

Documentation supports successful point-of-sale launch

CASE STUDY

Challenges:

- Teaching personnel how to use a POS system through documentation
- Merging software instructions with internal processes for user-ready workflows
- Fast-approaching launch deadline

Approach:

- Identified key tasks and outlined manual content
- Prioritized critical tasks for faster launch
- Immersed in software to drive precise instructions

Results:



Completed documentation on schedule



Guided & trained team for a successful launch



Developer & retailers inquired about D2 services

As a retailer updated their point-of-sale (POS) system across 21 stores, they faced the challenge of teaching managers and employees how to use it. While the software developer had generic documentation, it was not tailored to the retailer's specific UI customizations, hardware setup, or operational processes. Employees needed to learn to operate the till and troubleshooting resources. Store managers also needed processes for managing accounts and inventory, running sales and open/close procedures, and maintaining hardware/software.

Our approach

We started by talking to retail management to understand who would be using the documentation and their key tasks. We also took an initial inventory of the POS system and the functions it could perform. With this information, we outlined the manual content in a phased approach.

D2 attended training sessions with the software developer and retail management to learn how the POS system operated, ask questions, and determine what tasks (and struggles) retail staff dealt with on a daily basis. This information formed the foundation of the manual.

Armed with a sandbox version of the POS system for testing, a technical writer wrote and laid out the documentation. Our graphic designers helped design a template that fit the retailer's branding. Graphics were created with visual cues to help users identify key information and quickly follow instructions.

The results

The retailer was delighted with the document, and it helped guide and train their team for a successful launch. Following our phased plan, we published a few revisions to the manual based on hardware and software updates and customer feedback, while also incorporating lower-priority topics that were scheduled for future release. The software developer was impressed with the manual and interested in D2 documentation for their other customers. Leadership from other regional retail stores voiced interest as well.