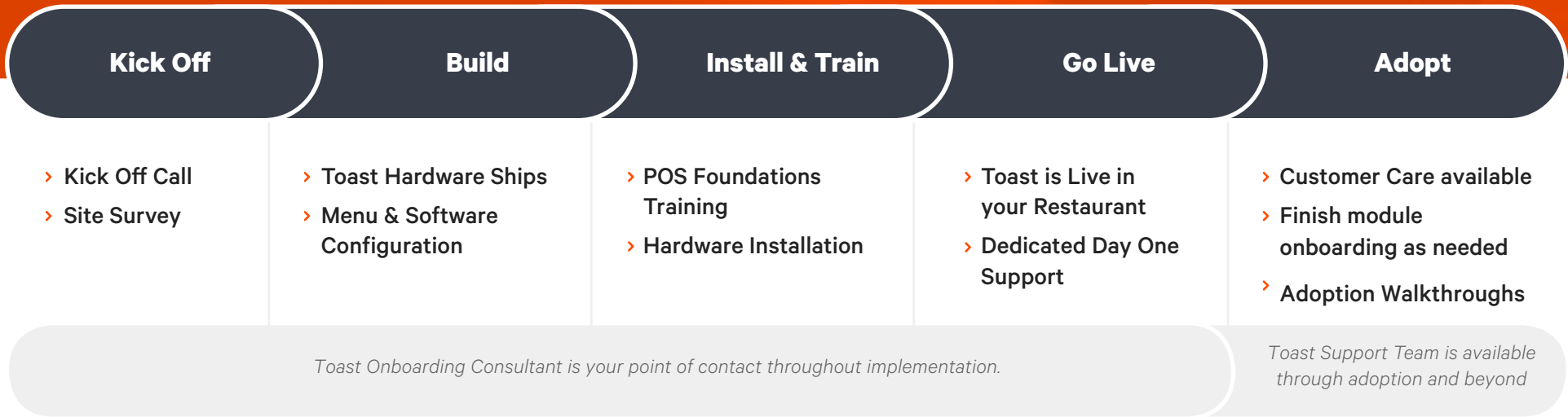




Welcome to Toast - Let's get started!

Our Customer Onboarding Journey is designed to ensure a successful implementation of Toast—so your team can continue to do what they love and thrive. Our team will do the heavy lifting. This guide is designed to help you engage with us along the way.



Toast Central

Use Toast Central, our knowledge base, to find answers to your top questions and learn more about how to use Toast.



Toast Classroom

Explore our comprehensive selection of live and on-demand training videos to build your Toast skills.

Kick Off

Build

Install & Train

Go Live

Adopt

Key Activities & Milestones

- Kick Off Call
 - Implementation Planning
 - Module Planning
- Site Survey

How you can engage with us

- Assign someone to manage your onboarding with us
- Submit completed menu template
- Be ready with information about your restaurant operations and implementation timeline
- Be at your restaurant location for the Site Survey

What to Expect

KICK OFF

Once you sign your contract and complete your account setup, a Toast Onboarding Consultant will conduct a Kick Off call with you. During the call you will receive an overview of the onboarding process and get your implementation started.

You will also receive an invitation to Toast University - so you can login and start to learn how to use Toast.

SITE SURVEY

During the Site Survey our team will work with you to make sure your restaurant is ready for installation.

We will verify cabling and wiring setup, identify locations for hardware, and test network connectivity. Upon completion, you will receive the results with any "to-dos" required prior to installation. Please note that Toast is not responsible for running cabling, however.



TRAINING Toast Classroom

- > Implementation Training



TRAINING Toast University

- > How to Sign Into Toast
- > Checklist of Site Readiness Requirements

Kick Off

Build

Install & Train

Go Live

Adopt

Key Activities & Milestones

- Toast Hardware Ships
- Menu & Software Configuration

How you can engage with us

- Complete site readiness tasks
- Schedule staff for Training and Go Live
- Help us build your menu - learn how to build, edit and adjust menu items
- Send us details on the partners you use so we can seamlessly set up our integrations

What to Expect

MENU & SOFTWARE CONFIGURATION

In the build phase, our team configures your software with a focus on your menu and beverage lists as we build your menu off of a customizable menu template.

SITE READINESS

During this phase, it's a great opportunity to complete additional site readiness tasks as required. These tasks need to be completed in advance of your install date.

Get ready to receive your hardware. Keep your eye out for the tracking confirmation so you can sign for the delivery!



TRAINING Toast Classroom

- > Basic Menu Configuration
- > Device Setup / UI Options



TRAINING Toast University

- > Menu Training Course
- > Toast Quick Setup Guide
- > Toast Module Training Course

Kick Off

Build

Install & Train

Go Live

Adopt

Key Activities & Milestones

- Hardware Installation
- POS Foundations Training
 - Manager Training Session
 - Staff Training Session

How you can engage with us

- Encourage managers and staff to attend training
- Add employees into Toast system
- Order printer paper
- Remove cash from drawers
- Mount KDS and Wireless Access Points as needed

What to Expect

HARDWARE INSTALL

Our implementers have direct restaurant experience and will ensure your hardware is set up cleanly and accurately.

POS FOUNDATIONS TRAINING

Our POS Foundations Training (as part of onboarding) is focused on getting your servers and managers ready for day one with Toast.



TRAINING Toast Classroom

- > Employee Training Manager
- > Device Setup/UI Options Training



TRAINING Toast University

- > Manager Training Course
- > Setup/Configuration Training Course
- > Staff Cash Management Training Course
- > Training: Full Service Restaurant Staff
- > Training: Quick Service Restaurant

**Option to purchase additional services, such as onsite installation day, gift card conversation for existing cards, and Digital Ordering set up*

Kick Off

Build

Install & Train

Go Live

Adopt

Key Activities & Milestones

- Toast is Live in your Restaurant
- Dedicated Day One Support*

How you can engage with us

- Use your new POS and process transactions
- Finalize your system configuration with your customized preferences
- Complete module setup

What to Expect

DEDICATED DAY ONE SUPPORT

Our implementers will support and problem solve for you and your team during Go Live to ensure you are able to provide top notch service during your first shift with Toast.

They will answer questions, train your staff on the job, perform additional configuration and troubleshoot your system if needed.



TRAINING Toast Classroom

- › Multi-Location Management
- › Cash Management



TRAINING Toast University

- › End of Day Training Guide:
Cash Management & Close Out

*Option to purchase additional support

Kick Off

Build

Install & Train

Go Live

Adopt

Key Activities & Milestones

- Finish module onboarding as needed
- Utilize our Customer Care Team as needed

How you can engage with us

- Visit [Toast Central](#) to chat with a Customer Care agent, submit a ticket, or search our knowledge base for help
 - **Submit a ticket**
 - Chat with Customer Care via Toast Central
 - Call @ 617-682-0225
- **Subscribe** to status updates and outage information
- Train in [Toast Classroom](#)

What to Expect

ONBOARD REMAINING MODULES Modules purchased are set up remotely by our Implementers. If you do not activate all modules prior to Go Live, your Onboarding Consultant will assist in scheduling necessary appointments to activate the remaining modules after Go Live.

SUPPORT

Our Customer Care team is available 24/7/365 to troubleshoot your questions and issues.

TRAINING & KNOWLEDGE BASE

We offer multiple live and on-demand training courses for you to build skills and knowledge through Toast Classroom. Additionally, you have access to our customer Knowledge Base with articles to help answer questions.



TRAINING Toast Classroom

Learn some best practices with our live and on-demand sessions for

- > **Toast Payroll**
- > **Online Ordering**



TRAINING Toast University

As you refine your operations on Toast, refer to our

- > **Reporting Training Course**

