

POS Manual Processes

Description This document explains how to manually execute specific employee functions in the event that the POS is unavailable.

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Function	Process
Air Pressure Calculator	Use the calculator on the Knowledge Center. It can be found here .
Appointments	Print weekly appointment list, the day before scheduled migration. Print Appointment PDF from POS Outage KC page. Write in known appointments on the spreadsheet from KC, leaving room to insert additional appointments as needed.
BOPIS – 21 Day Refunds	Any BOPIS orders older than 21 days will be automatically refunded once the POS systems are available and nightly processing runs.
BOPIS – Delete (from Stores/Web Link)	Monitor email
BOPIS – Orders	N/A
Certificate Retails	Create a BOPIS order, but do not finalize. See invoice instructions for additional info.
Credit Application	<p>Option 1 (recommended): Use Website for credit app. If customer is purchasing today and is approved, then complete a BOPIS order. Then follow BOPIS order process.</p> <p>Option 2: Use Mapply for application and then create a BOPIS order. Click here to view Mapply instructions.</p>
CSL Workflow	Print out the CSL Log from POS Outage page and use that to manually keep track of basic CSL data.
Customer History	Unfortunately Customer History will not be accessible until the POS is available.
Deposits (Manager menu)	Do deposits as needed. Keep copy. Enter in POS when available.

Email Form	Any rekeyed forms will be emailed if we have email on file. Emails for prior transactions will not be available during POS outage.
Employee Maintenance	Employees cannot be added, modified or inactivated until POS is available.
End of Day	Perform End of Day, as normal, after any Recovery Steps have been completed.
Execustar – Regional Offices	Unfortunately Execustar will not be available and there is no workaround in place.
Executive – Audited Forms	Unfortunately Executive Forms Auditing will not be accessible until the POS is available.
Fitment – Product Search	Use the website.
Fitment – Validation	Use Website to create a BOPIS order, even if you don't finalize it. This will ensure proper product fitment. See Invoice Instructions for additional information.
Free Air Checks	Do air checks. Do not log them.
Gift Certificates – Create	N/A
Gift Certificates – Redeem	N/A
Info Sheets	Log into SHOP. Select desired product. Select InfoSheet button (see Info Sheets tab for screen shots)

Inquiries / Reports	Use BI Tool or KC reporting.
Invoices – Adjustment Types	Print out in case of outage and/or use direct link to Knowledge document here .
Invoices – Adjustments	Use PDF to create an Adjustment Invoice.
Invoices – AR Payments	Capture PO # and Customer's AR Account Number on PDF form. Call Finance Dept for voice approval: 888-943-9707. To Look up an AR Account Number, click here .
Invoices – Auto Added Line Items	If doing BOPIS, will include. If PDF, can manually key in.
Invoices – Cash Payment	Use PDF.
Invoices – Check Payment	Use PDF. Call UTA (United TranzActions) for authorization: 1-800-858-5875 Then attach check to PDF for when rekey.
Invoices – Credit Card Payment	This is a separate document.
Invoices – Debit Card Payment	Run as credit, else cannot do.
Invoices – FET	During a system outage, it is unnecessary to collect FET fees.

Invoices – Fleet	<p>Create a PDF invoice. Be sure to capture the Fleet account number on the form.</p> <p>For ARI: Continue using existing approval process, directions found here.</p> <p>For Auto-Integrate Customers: EFM: The number is 800-325-8838. For tires: option 1, option 4, option 7.</p> <p>Fleetio - voice approvals are not available so an invoice could not be processed.</p> <p>EMKAY: Call center is 800-621-2001 opt 1.</p> <p>GSA: TBD</p>
Invoices – Labor	Use the PDF Invoice to create a labor invoice.
Invoices – Order Total Changes / Accessories etc.	Use PDF for price adjustments
Invoices – Split Payment	Split order – two BOPIS orders if two credit cards used. Else PDF if necessary.
Invoices – Taxes	Please refer to Tax Info document on KC for your tax rate. Enter tax rate into your PDF invoice for automatic calculation.
Invoices – Units	BOPIS or PDF depending on payment and transaction type
Layaways – Deposits	PDF and rekey
Layaways – Refunds	<p>Use a PDF if they have record of it on the layaway balance list they preprinted.</p> <p>Enter a line of the PDF for "prior layaway deposit" with a negative \$ amount to help with record keeping and calculation of correct amount due</p>
Lift Instructions	Refer to the ALI Lift Manual

Manual Costing Activity	N/A
MY Account – Create Orders	Monitor for emails and track manually
MY Account – Modify Appointments	Monitor for emails and track manually
Physical Inventory	MIM
Promise Time	On PDF or write on BOPIS if desired print out. If it's written on BOPIS printout, be sure to write on store copy so that everyone is aware of the time promised to customer
Quote	Write up a PDF.
Receiving Activities	MIM
Reprint a Form	N/A
Resale Customer	Use PDF and 0 tax
ROPIS – Create	Monitor for emails and track manually (appointments)
ROPIS – Delete	Monitor email

Scheduling – CREW Time	For those stores on CREW Time, please continue using the CREW Time application.
Scheduling – KD18	Finalize Schedule before your scheduled migration and print out.
SHOP	Access SHOP via the icon on your desktop, or navigate here . Put detailed comments in the SHOP order, to tie back to customer order.
Special Verbiage on Forms	N/A
Start of Day	See End of Day
State Specific – CA	License Number should print on PDF. For BOPIS Orders, CA Stores should write their license number on the BOPIS printout/invoice.
State Specific – CA / Invoice – AAA Discount	Use PDF. Reduce the tire retail by appropriate amount.
State Specific – FL	License Number should print on PDF. Be sure to print out the 2 copies of the FL Verbiage page and have customer sign it for our records.
Terms & Conditions on PED Device	Terms and conditions are part of the invoice PDFs. No special action required.
Text When Done	Capture on BOPIS printout or on PDF and text from your phone.
TPMS – Kits	Visit Dill Air Control Products and Schrader TPMS .

TPMS – Sensors	Bartec Scan tools list appropriate TPMS sensors for each vehicle using our terminology. You may also visit Schrader TPMS .
TPMS Reset Instructions	Use Bartec Tool
TPMS Torque	Visit the Wheel Torque Chart page of the KC.
Transfer of Products to Other Stores	Use SHOP or MIM
Vouchers – CPV	N/A
Vouchers – CRV	N/A
VTV Select – Beta Stores	Follow current best practice. Beta stores will not use scanner.
Work Order	PDF will also be used as work order.