

### Procedures

- Write Procedures for Expected Processes  
Recommend written procedures for manual handwritten invoices, what to say to customers regarding no computer invoice, cashier process, documenting inventory use, and any other necessary store process that may be different without the management system available.
- Train Crew using Expected Procedures

### Print LubeSoft® Reports Each Month

- Inventory by Category, Detail (1-7-5-6)
- Price List (1-7-2-4)
- Coupon Discount List (1-6-2-2)
- Fleet List (1-4-5)

### Disaster Plan Binder

- Table of Contents
- Recommend sections:
  - Procedures for when POS is not available
  - Parts Retail Price List
  - Inventory List, including pricing for all Jobs (Inventory by Category List, Detailed)
  - Promotions with Coupon Discount List
  - Fleets with Fleet List and any additional notes needed for special requirements on fleets
  - Invoice/Cashier Procedures
- Section dividers to match Table of Contents
- Insert Reports Listed Above in the appropriate section
- Written Manual Invoice Procedures
- Sample Manual Greet Sheet Form
- List of Information Required When Hand Writing An Invoice
- Sample Handwritten Invoice
- Spreadsheet List of All Inventory Items with Special Upcharges and Upcharge amount
- Sales Tax Calculation Rates and Procedures
- Offline Credit Card processing Procedures

### Other Suggested Items

- Have Solar or Battery Powered Calculator available to Calculate Sales Tax or use a Calculator on a mobile device
- Have at Least One Physical Filter Catalog Available
- Have a document showing website links for your main product supplier catalogs, such as oils, fluids, filters, lights, wipers, etc.
- Have at Least One Physical Chek-Chart Book Available for Technical Data
- Have a document showing website links to approved and trusted technical resource websites you allow your team to use

## POS Disaster Preparedness

- Have a document showing approved phone apps you recommend your staff use as trusted technical resources
- Greeter Sheet with Customer Name/Address/Phone fields, Year/Make/Model/Eng., Full Service
- Checklist, Type of Service Fields. **NOTE: forms should have a large water mark in the Center indicating: "This is NOT an Invoice".**
- Window Stickers you can hand write on with black sharpie marker
- Some form of receipt paper you can give the customer showing payment has been received (recommended this be kept in locked location so only management staff have access to it)

## Practice Procedures with the store Manager and Crew