Step by Step Guides:

Adding New Products in IMU:

- ☐ Open IMU Screen by typing IMU in the Eagle Browser
- ☐ Bring up a similar item that is in the same department
- ☐ Replace the SKU with a unique # following sequence and not already being used by another product
- ☐ Replace the SKU to what the packing list says **exactly**
- ☐ Replace the Mfg # to **exactly** what the packing list says
- ☐ Replace the Sequence to match the SKU **exactly**
- ☐ Make sure the Dept., Fineline, Prime Vend., & Mfg are **all** changed appropriately
- ☐ Go to the Pricing tab and put the corresponding info into the Repl Cost, Avg Cost, Retail (usually lower than List price), and List price
- ☐ Go to the Notes tab and put in anything you can think of that may be how a cashier may search for this item or information you want to pop up when a cashier is at the point of sale. Include unit quantities and coverage information
- ☐ If not an Orgill item then save a picture in the file C:\Users\Public\Documents\TeamViewer Shared Folder\Catalog Images folder (Make sure the name is the same that was entered in the SKU field in IMU)

Signature of person completing this checklist:

X_____

Step by Step Guides:

Receiving PO's in Eagle:

- ☐ Take the paperwork from Cashier or Yard and verify they have done their jobs correctly by looking over their attached paperwork and verifying it was checked off and they did it.
- ☐ Go to the filing cabinets Purchase Orders Written Drawer and pull out the Order Acknowledgment for this PO
- ☐ Open PO Screen by typing PO in the Eagle Browser
- ☐ Enter PO # from the Order Acknowledgment and compare it to the Receiving Paperwork. If PO doesn't exist report this to Travis so he can keep a tally of who is not filing them out.
- ☐ Make necessary changes in the body of the PO following this logic:
    - o Change quantities based off the packing list
    - o Change prices based off the Order Acknowledgment
    - o Make notes for where product is or why things changed
- ☐ In the Header screen menu (ctrl + /) Option 8 verify totals match
- ☐ If all is good press F2
- ☐ Click on Finalize
- ☐ Press F2 again and then press Enter and then press F4 then click on yes and press F12
- ☐ Staple RRP (just printed) and Order Acknowledgment & Bill of Lading together (In that order).
- ☐ File these in the bottom drawer of filing cabinet
- ☐ Also, just printed if it is a S/O was a new label. Use that label to do the following:
    - o Go to the Will Call Bin in Breaker Room and pull the S/O Paperwork from the stack and use it to find the order in Eagle.
    - o Call or Text the customer to let them know the product has arrived.
    - o Proceed to put the product away where it belongs (If it goes in Will Call make sure the S/O Paperwork is attached when you put it in will-call. If it goes outside give both labels to the appropriate Yard Employee
- ☐ SIGN IT – This means all the previous steps are finished, complete and correct

Signature of person completing this checklist:

X_____

Step by Step Guides:

Special Order Products:

- ☐ Customer asks for something we don't have
  - o Offer a solution or give options of what we can get special order.

Step by Step Guides:

Cashiers:

Receiving Product from UPS or FEDEX OR Common Carrier

☐ Sign the driver's paperwork – Make sure you note how many boxes or pallets etc. that you have signed for.

☐ Bring product to it's appropriate location for checking it in procedures (inside or outside)

☐ Make sure you hand off product to someone who can check the product in and they know they are responsible for the check in process

- Now New Person May or May Not Be Responsible -

☐ Find the packing list

☐ If no packing list is found refer to management to find direction as to how to proceed

☐ If the packing list is available – check each item off by following these procedures <u>EXACTLY</u>

  o Indicate with a line or note or something physically written on the packing list how you verified **product was the same** (either the code or descriptions or color or size etc.)

  o Indicate with a line or a note or a number or something physically written on the packing list how you verified the **quantity** was correct (number or products, lengths of products, size of product, etc.)

  o Note with something physically written on the packing list that you verified the **PO** and **Billing Address** belongs to us.

  o Make notes on the packing list if there is any variation in the slightest. This includes damage from scratches, dents, forklift damage, holes, or other minor cosmetics.

☐ Go to the Will Call Bin in Breaker Room and pull the S/O Paperwork from the stack and use it to find the order.

☐ Call or Text the customer to let them know the product has arrived.

☐ SIGN IT – This means all the previous steps are finished, complete and correct

☐ Put the paperwork in the HANDS of whomever will be receiving it in Eagle. If that person is not available then put it on top of their keyboard with a note telling them when it came and that they need to receive it.

☐ Proceed to put the product away where it belongs (If it goes in Will Call make sure the S/O Paperwork is attached when you put it in will-call.

Attach this to the order paperwork you just received and will hand to person receiving:

Signature of person completing this checklist:

X_____

Step by Step Guides:

Yard (step 1):

Receiving Product from Vendor, UPS, FEDEX, or Common Carrier

- ☐ Sign the driver's paperwork **after** you unload product. Make sure you note with a mark on the paperwork the address and PO you are receiving.
- ☐ Bring product to it's appropriate location for checking it in procedures (inside or outside). If you can count it as it comes off the truck this is the preferable method. Write Subject to Count if product is not able to be counted in a timely manner and skip to the "SIGN IT" step. Return to the steps you missed after driver has left the yard.
- ☐ If necessary make sure you hand off product to someone who can check the product in and they know they are responsible for the check in process **X Sign here:** _____ Receiver sign at bottom.
- *- Now New Person May or May Not Be Responsible -*
- ☐ Find the packing list or mark on the bill of lading or pick ticket or delivery ticket.
- ☐ If no packing list is found refer to management to find direction as to how to proceed
- ☐ If the packing list is available – check each item off by following these procedures <u>EXACTLY</u>
    - o Indicate with a line or note or something physically written on the packing list how you verified **product was the same** (either the code or *descriptions* or *color* or *size* etc.)
    - o Indicate with a line or a note or a number or something physically written on the packing list how you verified the **quantity** was correct (number or products, lengths of products, size of product, etc. Verify no scratches, dents, forklift damage, discoloration)
    - o Note with something physically written on the packing list that you verified the **PO** and **Billing Address** belongs to us.
    - o Make notes on the packing list if there is any variation in the slightest
- ☐ SIGN IT – This means all the previous steps are finished, complete and correct and give the paperwork to the driver and release him to leave if there are no other orders being received or returned. If there is a return set up, follow these same procedures and make sure you get the driver to sign the paperwork to verify the product you are sending back is correct. **KEEP THE A COPY OF THE PAPERWORK!** If the driver needs a copy for his records make a duplicate.
- ☐ Move to **Step by Step Guides: <u>Yard - P.O.S. Side of receiving (Step 2)</u>**

Attach this to the order paperwork you just received and will hand to person receiving:

Signature of person completing this checklist:

X_____

Step by Step Guides:

<u>Yard - P.O.S. Side of receiving (Step 2)</u>

- ☐ Go to the Will Call Bin in Breaker Room and pull the S/O Paperwork from the stack and use it to find the order in Eagle (get help if you need but you are still responsible).
- ☐ If no paperwork found, in Eagle and in the customer box of POS type a period and then # of P.O.
- ☐ If on an account then type the customer's last name or the name of the company in the box.
- ☐ Hit the F11 key for customer info and phone #.
- ☐ If this is a delivery type the address in the ship to box and hit the F5 button to save the order
- ☐ Press the F11 to exit customer maintenance
- ☐ To post notes (either internal or external) go into the order and make sure your curser is on the item box. Press the F3 key to make your notes and choose to post internal or on the ticket.
- ☐ The Plus sign button on the 10-key will take you to the exit screen to save and print.
- ☐ On that screen there is also an option to text the customer. Call or Text the customer to let them know the product has arrived.
- ☐ Note where the product will be stored to make internal notes in Eagle.
- ☐ If the order won't pull up in POS that means it is probably a PO. In the Eagle Browser (little blue house) on the launch bar type PO
- ☐ Enter the PO # in the box. Make sure you are typing 10000 before the 4 digit PO number.
- ☐ Leave notes in any and all screens to where the product is stocked or who the product is for or any special shipping comments. Go to the last screen and press F5 to save.
- ☐ Put the paperwork in the HANDS of whomever will be receiving it in Eagle. If that person is not available then put it on top of their keyboard with a note telling them when it came and that they need to receive it.
- ☐ Proceed to put the product away where it belongs (If it goes in Will Call make sure the S/O Paperwork is attached when you put it in will-call.

Attach this to the order paperwork you just received and will hand to person receiving:

Signature of person completing this checklist:

X_____

Cashier's Sweep/Mop Log

Please swap aisles weekly

Aisles 1-7, Cabinets display, Cash register area

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Aisles 6-14, Restrooms (Including stocking restrooms too)

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Name: _____ Mopped ☐ Date: _____

Cashiers' Closing Tasks

Please make sure to complete every day

General notes about closing – Please remember customers always, 100% of the time take precedence to anything you can be doing to close the store <u>No Matter What</u>! Begin closing procedures 30 minutes prior to actual closing time. Stop all projects and tasks you have been working on so you can focus on closing tasks.

<u>*During this 30 minutes, please make sure your area of responsibility is picked up and orderly. Sort through the paperwork and general daily messes and organize as is appropriate. In order to complete all these tasks, you may need to stay after your scheduled shift. These things should never take more than 30 minutes beyond closing.*</u>

Cashiers' tasks (BEFORE GOING HOME):

- ☐ Walkie Talkies are all put up and charging (This means the red light turns on in the charger)
- ☐ <u>ALL</u> Printers are loaded with paper
- ☐ Trash in / around area is thrown away and the trash is emptied & removed if necessary. This includes the contractor's area trashes
- ☐ Sort through all paperwork (orders, loading tickets, receipts etc. in the area) & ***<u>file.</u>*** Please make sure the mail and Printer are free of paperwork as well
- ☐ Clean off the contractor's area counters and make sure mail is filed where it needs to be
- ☐ Check the filing cabinet area to make sure papers are put away (Check Cashier's "In-Box")
- ☐ During slow periods of the year, count down 1 register 15 minutes prior to closing – During Summer months we will count down both tills after we close. Closing cashier needs to stay until released after a manager has verified tills and doesn't have any questions to ask
- ☐ Verify 3 sets of doors are locked – Contractor, Front Atrium, & Greenhouse including the gate
- ☐ Collect shopping carts and/or other product i.e. lawn mowers/snow blower/grill/plants or whatever is outside and bring them inside
- ☐ Take down open signs and turn them around to closed
- ☐ Shut popcorn machine down
- ☐ Put the Computers to bed. This means close all the open programs except the scheduler. Leave the computer screens on and in the desktop, they will fall asleep when they get tired on their own.
- ☐ Turn lights off in the following locations; contractor area, bathrooms & breakrooms, switches by medicine cooler, and breakers in server room.
- ☐ **Sign the Closing Log** when all these boxes can be checked off. You **WILL** be held responsible for anything that is not completed

Yard's Closing Tasks

Please make sure to complete every day

General notes about closing – Please remember customers always, 100% of the time take precedence to anything you can be doing to close the store <u>No Matter What</u>! Begin closing procedures 30 minutes prior to actual closing time. Stop all projects and tasks you have been working on so you can focus on closing tasks.

<u>*During this 30 minutes, please make sure your area of responsibility is picked up and orderly. Sort through the paperwork and general daily messes and organize as is appropriate. In order to complete all these tasks, you may need to stay after your scheduled shift. These things should never take more than 30 minutes beyond closing.*</u>

Yard tasks (BEFORE GOING HOME):

- ☐ Walkie Talkies are all put up and charging (This means the red light turns on in the charger)
- ☐ Flat stack everything in yard. Auto-Stak wood is a must but don't forget about feed, shingles etc.
- ☐ Trash in / around area is thrown away and the trash is emptied & removed if necessary
- ☐ Sort through all paperwork (orders, loading tickets, receipts etc. in the area) & file
- ☐ Park all vehicles and Forklifts in an appropriate location (free from areas of damage and away from fences at least 8', Winter parking preference is in the cold room)
  - ○ Winter time requires plugging in trucks.
- ☐ Remove all keys and record mileage on mileage tracking sheets (should have notes if mileage changed on this day)
- ☐ Close and lock all doors and sheds & gates.
- ☐ Ensure Forklifts are filled up with propane (or diesel for piggy back)
- ☐ Verify 3 sets of doors are locked –, Blue Door in Back, Employee Entrance & Yard Office Doors
- ☐ Turn lights off in the cold room & offices & saw shed.
- ☐ **Sign the Closing Log** when all these boxes can be checked off. You **WILL** be held responsible for anything that is not completed

Closer Log

Please sign daily AFTER your tasks are completed

Name: _____   Date: _____

Name: _____   Date: _____

Name: _____   Date: _____

Name: _____   Date: _____

Name: _____   Date: _____

Name: _____   Date: _____

Name: _____   Date: _____

Name: _____   Date: _____

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Name: _____   Date: _____

Name: _____   Date: _____

Name: _____   Date: _____

Name: _____   Date: _____

Name: _____   Date: _____

Free Day Log Sheet

Please sign BEFORE your tasks are completed

Name: _____ Date: _____ Project Working on: _____

_____

Name: _____ Date: _____ Project Working on: _____

_____

Name: _____ Date: _____ Project Working on: _____

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Name: _____ Date: _____ Project Working on: _____

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Name: _____ Date: _____ Project Working on: _____

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Name: _____ Date: _____ Project Working on: _____

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Name: _____ Date: _____ Project Working on: _____

_____

Name: _____ Date: _____ Project Working on: _____

_____

Cashiers Daily Job List

*First and foremost, make sure ALL customers are attended to before these tasks. **This means you may have to drop the task at hand to assist a customer**. Also remember, this is a small town and you need to overextend your service at all times to please customers.*

Monday   -

- ☐ Sweep & mop the store, please follow sweep log. Clean Restrooms thoroughly on Sweep Log Week (cleaning Toilets/Urinals & sink, replace paper towels, T.P., soap & empty trash) and just on the surface (replace paper towels, T.P., soap & empty trash) on off weeks.
- ☐ Clean windows, Mirrors & Cashier area.
- ☐ Begin to face the store.

Tuesday   -

- ☐ Face the entire store beginning on Aisle 14 and working your way to 1. Don't forget to face back rooms if there is sufficient customer service coverage.
- ☐ Work Back stock
- ☐ Empty Trashes for Trash Day tomorrow.

Wednesday   -

- ☐ Free Day! Your choice of what to work on. Also, don't forget to use the free day log sheet to log what your project was. Some Ideas are inventory controls, Shelving arrangements, Product Mixes, New Displays/Endcaps, Change Gondolas, Ads & Signage (including T.V.), etc. **FINISH CLEANING PROJECT UP!!!**

Thursday   -

- ☐ Work on Orgill, Primesource, Midwest and other vendor set ups. Please set aside all product that is new or special orders and go through the receiving process. (**Call customer**)

Friday -

- ☐ Continue previous days unfinished business i.e. restocking, facing, making tags, inventory issues.
- ☐ Clean Break Room & Kitchen areas.
- ☐ Clean all Sink & all counter areas (including Popcorn Machine)

Saturday   -

- ☐ Restocking and facing should be completed. Make sure everything has a home, make sure it is in Will-Call area with customer called and paperwork filed, or is being returned.

Sunday   -

- ☐ Paperwork and tidy up store. Make sure Filing cabinets and desk areas are free of paperwork.

ALWAYS BE COGNIZANT OF CUSTOMERS AT THE REGISTERS!