This section of the store operations manual explains the various policies and procedures involved in transactions at the point of sale at MaxSurf stores.

MaxSurf aims to create happy customers who want to come back again, and again,...and again.

MaxSurf employees can make this happen by processing transactions at the point of sale efficiently, accurately and courteously.

This module contains MaxSurf’s guidelines on:

- Opening the register
- Security Procedures at the Point of Sale
- Closing the Register
- Types of Transactions
- Busy Periods at the Point of Sale
- Register Errors
- Quiet Periods at the Point of Sale
- Delivery Service

**Mode of Sale**

Follow these steps at the point of sale:

- Welcome the customer
- Provide efficient service
- Follow security procedures for cash and goods
- Encourage the customer to return
Section 1: Opening the register.

The manager on duty will open the register prior to the opening of trading each day. These are the steps for opening the register:

- Get the key and cash float from the office
- Transfer the cash to the register
- Close the cash drawer
- Insert the key into the register and turn to ‘Register’ mode.
- Log on to the register by entering staff ID code
- Enter a ‘No Sale’ into the register so that the next tax invoice will have the correct date

Section 2: Closing the Register

At the close of trading each day, the manager on duty is responsible for closing the register. These are the steps for closing the register:

- Remove the cash and non-cash documents from the register
- Separate the cash float and count the cash and non-cash documents
- Record the cash and non-cash documents on the reconciliation statement
- Print a Z report
- Leave the cash drawer open
- Return the key, all monies and documents to the office

All registers must have the cash drawer left open overnight to prevent damage to the cash register in the case of burglary.

Section 3: Security Procedures at the Point of Sale

The MaxSurf team must maintain security procedures to prevent theft and fraud at the point of sale. These procedures include security when handling cash, cheques, and other transactions.

Cash handling procedures

- the cash drawer must be closed after each transaction
- never leave an open cash drawer unattended under any circumstances
- the register must be locked and the key removed whenever it’s unattended
- never count money in view of the customers.
- the maximum amount of cash allowed in the register is $300. The manager should remove any excess cash. Bank deposits can be made during the day in busy periods.
- when taking cash from a customer:
  - call the amount tendered
  - place the amount tendered into the note clip on the register until the customer has received their change
  - count back the change to double-check yourself
  - avoid being distracted by other people while processing a transaction
Getting change for the register:

Never let the register run short of change. This could cause delays in serving customers. Check the level of change during quiet times. If you anticipate high sales during the day, eg for a sale, get extra change early in the day.

Use a change sheet to document the amount of money you’re taking from the register for change. In the left-hand column, CASH, write in the amount of notes / coins you are removing from the register. In the right hand column, CHANGE REQUIRED, write the amount of notes / coins you are replacing in the register. The right hand total should be the same as the left hand total. The change sheet is a security check. Take the change sheet to the bank when getting change.

CHANGE SHEET

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<th>CHANGE REQUIRED</th>
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<td>Total</td>
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<td>$50</td>
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</tbody>
</table>

Cheque transactions

Most customers use EFTPOS rather than cheques these days. Cheques are still accepted at MaxSurf but these security procedures must be adhered to because using cheques carries a great risk of fraud.

Ask the customer for identification such as a current driver’s licence or passport
Write the licence or passport number on the back of the cheque.
Write the customer’s address and phone number on the back of the cheque.
Check that the signature on the cheque matches the one on their identification.

If you are suspicious of a customer who is offering a cheque, see your manager.
Credit card transactions

Credit cards also carry a risk of fraud. **Always check the customer’s signature.** Here are some credit card checks:

- Check that the customer’s signature matches the signature on the back of credit card, even for an EFTPOS transaction.
- If unsure that the signature matches the original, ask for other identification, eg licence or other cards.
- Hold the credit card while you are processing the transaction until you have confirmed the signature and authorisation number if applicable.
- Before processing a manual credit card voucher – check the card number against the list of stolen cards. The current list must be kept in the drawer under the register.
- The MaxSurf limit on a manual transaction is $200. Transactions over this amount must have an authorisation number. The phone number for authorisations is on the imprint machine.
- Be wary of customers who can’t sign properly because of a bandaged hand, keep their credit card in a pocket rather than a wallet, can’t produce other identification, or ask what the floor limit is to avoid having the amount authorised. If you’re doubtful, phone for an authorisation number.

**Section 4: Types of Transactions**

These are the transactions used at MaxSurf:

### Cash procedures

1. Scan the goods into the register.
2. Sub-total the sale and tell the customer the total amount.
3. Call the amount of money tendered by the customer.
4. Place the money tendered on the register.
5. Ring up the amount tendered using the Cash Total button.
6. Make up the change and count it back to the customer.
7. Place the amount tendered into the cash drawer.
8. Close the cash drawer.

### Cheque procedures

1. Follow the security procedures as listed under the title **Security Procedures at the Point of Sale.**
2. Process the sale as for a cash transaction.
3. Use the Cheque button on the register.
4. Place the cheque in a separate compartment.

### EFTPOS debit

1. Swipe the debit card through the machine
2. Press Saving or Cheque
3. Check that the amount is correct
4. Customer enters their PIN
5. Give the print out to the customer
6. Place the store copy in the correct compartment

### EFTPOS credit

1. Swipe the credit card through the machine
2. Press ‘Credit’ on the machine
3. Ask the customer to sign the print out
4. Check that the customers’ signature is the same as that on the credit card
5. Return the credit card and a copy of the print out to the customer.
6. Place the store copy in the correct compartment
Manual credit card

1. Check the number of the card against the list of stolen cards from the credit card company.
2. Place the credit card then the voucher in the imprint machine and firmly imprint the voucher.
3. Remove card and voucher from the machine and hold onto the card for security reasons.
4. Remove the top carbon paper.
5. Check that the imprint has gone through all copies of the voucher.
6. If the amount exceeds the floor limit then ring for authorisation and write the authorisation number on the voucher.
7. Complete the written details – quantity, description, amount, total, expiry date, type of card.
8. Ask customer to sign the voucher.
9. Check that the signature matches that on the card.
10. Return the card and the yellow copy of the voucher to the customer.
11. Place the voucher in the correct compartment drawer.

Lay-by

1. The sales assistant writes the details on the lay-by docket.
2. The deposit is entered into the register as a cash amount tendered. (At least 10% of the price.) The register will tell you the balance outstanding.
3. Press the lay-by button to open the cash drawer and put in the deposit.
4. Attach the tax invoice to the customer’s copy.
5. Put the MaxSurf copy in the correct compartment.
6. Wrap the goods and attach the lay-by number to the outside of the parcel.
7. Take the goods to the reserve for storing.

Gift voucher

1. Ask the customer what value they would like the gift voucher to be.
2. Enter the amount of the voucher into the register.
3. Press the Gift Voucher button on the register.
4. Place the voucher in the register slot so it gets a register imprint of the sale – this validates the voucher.
5. Call the amount of money tendered by the customer.
6. Place the money tendered on the register (not in the drawer yet).
7. Make up the change, if any, and count it back to the customer.
8. Place the amount tendered into the cash drawer and close the drawer.
9. Place the gift voucher in a MaxSurf envelope and hand to the customer with the tax invoice.

**Section 5: Busy Periods at the Point of Sale**

*Make MaxSurf customers happy.*

*Remember: ‘Think Like a Customer’.*

- Apologise to customers who are waiting - thank them for their patience.
- If the EFTPOS machine becomes unusable offer alternative methods of payment so that you don’t lose the sale.
- Call for assistance if necessary.
- Open another point of sale register.
Section 6: Quiet Periods at the Point of Sale

- Check the amount of change and replenish if necessary
- Check the amount of dockets and transaction vouchers available and replenish if necessary
- Check the amount of wrapping material or bags and replenish if necessary
- Clean and tidy the point of sale area and equipment
- Clear excess cash from the register and transfer money if necessary
- Check if the register roll needs to be replaced and do so if necessary

Section 7: Register Errors

- Most errors on the register can be rectified by pressing the Clear button and starting the transaction again
- If you process a transaction under the Cash Total button when it isn’t cash, make a note of the mistake and leave the note in the register to notify your manager
- All No Sale transactions must be accounted for. Keep the receipt, write the reason for the No Sale on the back of the receipt and have it signed by the department manager. Keep the receipt with the non-cash documents in the register
- All incorrect transactions must be accounted for. Keep the receipt, write VOID across the front, write the reason on the back, have it signed by your department manager. Keep the receipt with the non-cash documents in the register

Section 8: Exchanges and Refunds

A refund or exchange is given when:

- Goods have a basic fault which could not be detected at the time of sale
- Goods are unsuitable for the particular purpose that the customer made known to the sales assistant at the time of purchase
- Customers have changed their minds - providing the goods are in good condition and have not been used

In all cases, proof of purchase must be provided.

For all other situations, a refund or exchange will be given only at the manager’s discretion.
Section 9: Wrapping and packing goods

- All garments should be wrapped in tissue paper before being placed in the MaxSurf plastic bag
- All fragile items must be thoroughly protected with tissue paper to protect against damage
- Large items like skateboards, boogie boards and scooters will fit into the oversize MaxSurf bags
- Surfboards do not need to be wrapped if the customer is taking it with them – just make sure they have their tax invoice. Offer the delivery service

At the close of a sale, farewell the customer and hold the bag up until the customer takes it from your hand. Present the bag to the customer with the MaxSurf logo facing the customer. Do not hurry the customer to leave.

Section 10: Delivery Service

MaxSurf has a delivery service for large items like surfboards.

- MaxSurf will deliver once a week
- The current costs, and dates, for delivery are kept with the delivery docket book at the point of sale
- Deliveries will only be made when someone is there to receive them. Let the customer know

Complete the details on the delivery docket then follow these steps:

1. Detach the bottom part of the delivery docket and give it to the customer.
2. Wrap the goods for delivery.
3. Attach the top part of the form to the goods. The duplicate of the delivery docket stays in the docket book as the MaxSurf copy of the transaction.
4. Take the goods to the delivery storage area.