

# 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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