Employee Task Book

Employee Name: _____

Issued By: _____   Date Issued: _____

Basic systems overview- After completing this section the employee shall be able to identify various brands and models of POS equipment.

Call intake and work order system- Upon completion the employee shall have basic knowledge of the Intuit Field Service program and will be able to successfully operate CTSG's phone system

Equipment maintenance and repair- Once completed, the employee will be able to successfully tag equipment that has come into the shop for repair and will be able to make basic repairs to various pieces of equipment. This section will also ensure that the employee is able to properly clean and maintain various types of equipment (printers, computers, cashdrawers, etc.)

Focus POS Software- After completing this section, the employee shall have basic knowledge of the functions of Focus POS and can successfully setup a complete Focus POS system.

Task Book Guidelines

Each employee will be given only one copy of this task book. It is important that the employee maintains possesion of this task book at all times until it is completed. Each employee will have a total of 90 days to complete this task book. If 90 days has passed and the employee has not completed the task book, the employee will be reissued a new task book and will be required to start over. It is up to the employee to initiate training on the items included in this task book and to obtain signatures and dates. Once completed, the employee shall submit this task book to the Operations Manager for final review and schedule a meeting.
Falsifying or docturing this task book can result in immediate suspension or termination of employment.

Frequently Asked Questions (FAQ's)

Who can sign off on the tasks?

The Lead Technician or higher can sign off on the items included in this task book.

Who does the final sign off?

The Operations Manager or higher will complete the final sign off of the taskbook upon review.

What happens if I lose the task book?

If the task book is lost or misplaced the employee will be required to start the taskbook over.

Basic Systems Overview

	Date	Signature
List or identify computer brands/ models		
List or identify printer brands/ models		
List or identify cash drawer brands/ models/ sizes		
List or identify router brands/ models		
List or identify network switch brands/ models		
Describe the difference between CAT5 and CAT5 network cables		
Describe the difference between Solid State Drives (SSD), Hard Disk Drives (HDD) and Perifpheral Component Interconnect Express Drives (PCIe)		
Identify types of RAM and describe what it is used for		

Basic overview of Focus POS
- Login
-Ring Orders
-Close Check

Call Intake and Work Order System

	Date	Signature

Employee is able to use the phone system without assistance

List various types of work orders and when they should be used

Notate information in the appropriate format for work orders

Sucessfully create 20 work orders in field service

Correctly input billing on 20 work orders in field service

Equipment Repair & Maintenance

Printers

	Date	Signature

Tag 10 pieces of equipment in shop for repair and identify issues

Repair a broken spindle on a EPSON TMU220B impact printer

Repair a bent ribbon cage on a EPSON TMU220B impact printer

Remove printer casing on impact and thermal printers

Repair cutter by soldering on EPSON TMU220B

Replace print head on EPSON TMU220B impact printer

Replace thermal print head on EPSON T20 printer

Equipment Repair & Maintenance

Printers Cont...   **Date**   **Signature**

Demonstrates the proper way to install ink ribbon on EPSON TMU220B printer

Identify the difference between Thermal and Impact printer paper

Successfully replace network card in EPSON TMU220B printer and configure
with the Epson NetConfig program

Successfully replace feed button on both impact and thermal printers

Demonstrate proper cleaning method of thermal and impact printers to include
the correct cleaning products.

Computers

                                        Date   **Signature**

Replace touch screen on Posiflex 7215

Replace LCD screen on Posiflex 7215

Replace parralel cable on Posiflex 7215

Demonstrate proper cleaning method of touch screens

Replace computer RAM (Memory) on the Posiflex 7215 and Posiflex 3815 models

Remove and replace hard drives on various brands/ models of point of sale computers
(Posiflex, Touch Dynamic, Posbank, PosX, etc.)

Demonstrate how to calibrate touch screen on Touch Dynamic and Posiflex computers

Successfully image, clone, and restore image to Hard Drive

Focus POS Software

Date   **Signature**

Successfully setup a 3 station Focus system

Identify Focus shortcut target paths for Focus, Backup, and ST3+

Create item and modifier canvases in Focus

Shows knowledge of how **packages** work and how to create them

How to add items to canvases and align them properly

How to change receipt printer settings

How to change remote printer settings

How to create and modify **locations** in Focus

How to create and assign **jobs** to **employees**

How to create and apply different **revenue centers**

How to create and apply different **order types**

How to edit **time cards**

How to create various types of reports and have them display

How to set up automatic emailing of reports

How to use **printer assignments**

How to create **network printers**

How to **VOID** menu items and payments

How to edit credit card tips

How to clock in and clock out

How to reapply credit card payments (Swipe and Shift4 Only

How to place credit card proccessing offline and online

Acronyms

POS-	*Point of Sale*
RAM-	*Random Access Memory*
SSD-	*Solid State Drive*
HDD-	*Hard Disk Drive*
CAT5-	*Category 5 Cable*
CAT6-	*Category 6 Cable*
CAT5e-	*Category 5 Enhanced Cable*
CPU-	*Central Processing Unit*
LCD-	*Liquid Crystal Display*
EMV-	*Europay, Mastercard, Visa*

Definitions

Software- *Set of instructions, data or programs used to operate computers and execute specific tasks.*

Hardware- *The physical parts of a computer, such as the case, central processing unit (CPU), random access memory (RAM), monitor, mouse, keyboard, computer data storage, graphics card, sound card, speakers and motherboard.*

Disk Image- *A disk image is a copy of the entire contents of a storage device, such as a hard drive, DVD, or CD. The disk image represents the content exactly as it is on the original storage device, including both data and structure information.*

Cloning- *The process of creating an exact copy of another application program or object.*

Void- A transaction that is canceled before it settles as a debit, credit, or cash payment

Computer Terminal- *An electronic or electromechanical hardware device that can be used for entering data into, and transcribing data from, a computer or a computing system.*

EMV- *A payment method based on a technical standard for smart payment cards and for payment terminals and automated teller machines which can accept them.*

Point of Sale *A place where a customer executes the payment for goods or services and where sales taxes may become payable.*

Notes:

Final Sign Off

Fill out once task book is completed

Employee Signature:_____ Date:_____

Manager Name:_____ Date:_____

Manager Signature:_____ Date:_____