

Dynamics 365

POS Operations Guide

Knowledge Checks

KNOWLEDGE CHECK – OPEN A NEW SHIFT2

KNOWLEDGE CHECK – RING A SALE.....3

KNOWLEDGE CHECK – SPLIT TENDER3

KNOWLEDGE CHECK – EMPLOYEE DISCOUNT4

KNOWLEDGE CHECK – REGISTER DROP4

KNOWLEDGE CHECK – REGISTER AUDIT5

KNOWLEDGE CHECK – ISSUE OR RELOAD A GIFT CARD.....5

KNOWLEDGE CHECK – RETURN WITH RECEIPT.....6

KNOWLEDGE CHECK – RETURN WITHOUT RECEIPT6

KNOWLEDGE CHECK – CLOSING A REGISTER-RSA AND MANAGERS.....7

PURPOSE

The purpose of this document is for retail team members to check their understanding of the cashiering tasks required in their role.

KNOWLEDGE CHECK – OPEN A NEW SHIFT

Objective: Open a new shift and declare a tender

The following criteria must be met to meet this objective successfully:

- Place till and verify opening amounts
- Type the opening amount and press **Save**
- Declare tender
- Type in quantities of each denomination and press **Save**

KNOWLEDGE CHECK – RING A SALE

Objective: Use the POS to ring a sale

The following criteria must be met to meet this objective successfully:

- Greet customers in a friendly manner
- Apply correct discount(s), if applicable
- Correctly answer questions about discounts and coupons
- Use the correct tender button
- Ask the customer for a monetary donation
- Use the correct donation button
- Check for counterfeit money, if applicable
- Give the customer back the correct change, if applicable
- Follow proper procedure on tendering a credit card transaction, if applicable

KNOWLEDGE CHECK – SPLIT TENDER

Objective: Complete a split tender transaction

The following criteria must be met to meet this objective successfully:

- Select the correct first payment method
- Tender payment method correctly
- Select the correct additional payment method
- Tender remaining amount
- Give the customer back the correct change, if applicable

KNOWLEDGE CHECK – EMPLOYEE DISCOUNT

Objective: Apply employee discount to the transaction

The following criteria must be met to meet this objective successfully:

- Press **+Add customer** (in this case employee)
- Search for the team member
- Select the correct team member
- Verify team member's identity
- Add the team member to the transaction
- Follow the rest of the tender process to complete the transaction

KNOWLEDGE CHECK – REGISTER DROP

Never take advantage of an already open till to remove funds.

Objective: Demonstrate how to do a register drop

The following criteria must be met to meet this objective successfully.

- Conduct cash drop at the register. A drop receipt will print from the register. Save the drop receipt.
NOTE: Do not use drop envelopes.
- Insert money into the bill feeder of the LOOMIS safe and select the “insert bills” icon. Then, enter the 4-digit pin.
- A receipt will print from the LOOMIS safe. Staple the LOOMIS receipt to the drop receipt printed from the register.
- Place the stapled receipts into the register where the drop was conducted.

KNOWLEDGE CHECK – REGISTER AUDIT

Objective: Perform a register audit

The following criteria must be met to meet this objective successfully:

- Have RSA present (unless it is a quick-change situation)
- Keep money secure and use good cash-handling skills
- Perform audit using one X report
- Count till
- Initial correct receipts
- Place audit receipts in the correct place

KNOWLEDGE CHECK – ISSUE OR RELOAD A GIFT CARD

Objective: Issue or reload a gift card

The following criteria must be met to meet this objective successfully:

- Press **Gift Card**
- Press the correct key to issue or reload
- Type the amount and follow the rest of the tender process
- Verify that the correct amount was added to the card

KNOWLEDGE CHECK – RETURN WITH RECEIPT

Objective: Perform a return with a receipt

The following criteria must be met to meet this objective successfully:

- Press the correct key to start the return process
- Press **Return with Receipt** key and choose the reason code for each item
- Scan the receipt barcode to link the transaction to the original receipt
- Select all applicable returnable products
- Scan the RMC card or type the RMC number
- Type amount
- Verify that the correct amount was added to the RMC
- Have the customer sign the return receipt
- Inform customers regarding the card balance, expiration date, and where they can use the RMC card.

KNOWLEDGE CHECK – RETURN WITHOUT RECEIPT

Objective: Perform a return without a receipt

The following criteria must be met to meet this objective successfully:

- Press the correct key to start the return process
- Press **No Receipt Return** key
- Select department
- Ensure correct return value displays and modify, if necessary
- Scan the RMC card or type the RMC number
- Type amount
- Verify that the correct amount was added to the RMC
- Have the customer sign the return receipt
- Inform the customer regarding the card balance, expiration date, and where they can use the RMC card.

KNOWLEDGE CHECK – CLOSING A REGISTER (RSA TILL)

Objective: Complete the closing register process (RSA TILL).

The following criteria must be met to meet this objective successfully:

- Closing total is entered into POS, minus the “Coin”.
- Insert all bills into the LOOMIS safe using the bill feeder and select the “insert bills” icon. Then, enter the 4-digit pin.
- Place the printed receipt into the closing envelope with the other media from the register.
- Place the coins into the manager till. This will create an overage of the coin amount in the manager till.
- Repeat this process for all remaining register closures.

KNOWLEDGE CHECK – CLOSING A REGISTER (MANAGER TILL)

Objective: Complete the closing register process (MANAGER TILL).

The following criteria must be met to meet this objective successfully:

- The manager till must be the last till closed.
- Enter the closing total, minus the coins into the POS.
- A report will show an overage as the coin from all closed registers has been placed in the manager till.
- Insert all bills into the LOOMIS safe using the bill feeder and select the “insert bills” icon. Then, enter the 4-digit pin.
- Place the printed LOOMIS safe receipt into the register closing envelope with all other media.