



POS Membership Setup & Price Validation SOP

1. Objective

To ensure all new memberships, monthly recharges, and promotional discounts are configured accurately within the Point of Sale (POS) system, preventing revenue leakage and ensuring a seamless customer experience.

2. Roles & Responsibilities

- **Ongoing Validation Owner:** Josh McCown (VP of IT) is responsible for executing the recurring 30-day audits and updating the tracking logs.
- **Stores Operations Team:** GM and SM Responsible for daily/operational pricing verification at the store level by auditing the GSR or Shift Detail reports.
- **Implementation & Checklist Review:** Alex Tavera (VP of Lifecycle) is responsible for executing the POS Validation Checklist immediately following any membership change.
- **Technical Remediation:** Kevin Rapsard (POS Administrator) is responsible for rerunning failed or incorrect transactions to recover missing revenue.

3. Procedure Steps

Phase 1: Pre-Launch Build & Testing (45 Days Out)

1. **Advance Configuration:** All new membership plans must be fully built and configured in the POS system 45 days in advance of the live launch date.
2. **Configuration Validation:** All new membership plans and discounts configuration must be validated by Alex Tavera's team using the implementation checklist review process.
3. **Test Purchase:** Once the plan is built, Alex Tavera will execute a test purchase.
4. **Recharge Verification:** Alex, Josh and Kevin will monitor the test account to ensure the system triggers a successful monthly recharge with the correct item code and pricing.

Phase 2: Launch & Day-One Validation (1 Day Post-Live)

1. **Go-Live Audit:** Exactly the day after the new membership or discount goes live, the

Ongoing Validation Owner must audit live production transactions.

- All go-live audits timeline will be tracked via the Marketing Promos tracker spreadsheet. This should include the date of the validation, item to validate, and note a successful or failed validation.
- 2. **Store Operations Review:** The Stores Operations Team must pull and review the GSR, Shift Detail or Tableau report from the launch day to verify that physical store transactions match the approved pricing strategy.
- 3. **Verification Criteria:**
 - Validate that new memberships are set up at the correct base price.
 - Validate that the monthly recurring recharge is pulling the exact correct item and dollar amount.
 - Validate that any active discounts are calculating and applying the correct promotional price.

Error Reporting

If an incorrect price is discovered during the Day 1 validation or via the Stores Operations report review, this must immediately report the issue to Kevin Rapsard, Josh McCown, and Alex Tavera.

Communication

- Immediately report the issue to Alex Tavera, Kevin Rapsard and Josh McCown in IT via email to:
atavera@whitewatercw.com;krapsard@whitewatercw.com;jmccown@whitewatercw.com

Resolution / Customer Communication

- Alex Tavera and Kelli Rienstra will lead any needed customer communication as well as prep the Customer Service team.
- Kevin must rerun the incorrect transactions to capture and recover the missing revenue.

Phase 3: Ongoing Monthly Validation (Every 30 Days)

1. **Recurring Audits:** For all monthly recurring memberships promotions, validation must be performed every 30 days from the original live date.
2. **Duration:** This 30-day audit cycle must continue until the promotional/membership pricing returns to standard, normal pricing.

4. Tracking & Documentation

All validation activities must be tracked to ensure compliance and visibility.

- **Log Location:**  **Marketing Promotion Tracker**
- **Required Data Points:** The validator includes the exact dates the validation was performed (including GSR/Shift Detail review confirmations), any discrepancies found, and remediation actions taken.