Toast POS Navigation

Training Module

Boundaries Coffee Training Series

Training Videos

Complete these Toast Central training modules before hands-on practice:

• **Toast Classroom – Front of House:** central.toasttab.com/s/toast-classroom

• **Front of House Skills 101:** central.toasttab.com/s/front-of-house-skills-101

• **POS Practice Sandbox:** Toast Classroom → Getting Started with POS Functionality

Note: Toast Central requires login. Ask your manager for access.

Hardware Overview

- Toast Go 2 handheld device
- Touchscreen interface
- Built-in card reader (swipe, chip, tap)
- Stored in Boundaries satchel when taking orders outside

Order Entry Flow

1. **Tab Name** – Enter guest name
2. **Add Item** – Select category, then drink
3. **Select Size** – Choose size
4. **Select Modifiers** – Milk, sweetness, extras
5. **Done** – Confirm item
6. **Send to Kitchen** – Fire order

Common Modifiers

- Milk: Whole, 2%, Oat, Almond, Coconut, Fairlife
- Sweetness: Half Sweet, Extra Sweet
- Extras: Extra Shot (+$1), Sweet Cream (+$0.75), Drizzle (+$0.25)
- Temperature: Hot, Iced, Frozen

Payment Processing

Credit/Debit: Pay → Lane → Tap/Insert/Swipe
Cash: Pay → Cash → Enter amount → Change
Gift Card: Pay → Gift Card → Scan/Enter
Boundaries App: Pay → Gift Card → Scan QR code
Mobile Wallet: Apple/Google Pay → Tap

⚠️ **IMPORTANT: Boundaries App Payments**

When a guest pays with the Boundaries App, select **Gift Card** as the payment method. The app generates a digital gift card QR code. Do NOT select Credit Card.

Editing Orders

- Tap item to modify
- Swipe left to remove

- Void before payment; Refund after (manager approval may be required)

Hands-On Practice

Trainee: _____ **Date:** _____

Part A: Toast Navigation

Task	Qty	Initial	Focus
Enter tab name	3		Speed
Navigate to Originals	3		Find quickly
Navigate to Energy/Bubbly	3		Find quickly
Navigate to Kids Drinks	3		Find quickly
Add size modifier	5		Correct selection
Add each milk type	6		All options
Add sweetness modifier	3		Half/Extra
Remove item (swipe left)	3		Delete
Edit item modifiers	3		Change after adding

Part B: Order Scenarios

Order	Initial	Notes
Large Iced Texas Delight, oat milk, half sweet		
Medium Hot Hill Country with extra shot		
Frozen Salted Sweetheart, large, sweet cream		
Electric B Energy + Unicorn Latte		
Cookie Butter Nitro + Bacon Taco		
Strawberry Dream Matcha, iced, almond, extra sweet		
Hot Honey Bee Tea + Chocolate Croissant		
2 Large Iced: Lavender Sunrise + Harvest Moon		

Part C: Payment Processing

Task	Qty	Initial	Focus
Card payment (tap)	3		Lane selection
Card payment (chip)	2		Wait for prompt
Cash payment	3		Calculate change
Apply rewards (phone #)	3		Enter correctly
Gift card payment	2		Scan/enter
Boundaries App payment	2		Use Gift Card!
Sell gift card	1		Activation
Void item before payment	2		Swipe delete
Process refund (w/ trainer)	1		Manager approval

Trainer Signature: _____ **Date:** _____

Toast POS Navigation Quiz

Minimum passing score: 80% (16/20 correct)

1. What is the correct order entry flow?
    A) Add Item → Size → Tab Name → Modifiers
    B) Tab Name → Add Item → Size → Modifiers → Done → Send
    C) Size → Item → Modifiers → Name
    D) Item → Modifiers → Size → Pay

2. How do you remove an item from an order?
    A) Press the delete button
    B) Swipe left on the item
    C) Long press the item
    D) Tap the trash icon

3. What is the upcharge for an extra shot?
    A) $0.50
    B) $0.75
    C) $1.00
    D) $1.25

4. What is the upcharge for sweet cream?
    A) $0.25
    B) $0.50
    C) $0.75
    D) $1.00

5. How do you process a Boundaries App payment?
    A) Select Credit Card and scan
    B) Select Gift Card and scan the QR code
    C) Select Mobile Wallet
    D) Select Boundaries App button

6. What milk options are available?
    A) Whole, Skim, 2%
    B) Whole, 2%, Oat, Almond, Coconut, Fairlife
    C) Whole, Oat, Soy
    D) 2%, Almond, Cashew

7. What are the sweetness modifier options?
    A) Light, Regular, Extra
    B) Half Sweet, Extra Sweet
    C) Less Sugar, More Sugar
    D) 25%, 50%, 100%

8. How do you apply rewards to an order?
    A) Scan the app QR code
    B) Enter the guest's phone number
    C) Ask for their email
    D) Look up their name

9. What handheld device does Boundaries use?
    A) Toast Go 1
    B) Toast Go 2
    C) Toast Flex
    D) Toast Kiosk

10. What is Step 1 of the order entry flow?
    A) Add Item
    B) Tab Name
    C) Select Size
    D) Send to Kitchen

11. How do you edit an item's modifiers after adding it?
    A) Delete and re-add
    B) Tap the item to modify
    C) Press the edit button
    D) Cannot be edited

12. What is the upcharge for adding a drizzle?
    A) $0.25
    B) $0.50
    C) $0.75
    D) $1.00

13. When processing a cash payment, what do you enter?
    A) The total amount due
    B) The amount tendered by the guest
    C) The change amount
    D) The tip amount

14. What does "Void" mean?
    A) Complete the order
    B) Remove an item before payment
    C) Process a refund
    D) Close the register

15. When might manager approval be required?
    A) Adding modifiers
    B) Processing refunds
    C) Entering tab names
    D) Selecting sizes

16. How do you sell a new gift card?
    A) Select Gift Card payment
    B) Add Gift Card item → Select amount → Process payment → Activate
    C) Scan an existing card
    D) Enter the card number manually

17. What should you do if a guest changes their order?
    A) Start over completely
    B) Tap to edit or swipe left to delete items
    C) Ask them to order again at the window

D) Call a manager

18. Where is the Toast handheld stored when taking orders outside?
A) In your pocket
B) In the Boundaries satchel
C) On a lanyard
D) At the register

19. What temperature options are available for drinks?
A) Warm, Room Temp, Cold
B) Hot, Iced, Frozen
C) Hot, Cold
D) Steaming, Lukewarm, Chilled

20. Why is it important to use Gift Card for Boundaries App payments?
A) It's faster
B) The app generates a digital gift card QR code
C) Credit Card doesn't work
D) It gives bonus points

Answer Key

(For Manager/Trainer Use Only)

1. B – Tab Name → Add Item → Size → Modifiers → Done → Send
2. B – Swipe left on the item
3. C – $1.00
4. C – $0.75
5. B – Select Gift Card and scan the QR code
6. B – Whole, 2%, Oat, Almond, Coconut, Fairlife
7. B – Half Sweet, Extra Sweet
8. B – Enter the guest's phone number
9. B – Toast Go 2
10. B – Tab Name
11. B – Tap the item to modify
12. A – $0.25
13. B – The amount tendered by the guest
14. B – Remove an item before payment
15. B – Processing refunds
16. B – Add Gift Card item → Select amount → Process payment → Activate
17. B – Tap to edit or swipe left to delete items
18. B – In the Boundaries satchel
19. B – Hot, Iced, Frozen
20. B – The app generates a digital gift card QR code

Quiz Results

Score: _____ / 20   **Percentage:** _____%   **Pass/Fail:** _____
(Minimum 16/20 = 80% to pass)