STEP 5: POS Training for Cashiers/Managers



The next step in the process is to train the cashiers who are at the store location on how to use the POS system.

### Agenda:

To train the cashiers and store managers to use the Cloud POS efficiently and effectively.

### Duration:

1 1-hour session

### Medium:

Video Conference using MS Teams

### Training Breakdown:

- **Session 1:** POS Essential Training (1 Hour)

### Summary:

- The trainer will conduct the training session using the video conference through MS Teams for the cashiers and store managers to use the Cloud POS.
- The training session will focus on everything from ringing the transaction to cancelling the transaction as well as how to Z out at the end of the shift. All the functions that can be performed on the POS system will be covered during the training session.



Via Video Call



3x 1-hour sessions



Training Specialist

## STEP 6: Additional Module Training

With the Cloud POS system being the heart of your business, we do offer additional modules that can be added on to really make your system work for you.

### Agenda:

Train you on using the additional modules of the POS to help you grow and expand. The agenda is also to highlight the benefit of activating the additional modules and helping you activate and configure the same.

### Duration:

1 1-hour session

### Medium:

Video Conference using MS Teams

### Training Breakdown:

- **Session 1:** Learn to utilize the additional modules (1 hour)

### Summary:

- The trainer will then provide the overview of the settings that need to be configured to activate the following modules:
  - Loyal-n-Save
  - FTx Uplift
  - FTx Digital Signage
  - FTx Commerce
  - FTx Identity
  - FTx Warehouse
- The trainer will also give the walkthrough of how to configure the activated module and help you set it up initially.



Via Video Call



3x 1-hour sessions



Training Specialist

## STEP 7: Install POS

Once all the trainings are completed, the trainer will assist you with the installation of the Cloud POS into your system and connect and configure the peripherals.

### Agenda:

The agenda here is to have the latest version of Cloud POS installed on your system for you to use the Cloud POS functionality.

### Duration:

30 minutes to 60 minutes based on the system configuration

### Tools Involved:

- Zoho Assist
- Latest version of MSI of Cloud POS
- Drivers of the peripherals that need to be configured

### Summary:

The trainer will remotely access your system using Zoho Assist and start working on the POS installation into your system. The trainer will first run through the prerequisites checklist to ensure that the system is as per the expectation, and once the system is configured as per the requirement, the trainer will then run the installer file to install the POS.

Once the POS is installed, the trainer will log in through the support credentials and will then sync the data to ensure everything is in place.

Based on the make and model of the other hardware devices, the trainer will install the drivers if available locally, or look for the same over the internet and get them installed. Once the installation of these drivers is completed, the trainer will then configure it with the system and test it by making the dummy transaction.



Via Video or Phone Call



30-60 minutes



Training Specialist or Onboarding Manager

## STEP 8: Pre-Launch



Once the training and POS setup are complete, the onboarding manager will then connect again with you to review the configuration.

### Agenda:

The agenda here is to ensure that everything is in place before you go live with the new Cloud POS.

### Duration:

1 hour

### Medium:

Via MS Teams Video Conference

### Summary:

The onboarding manager here will connect with you again to ensure that the setup of the system is as per the expectation and that everything is working fine. The manager will validate the configuration setting of the POS and peripheral devices as well as Control Center to ensure that any transaction happening on the POS is getting synced with Control Center.

During this session, the onboarding manager will also be answering the additional questions related to training or the configuration that you may have.



Via Video Call



1x 1-hour session



Onboarding Manager

## STEP 9: Go Live

This is the final step of the process where, once we have received the green flag that everything is as per expectation and the configuration of the system looks good, you will be moved to the Go-Live state. You will now be using the latest version of the POS, which is on the Cloud.



Once the store is live, the onboarding manager will be monitoring you for a while to ensure that everything is working as expected.



Onboarding Manager

## STEP 10: Move to Support

Once everything is running on autopilot mode and meeting your expectations, you will be transitioned from Go-Live to Support.



Access comprehensive guides and training videos for your Cloud POS and other solutions on our online training platform, [FTx Academy](#), or explore more on our [YouTube channel](#).

Test Your Skills & Earn Certifications On FasTrax Solutions!



[Control Center Trainings](#)



[Cashier Trainings](#)



Onboarding Manager