



Point-of-Sale Promotions and Change SOP

Purpose

To ensure all promotional changes in the Point-of-Sale (POS) system function correctly before being launched to the public, minimizing errors, downtime, or negative customer experiences.

Requirements

- A minimum of 1 week for development and 1 week for testing is required for a successful promotional or minor POS profile change.
- IT to confirm operational site level network, ISP, remote connectivity, and up-to-date replication is required.
- All promotions/changes must be tested in a testing environment before deployment.
- Nationwide promotions/changes must be tested at a controlled location in each market before deployment; OH (with bug prep), MI, TX, LA, and SC.
- All tests and test results must be documented and scheduled by the IT team member making the POS change. [📅 Profile Testing Tracker](#)

Scope

This SOP applies to all IT staff and designated team members responsible for configuring and testing POS systems at WhiteWater Express Car Wash locations. Kevin Rapsard will act as the backstop for all POS promotions and profile changes, in compliance with the POS Promotions and Change SOP.

Roles and Responsibilities

1. IT Team:
 - a. Configure the POS with the proposed promotional changes.
 - b. Perform functional tests to verify the setup and ensure the promotion is designed within the abilities of the POS software capabilities.
 - c. Identify, document, and schedule the employees that will test the change.

- d. Document results and resolve any issues identified.  Profile Testing Tracker
2. Marketing Team
 - a. Provide detailed promotion requirements, including discounts, promotion date range, terms, and conditions.
 - b. Validate the promotion in a test environment.
 - c. Notify/Train site team for new promotions or POS changes. Distribute all marketing materials and customer communications.
 - d. Notify IT team immediately in the event of a promotional date change.
3. Operations Team / IT Field Team
 - a. Participate in on-site testing.
 - b. Provide feedback and report and errors found.
 - c. Provide proof of testing via receipt, GSR/Shift Details, or photo.

Procedure

Pre-Test Prep

- Gather Promotion Details
 - a. Confirm the promotion specifics with the Marketing Team (Primary: Devann Blake, Backstop: Kelli Sandrol), including effective dates, discounts, new items, in-store or e-commerce, eligible products/services, and locations.
 Marketing Promotion Tracker
- Configure POS System
 - Configured the promotion or POS change into the POS configuration.
 - Verify configuration accuracy by cross-checking against the marketing guidelines.

Functional Testing

- Perform the following tests:
 - Transaction/Visual
 - Verify that all screens, media, and buttons appear correctly on the paystation screen and work as intended.
 - Verify that all new and existing functionality remains such as loyalty, new/existing membership functions, a la carte items, tips, and customer phone/email collection.
 - Membership
 - Test Promotions/Changes that affect members and verify discounts and recharges are applied correctly.
 - Verify expiration dates for items are set to expire correctly.
 - Verify the original item to be discounted prices are up-to-date.
 - Barcodes/Prepaid Codes/Promotional Codes

- Verify the paystation reads the barcode (use the final printed barcode when available).
 - Verify expiration dates for the barcode are set to expire correctly.
 - Validate that customers can use code across point of sale systems.
- Receipts
 - Confirm the promotion is reflected accurately on printed and digital receipts.
 - Apply the promotion to individual transactions and ensure proper discounts. Check for edge cases (e.g., multiple discounts, ineligible items). When testing, complete the transaction and charge to your company credit card to ensure a complete test.
 - Provide a copy of the receipt, GRS/SD and or photo of the transaction to confirm testing is completed. Upload verification documents to:
 - [POS Tests](#)
- Reports and Data
 - Ensure the promotion appears correctly in POS reports for tracking.
 - [New DRB Items](#)
 - Upload verification supporting documents (photo, receipt, screenshot, GSR/SD) to:
 - [POS Tests](#)

User Test Group

All promotions and changes must go through two test phases; Marketing - to be done in test environment or in store, and In-store - to be done at a select location in each market by the operations leadership or the IT Field team. Each phase of testing requires documentation and validation the test was performed in following spreadsheet:

■ [Profile Testing Tracker](#)

- Phase 1 - Marketing Testing
 - Perform all testing actions listed in the above Functional Testing section of this manual.
 - Document and provide feedback on testing results.
- Phase 2 - In-store Testing
 - This is the final validation testing and customer experience.
 - Perform all testing actions listed in the Functional Testing section of this manual.
 - Pay special attention to ensure the correct media and pricing is displayed.
 - Document and provide feedback on testing results in the Profile Testing Tracker.
 - [Profile Testing Tracker](#)
 - Provide validation testing was performed: receipt, photo, GRS/SD.

Approval and Deployment

- Confirm all tests are successful and documented.
- Provide testing results outlined on the [Profile Testing Tracker](#) to key stakeholders, VP of IT, and Marketing Team.
 - Promotion details - Offering, date range, stores

- Test results, outcome and errors or issues that need to be addressed.
- Provide validation that Phase 2 test was performed.
- Schedule promotion/change deployment in the live POS system.

Post-Deployment Monitoring

During this phase monitoring is to be managed by and reported to Kevin Rapsard who also serves as the backstop to manage POS issues.

- Monitor the POS system closely during the first day of the promotion.
- Monitor GSR/SD for pricing issues.
- Monitor customer recharges and replication.
- Collect feedback from staff and customers to identify any issues.
- Address problems promptly to ensure smooth operation.

Documentation

Promotion Marketing Tracker:  Marketing Promotion Tracker

Testing Checklist Guideline:  Profile Testing Tracker

- Promotion details are complete and accurate.
- POS configuration matches promotion requirements.
- Discounts and pricing apply correctly.
- Transactions process as expected.
- Receipts reflect promotion details accurately.
- Reports include correct promotion data.

Documentation and Reporting:  Profile Testing Tracker

- Log of all tests performed and validation testing was completed.
- Description of promotion/profile name that was tested
- Tester name
- Test location
- Results of test
- Issues identified