

Your Successful Passport® Upgrade Survey

This survey is designed to help the salesperson guide the new Passport customer to a smooth adoption of the system.



Instructions:

1. Review each question with your customer and note the answers in the space provided.
2. Take note of the alerts related to Passport Software Modules that could be required to delight the customer with their new Passport system, based on their specific requirements. The Gilbarco Veeder-Root sales tool, Passport Base Application vs. Software Module Comparison SP-2509, will provide additional detail on this Software Module decision.
3. Provide a copy of the completed survey to your Passport Certified Technician to guarantee a successful installation and rollout.



Customer Name	
Survey Date	
Store Address(es):	

Category and Question	Answer	System Selection Notes (for the salesperson)	Configuration and Training Notes (For the technician)
Employees			
How many Employees work at your store?		Base Passport provides for 20 active employees and 4 security groups. Employee Management software module handles additional amounts.	Use for: Employee Maintenance Security Group Maintenance Period Maintenance
What are the different roles?			
Do you run shifts?			
Store Management			
What time do you close your financial day?			Use for Forced Day Close settings under Period Maintenance
Do you want to control this timeframe?			

Category and Question	Answer	System Selection Notes (for the salesperson)	Configuration and Training Notes (For the technician)
Payment			
What forms of payment do you take at your store?	Cash Check Credit Debit Manufacturing Coupon Local Accounts Imprinter EBT Others	Base Passport provides six configurable tender types. If you need more, purchase the Enhanced Store software module.	Use for Tender Maintenance
Pricebook			
Do you scan at your store?		If you maintain your own price book without a back office, you need to purchase a key wedge scanner to add items into the Passport price book.	Use for Item Maintenance set-up.
What type of scanner do you use?			The G-SITE to Passport Conversion Tool will convert your current G-SITE data to a format that is supported by Passport. G-SITE never deletes any items, so you may have some items that have not been sold in years. An exception report details items that were dropped due to formatting errors.
Do you maintain your own price book?			
Back office			
Who is your Back office provider?			Use for: Backoffice Settings in Item Maintenance.
Is your Back office configured for both price book maintenance and store totals?			

Category and Question	Answer	System Selection Notes (for the salesperson)	Configuration and Training Notes (For the technician)
Dispenser Options			
Do you run your forecourt as prepaid only?			Use for: Dispenser Options Forecourt Configurations Tender Maintenance (Drive-Off)
How do you enforce prepaid?			
Does this mode of operation change at night?			
How do you handle Drive Offs?			
Customer Messaging			
Do you change your customer messages? Where?			Use for: Register Group Maintenance Site Options (CRIND Message)
Do you have different messages for your CRIND customers?			
Department Maintenance			
Do you sell against an open department?			Use for: Department Maintenance Register Group Maintenance Key Maintenance
How many do you use?			
PLU's and UPC Usage			
Do you use PLU numbers or Macro Keys to quickly select some specific items?			Use for: Item Maintenance SpeedKey Maintenance
Do you sell items that are stored outside on the forecourt?			

Category and Question	Answer	System Selection Notes (for the salesperson)	Configuration and Training Notes (For the technician)
Reports Configuration			
What G-SITE reports are critical to your store's daily operation?		Enhanced Reporting, Employee Management, and Advanced Merchandising software modules add additional reports.	Use for: Period Maintenance Reports (All areas)
Which reports do you want to view only when necessary?			
Cash Management			
How much money does your cashier have in the drawer at the beginning of their shift?		By adding the Employee Management software module you have more flexibility in security methods for till balancing.	Use for: Store Options Accounting Options Employee Maintenance
Do they switch cash drawers at shift change or drop their money back to the opening amount?			
Restriction Maintenance			
What are your restriction times for items such as alcohol?			Use for: Restriction Maintenance
Do you want your cashiers to enter a birth date or only be notified about restricted items?			
Receipts			
How long do you want to be able to reprint a receipt?			Use for: Store Options (Max is 30 days)
Data Maintenance			
How long do you want to view key reports?		The ability to track data up to a year is part of the Base Passport offering. Configurable Manager Periods and Flash Reports are available under the Advanced Merchandising or Enhanced Reporting software modules.	Use for: Store Options Period Maintenance Flash Report Configuration
Do you need to track certain items over specific periods of time?			

Category and Question	Answer	System Selection Notes (for the salesperson)	Configuration and Training Notes (For the technician)
Exception Conditions			
Do you want the cashier to be allowed to open the cash drawer using No Sale or Void Transaction without telling you why they are doing it?		Standard NACS reason codes are included in the Base Passport application. Employee Management software module gives you the ability to create reason codes.	Use for: Register Group Options
Local Accounts			
Face or Card Based local accounts?		The Enhanced Store software module is required to support Local Accounts.	Use for: Local Account Maintenance
Who and how many?			
Paid In / Paid Outs			
What situations require you to pay or receive payment from a vendor or customer from using your cash drawer?			Use for: Income/Expense Maintenance (Paid-In/Paid-Out)
Discount Methods			
What types of discounts (fuel and dry stock) do you allow at your store?			Use for: Discount Maintenance Fuel Discounting
Do you want to track them or limit them?			
Daily Reminders			
How do you communicate with your employees when you are not in the store?			Use for: Reminder Maintenance

Category and Question	Answer	System Selection Notes (for the salesperson)	Configuration and Training Notes (For the technician)
Third Party Devices			
Do you have a tank monitor interface? Which one?		Refer to our Partners program document SP-3027J, for interface information.	Use for Third Party applications : Car Wash Maintenance Forecourt Configuration Security Camera Interface Store Options
Car Wash on site?			
Security Camera?			
Other Devices in the Store?			