

To ensure Our People have the basic knowledge and skills to navigate the POS.

Sales

Date:

/ /

Store #

Associate: _____

Mentor: _____

Mentor

Instructions:

Create your own unique customer scenario and utilize your store practice account details when performing observation.

Scenario _____

| | | | |
|---|---|------------------------------|-----------------------------|
| POS Overview | Explained what the left-side menu items are used for. (POS Feedback, Invoice Sales, Appointment Maintenance, Transfer Receiving, Inquiries And Reports, Wizards, Manager, Executive, CSL, Sessions) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | Explained what each tile on the Invoice Sales screen is used for. (Customer Inquiry, Appointments Start Time, Web Orders, BOPIS, VTV Select). | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Create or Edit a Customer Record | Navigated to the customer inquiry screen, opened the "Add Customer Data" window and accurately entered customer information into the required fields. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | Navigated to the vehicle data screen and accurately entered the correct vehicle data. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | Explained the importance of accurate data capture. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | Understands the legend. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Look up Customer Information | Explained our 3 customer types (Retail, Resale, A/R/Fleet). | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | Ability to view past invoices (last rotation, balance and/or purchase). | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | Ability to view mileage and previous tread depth data (Work Order button). | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | Determined if customer has certificates. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Convert BOPIS, WEB, Appointments | Navigated to the appointment list and identified appointment information. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | Navigated to the BOPIS list and converted to invoice. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | Navigated to the Web Orders list and determined if the order has an appointment. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Create an Invoice | Demonstrated ability to create a purchase invoice. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | Navigated using VTV Select for unplanned visits. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | Verified tire and wheel fitment and utilized Treadwell. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | Demonstrated ability to create a service invoice. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | Located appropriate labor code in POS or utilized KC POS page. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | Determined an accurate wait time. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Finalize invoice | Verified or calculated OEM air pressure. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | Verified VTV information (entered or used VTV INSP). | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | Verified email address and telephone number. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | Explained the Journey Tracker. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |