

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

Sales Associate: _____ **Date:** / / **Store #** _____
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