

DOCENT ORIENTATION CHECKLIST

Instructor Initials: _____

Upon completion of the Orientation session, each docent participant will place a check mark for each item s/he is competent in and then sign and date at the bottom. This form is to be given to the docent instructor who will give it to the Gallery Manager as a record of attendance.

Opening the Gallery

- _____ Able to unlock/lock the lockbox
- _____ Able to turn on lights and adjust temperature only (heat or A/C) - ~72/winter & ~78/summer
- _____ Able to turn on computer, open file cabinet in the office, set up cashbox for the day and what to do if change or smaller bills are needed
- _____ Able to perform a check of the Gallery
- _____ Able to turn on Open sign, turn on the water fountain, set up table and chairs outside and unlock front door

Daily Tasks

- _____ Able to complete the Daily Sheet with all information needed
- _____ Knows the gallery: manuals; docent desk area; office; printer; storage areas
- _____ Able to greet visitors and promote "People's Choice Award"
- _____ Able to answer the phone and knows what to do with messages

Sales

- _____ Able to identify which items are taxable or non-taxable
- _____ Able to create a sales transaction in Masterpiece (MP)
- _____ Able to process a cash transaction, a check transaction, and a credit-card transaction in MP
- _____ Able to use the Genius credit card machine and follow prompts in MP
- _____ Able to record in the inventory book sale and make artist call after the sale
- _____ Knows what payments are run through the gallery; and which payments are not

Miscellaneous

- _____ Knows where to find information
- _____ Able to take in Cards or Bin Paintings and record correctly
- _____ Knows how to use the printer as a copy machine / finding Master Copies of handouts
- _____ Able to use the call list for an emergency or unfamiliar situation
- _____ Knows to **not** rearrange or move materials in docent desk area; operations manual; office; paintings or bins; storage shelves; reception cabinets; or furniture
- _____ Knows to **not** process entry payment for shows, workshops, virtual classes, bins, or membership without the completed registration form. Record payment type and amount on form. Entry form must be placed in correct folder in the office and chair/coordinator notified.
- _____ Knows what to do with new or renewal membership forms

Closing the Gallery

- _____ Able to turn OFF sign, water fountain, computer, lights and lock front door and confirm locked
- _____ Able to output daily log of transactions in MP, count cash and put Daily Sales Baggie and report in lockbox, and put cashbox away
- _____ Able to turn down temperature only (heat/air system) - ~70/winter & ~80/summer
- _____ Able to open lockbox, lock backdoor, secure key in lockbox and confirm door is locked

Name: (Print) _____ Date: _____

Signature: _____

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