STORE MANAGER DEVELOPMENT PROGRAM

Course 1100 - Store Manager
DEVELOPER GUIDE

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STORE MANAGER OVERVIEW-1100

Welcome

Welcome to the Store Manager Development Course. In the Store Manager course, you will learn about essential Store Manager duties, including reviewing vehicle incident reports (VIRs), managing team member WhiteWater University accounts, creating schedules, and handling various operational responsibilities. Each module within the guide aims to equip managers with the skills to maintain high operational standards, ensure customer satisfaction, and foster a productive work environment.

Notes and Questions

As you review each development program module, please follow along and take notes. Taking notes will help you remember any key points or questions you want to discuss. Once you have completed each module, you can review the information and your questions with the manager.

Quiz

Once you have finished watching the module, there will be a quiz to review the information. A score of 100% must be achieved to pass each quiz. If you do not pass the quiz on your first attempt, retry the quiz. If you do not pass on your second attempt, locate a manager. Your manager will review the module with you and address any questions you may have. Once you have passed the quiz, exit the module and locate a manager to proceed to the Demonstration for this module. Your manager will then review the information and any questions you may have.

The **Reviewing Vehicle Incident Reports** module reviews how to gather and evaluate evidence, such as photos, video footage, and employee testimonies, to determine responsibility for vehicle damage claims. Effective communication with customers about the findings is crucial, whether accepting or denying responsibility. The **Vehicle Incident Portal** module guides managers on using a centralized database to access and manage claims efficiently, ensuring all evidence and interactions are documented accurately. The **Manager Site Standards** module focuses on maintaining cleanliness, functionality, and organization across the car wash facility through regular inspections and documentation. The **WhiteWater University Management** module introduces the learning management software TalentLMS, which helps managers oversee team member development and manage user accounts. The **Scheduling** module covers creating effective work schedules based on projected store volume, weather, and team availability while allowing flexibility for unexpected absences and increased customer volume. The **Deputy Management** module explains how to use the Deputy app to manage schedules, edit employee information, and archive employees. Finally, the **Counseling Reports** module provides guidelines for issuing and documenting performance or behavioral issues, emphasizing constructive feedback and clear action plans for improvement. This guide is designed to ensure that managers can handle their responsibilities effectively and contribute to the overall success of their car wash locations. The **Pay Station Cash Deposit** modules provide detailed instructions on managing and processing pay station cash deposits to ensure accuracy, security, and efficiency.

REVIEWING VEHICLE INCIDENT REPORTS-1101

Welcome

Welcome to the Reviewing Vehicle Incident Reports Module. In this module, you will learn how to review an incident after submitting a Vehicle Incident Report to determine whether the car wash is responsible for causing the damage. You will also learn the process for submitting videos and other evidence after you have completed the review.

Notes and Questions

As you go through the module, please follow along and take notes. Taking notes will help you remember any key points or questions you want to discuss. Once you have completed each section and quiz, you can review the information and your questions with a manager.

Quiz

Once you have finished watching the module, there will be a quiz to review the information in the module. A score of 100% must be achieved to pass each quiz. If you do not pass the quiz on your first attempt, retry the quiz. If you do not pass on your second attempt, locate a manager. Your manager will review the module with you and address any questions you may have. Once you have passed the quiz, exit the module and locate a manager to proceed to the Demonstration for this module. Your manager will then review the information and any questions you may have.

Why

The purpose of reviewing vehicle incident reports is to gather and evaluate all evidence surrounding the claim and determine responsibility. The efficient gathering of information allows us to make quicker decisions regarding responsibility for damage. This allows us to communicate with customers and update them on the status of their claims in a short amount of time. Whether we are responsible for causing the damage or not, customers will appreciate our thorough review and quick response.

What

The following are the items you will need when reviewing vehicle incident reports:

1. Camera Footage of the Incident

   To determine if the vehicle damage occurred at the car wash, we must review the footage of the customer's visit on the day of the reported incident.

2. Company Email

   Management email accounts will be used to access and update Vehicle Incident Reports.

3. Camera Computer

   The camera computer is used to access the camera footage and the Vehicle Incident Portal.

4. Office Computer

   The office computer will be used to access the Intranet.

5. Completed Vehicle Incident Report

   The completed VIR will provide the information and photos needed to review the incident.

Educate

Anytime we receive a VIR, we must review the incident to determine if the car wash is responsible for causing the damage. Communication is key throughout the incident review process, and prompt evaluation of customer claims makes the reviewing process easier and makes for a better customer experience regardless of the outcome. All customer claims must be evaluated by location management within 72 hours after the claim is reported to ensure a prompt response. During the review process, you will need to gather all the evidence from the incident, review the evidence and determine responsibility for the damage. Once you complete your review of the incident and make a decision, you will need to communicate with the customer regarding the decision.

Evidence Gathering

Before we can begin reviewing the evidence, we must first gather the evidence. Evidence includes all facts, information and media that could prove or disprove something. Gathering evidence is critical to the decision-making process when a customer makes a damage claim. During the evidence-gathering process, you will need to collect photos of the damage, video footage of the customer's entire visit on the date of claim and any employee testimony that may be available.

<u>Photos of Damage</u>

The photos of the damage from the complete VIR will help us determine exactly where the vehicle damage is located and what it looks like. This will allow us to locate the damage when reviewing video footage. The photos of damage will be saved to the Google Drive folder for the claim using the Evidence Link.

<u>Video Footage</u>

Video footage helps identify whether damage was present before entering the car wash tunnel. Video footage should be saved immediately after the incident report is completed and photos are taken. Video is often the most important evidence used during the review process.

The camera needed to save footage is based on where the damage is located. Using the VIR and photos of the damage, you can determine which camera angles we need to save footage from. Often, vehicle damage can be seen from one angle and not another. For this reason, we must always save any video footage that could be useful during the review process. When saving the footage, ensure that the date and time can be seen in the video.

<u>Employee Testimony</u>

Any employees involved in or witnessed the incident should be interviewed as soon as possible after the incident while it is still fresh in their memory. Any significant information or observations, such as an employee remembering to see the damage already present on the vehicle during the loading process, should be recorded in the notes section using the Vehicle Incident Portal. Additionally, if the customer made a statement to any employee acknowledging preexisting damage or driver error, it should be documented.

Reviewing the Incident

Once you have gathered the evidence, it is time to review the incident. Look at the pictures to determine exactly where to look for the damage. Using items such as door handles, body panels, trim pieces, antennas, mirrors, etc., on the vehicle as reference points may be helpful. This will allow you to quickly and easily locate the damage on the camera footage. When reviewing an incident, it is important to remember that car wash equipment malfunctions are rarely the cause of vehicle damage. Most often, damage results from a vehicle having pre-existing damage, excessively old or worn parts, or aftermarket modifications. It is also common for customers to cause damage by way of driver error before, during or after the wash process.

Common Causes of Damage

The most common causes of vehicle damage are preexisting, unforeseen, or internal vehicle conditions and defects, previous body work, parts blown off by blowers, antennas and mirrors, hood ornaments, non-factory items and vehicle modifications, older vehicles and driver error. Let's review each of the causes of damage and some common examples.

<u>Preexisting, unforeseen, or internal vehicle conditions and defects</u>

One of the most common causes of damage is body panels showing signs of previous impact or other damage. Most plastic body panels are held on using weak plastic clips that can easily become damaged from minor impacts. If the clips attaching these body panels have been damaged or broken, the car wash tunnel equipment can easily dislodge the body panel. In these instances, the preexisting damage to the vehicle causes the car wash to cause further damage. If the damage did not exist, the car wash would not have damaged the vehicle. We cannot accept responsibility in cases where vehicle

damage is preexisting or further damage is caused due to preexisting damage. These damages occur because of vehicle condition or defects, not car wash malfunction.

Previous Body Work

We cannot accept responsibility for damage caused by previous body work on the vehicle, such as pinstriping, graphics, painted plastic, repaints, etc.

A common example of previous work would be plastic trim pieces, such as grills or emblems that are normally unfinished plastic, have been painted to match the vehicle or to "blackout" the trim. These plastic pieces are not intended to be painted and are often made from flexible, glossy plastic compounds that make it difficult for paint to bond to them. This often leads to flaking, cracking, or peeling, which can occur or worsen during the car wash. Whether the customer believes the car wash caused the initial damage or caused further damage, we cannot accept responsibility for damage to these parts.

Parts Blown Off by the Blowers

We cannot accept responsibility for damaged or lost parts, such as roof rails, mirror glass or covers, fuel doors, lights, etc., blown off by the blowers.

A common example is when a trim piece is blown off by the blowers due to previous damage causing it to not sit flush as intended from the factory. In this scenario, the blowers did not malfunction in any way and performed exactly as intended. The previous damage to the trim piece caused it to not sit flush with the body panels, allowing air to get underneath and blow it off.

Antennas & Mirrors

Because damage to items such as standard or oversized side mirrors and power, cellular or satellite antennas is often caused by preexisting damage or improper operation by the driver, we cannot accept responsibility for damage to these parts.

A common example is a motorized power antenna not retracted before entering the car wash. Power antennas are not designed to go through an automated car wash while in the up position. The vehicle's driver is solely responsible for lowering the antenna by powering off the radio because they operate their own vehicle.

Hood Ornaments & Emblems

Hood ornaments, emblems, parts or logos attached with tape, adhesive, press fit, snap-on, etc., are not items we can accept responsibility for if damaged. Tapes and adhesives get brittle, and their bonding strength weakens as they age, while press-fit and snap-on badges, ornaments, trim pieces, etc., can become warped or brittle due to exposure to heat and other environmental factors.

A common example is when a team logo emblem is affixed to the side or rear of the vehicle and comes off in the car wash, causing paint damage. In this scenario, the emblem was attached to the vehicle with adhesive, and the adhesive had weakened, causing the emblem to become loose. So, when the vehicle went through the car wash, the emblem fell off.

Non-factory Items and Modifications

Our car washes are designed and tested to wash factory-specification production vehicles. For this reason, we cannot accept responsibility for these parts or for damage caused by these parts or modifications. Some examples of non-standard or non-factory equipment are custom tires, rims, metal stems larger than one and a half inches, caps or other wheel accessories. Additionally, spare tire covers, wipers, running boards, bug shields, visors and deflectors, spoilers, hitches, license plates and frames, luggage racks, bike racks, custom lights, exposed wires, raised or lowered vehicles, etc.

Any modifications or parts that put the vehicle outside of factory specifications can result in improper operation of the car wash equipment. Lowered vehicles can be damaged due to lack of ground clearance, which places them too close to the equipment. Parts such as tow hitches, bike racks, luggage racks, light bars, etc., that protrude from the vehicle can get caught on brushes and cause

damage to the part and/or damage to the vehicle. Aftermarket, non-factory, or custom tires, rims, metal stems larger than one and a half inches, caps or other wheel accessories may extend too far from the vehicle and cause issues with the tire brush and/or the tire shine applicators.

Older Vehicles

We cannot accept responsibility for damage to vehicles over seven years of age or 100,000 miles. Environmental factors, previous damage, disrepair, and owner maintenance habits affect the life expectancy of a vehicle and the parts used to build it.

Driver Error

Often, a customer will make an error while going through the car wash that causes damage to their own vehicle and possibly other customer vehicles. Errors such as turning the wheel, braking or putting the vehicle in gear during the wash process can put vehicles in a position to be damaged. When these errors occur, we cannot accept responsibility for the damage.

Evidence Submission

Once an incident report is submitted, an email will automatically be sent to the location's Area Director, Multi-Site Director, General Manager, and Store Manager containing the completed form. It will also contain a link to access the next section that needs to be filled out, the Video Evidence section. This is where the location will determine responsibility for whether the damage was caused due to tunnel malfunction, employee error, or customer error. This section will require the following to be added: video evidence to be uploaded to the form, date of video review, cause of damage, indication of claim acceptance or denial, and the reasoning behind the decision. Once all the information has been input, sign and submit the form.

Determining Responsibility

After you have completed your review of the incident, you will need to determine responsibility for the incident. By using all the information you have at your disposal, from the initial vehicle incident report to your review of the video footage, you will be able to assess which party is responsible accurately. You must also consider whether the damage falls into any of the categories listed on the disclaimer board. Every WhiteWater site has a disclaimer of liability posted at the entrance of the car wash tunnel to inform customers of what we will not accept liability for and inform them that they are entering the car wash entirely at their own risk. These disclaimers provide legal protection for the company while making customer expectations more realistic. You will need to determine if the damage in question falls within the disclaimer of liability. Although this does not completely disqualify the claim, it can be used as a guideline. Once you have decided to accept or deny responsibility for the damage, you must contact the customer and inform them of the decision and any next steps.

Denying a Claim

If it is determined that the car wash did not cause the damage, we will need to communicate with the customer to explain why we are unable to accept responsibility. Be sure to inform the customer that you have reviewed photos, video, and other information to make your determination. We want the customer to understand that we have thoroughly reviewed the incident and not feel like we arbitrarily denied their claim.

Angry Customers

If the customer disagrees with the decision you will need to offer for the customer to review any footage we collected of the incident. You can also explain how the equipment functions and why it is safe for vehicles. Regardless, emotions can run high in these situations, and customers may become angry or disagree with the company's decision, and these frustrations often are taken out on team members. In these cases, if you feel unsafe or the customer is acting disrespectfully, do not be afraid to walk away or tell the customer that another management member will reach out to them. If they refuse to accept your determination at any time, direct them to the website's Contact Us page.

<u>Accepting Responsibility</u>

We can only accept responsibility for damage caused by equipment malfunction or employee error. If it is determined that the car wash caused the damage, an email will automatically be sent to the location's Area Director for final approval of the claim after the Video Evidence section is submitted. In the next module, Vehicle Incident Portal, you will learn more about the rest of the vehicle incident process.

Conclusion

In conclusion, the Reviewing Vehicle Incident Reports Module is designed to equip you with the necessary skills to evaluate vehicle incident reports accurately and efficiently. By gathering comprehensive evidence, such as photos, video footage, and employee testimonies, you can determine the responsibility for the damage reported. This thorough review process not only helps in making informed decisions but also enhances customer satisfaction through prompt communication and resolution of claims. Remember, maintaining detailed and accurate records of all incidents and providing timely updates to customers are crucial steps in ensuring a transparent and effective claim management process.

Reviewing Vehicle Incident Reports Quiz

Once the employee has completed the module, they must complete the quiz. To pass the quiz, the employee must score 100%. If the employee does not pass their first attempt, they must take the quiz again. If they do not pass on their second attempt, you must review the quiz and answers with them before their third attempt.

1. Which of the following is NOT a common cause of damage? (Select all that apply)
   a. Previous body work
   b. **Scratches caused by the wraps**
   c. Hood ornaments
   d. Driver error
   e. **Paint discolored by triple polish**

2. Which of the following is a common cause of damage? (Select all that apply)
   a. **Previous body work**
   b. Scratches caused by the wraps
   c. **Preexisting damage to the vehicle**
   d. **Driver error**
   e. Paint damage cause by car wash chemicals
   f. Factory installed parts

3. How many quotes does a customer need to get for repairs?
   a. 1
   b. **2-3**
   c. 4
   d. It depends on the amount of damage

4. We cannot accept responsibility for damage to vehicles over _____ years of age or _____ miles.
   a. Five, 75,000
   b. **Seven, 100,000**
   c. Ten, 100,000
   d. None of the above

5. What is the purpose of reviewing vehicle incident reports?
   a. To find a reason to deny the claim
   b. To determine why the car wash caused damage to a vehicle
   c. To gather all the evidence surrounding the claim and send the information to your Area Director
   d. **To gather and evaluate all evidence surrounding the claim and make a determination of responsibility**

6. Who is responsible for completing the Video Evidence section?
   a. Corporate Office
   b. **Location Management**
   c. Regional Directors
   d. The guest

7. Communication is key throughout the review process.
   a. **True**
   b. False

Guests must be contacted _____ after a VIR is submitted.

    Within 24 hours

    Within 72 hours

    Within 5 business days

    Within 30 calendar days

8. Evidence of prior damage on cameras is required to deny an incident.
    a. True
    b. False
9. What can you do if you are unsure about whether we are responsible?
    a. Deny the claim
    b. Accept the claim
    c. Seek out peer support
    d. Ignore the claim

Reviewing Vehicle Incident Reports Demonstration

During the Demonstration, it is important that you do not stop to answer an employee's questions or provide additional information. The goal is for the employee to see the process performed in as close to a real-life scenario as possible. This uninterrupted performance will help to connect the steps or information that was learned. We will answer all questions and address any issues after the Demonstration.

Once the team member has passed the quiz, ask the team member if they have any questions. Once all questions have been answered, it is time to demonstrate the process of reviewing an incident using video footage from a recent incident.

Review the footage and identify the damage on screen, how to manipulate the video to see the damage and saving video footage. Then, review the footage with the team member and take them through what you see on the video and what determination you would make.

After the demonstration, review the process and any team member questions. Then give the team member **Reviewing Incident Reports Handouts 1 & 2** to review and study.

Reviewing Vehicle Incident Reports Perform & Coach

During Perform & Coach, it is important that you do not stop to answer team members questions or provide additional information. The goal is for the team members to complete the process.

Have the team member review an incident using video footage from a recent incident. Instruct them to review the footage and identify the damage on screen and save the video footage. Then, have them take you through what they see on the video and what determination they would make.

Provide coaching and repeat the Perform & Coach process until the team member has complete knowledge and understanding of all the information covered in this module, and you and the team member both feel confident they can perform the procedure to standard.

Upon completion of this module, Shift Leaders will **ONLY** be able to assist with reviewing and saving video footage. They will **NOT** be authorized to make decisions on approving/denying claims until they are promoted to a Store Manager position.

Reviewing Vehicle Incident Reports Handout 1-Common Causes of Damage

The following are the common causes of damage:

Preexisting, unforeseen, or internal vehicle conditions and defects

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Older Vehicles

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Driver Error

Often, a customer will make an error while going through the car wash that causes damage to their own vehicle and possibly other customer vehicles. Errors such as turning the wheel, braking or putting the vehicle in gear during the wash process can put vehicles in a position to be damaged. When these errors occur, we cannot accept responsibility for the damage.

Reviewing Vehicle Incident Reports Handout 2-Evidence Submission

Video Evidence

Multi-Site Director Name

EELITE

MSD Email

devtesting@whitewatercw.com

Your Name *

| Test | | Manager |

Position *

MSD

Date of Video Review *

6/20/2024

Upload the Video Footage of the Incident *

Upload or drag files here.

Entrance Arch - Driver Side.mp4
66.9 MB

Damage Cause *

Mechanical Failure

Determination Narrative *

The tire brush cylinder broke off and scratched
the rims

Why was the claim approved or denied?

Claim Approved *

● Yes ○ No

Manager Signature *

draw type

Submit Video Evidence

VEHICLE INCIDENT PORTAL-1102

Welcome

Welcome to the Vehicle Incident Portal Module. In this module, you will learn how to navigate the Vehicle Incident Portal and the entire process of accepting responsibility.

Why

The purpose of the Vehicle Incident Portal is to provide a place where vehicle incident claims can be easily accessed, managed and reviewed by all persons and departments necessary. By having a central location to access the information, we can more efficiently and effectively review the claims. Each section of the report gives more people in the company opportunities to view the incident before completion to ensure its validity and to help prevention efforts in the future.

What

The following are the items you will need to manage incident reports during the review process.

1. Vehicle Incident Portal

   The portal is used throughout the vehicle incident review process to save and access information and complete the incident report process.

2. Company Intranet

   The company intranet is used to access the Vehicle Incident Portal.

3. Computer

   The computer is used to access the intranet.

4. Company Email

   Management email accounts will be used to access and update Vehicle Incident Reports through each phase of the process.

Educate

The Vehicle Incident Portal is a database of all vehicle incident claims that is used by multiple positions and departments. The portal provides a centralized location for all the claims that are submitted from each store. You will use the portal throughout the process of reviewing a vehicle incident to add notes and update the status of the claim. You will also use the portal to access and save evidence related to each claim. After a VIR is submitted, a claim ID will automatically be assigned and a file created in the Vehicle Incident Portal. Once you have accessed the claim you are working on, you will be able to add evidence and notes, update the claim status and, if necessary, complete a Release of Claims.

Vehicle Incident Portal

To access the Vehicle Incident Portal and locate the claim being reviewed, perform the following steps:

1. Go to the WhiteWater Intranet
2. Go to the Operations tab and click on Vehicle Incident Portal
3. Select your location from the dropdown list
4. Enter the desired search criteria
   - You can also search by claim ID if you have that information
5. Click Search

Results

The results of the search will show Claim ID, Location, Status, Date, Customer Name, Customer Phone Number, Customer Email, Payment Amount (if applicable), and the Form Links. There are also two pictograms for access to each claims Evidence Link and Claim Notes.

Claim Notes

As you go through the process and communicate with the customer, you will want to make notes of the interactions and what was discussed. You will also be able to add new notes and view all the previous notes that have been input throughout the process. It is important that we notate all interactions and the results of those interactions so that we can all be on the same page.

Evidence Link

The Evidence Link will open the Google Drive folder used to store photos of the vehicle damage and other evidence collected during the review process. When a VIR is submitted, the Google Drive folder is automatically created, and the photos from the report are saved to it. The Evidence Link can be used to upload additional photos, footage or any other evidence necessary.

AD Approval-Claim

Once the store has filled out the Video Evidence section of the VIR and indicated that we are accepting responsibility, the AD Approval section will populate at the bottom of the report. This section gives the location's Area Director an opportunity to review the claim to ensure that we are responsible for the damage and to ensure measures are taken to prevent similar damage from occurring. The Area Director will have to review all evidence that we currently have and either approve or deny the claim.

Repair Quote Info

If the Area Director approves the claim, the Repair Quote Information section of the form will be populated at the bottom of the report. This is when the store will ask the guest to obtain two to three estimates to repair the damage to their vehicle.

Invoices

After the customer has submitted the repair quotes, you will need to upload them into the form. It is required that at least two (2) quotes be uploaded to the form and each quote should be uploaded individually to one of the three available boxes.

Quote Amount

In the Quote Amount box, enter the amount of the lowest estimate submitted. This is the amount that WhiteWater will be paying to the customer for the incident and requires accuracy.

If a customer has a preferred facility that they would like to repair the vehicle, we will honor quotes up to 10 percent more than the lowest submitted quote. For example if the lowest quote is $100 and the quote from the preferred repair shop is less than $110, we will accept that quote.

Rental Car

You will also need to indicate if the customer will need a rental car while the repairs take place. If t the damages we are covering requires the customer to be out of a car for more than one day, we will cover the cost of a rental vehicle of a similar type to the customer's vehicle. We will review the full rental car process later in this module.

AD/RD/LP Quote Approval

Depending on the amount of the quote amount for the claim, different levels of management will be responsible for reviewing the quotes provided. This allows for verification that the lowest quote was selected and that the quotes don't have any work unrelated to the claim. An example of unrelated work would be if we scratched the driver's side door and the quote includes work on the rear bumper, the quote would not be accepted

- Quotes over $500 will be reviewed by Loss Prevention
- Quotes under $2,500 will be reviewed by the Area Director and Loss Prevention
- Quotes above $2,500 will be reviewed by the Regional Director and Loss Prevention

Release of Claims

After the appropriate approvals have been submitted, the release of the claims section of the VIR must be completed on-site with the customer. It is a contract between WhiteWater Express Car Wash and the customer to pay for the agreed-upon settlement in exchange for a release of this claim. It does not say they cannot file another claim against us, it is saying they cannot file another claim for the same event. When this is signed, we are contractually obligated to pay. WhiteWater Express will pay guests the amount listed on the estimates with a check. We are not paying repair shops or using the Divvy card for vehicle claims.

Claim Check Mailed

The accounting department completes this section when they mail the claim check to the location. Once they submit this section, you will be notified of the date the check was mailed and receive the tracking number so that you can anticipate its arrival and update the customer.

Customer Acknowledgement of Claim Check

Once the check is received by the location, the customer must be notified of its arrival. When the customer arrives for the check, they must sign the acknowledgment stating that they received the claim check. This ensures that there cannot be future disputes about whether the claim was paid out. For claims that do not require a rental car, this is the final step of the claim process.

Rental Car Process & Policy

As we discussed in the Repair Quote Info section, if the damages we are covering will require the customer to be out of a car for more than one day, we will cover the cost of a rental vehicle of a similar type to the customer's vehicle. WhiteWater does not have the ability to rent a car for customers while repairs are being completed, so customers will have to rent the vehicle themselves and submit receipts for reimbursement. If it was indicated in the Repair Quote Info section, the VIR will continue to the Rental Car section.

Rental Car Check Request

Once the customer has paid for their rental vehicle, they must submit their receipt to the location. Once received, upload that receipt and indicate how much the customer paid for the rental.

Rental Car Check Request-Approval

Loss Prevention will then review the receipt to ensure that no fees or services are listed that we are not responsible for and approve or deny it. If any section of the receipt is denied that amount will be deducted from the total amount of the reimbursement check.

Rental Car Check Mailed

The accounting department completes this section when they mail the rental car check to the location. Once they submit this section, you will be notified of the date the check was mailed and receive the tracking number so that you can anticipate its arrival and update the customer.

Customer Acknowledgement of Rental Car Check

Once the rental check is received by the location, the customer must be notified of its arrival. When the customer arrives for the check, they must sign the acknowledgment stating that they received the check for the rental car. This ensures that there cannot be future disputes about whether the rental car costs were reimbursed. After this section has been submitted, the claim will be complete.

Vehicle Incident Portal Quiz

Once the employee has completed the module, they must complete the quiz. To pass the quiz, the employee must score 100%. If the employee does not pass their first attempt, they must take the quiz again. If they do not pass on their second attempt, you must review the quiz and answers with them before their third attempt.

1. After a VIR is submitted, a claim ID will automatically be assigned, and a file will be created in the Vehicle Incident Portal.
    a. **True**
    b. False

2. What is the Vehicle Incident Portal?
    a. A database of all vehicle incident claims that is used to watch old videos of damage
    b. **A database of all vehicle incident claims that is used by multiple positions and departments**
    c. A database of all claims submitted by customers through the website
    d. A system we use to communicate with customers that submit claims

3. The Release of Claims form can be completed on-site or through email.
    a. True
    b. **False**

4. The release of claims is a contract between us and the customer stating we will cover the cost of the repairs and they cannot come back to the car wash ever again.
    a. True
    b. **False**

5. Which of the following are needed to access the claim information during the review process.? (Select all that apply)
    a. **Vehicle Incident Portal**
    b. Release of Claims form
    c. **Company Intranet**
    d. **Computer**
    e. None of the above

6. When does the Repair Quote Information section of the form appear?
    a. After the customer signs a rental agreement
    b. **Once the Area Director approves the claim**
    c. Before any evidence is reviewed
    d. Upon submission of the VIR

7. Which management level reviews repair quotes for claims above $2,500?
    a. Area Director
    b. **Regional Director**
    c. **Loss Prevention**
    d. Operations Manager

8. Vehicle incident claims can be paid for with a store Divvy card.
    a. True
    b. **False**

9. What is the purpose of the Release of Claims form?
    a. To deny responsibility for the incident
    b. **To authorize payment for vehicle repairs and to prevent future claims related to the same incident**
    c. To get the customer permission to file a claim
    d. To request additional evidence from the customer

10. What must be signed before a check is sent to the location?
    a. Customer Acknowledgement of Rental Car Check
    b. LP approval
    c. **Release of Claims**
    d. Customer Acknowledgement of Claim Check

Vehicle Incident Portal Demonstration

During the Demonstration, it is important that you do not stop to answer an employee's questions or provide additional information. The goal is for the employee to see the process performed in as close to a real-life scenario as possible. This uninterrupted performance will help to connect the steps or information that was learned. We will answer all questions and address any issues after the Demonstration.

Once the employee has passed the quiz, ask the employee if they have any questions and provide the answers. Once all questions have been answered, it is time for the employee to go through the procedure. Go to the intranet and demonstrate the steps to access the incident portal and the specific claim. Then, show the employee the different elements of each claim in the portal. Answer any questions they may have after the demonstration.

After the demonstration, review the process and any team member questions. Then, give the team members **Vehicle Incident Portal Handouts 1, 2 & 3** to review and study.

Vehicle Incident Portal Perform & Coach

During Perform & Coach, it is important that you do not stop to answer team members' questions or provide additional information. The goal is for the team members to complete the process.

Have the team member perform the grit trap removal process without commentary or interruption in real-time. During the performance, observe steps performed correctly and incorrectly so that accurate coaching may be delivered at the completion of the performance. Once complete, deliver feedback and coaching on the performance.

Once the employee has demonstrated that they can successfully navigate the portal, they will need to go through the process at the next opportunity. A manager or supervisor must shadow the employee during their initial attempts to ensure proper completion. Once the employee completes all the steps, they can complete the portal portion of the incident review process anytime the need arises.

Repeat the Perform & Coach process until the team member has complete knowledge and understanding of all the information covered in this module, and you and the team member both feel confident they can perform the tasks and procedures to standard. Once the team member demonstrates the ability to consistently perform the tasks and procedures correctly, they are ready for development sign-off.

MANAGER SITE STANDARDS - 1103

Welcome

Welcome to the Manager Site Standards Module. In this module, you will learn about the Manager Site Standards and the form used to document the process.

Notes and Questions

As you go through the module, please follow along and take notes. Taking notes will help you remember any key points or questions you want to discuss. Once you have completed each section and quiz, you can review the information and your questions with a manager.

Quiz

Once you have finished watching the module, there will be a quiz to review the information in the module. A score of 100% must be achieved to pass each quiz. If you do not pass the quiz on your first attempt, retry the quiz. If you do not pass on your second attempt, locate a manager. Your manager will review the module with you and address any questions you may have. Once you have passed the quiz, exit the module and locate a manager to proceed to the Demonstration for this module. Your manager will then review the information and any questions you may have.

Why

The purpose of the Manager Site Standards form is to maintain high standards of cleanliness, functionality, and organization throughout the car wash facility. This structured approach ensures all critical areas are regularly inspected and maintained, contributing to customer satisfaction and the overall efficiency of the car wash.

What

The following are the items you will need to complete the Manager Site Standards form:

1. Phone/Tablet

   You will need a phone or tablet to access and complete the form, as well as to capture and upload photos and videos.

2. Manager Site Standard Form

   The form will be used to document, upload photos, and submit the site standards.

Educate

The Manager Site Standards form is a comprehensive checklist the store manager and general manager must complete bi-weekly to ensure that the site standards are consistently met and maintained. Regular assessments help promptly identify any deviations or areas needing improvement, thereby maintaining high-quality service and operational standards. Consistent monitoring also ensures that corrective actions can be taken promptly to address any issues, preventing them from escalating and ensuring the company's reputation and operational efficiency are upheld.

Notes & Score

Each section includes a space for notes and specific tasks that need to be completed to address any issues found during the inspection. It is critical that you are objective and honest with your feedback so that the most accurate information is reported. A score is calculated for each section, giving an overall score after the form is completed. While one hundred percent (100%) is not expected for reports, low scores indicate potential issues or repairs that may need to be addressed.

Tasks & Due Dates

As you go through each section of the form, you will add tasks that must be completed to address observed issues. Tasks could include cleaning or maintenance-related, or they could be ordering replacement signage for a wind master sign. Regardless of the task, enter the task description into the form and set a due date for the tasks to be completed. Once submitted, a list of the tasks and due dates for all sections will be generated as part of the entry email received by the location.

Completing the Form

The form is divided into several sections, each focusing on different areas of the car wash. As you go through the form, you may notice that its order doesn't exactly match the order for your location. This is because we don't have the same layout at each location. It is best to start at the Entrance Area and work your way through the site while scrolling between appropriate sections rather than following the exact order of the form and walking all over the site.

It is important to provide as much information as possible during the evaluation. To help gather adequate information, ensure you do the following in each evaluation:

- Take photographs or videos as evidence of compliance or non-compliance.
- Carefully document all findings in the provided forms, ensuring accuracy and completeness.
- Highlight any areas that do not meet the standards, providing detailed descriptions and supporting evidence.
- Speak with site staff to gather additional information and verify that procedures and protocols are being followed correctly.

Now, let's review each section of the form.

General Information

The General Information section requires you to input the location, who is completing the form, and when the process started. As a reminder, a store or general manager must complete or be present to complete a Manager Site Standards form.

Entrance Area

Walk the entrance drive and check the cleanliness and condition of the entrance drive and pay station lanes, the condition of menu boards, and the functionality of the pay stations.

Tunnel

Check the cleanliness of walls, ceilings, equipment, floors, and conveyor shelves and the functionality of equipment and chemical, rinse, and drying systems.

Exit Area

Check the cleanliness of the tunnel exit, including determining if debris is present and the functionality of the Wait/Go light and anti-collision pad.

Lot

In addition to general cleanliness, the lot has several items of focus. You will also check the condition of trash cans, the organization and stock of towel carts, and the functionality of vacuums, air guns, mat cleaners, and spray stations.

Vacuum Area

Report on the central vacuum units' condition, cleanliness, and functionality. Check for low suction or clogs.

Equipment Room

Check the organization and cleanliness of shelves, tables, tools, and supplies and the functionality of equipment and chemical lines. You will also perform specific checks of the presoak and drying agent's metering tips to ensure they are not clogged.

Signage

Check that all location signage, including pump toppers, pylon, wind master, yard, and dirty towel return signs, is appropriately placed and in good condition and that no signage is missing or damaged.

Additionally, if any promotional materials or hiring banners should be displayed when the report is completed, ensure they are appropriately placed and in good condition.

Dumpster

Inspect the dumpster area and indicate if there is trash or debris around the dumpster and if the area needs to be pressure washed. You will also indicate the fullness of the dumpster and if the door for the enclosure was open or closed at the time of inspection.

Store Team

Verify that pay stations are appropriately staffed, team members are active in the lot and in proper uniform, and loading and prep procedures are performed correctly and according to WhiteWater standard procedures.

Customer Lobby

Confirm that the lobby is clean, tidy, and free of dust or trash. Verify that the desk and any cards and brochures are organized and adequately stocked.

Back Office

Confirm that the office is clean, tidy, and free of dust or trash and that the shelves and desk are organized and adequately stocked. You will also confirm that the Game Plan board is posted in the office and filled out appropriately based on the time the form is completed.

Break Room

Check that the break room is clean and free of clutter, the counters are clean, the refrigerator is clean and neatly stocked, the microwave is clean, and trash cans are not overflowing.

Restroom

Verify that restrooms are clean, free of odors, and adequately stocked with all necessary supplies, including soap, toilet paper, paper towels, etc.

Additional Information

In this section, you will input the number of Customer Feedback Surveys and Wash Quality Reports completed that day and the location's Google rating at the time of form completion.

Conclusion

Consistently completing manager site standards ensures our locations' consistent and thorough inspection and maintenance. By utilizing the form, managers can document the condition of each critical area within the facility, ensuring that cleanliness, functionality, and organization are maintained at the highest levels. The form also ensures that all issues are documented and communicated with the necessary parties. This rigorous process enhances the customer experience and contributes to our car wash facilities' overall efficiency and operational success. By diligently using this form, we can promptly identify and address issues, fostering a safe, clean, and welcoming environment for our customers and staff.

Manager Site Standards Quiz

Once the team members have completed the module, they must complete the quiz. To pass the quiz, the team member must score 100%. If the team member does not pass their first attempt, they must retake the quiz. If they do not pass on their second attempt, you must review the quiz and answers with them before their third attempt.

1. A Store or General Manager must complete the Manager Site Standards form.
   a. **True**
   b. False
2. The inspection order must strictly follow the form sequence regardless of the location's layout.
   a. True
   b. **False**
3. The vacuum section reports on the vacuum hose condition and functionality.
   a. **True**
   b. False
4. The Customer Lobby section checks that the Game Plan board is filled out appropriately.
   a. True
   b. **False**
5. What information is entered in the Additional Information section? (Select all that apply)
   a. **Number of Customer Feedback Surveys completed that day**
   b. Number of team members scheduled
   c. **Google rating at the time of form completion**
   d. The work schedule for the day of completion
   e. **Wash Quality Reports completed that day**
6. What is the primary purpose of the Manager Site Standards form?
   a. **To maintain high standards of cleanliness, functionality, and organization**
   b. To track employee performance
   c. To promote sales of memberships
   d. To ensure customer feedback is collected
7. What device is required to complete the Manager Site Standards form?
   a. Laptop
   b. Desktop computer
   c. **Phone/Tablet**
   d. Digital camera
8. Which section checks for the cleanliness and functionality of the pay stations?
   a. Tunnel
   b. **Entrance Area**
   c. Lot
   d. Store Team

Manager Site Standards Demonstration

Once the team member has passed the quiz, ask the team member if they have any questions. Once all questions have been answered, perform a real-time demonstration in as close to the same manner it is typically performed.

During the Demonstration, do not stop to answer team members' questions or provide additional information. The goal is for team members to see the process performed as close to a real-life scenario. The uninterrupted performance will help connect the steps or information learned. You will answer all questions and provide further insight into your performance during the process after the demonstration is completed.

Using the Manager Site Standards form, perform the tasks for each section. For this demonstration, stop after each section to review and answer questions.

After the demonstration, review the process and any team member questions and distribute the handout(s) for review and study.

Manager Site Standards Perform & Coach

During Perform & Coach, do not stop to answer team member questions or provide additional information or coaching during their performance. The goal is for the team members to complete the process as best they can while you observe the performance to determine which area needs to be addressed first.

Using the Manager Site Standards form, have the team members perform the tasks and complete each section. For this demonstration, stop after each section to review and answer questions.

Repeat the process until the team member completely understands all the information covered in this module and you and the team member feel confident they can perform the procedure to standard.

Use the QR Code to access the Manager Site Standards Form
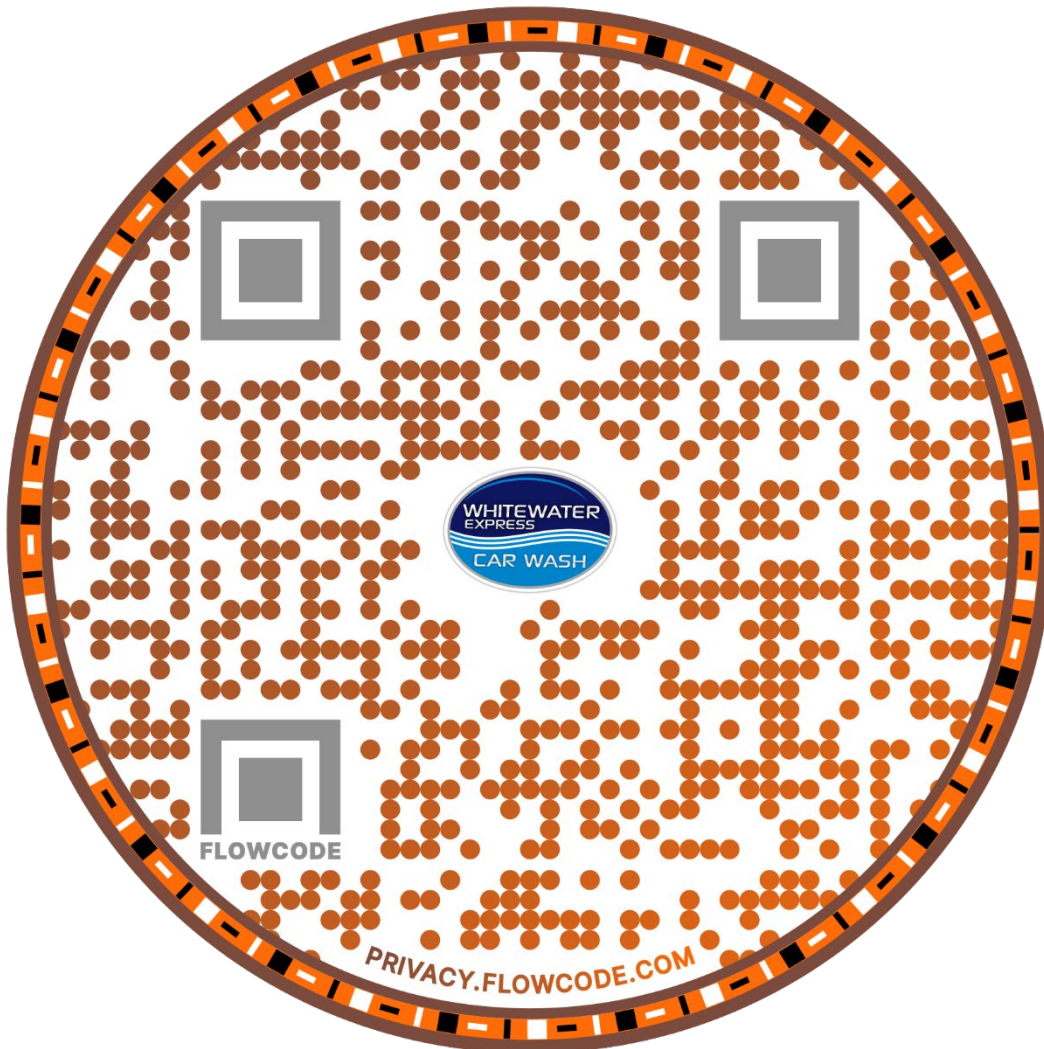
PURCHASING POLICY-1104

Welcome

Welcome to the Purchasing Module. In this module, you will learn about our purchasing policy and guidelines for credit card usage, and ensure compliance with our credit card usage policies.

Notes and Questions

As you go through the module, please follow along and take notes. Taking notes will help you remember any key points or questions you want to discuss. Once you have completed each section and quiz, you can review the information and your questions with a manager.

Quiz

Once you have finished watching the module, there will be a quiz to review the information in the module. A score of 100% must be achieved to pass each quiz. If you do not pass the quiz on your first attempt, retry the quiz. If you do not pass on your second attempt, locate a manager. Your manager will review the module with you and address any questions you may have. Once you have passed the quiz, exit the module and locate a manager to proceed to the Demonstration for this module. Your manager will then review the information and any questions you may have.

Why

The purpose of the Purchasing Policy module is to educate team members on the company Purchasing Policy to ensure financial accountability, transparency, and proper use of corporate resources.

What

The following are the items you will need to access the Purchasing Policy resources:

1. Phone/Tablet/Computer & Intranet

    Used to access the various guides and resources on the Intranet.

Educate

The following information is essential for ensuring compliance with our company purchasing policy.

Authorized Use of Credit Cards

Company credit cards are issued to authorized personnel and locations to facilitate approved company expenses. Cardholders and users must adhere to company policies and exercise prudent judgment to ensure cost consistency and limit liabilities. Prohibited and restricted purchases include the following:

Alcohol

Prohibited without the CEO/CFO/COO's written approval.

Gift Cards

Strictly prohibited.

Personal Use

Personal expenses, including Venmo/Zelle transactions and other personal payment applications, are strictly prohibited.

Medical Supplies

Only approved first-aid kits and supplies are allowed per the NPE Cognito Form.

Fuel

Only for company-approved equipment and rental cars; personal vehicle mileage is not reimbursable through credit card use.

Technology and Subscriptions

Purchases are restricted to the Corporate Technology team, with memberships and extended warranties requiring written approval.

Credit Limits and Authorization Levels

Credit limits are assigned based on position within the company and are as follows:

Store Management

Up to $500 per transaction, excluding Baker, Dubois, and NPE purchases

Area Director, Maintenance/IT Tech

Up to $2,500 per transaction, excluding Capex Purchase Orders, otherwise approved by the Facilities Team

Regional Director, Maintenance/IT Lead

Up to $5,000 per transaction. excluding Capex Purchase Orders, otherwise approved by the Facilities Team

Vice President/Corporate Department Director

Up to $10,000 per transaction.

CEO, COO, CFO

Up to $100,000 per transaction.

NOTE: All transactions are subject to review by Accounting to ensure compliance with policy.

Credit Card Documentation and Receipts

Receipt Management: Cardholders must retain and submit itemized receipts for all credit card transactions electronically. Receipts for meals must include the purpose of the trip and the names of all team members involved in the meal if one member pays for the group.

Invoices submitted as documentation must be itemized and include the tax line indicating whether tax was charged.

- Credit Card Budgets: Receipts must be coded to the proper budgets -
- Store Budget - purchases made by Store Team Members
- Maintenance Budget - Purchases made by Facilities/IT Teams
- Capex Budget - purchases for all Capex projects
- Corporate Overhead - purchases made by Corporate Team members
- Human Resources - purchases made by HR Team members
- Southwest Split/Midwest Split - purchases made by MSD/AD/RD's
- New Site Startup Costs - purchases associated with Greenfield site openings
- Rebrand Budgets - purchases associated with Rebrand locations
- Acquisition Budgets - purchases associated with Acquired Sites
- Miscellaneous other budgets as assigned

Travel Expenses

All travel outside the local market must be pre-approved through the [Travel Booking Authorization Form](#) available on the HR page of the Company Intranet. Adhere to the following guidelines:

Overnight Accommodations, Flights, or Rental Cars

Employees requiring overnight accommodations, flights, or rental cars must complete and submit an authorization form before booking.

Travel Expenses Over $300

Regional directors, vice presidents, and department heads must obtain approval via the authorization form for travel expenses exceeding $300 for themselves and their direct reports before booking. For travel related to new site openings, one form can be submitted for multiple team members.

Daily Meal Allowance, Eligibility & Guidelines

Employees are allotted up to $55.00 per day for meals while traveling. This covers breakfast, lunch, and dinner. Meals are reimbursable only when traveling out of the market, defined as requiring an overnight stay

- Breakfast: Reimbursable on the return day if the trip concludes in the morning.
- Lunch: Reimbursable on the day of return if travel concludes after 2:00 PM.
- Dinner: Reimbursable if travel ends after 6:00 PM.

Non-Reimbursable Expenses:

Drinks and snacks are not eligible for reimbursement, whether during in-market or out-of-market travel.

Pay Cards for Travel Meals (Per Diem):

Employees without a company credit card and traveling out of the market may be issued a temporary Pay Card, specifically for managing per diem allowances as per the travel meal policy. Cards can be requested via the Travel Per Diem Request form located on the HR page of the Company Intranet. Meals cannot be purchased with a company credit card for employees who have received a Pay Card, specifically for managing per diem allowances.

Non-Compliance and Violations

All credit card charges must be completed and coded correctly within 7 days except for the last week of the month, which must be completed by the last day of the month. Failure to complete charges within this timeframe can result in suspension of card privileges. In addition, consistent failure to complete transactions within the timeframe can result in suspension of card privileges and disciplinary action. The Controller and Sr. Accounting Manager will determine the suspension of card privileges.

Consequences of Misuse

Misusing the company credit card can result in disciplinary actions, including revocation, repayment of unauthorized expenses, and possible termination of employment.

Fraudulent Charge Resolution

Cardholders must immediately report fraudulent charges to the Accounting Department for further assistance. Resolution of all fraudulent charges is the cardholder's responsibility.

Personal Charges

Accidental personal charges must be immediately reported to the Accounting and HR teams (contact details provided below) and your immediate supervisor. More than one unauthorized personal purchase within a six-month period will result in a written warning, and further misuse could result in termination. Personal Charges will be deducted from the employee's next paycheck.

Contact Information

- For any issues related to credit card use, contact payables@whitewatercw.com.
- For issues related to personal charges, email:
  - accounting@whitewatercw.com
  - hr@whitewatercw.com
  - Your immediate supervisor

Invoicing on Account

WhiteWater Express establishes a trade credit account and is invoiced for goods to be paid for later. The following guidelines apply:

Credit Applications

The CFO or Controller must sign all credit applications for a trade credit account.

Vendor Requirements

Vendors issuing invoices must have a current W-9 on file before their first remittance, and service providers working at store locations must have a current Certificate of Insurance on file.

Payment Policy

Authorized purchases on account will be paid on the due date or on the latest possible date to qualify for a discount. Our policy is to always take advantage of discounts for early payment where available and feasible.

Invoice Submission

All vendor invoices should be delivered to payables@whitewatercw.com or mailed to the following address:

WhiteWater Express Car Wash 106 Vintage Park #100 Houston, TX 77070

Policy Updates and Revisions

This policy is subject to periodic review and updates to reflect changes in company practices and regulatory requirements. All updates will be communicated to cardholders and relevant personnel. Construction-related contracts for new development are excluded from the scope of this document.

Purchasing Policy Quiz

Once the employee has completed the module, they must complete the quiz. To pass the quiz, the employee must score 100%. If the employee does not pass their first attempt, they must take the quiz again. If they do not pass on their second attempt, you must review the quiz and answers with them before their third attempt.

1. Which purchases are strictly prohibited without the CEO/CFO/COO's written approval?
   a. **Alcohol**
   b. Gift Cards
   c. Personal Use
   d. All the above

2. What is the maximum transaction limit for Store Management?
   a. **$500**
   b. $1,000
   c. $2,500
   d. $5,000

3. What type of purchases are allowed under the fuel category?
   a. Personal vehicle mileage reimbursement.
   b. **Only for company-approved equipment and rental cars.**
   c. Fuel for personal cars.
   d. None of the above.

4. What is the daily meal allowance for employees while traveling?
   a. $20
   b. **$55**
   c. $100
   d. $75

5. Which of the following expenses are non-reimbursable?
   a. Breakfast during out-of-market travel
   b. **Drinks and snacks during in-market or out-of-market travel**
   c. Lunch if travel concludes after 2:00 PM
   d. Dinner if travel ends after 6:00 PM

6. Where should vendor invoices be delivered for payment processing?
   a. To the HR department.
   b. **To payables@whitewatercw.com or mailed to WhiteWater Express Car Wash, 106 Vintage Park #100, Houston, TX 77070.**
   c. To the local office.
   d. To any company email.

7. Employees requiring overnight accommodations, flights, or rental cars must complete and submit an authorization form before booking.
   a. **True**
   b. False

Purchasing Policy Demonstration

Once the team member has passed the quiz, ask the team member if they have any questions. Once all questions have been answered, perform a real-time demonstration in as close to the same manner it is typically performed.

During the Demonstration, do not stop to answer team members' questions or provide additional information. The goal is for team members to see the process performed as close to a real-life scenario. The uninterrupted performance will help connect the steps or information learned. You will answer all questions and provide further insight into your performance during the process after the demonstration is completed.

Demonstrate the steps for accessing the Purchasing Policy and other resources on the Intranet, then review the key points of the policy.

After the demonstration, review the process and any team member questions and distribute the handout(s) for review and study.

Purchasing Policy Perform & Coach

During Perform & Coach, do not stop to answer team member questions or provide additional information or coaching during their performance. The goal is for the team members to complete the process as best they can while you observe the performance to determine which area needs to be addressed first.

Have the team members perform the steps for accessing the Purchasing Policy and other resources on the Intranet, then have them explain the key points of the policy.

Repeat the process until the team member completely understands all the information covered in this module and you and the team member feel confident they can perform the procedure to standard.

Purchasing Policy Handout

Travel Per Diem Request

To ensure fair compensation for travel to out-of-town sites, we've instituted a **Travel Per Diem program**. Eligible employees will receive $55.00 per day, deposited onto a designated pay card upon approval.

If an employee travels with a team member possessing a company credit card, they are ineligible for per diem. Expenses will be covered by the team member with the company card.

Employees using personal vehicles will be reimbursed for mileage. Please complete the mileage reimbursement form within 5 days of trip completion.

Hourly employees must adhere to their schedules and clock in on their designated Timeclock system. The Area Director must approve their hours at trip's end.

Submission forms will be emailed to the VP of Operations and HR department for review and approval.

Employee (Full legal name) Traveler 1 *

Employee Number *

Employee Home Location *

Job Title: *

Hourly or Salary? *

Rentals

Rentals Needed (Please check all that apply) *

☐ Vehicle   ☐ Flights   ☐ Hotels   ☐ N/A

What is the reason of the visit? *

○ Training   ○ Visit   ○ Staffing Issues   ○ Assist with Rebrand

What stores are you going to assist during your trip?

[+ Add Day]

Travel Days

⊗ **Item 1**

Number of Travel Days Worked *

Are you traveling with someone that has a Divvy Card? *

☐ Yes   ☐ No

Notes.

[+ Add Item]

Area Director Submitting the Request: *

Todays Date *

BILL SPEND-1105

Welcome

Welcome to the Bill Spend Module. In this module, you will learn about our company credit card usage policies, the Bill Spend interface, and how to manage and classify transactions.

Notes and Questions

As you go through the module, please follow along and take notes. Taking notes will help you remember any key points or questions you want to discuss. Once you have completed each section and quiz, you can review the information and your questions with a manager.

Quiz

Once you have finished watching the module, there will be a quiz to review the information in the module. A score of 100% must be achieved to pass each quiz. If you do not pass the quiz on your first attempt, retry the quiz. If you do not pass on your second attempt, locate a manager. Your manager will review the module with you and address any questions you may have. Once you have passed the quiz, exit the module and locate a manager to proceed to the Demonstration for this module. Your manager will then review the information and any questions you may have.

Course Note

This course only intends to educate and prepare Shift Leaders to perform the required Bill Spend functions in their future role. Shift Leaders **WILL NOT** have their own Bill Spend login. However, they can still participate in categorizing and navigating the Bill Spend website or app during training using a manager account and with a manager present.

Shift Leaders are NEVER allowed to make purchases using the store credit card.

Why

The Bill Spend module reviews the guidelines for using company-issued credit cards to ensure financial accountability, proper use of corporate resources, and proper allocation of funds.

What

The following are the items you will need for Bill Spend tasks:

1. Bill Spend Website or App

    Used to classify, add transaction details, and upload receipts.
2. Phone/Tablet/Computer & Intranet

    Used to access the Bill Spend website or app and the various guides and resources on the Intranet.

Educate

The following information is essential for ensuring compliance with our credit card usage policies. Please refer to the Credit Cardholder Guide is located on the Finance tab of the Company Intranet for additional guidelines on using your company credit card.

Credit Card Cardholder Guide

For convenience, WhiteWater Express provides purchasing cards to individuals and stores to procure supplies and other expenses. In utilizing these cards for company purposes, users must adhere to the company's policies and practices around appropriateness and provide sufficient documentation to justify the expense. The purpose of this guide is to introduce new users to the initial set-up of these cards and provide an ongoing reference for the documentation standards for all purchases.

Using the card on the company's behalf is a privilege, and misuse of the company card may result in disciplinary action up to and including termination. Please consult the Purchasing policy on the Intranet for guidance on purchase authorization and limitations.

Activating Your Account and Card

Go to DIVVY and log in with the login information provided for your account. Generally, store cards are associated with the store's specific email address (e.g., WX101 Tomball is tomball@whitewaterexpress.com). You will need to activate your card upon first log in or if you receive a replacement. Once enrolled, we recommend changing your login settings to use a PIN to log in on the DIVVY app for easier use for store cards.

Once you're set up, you can use the website or the Divvy phone app to attach receipts to transactions, categorize expenses for accounting, as well as document transaction details to ensure proper attribution to specific stores where applicable.

The billing address for all cards is 106 Vintage Park Blvd Suite 100, Houston, TX 77070.

Help Center

Divvy has a robust help chat located in the More section of the phone app or the lower left hand of the website. This feature allows you to start a conversation or find the answer under the Visit the Help Center. The chat feature provides real-time answers in typically less than a minute and will email you a transcript of your conversation, which is convenient for sharing with team members. Divvy also offers a Help Center Article search and a phone hotline as additional resources.

Virtual Cards

Divvy also has the bonus of creating Virtual Cards, which allow you to simplify and secure company spending. Virtual cards have unique numbers/security codes and can be created for individual vendors and can be burners (one-time use) or subscription cards (card limits reset each month). Virtual cards are tied to an active budget and will prefill this info along with the Category and Location fields. An added benefit of Virtual Cards is that fraudulent transactions would be limited to one card, reducing the time needed to inform multiple vendors of replacement card information. Examples of Virtual Cards would be Amazon, Kleen Rite, and other online vendors used regularly.

Important Note: Virtual Cards can only be generated via the mobile app, not through the website, for most users. When making your virtual card, please set it up as a Vendor Card with no limits.

Required Documentation

Transactions are marked as INCOMPLETE until all required fields have been filled out: Budget, Category, Location, Receipt attached, Notes. The phone app will send out push notifications only when you have this feature turned on in your settings. You will receive notifications reminding you to add a receipt or provide any additional information required. Under More, at the bottom of the right screen, you can also see a badge under Alerts telling you which transactions need attention. Please complete all transactions in Divvy no later than 3 days after the transaction has converted from pending status. This section provides more information on each required field and guidance on completing each.

Budget

Budgets in Divvy are designed to group similar transactions together and allow for real-time tracking of those expenses. Budgets are allocated to limit spending to reasonable amounts and avoid unreasonable or surprise large expenses. These allocations are for convenience in tracking spending. They are NOT permission to spend that amount in full each month.

Each transaction will need a budget assigned to it. If you can access more than one budget in Divvy, select the budget that fits your transaction.

Receipts

Each purchase you make is required to have a receipt attached in Divvy. For retail transactions,

take a picture of the receipt and attach it to the transaction in the app. For online transactions, you can print to PDF and attach it in the online portal or take a picture on your phone of the screen and attach it in the phone app. Once attached in DIVVY, you will need to add notes to the expense to describe the nature of the transaction. For equipment repairs, we highly recommend that you identify the piece of equipment being repaired.

- All receipts must be itemized; a copy of the signature stub and the total is insufficient documentation.
- Receipts must be in PDF or JPG format. Please do not add a PNG or TIFF file, the system does not recognize these.
- We recommend retaining all receipts on-site for one month before discarding them.
- If you lose a receipt, add Lost Receipt as the first two words in the note section and a description of the charge.

Location

Locations generally correspond to Store numbers and names. A few special-use locations are used for splitting expenses across an MSA (990-994) and a 9999 Corporate Intercompany. Store users should only use these special-use locations when instructed to do so.

Category

You will be asked to categorize each expense with a spend category. The category is mapped to a corresponding general ledger account for financial reporting. Between the category and thorough notes from the cardholder, enough information should be available to allocate the expense without additional follow-up with the cardholder properly. Below is a full list of all the potential categories to use and their descriptions.

Splitting Transactions

Often, purchases are made on one receipt that applies to more than one Category (i.e., a Home Depot receipt with tools, which would go to Facility Supplies, and repair parts, which would go to R&M). When that occurs, the transaction must be split to allocate the charges to the right categories properly. Transactions can be split after they have moved from pending to posted (_Pending_ is replaced with transaction date).

For help with splitting transactions, go to the help guide at, help.getdivvy.com and do a search. Store transactions can't be split across multiple budgets. i.e., You shouldn't use a store-specific card to make purchases for other stores, as that charge will count against the wrong budget in Divvy.

Where shipping or taxes are applied, in a split transaction, you may allocate those line items in whole to one of the categories rather than doing the math to split those lines. Example: Spent $50 online at KleenRite, with $30 belonging to Repairs & Maintenance and $20 belonging to Facility Supplies. There was an $8 shipping charge. You can split the $30/$20 to the proper category, then apply the $8 shipping to either R&M or Facility. There is no need to split the $8 between the two.

Split Locations/Budgets

You cannot split a transaction across budgets therefore, generally, store cards shouldn't be used to purchase items for multiple stores. For transactions incurred by area or corporate users that apply to more than one store, a budget named AD Split Charges has been created to accommodate splitting store-level expenses and to track those items separately. Example: Kleen-Rite supplies purchased for multiple locations should be attributed to the multiple stores. Use AD Split Charges for these expenses, split the transaction, and allocate to the appropriate locations as needed. An additional Purchase Order field is required for all transactions for Capital Expenditure purchases.

Bill Spend Quiz

Once the employee has completed the module, they must complete the quiz. To pass the quiz, the employee must score 100%. If the employee does not pass their first attempt, they must take the quiz again. If they do not pass on their second attempt, you must review the quiz and answers with them before their third attempt.

1. What is the main purpose of the Bill Spend Module?
    a. **To review the guidelines for using company-issued credit cards.**
    b. To increase the company's overall spending.
    c. To encourage employees to use personal funds for business expenses.
    d. To eliminate the use of credit cards altogether.
2. What happens if credit card charges are not completed and coded correctly within the required timeframe?
    a. **Suspension of card privileges**
    b. Increase in credit limit
    c. No consequences
    d. Award points are given
3. What must cardholders do if they notice fraudulent charges on their company credit card?
    a. Ignore them
    b. **Report immediately to the Accounting Department**
    c. Pay for them personally
    d. Wait until the next billing cycle
4. Virtual cards are not tied to an active budget and will have to be configured before each use.
    a. True
    b. **False**
5. What should employees do if they lose a receipt for a company purchase?
    a. **Add "Lost Receipt" in the notes section and describe the charge.**
    b. Do nothing.
    c. Create a fake receipt.
    d. Report to HR.

Bill Spend Demonstration

Once the team member has passed the quiz, ask the team member if they have any questions. Once all questions have been answered, perform a real-time demonstration in as close to the same manner it is typically performed.

During the Demonstration, do not stop to answer team members' questions or provide additional information. The goal is for team members to see the process performed as close to a real-life scenario. The uninterrupted performance will help connect the steps or information learned. You will answer all questions and provide further insight into your performance during the process after the demonstration is completed.

Go through each of the Bill Spend tasks on the website and app to familiarize the team members with the Bill Spend website and app.

After the demonstration, review the process and any team member questions and distribute the handout(s) for review and study.

Bill Spend Perform & Coach

During Perform & Coach, do not stop to answer team member questions or provide additional information or coaching during their performance. The goal is for the team members to complete the process as best they can while you observe the performance to determine which area needs to be addressed first.

Have the team member complete each of the Bill Spend tasks on the website and app.

Repeat the process until the team member completely understands all the information covered in this module and you and the team member feel confident they can perform the procedure to standard.

REMINDER

This course only intends to educate and prepare Shift Leaders to perform the required Bill Spend functions in their future role. Shift Leaders **WILL NOT** have their own Bill Spend login. However, they can still participate in categorizing and navigating the Bill Spend website or app during training using a manager account and with a manager present.

Shift Leaders are NEVER allowed to make purchases using the store credit card.

Bill Spend Handout 1-Store Categories

Store Casualty Loss- (Store Casualty Loss Budget) - Use this category for expenses related to customer vehicle damage for which we have accepted responsibility and paid including: Wiper Blades, Mirrors, Body Work. Include incident number and customer name in notes. Incidents under $500 will be paid with the Store card. Incidents above this amount must immediately be disclosed to the Area Director and Director of Operational Development to coordinate payment. **All customer incidents require an incident report to be filed. If you use this category, you must attach both a detailed receipt AND include an incident number in the Notes field.**

Store Dues & Subscriptions- Recurring dues and subscriptions. This category is typically used by the Accounting Department. Please contact the Accounting team before using this category.

Store Electricity- This category is typically used by the Accounting Department. Please contact the Accounting team before using this category.

Store Electricity Delivery Charge- This category is typically used by the Accounting Department. Please contact the Accounting team before using this category.

Store Facility Repairs- Use this category for **3rd Party Contractors only** for repair and maintenance costs for the building and property. This includes outside repairs services such as pest control, locksmiths, plumbers, electricians (non-equipment repairs), painters, etc.

Store Facility Supplies- Use this category for all consumable supplies required for maintaining the building and property (not car wash equipment, vacuums, point of sale equipment, or mat cleaners). This account should be used for replacement vacuum claws, airgun triggers and hoses, and other wearing parts in the vac stalls. Store consumable supplies include: Small Equipment, Tools, Trash Bags, Vacuum Heads, Cleaner, Vinegar, Gas, Prep Buckets, XPT Receipt Paper, etc. Washing Machines, because of their cost and frequency of replacement, should also be categorized as Facility Supplies.

Store Landscaping- Use this category for any Lawn and Landscape maintenance. When using a 3rd Party Contractor please put against the Landscaping Budget. Landscaping supplies purchased by the store, like mulch, would use the Store Budget.

Store Misc. Exp- **Do NOT** use this category without express instructions from the accounting team.

Store Office Supplies- Use this category for Office Supplies for store operations: Printing Paper, Pens, Bathroom Supplies, Cleaning Supplies for office.

Store Office Pantry- Use this category for allowed pantry purchases in accordance with the Purchasing policy (Snacks, coffee, Gatorade, etc.). No highly caffeinated drinks like Monster or Red Bull allowed.

Store Office Water- Use this category for drinking water and ice purchases ONLY. No other drinks are to be put against this Category.

Store Permits & Fees- Use this category for regulatory compliance and inspections. This can include fire extinguisher inspections, alarm permits, certificates of occupancy, etc.

Store Repair & Maintenance- Use this category for repairs and maintenance to car wash equipment inside the tunnel and equipment room as well as the vacuums, XPTs and mat machines (not Facility Repairs!). Repair and maintenance includes wrap parts and repairs, brackets, air compressor parts and repairs, hydraulic oil, etc.

Store Repair Unexpected Breakdown- Use this category for repairs required due to a result of damage or other unexpected, sudden breakdown of equipment. An example might be damage caused by a customer driving off the conveyor or a new piece of equipment that quit working.

Store Tank Pumping- (Tank Pumping Budget) - Use this category for all tank pumping. This would not include permits or repairs, which would be categorized in Store Permits & Fees or Facility Repairs, respectively.

Store Telephone/Data Exp- This category is typically used by the Accounting Department. Please contact the Accounting team before using this category.

Store Uniform- (Uniform Budget) - This is a store level expense category that will generally only be used by the HR department for purchasing uniforms (shirts/hats/name badges, etc.). Purchases of tattoo sleeves are not permitted.

Store Vending Merch COGS- Use this category for the purchase of all items sold in the vending machines.

Store Wash Water COGS- This category is typically used by the Accounting Department for Wash Water utility costs. Please contact the Accounting team before using this category.

Store Waste Removal- Use this category for any waste disposal. Please contact the Accounting team before using this category.

Store Water Irrigation Exp- This category is typically used by the Accounting Department. Please contact the Accounting team before using this category.

Store Water Processing COGS- Use this category for Culligan's or water softener salt purchased.

NOTE for Capital Expenditures: See Corp Capex Additions. This category is typically used by the DOD, AD's and Corporate staff. Please contact your AD prior to using this category.

Bill Spend Handout 2-Travel Categories

These categories should be used for all travel-related expenses. Travel categories should be used for all travel involving an overnight stay for work purposes or for an out-of-town trip, including leaving your home MSA to another city and returning the same day. For example, a Houston-based employee driving to Austin MSA for a site visit and returning to Houston the same day qualifies for the use of Travel categories for expenses related to that trip, as would any overnight trip.

When you use travel categories, the travel budget will be either corporate travel or a rebrand/acquisition budget, and the location used should always be 9999 Houston.

Travel Airfare- Use this category for all airline purchases.

Travel Auto—Use this category for all auto-related purchases, including fuel, tolls, mileage reimbursement and test washes.

Travel Lodging- Use this category for all hotel charges.

Travel Meals- Meal charges incurred while traveling. Please identify all participants in the meal, either employees or others outside the organization.

Bill Spend Handout 3-Marketing & Other Categories

These tags should be used only for marketing costs and can be allocated to all sites, single sites, or by MSA. Please ensure Devann Blake is made aware of all marketing/advertising costs being incurred.

_Marketing Collateral-_Use this category for the purchase of enrollment forms, brochures, wash books, ovals, and other printed materials for stores.

_Marketing Promotional-_Use this account for all ARM enrollment and other promotional giveaways – stickers, cups, towels.

_Marketing Soft Signage-_Use this account for decals, on-site/non-permanent signage (towel baskets, carts, etc.), Now Open flags and other external store signage.

_Marketing Other-_Other expenses related to Marketing and designated by the Marketing Manager.

_Personal Expenses-_Use this tag for items charged to the company card in error. The accounting team will contact you to discuss reimbursement of the company for these charges. Habitual use of the company card for personal expenses may result in disciplinary action up to/including termination.

WHITEWATER UNIVERSITY MANAGEMENT - 1106

Welcome

Welcome to the Whitewater University Management Module. In this module, you will learn about our learning management software and how to navigate the interface as a manager. We will also review the steps for performing various tasks in team member accounts.

Notes and Questions

As you go through the module, please follow along and take notes. Taking notes will help you remember any key points or questions you want to discuss. Once you have completed each section and quiz, you can review the information and your questions with a manager.

Quiz

Once you have finished watching the module, there will be a quiz to review the information in the module. A score of 100% must be achieved to pass each quiz. If you do not pass the quiz on your first attempt, retry the quiz. If you do not pass on your second attempt, locate a manager. Your manager will review the module with you and address any questions you may have. Once you have passed the quiz, exit the module and locate a manager to proceed to the Demonstration for this module. Your manager will then review the information and any questions you may have.

Why

The purpose of managing team member accounts on WhiteWater University is to ensure that team members can access their accounts and have the continued ability to move forward with their development module progress.

What

The following are the items you will need for managing WhiteWater University:

1. TalentLMS

   The learning management software that powers WhiteWater University.

2. Computer

   A computer will be needed to access WhiteWater University.

3. WhiteWater University Login Information

   Your WhiteWater University login information will be needed to access your account.

4. Administrator (Manager) User type

   This user type is required to perform the functions discussed in this module.

Educate

WhiteWater University is powered by our learning management software, TalentLMS. Upon promotion to Store Manager, your user type in TalentLMS will change from Learner to Manager, and you will have access to additional functions.

User Types

Before we discuss how to manage user accounts, we must first discuss user types. User types allow users to have various levels of access within TalentLMS. Let's review each of the user types.

Learner

The learner user type is the default type used when you log into TalentLMS. This is the user type for all Team and Shift leaders. This is also the user type that managers will need to be in when completing their modules and courses. Always ensure that you are in the leaner user type and assigned to the course as a learner. Any progress made outside of the learner type will not record completion information and will not update the information on the Development Tracking Portal.

Instructor

We do not use the instructor user type for WhiteWater University; however, it is automatically added to your profile when assigned the Manager user type.

Administrator (Manager)

Once you have the user type, you can change it to Learner, Instructor, or Administrator. The Administrator user type must be selected before any changes to user accounts can be made.

Managing User Accounts

As a manager, you will be able to perform various account management functions, including managing user accounts, adding/removing users from courses, and resetting quizzes.

To access the account management functions, you will first need to change your user type to Administrator. To change your user type:

1. Move your mouse to the top of the screen where your current user type is listed next to your name
2. Click the triangle to the right of the user type
3. Select Administrator
4. The page will refresh and change to the Administrator view

Now that you know how to access the Administrator user type, let's review each of the available functions and the steps for completing each one.

Accessing & Managing User Info

To access use profiles, go to the home page and perform the following steps:

1. Click on Users
2. Begin typing the user's name into the search box at the bottom of the list
   - As you type, the users will start to filter
3. Locate the user and click on their name. You will then be redirected to the user's profile
4. Once on the next screen, you will be able to update the user's name, email address, username, password, employee ID, and Location number
5. Locate the box for the information that needs to be updated and input the new information
6. Click Update User at the bottom of the page
7. A box will appear at the top of the screen indicating the success or failure of the update

Resetting Passwords

If you must reset a user's password, you will need to use a temporary password, i.e., "Whitewater1," and then update the user profile. After the user logs in using the temporary password, they will be prompted to enter a new password.

Adding/Removing a Course

1. Go to the tab labeled Profile
2. Click on Courses
3. On the next page, locate the course you need to add or remove
4. In the Options column, you will either see three (3) dots or a plus sign
   - If the user is already assigned to the course, you will see three (3) dots. Hover the mouse over the dots, then click on the minus sign
   - If the user is not already assigned to the course, click on the plus sign

Resetting User Progress

1. In the upper right corner of the user profile, click on the tab labeled Progress
2. On the next page, select Courses
3. Locate the course that the module is associated with
4. In the Progress column, click the progress bar to view the unit progress
5. Hover over the unit to be reset and click Reset

Conclusion

You now have the tools and knowledge to manage team member accounts using TalentLMS. By mastering these skills, you ensure our team can continuously progress through their development modules, contributing to a high-performing and knowledgeable workforce. Remember, your role as a manager is pivotal in facilitating growth and development within our team.

WhiteWater University Management Quiz

Once the team members have completed the module, they must complete the quiz. To pass the quiz, the team member must score 100%. If the team member does not pass their first attempt, they must retake the quiz. If they do not pass on their second attempt, you must review the quiz and answers with them before their third attempt.

1. What powers WhiteWater University?
    a. GrowLMS
    b. TalentLMS
    c. Various programs and vendors
    d. The WhiteWater IT Department

2. What user type do you need to perform account management functions?
    a. Learner
    b. Instructor
    c. **Administrator (Manager)**
    d. Guest

3. What user type should managers be in when completing their modules and courses?
    a. **Learner**
    b. Instructor
    c. Administrator
    d. All the above

4. The Profile tab is used to access user profiles and manage user info.
    a. True
    b. False

5. What should you do if you need to reset a user's password?
    a. **Set a temporary password, then update the user profile**
    b. Delete the user account
    c. Contact the user for their new password
    d. Log in as the user

6. Which tab must be selected to reset a user's progress in a course?
    a. **Progress**
    b. Profile
    c. Infographic
    d. None of the above

7. How do you change your user type to Administrator?
    a. Send a request to the WhiteWater IT Department
    b. Submit a Development Support Request
    c. On the TalentLMS home page, click on the Messages icon and send a message to your Area Director
    d. **On the TalentLMS home page, click the triangle next to your user type, and select Administrator**

WhiteWater University Management Demonstration

Once the team member has passed the quiz, ask the team member if they have any questions. Once all questions have been answered, perform a real-time demonstration in as close to the same manner it is typically performed.

During the Demonstration, do not stop to answer team members' questions or provide additional information. The goal is for team members to see the process performed as close to a real-life scenario. The uninterrupted performance will help connect the steps or information learned. You will answer all questions and provide further insight into your performance during the process after the demonstration is completed.

Go to TalentLMS and demonstrate the steps to complete each of the WhiteWater University tasks.

After the demonstration, review the process and any team member questions and distribute the handout(s) for review and study.

WhiteWater University Management Perform & Coach

During Perform & Coach, do not stop to answer team member questions or provide additional information or coaching during their performance. The goal is for the team members to complete the process as best they can while you observe the performance to determine which area needs to be addressed first.

Have the team members perform each of the WhiteWater University tasks.

Repeat the process until the team member completely understands all the information covered in this module and you and the team member feel confident they can perform the procedure to standard.

WhiteWater University Management Handout 1-User Types

The following is an overview of the user types in TalentLMS:

<u>*Learner*</u>

The learner user type is the default type used when you log into TalentLMS. This is the user type for all Team and Shift leaders. This is also the user type that managers will need to be in when completing their modules and courses. Always ensure that you are in the leaner user type and assigned to the course as a learner. Any progress made outside of the learner type will not record completion information or update the information on the Development Tracking Portal.

<u>*Instructor*</u>

We do not use the instructor user type for WhiteWater University; however, it is automatically added to your profile when assigned the Manager user type.

<u>*Administrator (Manager)*</u>

Once you have the user type, you can change it to Learner, Instructor, or Administrator. The Administrator user type must be selected before any changes to user accounts can be made.

WhiteWater University Management Handout 2-Account Management

As a manager, you will be able to perform various account management functions, including managing user accounts, adding/removing users from courses, and resetting quizzes.

To access the account management functions, you will first need to change your user type to Administrator. To change your user type:

1. Move your mouse to the top of the screen where your current user type is listed next to your name
2. Click the triangle to the right of the user type
3. Select Administrator
4. The page will refresh and change to the Administrator view

Now that you know how to access the Administrator user type, let's review each of the available functions and the steps for completing each one.

Accessing & Managing User Info

To access use profiles, go to the home page and perform the following steps:

1. Click on Users
2. Begin typing the user's name into the search box at the bottom of the list
   - As you type, the users will start to filter
3. Locate the user and click on their name. You will then be redirected to the user's profile
4. Once on the next screen, you will be able to update the user's name, email address, username, password, employee ID, and Location number
5. Locate the box for the information that needs to be updated and input the new information
6. Click Update User at the bottom of the page
7. A box will appear at the top of the screen indicating the success or failure of the update

Resetting Passwords

If you must reset a user's password, you will need to use a temporary password, i.e., "Whitewater1," and then update the user profile. After the user logs in using the temporary password, they will be prompted to enter a new password.

Adding/Removing a Course

1. Go to the tab labeled Profile
2. Click on Courses
3. On the next page, locate the course you need to add or remove
4. In the Options column, you will either see three (3) dots or a plus sign
   - If the user is already assigned to the course, you will see three (3) dots. Hover the mouse over the dots, then click on the minus sign
   - If the user is not already assigned to the course, click on the plus sign

Resetting User Progress

1. In the upper right corner of the user profile, click on the tab labeled Progress
2. On the next page, select Courses
3. Locate the course that the module is associated with
4. In the Progress column, click the progress bar to view the unit progress
5. Hover over the unit to be reset and click Reset

SCHEDULING - 1107

Welcome

Welcome to the Scheduling Module. In this module, you will learn about static schedules, how to effectively create work schedules for your location, and how to work with your team to fulfill scheduling needs.

Notes and Questions

As you go through the module, please follow along and take notes. Taking notes will help you remember any key points or questions you want to discuss. Once you have completed each section and quiz, you can review the information and your questions with a manager.

Quiz

Once you have finished watching the module, there will be a quiz to review the information in the module. A score of 100% must be achieved to pass each quiz. If you do not pass the quiz on your first attempt, retry the quiz. If you do not pass on your second attempt, locate a manager. Your manager will review the module with you and address any questions you may have. Once you have passed the quiz, exit the module and locate a manager to proceed to the Demonstration for this module. Your manager will then review the information and any questions you may have.

Why

Managers must create effective schedules to ensure there is always enough staff to assist customers with questions, help them with wash packages and memberships, and handle any customer issues that arise. Ensuring the location has adequate coverage to operate all aspects of the car wash enables us to deliver exceptional customer service.

What

The following are the items you will need to create effective schedules:

3. Phone/Tablet/Computer

   Used to access work schedules, weather reports, and wash trends.

4. Weather Forecast

   The weather forecast will assist with identifying potential trends in upcoming volumes based on customers' general reactions to each weather type.

5. SiteWatch Web

   Used to view historical volume and hourly breakdowns.

6. Maintenance Schedule

   Your location's maintenance schedule will be needed to determine when tasks can be completed during operating hours and if any items require the location to be closed.

Educate

Creating effective schedules is critical to managing labor costs efficiently and ensuring labor costs align with revenue projections. To more accurately budget labor costs, we utilize a static schedule based on locations' historical and projected monthly volume. As volume trends and projections fluctuate with location performance, the number of hours and staff allocated to a location vary to ensure that labor costs remain aligned with revenue projections.

Using the static schedule as a baseline, you can begin making the appropriate adjustments to fit the location's needs based on projected store volume, weather, team size and availability, and more. Let's discuss some key items to consider when creating a schedule.

Store Team

When creating a schedule for your location, each shift must have competent leadership to oversee operations, handle issues, provide exceptional customer service, assist with wash processes, and

maintain site cleanliness. You will also want to balance the schedule with a mix of experienced and new team members to maintain service quality while developing new team members.

Always allow flexibility in the schedule to accommodate unexpected absences, increased customer volume, or special events. Schedule overlap periods during shift changes to ensure smooth transitions and effective communication between outgoing and incoming staff.

Projected Store Volume

To determine volume projections, look at the hourly volume breakdown for recent weeks. This information will help you understand your location's volume trends and determine the best times to increase or decrease staff size. When making your schedule, shift the labor hours to the peak hours by scheduling more staff during peak hours to handle higher customer volumes, whereas fewer team members can manage operations during off-peak hours.

Scheduled Maintenance & Repairs

Allocating time for scheduled maintenance and repairs is vital for uninterrupted operations and maintaining high service standards. By integrating scheduled maintenance tasks into the schedule, you can ensure they are completed and that tasks do not interfere with or cause interruption to daily operations.

Development & Safety

You should also allocate time for team member development and utilize periods of low volume to complete development tasks, including completing WhiteWater University modules, demonstrating the performance of tasks, and engaging in role-playing and real-time exercises. Additionally, the time can be used to ensure all team members are up-to-date with their bi-weekly safety training courses.

Weather

The final consideration when creating a schedule is the weather. As you know, weather affects volume more than anything else, and preparing and adjusting schedules proactively ensures optimal staffing levels and helps manage labor costs effectively. By scheduling more staff during sunny or clear weather days, more customers are likely to visit the car wash, and less staff during rainy, snowy, or extremely cold days when the volume is expected to be lower. Days with a poor weather forecast are also great opportunities to complete maintenance and cleaning tasks and develop team members. Lastly, remember that different seasons may bring variations in customer volume. For instance, spring and summer might see higher volumes in our warm-weather markets due to more favorable weather, whereas fall and winter may have lower volumes.

<u>Inclement Weather Tasks</u>

On bad weather days, managing labor carefully is crucial. Bad weather days that drastically reduce volume present opportunities to spend additional time on development with new and existing team members to accelerate their progress on the development path. There may also be opportunities to demonstrate or perform tasks that can't be performed during operations. Additionally, it may be possible to demonstrate or see the performance of one task with multiple team members, making the process more efficient. These opportunities will allow team members to reach mastery and complete development sign-off sooner.

Bad weather days also present the opportunity to complete cleaning and maintenance tasks that may be scheduled throughout the week or after hours. This allows more time to focus on customers in the days immediately following the bad weather.

Conclusion

Effective schedules are critical for ensuring adequate staffing levels to assist customers, manage wash packages and memberships, and handle any customer issues that arise. Managers should use the static schedule as a baseline before making adjustments after considering the skills and abilities of their store team, projected store volume, weather conditions, scheduled maintenance, and team development. By effectively managing these factors, managers can create schedules that not only

meet operational needs but also contribute to the overall success of the car wash by providing exceptional customer service and controlling labor costs. In the next module, you will learn how to use our scheduling software to create and distribute work schedules.

Scheduling Quiz

Once the team members have completed the module, they must complete the quiz. To pass the quiz, the team member must score 100%. If the team member does not pass their first attempt, they must retake the quiz. If they do not pass on their second attempt, you must review the quiz and answers with them before their third attempt.

1. Why is it important for managers to create effective schedules?
   a. **To ensure there is always enough staff to assist customers and handle any customer issues that arise.**
   b. To keep the maintenance schedule on track.
   c. To ensure employees get enough rest.
   d. To reduce the overall labor cost.

2. What is the primary use of the weather forecast in scheduling?
   a. To plan vacations for the staff.
   b. **To identify potential trends in upcoming volumes.**
   c. To determine the maintenance schedule.
   d. To decide the opening and closing hours.

3. What is the purpose of SiteWatch Web in creating schedules?
   a. **To view historical volume and hourly breakdowns.**
   b. To track employee performance.
   c. To monitor customer feedback.
   d. To manage inventory.

4. Why should there be overlap periods during shift changes?
   a. To ensure employees can have longer breaks.
   b. **To ensure smooth transitions and effective communication between outgoing and incoming staff.**
   c. To allow for additional training sessions.
   d. To accommodate unexpected absences.

5. What should managers do on bad weather days?
   a. Send most staff home to save costs.
   b. **Focus on team member development and complete cleaning and maintenance tasks.**
   c. Close the car wash for the day.
   d. Increase staff to handle potential issues.

6. Which of the following is a key consideration when creating a schedule?
   a. Employee preferences
   b. Store inventory
   c. **Projected store volume**
   d. Competitors' schedules

7. What is a static schedule based on?
   a. Employee requests
   b. Managers' availability
   c. **Locations' historical and projected monthly volume**
   d. Competitors' schedules

8. Creating effective schedules is critical for managing labor costs efficiently.
   a. **True**
   b. False
9. Store volume projections should be ignored when creating schedules.
   a. True
   b. **False**
10. Weather does not impact customer volume at a car wash.
    a. True
    b. **False**

Scheduling Demonstration

Once the team member has passed the quiz, ask the team member if they have any questions. Once all questions have been answered, perform a real-time demonstration in as close to the same manner it is typically performed.

During the Demonstration, do not stop to answer team members' questions or provide additional information. The goal is for team members to see the process performed as close to a real-life scenario. The uninterrupted performance will help connect the steps or information learned. You will answer all questions and provide further insight into your performance during the process after the demonstration is completed.

Demonstrate how to access and utilize the various scheduling resources and create a mock schedule for the upcoming weeks; then review the schedule you just created and the steps taken to get there.

After the demonstration, review the process and any team member questions and distribute the handout(s) for review and study.

Scheduling Perform & Coach

During Perform & Coach, do not stop to answer team member questions or provide additional information or coaching during their performance. The goal is for the team members to complete the process as best they can while you observe the performance to determine which area needs to be addressed first.

Have the team member perform the steps to access and utilize the various scheduling resources and create a mock schedule for the upcoming weeks. Then, have the team member explain the schedule and the steps taken to get there.

Repeat the process until the team member completely understands all the information covered in this module and you and the team member feel confident they can perform the procedure to standard.

Scheduling Handout

To more accurately budget labor costs, we utilize a static schedule based on locations' historical and projected monthly volume. As volume trends and projections fluctuate with location performance, the number of hours and staff allocated to a location vary to ensure that labor costs remain aligned with revenue projections.

Using the static schedule as a baseline, you can begin making the appropriate adjustments to fit the location's needs based on projected store volume, weather, team size and availability, and more. Let's discuss some key items to consider when creating a schedule.

Store Team

When creating a schedule for your location, each shift must have competent leadership to oversee operations, handle issues, provide exceptional customer service, assist with wash processes, and maintain site cleanliness. You will also want to balance the schedule with a mix of experienced and new team members to maintain service quality while developing new team members.

Always allow flexibility in the schedule to accommodate unexpected absences, increased customer volume, or special events. Schedule overlap periods during shift changes to ensure smooth transitions and effective communication between outgoing and incoming staff.

Projected Store Volume

To determine volume projections, look at the hourly volume breakdown for recent weeks. This information will help you understand your location's volume trends and determine the best times to increase or decrease staff size. When making your schedule, shift the labor hours to the peak hours by scheduling more staff during peak hours to handle higher customer volumes, whereas fewer team members can manage operations during off-peak hours.

Scheduled Maintenance & Repairs

Allocating time for scheduled maintenance and repairs is vital for uninterrupted operations and maintaining high service standards. By integrating scheduled maintenance tasks into the schedule, you can ensure they are completed and that tasks do not interfere with or cause interruption to daily operations.

Development & Safety

You should also allocate time for team member development and utilize periods of low volume to complete development tasks, including completing WhiteWater University modules, demonstrating the performance of tasks, and engaging in role-playing and real-time exercises. Additionally, the time can be used to ensure all team members are up-to-date with their bi-weekly safety training courses.

Weather

The final consideration when creating a schedule is the weather. As you know, weather affects volume more than anything else, and preparing and adjusting schedules proactively ensures optimal staffing levels and helps manage labor costs effectively. By scheduling more staff during sunny or clear weather days, more customers are likely to visit the car wash, and less staff during rainy, snowy, or extremely cold days when the volume is expected to be lower. Days with a poor weather forecast are also great opportunities to complete maintenance and cleaning tasks and develop team members. Lastly, remember that different seasons may bring variations in customer volume. For instance, spring and summer might see higher volumes in our warm-weather markets due to more favorable weather, whereas fall and winter may have lower volumes.

<u>Inclement Weather Tasks</u>

On bad weather days, managing labor carefully is crucial. Bad weather days that drastically reduce volume present opportunities to spend additional time on development with new and existing team members to accelerate their progress on the development path. There may also be opportunities to demonstrate or perform tasks that can't be performed during operations. Additionally, it may be

possible to demonstrate or see the performance of one task with multiple team members, making the process more efficient. These opportunities will allow team members to reach mastery and complete development sign-off sooner.

Bad weather days also present the opportunity to complete cleaning and maintenance tasks that may be scheduled throughout the week or after hours. This allows more time to focus on customers in the days immediately following the bad weather.

Conclusion

Effective schedules are critical for ensuring adequate staffing levels to assist customers, manage wash packages and memberships, and handle any customer issues that arise. Managers should use the static schedule as a baseline before making adjustments after considering the skills and abilities of their store team, projected store volume, weather conditions, scheduled maintenance, and team development. By effectively managing these factors, managers can create schedules that not only meet operational needs but also contribute to the overall success of the car wash by providing exceptional customer service and controlling labor costs. In the next module, you will learn how to use our scheduling software to create and distribute work schedules.

DEPUTY MANAGEMENT-1108

Welcome

Welcome to the Deputy Management Development Module. In this module you will learn about the location management role in the Deputy app. Please follow along and take note of any questions that you think of as we go through the information. Once you have completed this section, you can review the information and your questions with a manager.

Why

The purpose of the Deputy Management Development Module is to learn how to utilize the location management functions of Deputy to the best of your ability. In this program you will learn all about utilizing the Deputy app and how work with your team on fulfilling all scheduling needs.

What

The following are the items you will need to perform the scheduling tasks and utilize Deputy:

1. Cell Phone or Computer

   You will need a cell phone or computer in order to access Deputy.

2. Deputy App

   You will need the Deputy app in order to access Deputy from your phone.

Educate

You already know how to utilize the Deputy app to view your schedule and make changes to your availability. Now, we are going to learn about how to create, edit and manage schedules on Deputy. Utilizing Deputy allows us to have clear communication regarding work schedules, when people are available to work and when they may need some time off. It also allows management to make changes and updates to the schedule that can be instantly seen by the entire store team. Team members will also be notified through the app and/or email when any schedule changes occur.

Access Levels

Your ability to view and edit people in Deputy is controlled by your access level, and is limited to only the team members, or stores, you manage. If you feel your access level is incorrect, or are unable to view the details of those who you manage, consult your location's Area Director for further information. Let's review the two access levels utilized at the stores, Employee and Location Manager:

Employee Access

Employee access is used for the Team Leader and Shift Supervisor positions. Having employee access means you are able to view the schedule, clock in and out for shifts that you are scheduled to work, view any available shifts that need to be filled. This access level also allows the team member to indicate days or times that they are unavailable to work. Users are able to update their availability any time so, if any work availability changes occur in the future, they will be able to indicate those changes through Deputy. Lastly, this access level will allow users to request time-off for personal days or vacation.

Location Manager

If you have the access of a Location Manager, you are either the Store Manager or General Manager of your location. The location manager tole has the ability to not only view the schedule, but edit the schedule as needed, post a new schedule and add and archive employees. Additionally, the location manager role is able to view and make changes to a schedule. As a location manager, you will have access to two tabs, the People tab and the Scheduling tab. Let's review each tab and its functions.

The People Tab

The people tab allows you to view all employees at your location, or locations, edit employee information, as well as archive employees that are no longer with WhiteWater. Let's review each of these tasks.

Completing Employee Registration

When a new employee completes their onboarding paperwork, an email invite will be sent and the following information will automatically be input into their profile:

- Full Name
- Email Address
- Phone Number
- Work Location
- Employee Number
- Access Level

Once the team member has completed creation of their account, you will need to add

Editing Employee Information

From time to time, an employee will need to make a change to their information in Deputy. When this occurs, you will need to perform the following steps:

1. Go to the people tab
2. Find the employee you are looking for
3. Once you have found the employee, click on the three dots on the right side of the screen on the line for that employee
4. Select the Edit Personal option
5. Edit the necessary information
6. Click save

Archiving Employees

Once an employee is no longer working at WhiteWater, you will need to archive the employee in Deputy. To archive employees, perform the following steps:

1. Go to the schedule tab
2. Find and select the terminated employee from the list on the left side of the screen
3. Click on the three dots next to their name
4. Select Turn All Shifts to Open
5. When the prompt appears select Remove
6. Go to the people tab
7. Find the employee you are looking for
8. Once you have found the employee, click on the three dots on the right side of the screen on the line for that employee
9. Select the option for Archive Employee
10. Once the prompt that appears, click archive employee

<u>The Scheduling Tab</u>

Each week, the management team will create a schedule to notify each employee of what shift they are working at each location. The scheduling tab is used for creating the schedule as well as making any updates or changes to the schedule.

Let's review how to schedule each employee and make updates to the schedule.

Adding Shifts

To add new shifts to a schedule, perform the following steps:

1. Go to the scheduling tab
2. Select the appropriate location

3. Go to the week you are scheduling for
4. Click on the plus sign at the bottom of the box for the day you are scheduling
5. In the window that appears, select the employee you are scheduling
   a. If you would like to repeat the shift, click on the arrow to the right of the save button and select when the shift will repeat
6. Repeat for each employee and day of the week

Posting the Schedule

Once the you determine the schedule is complete, you are ready to post the schedule. To post the schedule, perform the following steps:

1. Click on the purple publish button in the upper, right corner
2. When the prompt appears, select if you want to notify all employees or only employees whose schedules have changed
3. Click Next
4. Select the work areas you wish to update
5. Select Notify (email and app only)
6. Click Publish

When the schedule has been posted, a notification will be sent to all employees that are scheduled. The notification will include a text message and a message from the Deputy app stating that a new schedule has been posted. After the schedule is posted, if any edits to the schedule are made, Deputy will notify users in the same manner. Users can choose to opt out of the notifications, but we want team members to be aware of their schedule and any changes that have been made. So, it is encouraged to leave the notifications turned on.

Editing the Schedule

On occasion, you will need to adjust the schedule after it has been posted. This could be due to a number of reasons such as weather, call-offs, etc. Anytime we make changes to the schedule, it is important that we discuss any changes with team members before the changes are posted. This ensures that we are respectful of the employee and their time while communicating the needs of the store and asking for their help. To edit the schedule, perform the following steps:

1. Go to the scheduling tab
2. Select the appropriate location
3. Go to the schedule you want to edit
4. Select the team member whose schedule is changing
5. Select the area, or role, for the team member
6. Set the start and end time for the shift
7. Indicate if there are any meal or rest breaks
8. Input any notes as necessary
9. Click save
10. Click on the purple publish button in the upper, right corner
11. When the prompt appears, select if you want to notify all employees or only employees whose schedules have changed
12. Click Next
13. Select the work areas you wish to update
14. Select Notify (email and app only)
15. Click Publish

Deputy Management Quiz

Once the employee has completed the module, they will need to complete the quiz. In order to pass the quiz, the employee must score a 100%. If the employee does not pass on their first attempt, they will need to take the quiz again. If they do not pass on their second attempt, you will need to review the quiz and answers with them before they attempt the quiz again.

1. Which of the following tabs are used by Location Managers?
   a. **People tab**
   b. Location tab
   c. **Scheduling tab**
   d. All the above

2. Which tab is used to add employee shifts?
   a. People tab
   b. Location tab
   c. **Scheduling tab**
   d. WhiteWater tab

3. The purpose of the Deputy Management Development Module is to learn how to utilize the _____ functions of Deputy to the best of your ability.
   a. Employee functions
   b. **Location management**
   c. Area director
   d. None of these

4. Employee access is used for _____.
   a. **Team Leaders**
   b. **Shift Supervisors**
   c. Store Managers
   d. General Managers
   e. All the above

5. Location Manager access is used for _____.
   a. Team Leaders
   b. Shift Supervisors
   c. **Store Managers**
   d. **General Managers**
   e. None of the above

6. Employee information cannot be edited once they have registered their account.
   a. True
   b. **False**

7. You must click the purple publish schedule in order post a new schedule.
   a. **True**
   b. False

8. You will need to add additional employee information after they have registered.
   a. True
   b. **False**

9. Deputy can be accessed using a cell phone or computer.
    a. **True**
    b. False
10. It is not important that we discuss any changes with team members before schedule changes are posted.
    a. True
    b. **False**

Deputy Management Demonstration

Once the team member has passed the quiz, ask the team member if they have any questions. Once all questions have been answered, perform a real-time demonstration in as close to the same manner it is typically performed.

During the Demonstration, do not stop to answer team members' questions or provide additional information. The goal is for team members to see the process performed as close to a real-life scenario. The uninterrupted performance will help connect the steps or information learned. You will answer all questions and provide further insight into your performance during the process after the demonstration is completed.

Demonstrate the Location Manager-related tasks on Deputy. Then, demonstrate completing a schedule by making a mock schedule in Deputy for an upcoming week and review the schedule you just created, and the steps taken to get there.

After the demonstration, review the process and any team member questions and distribute the handout(s) for review and study.

Deputy Management Perform & Coach

During Perform & Coach, do not stop to answer team member questions or provide additional information or coaching during their performance. The goal is for the team members to complete the process as best they can while you observe the performance to determine which area needs to be addressed first.

Have the team member perform the Location Manager-related tasks and create a mock schedule for an upcoming week in Deputy.

Repeat the process until the team member completely understands all the information covered in this module and you and the team member feel confident they can perform the procedure to standard.

COUNSELING REPORTS - 1109

Welcome

Welcome to the Counseling Reports Module. In this module, you will learn about counseling reports and the different types of counseling reports you may be required to deliver. You will also learn how to effectively and professionally deliver counseling reports and complete any associated documentation.

Notes and Questions

As you go through the module, please follow along and take notes. Taking notes will help you remember any key points or questions you want to discuss. Once you have completed each section and quiz, you can review the information and your questions with a manager.

Quiz

Once you have finished watching the module, there will be a quiz to review the information in the module. A score of 100% must be achieved to pass each quiz. If you do not pass the quiz on your first attempt, retry the quiz. If you do not pass on your second attempt, locate a manager. Your manager will review the module with you and address any questions you may have. Once you have passed the quiz, exit the module and locate a manager to proceed to the Demonstration for this module. Your manager will then review the information and any questions you may have.

Why

The primary purpose of these reports is to ensure clear communication and understanding between team members and managers. By addressing issues constructively and supportively and providing specific feedback and actionable steps for improvement, counseling reports help maintain a positive work environment by promoting accountability, transparency, and ongoing development.

What

The following are the items you will need to complete and deliver effective counseling reports:

1. Phone/Tablet/Computer

   You will need one of these items to access the counseling report form.
2. Intranet

   The Counseling Report form can be accessed through the Intranet.
3. Counseling Report Form

   This form must be completed anytime a counseling report is issued.
4. Private Meeting Space

   Counseling reports must be delivered in the office or other private area and within view of a camera.
5. Team Member

   The team member receiving the counseling report must be present for the delivery of a counseling report.
6. Witness

   A witness may be required for counseling report interactions.
7. Manager

   Only those in the store manager position and above are authorized to issue or witness a counseling report.

Educate

Counseling reports are formal documents that address and document performance issues, behavioral problems, or other employee concerns. The reports document interactions regarding performance, behavior, or other workplace issues and provide a detailed discussion record, including the issue's

nature, the team member's perspective, manager observations, and any agreed-upon action plans or follow-up steps.

Types of Counseling Reports

Depending on the severity of the offense and other factors, counseling reports may be classified as verbal, written, or final. Let's review the criteria and an example of each type.

Verbal Counseling Reports

A verbal counseling report is issued for relatively minor or first occurrences of an action that warrants a disciplinary response. It's important to note that the purpose of this type of report is to create a constructive and respectful dialogue to address and document issues.

Example

John forgot to tuck his shirt in before clocking into work. His manager, Jane, notices and discusses why following the dress code is important. John agrees, tucks in his shirt, and assures Jane that it won't happen again and that he understands why following the dress code is important.

Written Counseling Reports

A written counseling report is issued for **repeated** or **more severe** actions that violate the rules and conduct we are all expected to uphold while working at WhiteWater. Once again, the purpose of this report is to create a constructive and respectful dialogue where issues are discussed and documented. However, this report is more severe than verbal and should be treated as such.

Example

John was scheduled to open the store with Jane one morning. However, John fails to arrive on time, making Jane the only one at the location. When Jane contacts John, he informs her he has overslept and will head over immediately. Because John did not adhere to the schedule and arrived late, considerable stress was placed on Jane. Jane addresses this with John, and he agrees that his actions were unacceptable and will make it a priority to arrive on time.

Giving 1-2 verbal counseling reports before issuing a written report is best practice unless the action strictly violates our employee handbook or reflects insubordination. Written counseling reports should always take place with a third party present. If you do not have a third party you can include in the discussion, please contact Human Resources. Following the discussion, complete an Employee Counseling Report on the Intranet.

Final Counseling Reports

Final counseling reports are reserved for either the most serious of violations of company policy that do not warrant immediate termination or for repeated violations of any nature that demonstrate continuous disrespect for the policies we are all expected to follow. Unlike verbal or written counseling reports, issuing a final counseling report should be exclusively reserved for when a dialogue with a Spartan has shown to be ineffective at correcting policy violations. Once a final counseling report has been issued, any further actions that violate the policy will be grounds for termination.

Example

John is guiding guests' vehicles into the tunnel; John has a history of not checking guests' vehicles to ensure they are safe to go through the tunnel. Members of management have previously addressed this issue multiple times through verbal and written counseling reports. John fails to check a truck bed, which results in the contents of the truck bed getting caught in tunnel equipment, damaging the equipment and guests' vehicles. Jane addresses this with John, and he promises to do better from now on with checking vehicles; however, given the seriousness of John's actions, he is placed on a Final warning and is told that any further poor performance will result in immediate termination.

Unless a violation is an immediate terminable offense, a written counseling report is required before filing a final report. Examples of an immediate final would be extreme safety issues, extreme insubordination, or issues that cause immediate harm to WhiteWater's business, including any violations detailed in the Employee Handbook.

Final counseling reports should always occur with a third party present to witness the interaction. A witness is required when issuing a final for serious infractions such as harassment, theft, or violations of company policy that could lead to severe disciplinary action or termination. If you do not have a third party you can include in the discussion, please contact the Director of Loss Prevention for violations involving theft or fraud and the Employee Relations team for all others.

Delivering Counseling Reports

When preparing for a conversation with a team member, ensure you have a clear plan and complete the counseling report form in advance. Define your objectives, key points, and desired outcomes, and include specific examples and an outlined action plan in the report. Practice the conversation by role-playing to refine your message and anticipate reactions.

Counseling reports are private matters that must be delivered in the offices at each respective location and within view of a camera. They should only include the issuing party, the receiving party, and a witness. Always maintain a professional demeanor when delivering a counseling report, even if the team member becomes emotional. Clearly explain why the meeting is happening and the issues, present the facts objectively without personal judgment, focus on the issue, and critique only specific actions or behaviors, not the employee's character. Be empathetic and show understanding and support for the employee's situation as you listen to team members and allow them to share their perspectives without interruption. To close the meeting, clearly outline what needs to be done for improvement and the support the company will provide. Then, verify that the team member understands the result of not meeting the improvement plan and schedule a follow-up meeting to review progress. Following the discussion, complete an Employee Counseling Report on the Intranet.

Counseling Report Form

Counseling reports must be as detailed as possible. Details regarding specific infractions are crucial in accurately assessing the level of the counseling report and communicating to all parties exactly what occurred and the expected improvements. As you complete the report, remember to refrain from using feeling words like "I feel" or "I think." Only include facts, not opinions or assumptions about the event. Reports should also be written so that someone without knowledge of the infraction can read it and fully understand it and future expectations without further explanation.

Submitting the Form

Counseling reports may not be submitted until after the team member has been informed of the infraction and all parties have reviewed and signed the counseling report. The following are the steps for completing the form:

1. Go to the Intranet and locate the Counseling Report Form link
2. Click the link, and the form will open
3. In the Employee Info section, input the following information:
    - Employee Name
    - Location
    - Position
    - Employee ID
    - Date of Offense
4. Select the type of warning
    - Verbal, Written, or Final
5. Select the type of offense
    - More than one offense type may be selected

- If Other is chosen, you must manually input the type of offense
6. Input the details of the infraction
   - Be as detailed as possible in describing the events
7. Input the expectations set forth when the report was delivered
8. Complete the signature and date steps for the employee, manager, and witness
   - If a team member refuses to sign the document, input "Refused to Sign" in the space for the team member's signature
9. Input your email address
10. Input the Area Director's email
11. Submit the form

Conclusion

Clear and effective communication between team members and managers can be achieved using structured counseling reports. Counseling reports aim to create a constructive dialogue, providing specific feedback and clear expectations for improvement. Properly documenting and delivering these reports helps resolve issues and supports the overall growth and development of the team members, helps maintain a positive work environment, promotes accountability, transparency, and ongoing development, and ultimately contributes to the organization's success.

Counseling Reports Quiz

Once the team members have completed the module, they must complete the quiz. To pass the quiz, the team member must score 100%. If the team member does not pass their first attempt, they must retake the quiz. If they do not pass on their second attempt, you must review the quiz and answers with them before their third attempt.

1. What is the primary purpose of counseling reports?
    a. To document employee attendance.
    b. **To ensure clear communication and understanding between team members and managers.**
    c. To track employee work hours.
    d. To record employee benefits.
2. Where should counseling reports be delivered?
    a. In the break room
    b. **In the office or other private area within view of a camera**
    c. In the parking lot
    d. At the employee's home
3. Who is authorized to issue or witness a counseling report?
    a. Any team member
    b. **Store managers and above**
    c. Customers
    d. Human Resources only
4. What type of counseling report is issued for minor or first occurrences of an action?
    a. Final Counseling Report
    b. **Verbal Counseling Report**
    c. Written Counseling Report
    d. Performance Review
5. What should be done before issuing a written counseling report?
    a. **Issue 1-2 verbal counseling reports unless the action strictly violates the employee handbook.**
    b. Call the employee's family.
    c. File a complaint with the police.
    d. Ignore the issue.
6. How should counseling reports be written?
    a. Using feeling words like "I feel" or "I think."
    b. With opinions and assumptions.
    c. **Including only facts, not opinions or assumptions about the event.**
    d. Using casual language.
7. Who should be present during the delivery of a final counseling report?
    a. Only the issuing manager
    b. **The issuing party, the receiving party, and a witness**
    c. The entire team
    d. No one else

8. What should be done if a team member refuses to sign the counseling report?
    a. Discard the report.
    b. Input "Refused to Sign" in the space for the team member's signature.
    c. Call the police.
    d. Force the team member to sign.
9. Counseling reports should always include personal judgments about the employee.
    a. True
    b. False
10. A witness is not required for issuing final counseling reports.
    a. True
    b. False

Counseling Reports Demonstration

Once the team member has passed the quiz, ask the team member if they have any questions. Once all questions have been answered, perform a real-time demonstration in as close to the same manner it is typically performed.

During the Demonstration, do not stop to answer team members' questions or provide additional information. The goal is for team members to see the process performed as close to a real-life scenario. The uninterrupted performance will help connect the steps or information learned. You will answer all questions and provide further insight into your performance during the process after the demonstration is completed.

Demonstrate the steps for accessing the Counseling Report form and how to complete the form. Then, perform a role-play scenario of delivering a counseling report using the team member as the team member receiving the counseling report.

After the demonstration, review the process and any team member questions and distribute the handout(s) for review and study.

Counseling Reports Perform & Coach

During Perform & Coach, do not stop to answer team member questions or provide additional information or coaching during their performance. The goal is for the team members to complete the process as best they can while you observe the performance to determine which area needs to be addressed first.

Have the team member perform the steps for accessing and completing the Counseling Report form and complete a role-play scenario of delivering a counseling report with the team member acting as a manager and you acting as the team member receiving the counseling report.

Repeat the process until the team member completely understands all the information covered in this module and you and the team member feel confident they can perform the procedure to standard.

Counseling Reports Handout 1-Completing the Form

The following are the steps for completing the form:

1. Go to the Intranet and locate the Counseling Report Form link
2. Click the link, and the form will open
3. In the Employee Info section, input the following information:
   - Employee Name
   - Location
   - Position
   - Employee ID
   - Date of Offense
4. Select the type of warning
   - Verbal, Written, or Final
5. Select the type of offense
   - More than one offense type may be selected
   - If Other is chosen, you must manually input the type of offense
6. Input the details of the infraction
   - Be as detailed as possible in describing the events
7. Input the expectations set forth when the report was delivered
8. Complete the signature and date steps for the employee, manager, and witness
   - If a team member refuses to sign the document, input "Refused to Sign" in the space for the team member's signature
9. Input your email address
10. Input the Area Director's email
11. Submit the form

Counseling Reports Handout 2-Counseling Report Form

Employee Info

Employee Full Name: *

Location: *

Position *

Type in or select from the drop-down menu.

Date of Offense: *

Employee ID *

Type of Warning: *

☐ Verbal ☐ Written ☐ Final

Type of Offense: *

☐ Violation of Safety Rules ☐ Attendance ☐ No Call, No Show
☐ Customer/Employee Complaint ☐ Insubordination ☐ Poor Performance
☐ Violation of Company Policies ☐ Dress Code Violation ☐ Other

Details of Infraction: *

Expectations: *

Failure to improve on above will result in the next disciplinary action up to and including termination.

By signing this form, you confirm that you understand the information and plan of improvement. Signing this form does not necessarily indicate that you agree with this warning.

Signatures

Employee Full Name:

First

Last

Employee's Signature

×

draw   type

Date

Manager Full Name: *

First

Last

Managers Signature *

×

draw   type

Date *

Witness Name:

First

Last

Witness Signature

×

draw   type

Date

Please insert an email to receive a copy *

Please insert your AD email address *

MARKETING 101 - 1110

Welcome

Welcome to the Marketing 101 Module. In this module, you will learn about the marketing programs, campaigns, membership support, advertising elements available to your stores for use on-site, and our external marketing programs that run all year long.

Notes and Questions

As you go through the module, please follow along and take notes. Taking notes will help you remember any key points or questions you want to discuss. Once you have completed each section and quiz, you can review the information and your questions with a manager.

Quiz

Once you have finished watching the module, there will be a quiz to review the information in the module. A score of 100% must be achieved to pass each quiz. If you do not pass the quiz on your first attempt, retry the quiz. If you do not pass on your second attempt, locate a manager. Your manager will review the module with you and address any questions you may have. Once you have passed the quiz, exit the module and locate a manager to proceed to the Demonstration for this module. Your manager will then review the information and any questions you may have.

Why

The purpose of Marketing 101 is to ensure efficient and effective membership management and customer engagement, understanding of online membership management, promoting sales through on-demand promotions, ordering necessary marketing materials, and utilizing customer relationship management tools. With our various marketing tools and resources, team members can better serve customers, increase sales, and contribute to the overall success of the business.

What

The following are the items you will need to access and utilize the various marketing tools and resources:

1. Intranet
   The company Intranet will be needed to access various order and request forms and customer relationship management tools.
2. Phone/Tablet/Computer

   A phone, tablet, or computer will be needed to access the Intranet and other resources.

Educate

Let's review various marketing items related to member support and membership management, store support resources, evergreen programs, our digital, social, and web presence, customer engagement tools, and online sales and e-commerce.

Online Membership Management

Unlimited Speed Club Members can manage their plan anytime on our website via the '**Manage My Plan**' page. Members can quickly and easily change their plan, update their credit card, request a receipt, cancel, or submit a note for unique needs. The following are the actions members can take in the online portal:

Change Plan

This allows members to switch from their existing plan to a higher/lower wash package. They will then be put into the new plan, receive the new wash immediately, and be charged the new rate on their next recharge.

Pause Membership

To retain an existing plan and keep the credit card on file, pause an existing plan and recharge at $0.01 each month. The pause is effective immediately regardless of where they are in their recharge cycle.

Resume from Pause

Members will be prompted to select a plan type to resume or reinstate their plan. Customers can begin washing immediately once un-paused. Grandfathered or previously discounted plan options will not be available for members who pause and resume.

Cancel Membership

Members can cancel their existing plan online, allowing them to wash for their current period. After that, their plan will be terminated, and they can no longer wash. Select members may be prompted with a "down-sell" offer to keep their plan at a discounted rate.

Request Receipt

Members will receive an emailed receipt for their last monthly charge.

Update Credit Card

Members can easily update their credit card to any new valid card.

Other

For all other unique or unlisted needs, members can select 'Other', and a ticket will be generated for customer service support and processing within 72 business hours.

On-Demand Promo

To support membership sales when drive-up traffic is high, the weather is nice, and the site is fully staffed, approved locations can turn on our On-Demand Promotion to boost and grow your membership numbers. To participate, submit the On-Demand Promotion form 48 hours or more before the desired live date(s) for approval, confirm that your store is properly staffed, able to effectively work the pay stations, and that the weather is appropriate. Once approved, your store will receive an automated email with instructions and a playbook to share with your team.

Offer & Promo Duration

The On-Demand Promo runs between one to three (1-3) days; during the promo, new members can get their first month for the price of a single wash.

Program Goal

The goal is to achieve a 10% conversion rate in the On-Demand Promo, and maintaining a team member presence at the pay stations is key to educating each customer on the promotion and value of membership and achieving the goal.

Online Ordering

Order general marketing materials, on-site signage, collateral and more via the Intranet. This quick and easy way to get replacements, new items, or specific signage will be vital for your store. If your store has damaged or worn-out signs, is running low on air fresheners, needs a replacement frame, or more, this section will support you in ordering the items you need. To order items online, perform the following steps:

1. Go to the Intranet
2. Select 'Marketing & Branding'
3. Select from the categories under 'Store Site Needs'
4. Make Your Order Selection
   - For unique or miscellaneous needs, use the **On-Site Signage Order Form > MISC**
5. An email with tracking information will be sent to the store email address.

POS Cross-Utilization

As we continue to grow and increase our footprint across markets, stores may experience member cross-utilization from ICS to DRB or vice versa. To accommodate these members and allow them to wash at any location with their plan, your store has a unique 'rewash' button to account for vehicles with other point of sales FastPass tags. To process a cross-utilization wash, perform the following steps:

1. Use the WhiteWater membership sticker attached to the vehicle to identify the customer as a member.
2. Process them through the wash by using either 'Rewash – ICS' or 'Rewash – DRB'
3. This will fire our top wash and put the customer through while they are at a different location.
4. If your store does not have this button available or are experiencing any issues with the wash, please contact marketing and IT for immediate support.

Community

Our community opportunities are designed to give back and support local organizations through fundraising and donation programs. We want to help make a difference in the lives of others and our community by creating a partnership with schools, education groups, service clubs, youth athletic groups, and more!

Spirit Days

Spirit Days are a great way to raise funds for any organization! Participants invite the community to enjoy car washes on their designated Spirit Day on Tuesdays or Wednesdays, and the group will receive 25% of the proceeds from all sales where the assigned code was used.

Fundraising

Our fundraising car wash pass allows organizations to earn 50% of the sales to help them hit their fundraising goals! Organizations purchase Carnauba Gold Washes at a discounted rate, sell the wash to friends and family at a discounted rate, and keep the proceeds.

Donations

We proudly participate in silent auction donations, raffles, or requests for free items to pass out at an event for qualified organizations looking for support.

Wash Books & Gift Cards

Customers can save on single-wash purchases with our wash book and gift card discounts, which are always available at stores and online. Wash Books are sold in booklets of five (5) washes, and gift cards are sold individually.

DRB Locations

Customers at DRB sites can purchase WhiteWater or Carnauba wash books on-site or any wash book online at a 20% discount. In other words, buy four (4) washes and get one (1) FREE.

ICS Locations

Customers at ICS locations can purchase gift cards on-site for any value or online in increments of $25, $50, and $100 and receive a 20% bonus value on their purchase. **NOTE:** Gift cards cannot be used to purchase Unlimited Speed Club memberships.

Store Toolkits

To engage with local businesses and attract new customers to your store, toolkits offer customers exclusive discounts for washes and plans.

FREE Ceramic Wash

The local business toolkit includes a coupon card with a QR code for one (1) free Ceramic wash to incentivize locals to come and wash at WhiteWater. This can apply to local gyms, daycare centers, or other businesses near your wash.

50% Off Membership

As a welcome gift to new residents in apartments or condos near stores, 50% off any NEW Unlimited Plan is available for the first month only. This offer only applies to the first month of membership; after that, residents will be charged the standard monthly rate.

To redeem the coupons, customers will simply scan the QR code on the coupon. Then, they'll receive a text with their unique barcode to redeem the applicable offer at your store within 24 hours. The customer's information will allow us to communicate future promotions and company updates, encouraging the customer to wash with us again.

First Responders & Military Discount

Specialized programs offered at dedicated times of the year have been developed for First Responders and Military to receive discounts as our way of saying thank you for their hard work and dedication. Support materials for both programs are located on the Intranet.

First Responders

First responders can receive one FREE wash when they wash their marked/official vehicle. The goal is to convert these first responders into a fleet plan. When putting them through their free wash, advise them that we are happy to do so today and would like to assist them with washing their fleet in the future. If the customer is interested, please collect their information and complete the fleet inquiry form on the intranet.

Active-Duty Military

For active duty military members with valid ID, we offer $10 off Ceramic memberships and $5 off all other memberships.

Ceramic: $29.99/mo. | Carnauba: $27.99/mo. | Class V: $21.99/mo. | WhiteWater: $14.99/mo.

Digital, Social & Web

Always on organic and paid support runs across Facebook, Instagram, TikTok and LinkedIn year-round to build brand awareness, customer engagement, and traffic for all stores. This includes targeted ads to attract new customers within five (5) miles of all locations, geo-fencing of key retailers and local competitors with display ads, and GPS tracking to monitor conversion. Our ad content continuously evolves to include more trackable offers for single washes, and plans are in place to increase conversion tracking and drive visits.

We also engage with social media influencers across markets to reach new audiences in their authentic voice with relevant content and offers. During select cultural moments and holidays, we will promote wash codes for single-day offers that can be redeemed on-site.

To help increase our digital, social, and web presence, team members are encouraged to follow WhiteWater Express on social platforms, assist customers with offers and coupons from social efforts, and submit local Facebook groups & influencers to the Marketing Team. The Marketing Team handles all social media accounts and posts.

Email & Text Campaigns

Customers and members receive regular email and text communications with information on their plans, upcoming promotions, new store openings and offers. This messaging is sent to the contact information provided from membership sign-ups, website submissions, and digital ads.

Members receive a welcome text message, plan reminders, upgrade offers and referrals for friends and family. Customers, either lapsed members or prospects, receive information on member and wash promotions and opportunities to rejoin or visit new locations as they open. Some emails and texts contain offers for free washes, wash discounts and plan deals based on their location and behavior.

Birdeye & Google Reviews

Birdeye is a software and messaging platform we use to collect and manage customer reviews from Google, Apple, Facebook and more. This tool allows us to easily and quickly manage reviews across all sites and respond to customers directly, thanking them or following up, depending on the rating and

comment. Birdeye listings also help WhiteWater Express rank higher on searches, improve our Google ad performance, and maintain accurate business listings from store hours to location details.

To increase your Google review scores and rating, engage directly with customers in the lot and learn more about their wash experience. Then, administer a Google review card to request a review from happy and satisfied customers. If your location is running low on Google review cards, more cards can be ordered through the Intranet under 'Marketing & Branding' anytime. The Marketing Team manages all company online listings and responses.

Rinsed

Rinsed is our Customer Relationship Management tool. It supports members, sells plans, communicates with customers, and provides reporting by location. Rinsed is integrated with DRB and ICS to allow customers to manage their plans, purchase plans or washes, submit contact information, and engage with WhiteWater Express. The following are the resources available for the Rinsed tool.

Manage My Plan

This form allows customers to manage their plans as they see fit. Review and explore this page on our website to familiarize yourself with the process.

Rinsed Analytic Tools

Your store can access several reporting tools, from churn reporting to daily sales. The rinsed analytics cheat sheet on the Intranet can help you learn more about these reports.

Online Sales & E-commerce

Customers can purchase a new unlimited plan online for DRB and ICS locations on our website. As an exclusive offer for online sales, new plans purchased online will receive $10 off any new plan purchase for their first month only, then the standard monthly rate applies. Customers who purchase a plan online will receive a confirmation email with a temporary barcode and instructions to visit their local WhiteWater and locate a Team Member to activate their plan and apply a membership sticker to their vehicle. When the customer arrives to activate their membership, perform the following steps:

1. Scan the temporary barcode at a SAL lane or in the lobby, update the customer info, select the Add/Update FastPass Tag' button, and enter the new fast pass tag ID.
    ● Temporary barcodes will not work at a pay station.
2. Apply a new membership sticker to the vehicle.
3. Educate the new member about our free amenities and deliver the welcome gift.

Conclusion

Overall, WhiteWater Express's multifaceted approach to member support and marketing, combined with a strong focus on community engagement and customer satisfaction, positions the company as a leader in the car wash industry. By leveraging these strategies and tools, WhiteWater Express can continue to grow its customer base, enhance member experiences, and achieve long-term success.

Marketing 101 Quiz

Once the team members have completed the module, they must complete the quiz. To pass the quiz, the team member must score 100%. If the team member does not pass their first attempt, they must retake the quiz. If they do not pass on their second attempt, you must review the quiz and answers with them before their third attempt.

1. What actions can members take on the online portal?
   a. Change Plan
   b. Pause Membership
   c. Update Credit Card
   d. All the above
2. How long does the On-Demand Promo typically run?
   a. 1-3 days
   b. 1-2 weeks
   c. 1 month
   d. 1 year
3. What is the conversion goal for the On-Demand Promo?
   a. 5%
   b. 10%
   c. 15%
   d. 20%
4. Where can stores order general marketing materials and on-site signage?
   a. Company Intranet
   b. Local store manager
   c. Marketing department via email
   d. Supplier's website
5. What should stores do if they experience issues with cross-utilization washes?
   a. Use a different wash system
   b. Contact marketing and IT for support
   c. Cancel the membership
   d. Ignore the issue
6. What kind of discount is available to active-duty military members for Ceramic memberships?
   a. $5 off
   b. $10 off
   c. $15 off
   d. No discount
7. What platform is used for managing customer reviews?
   a. Rinsed
   b. Birdeye
   c. Google Analytics
   d. Facebook

8. What is the goal of engaging customers and requesting Google reviews?
   a. **To increase Google review scores and ratings**
   b. To reduce the number of negative reviews
   c. To gather customer complaints
   d. To promote social media

9. Who handles social media accounts and posts?
   a. Birdeye
   b. Rinsed
   c. The Management Team
   d. **The Marketing Team**
   e. The IT Team

10. What exclusive offer is available for online sales of new unlimited plans?
   a. $5 off any new plan purchase
   b. **$10 off any new plan purchase for the first month**
   c. 20% off all new plans
   d. Free washes for the first month

Marketing 101 Demonstration

Once the team member has passed the quiz, ask the team member if they have any questions. Once all questions have been answered, perform a real-time demonstration in as close to the same manner it is typically performed.

During the Demonstration, do not stop to answer team members' questions or provide additional information. The goal is for team members to see the process performed as close to a real-life scenario. The uninterrupted performance will help connect the steps or information learned. You will answer all questions and provide further insight into your performance during the process after the demonstration is completed.

Go through each of the tasks on the and how to access the marketing resources on the Intranet.

After the demonstration, review the process and any team member questions and distribute the handout(s) for review and study.

Marketing 101 Perform & Coach

During Perform & Coach, do not stop to answer team member questions or provide additional information or coaching during their performance. The goal is for the team members to complete the process as best they can while you observe the performance to determine which area needs to be addressed first.

Have the team members go through each of the tasks on the and how to access the marketing resources on the Intranet.

Repeat the process until the team member completely understands all the information covered in this module and you and the team member feel confident they can perform the procedure to standard.

Marketing 101 Handout 1-Online Membership Management

Unlimited Speed Club Members can manage their plan anytime on our website via the '**Manage My Plan**' page. Members can quickly and easily change their plan, update their credit card, request a receipt, cancel, or submit a note for unique needs. The following are the actions members can take in the online portal:

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This allows members to switch from their existing plan to a higher/lower wash package. They will then be put into the new plan, receive the new wash immediately, and be charged the new rate on their next recharge.

Pause Membership

To retain an existing plan and keep the credit card on file, pause an existing plan and recharge at $0.01 each month. The pause is effective immediately regardless of where they are in their recharge cycle.

Resume from Pause

Members will be prompted to select a plan type to resume or reinstate their plan. Customers can begin washing immediately once un-paused. Grandfathered or previously discounted plan options will not be available for members who pause and resume.

Cancel Membership

Members can cancel their existing plan online, allowing them to wash for their current period. After that, their plan will be terminated, and they can no longer wash. Select members may be prompted with a "down-sell" offer to keep their plan at a discounted rate.

Request Receipt

Members will receive an emailed receipt for their last monthly charge.

Update Credit Card

Members can easily update their credit card to any new valid card.

Other

For all other unique or unlisted needs, members can select 'Other', and a ticket will be generated for customer service support and processing within 72 business hours.

Marketing 101 Handout 2-On Demand Promo Form

On Demand Promo Form

Your Name *

Your Email *

Date of Request *

7/30/2024

Promo Start Date

Promo End Date

MSA *

Locations *

000 - Demo   708 - Sass   99 - Corporate

Number of Days to Run the Promo *

−   1   +

Max three days

Is the weather favorable for the promo length?

Yes   ● No

Is the site scheduled to staff the XPTs at all times?

Yes   ● No

Is signage on site for the cost of the wash promo?

Yes   ● No

Additional comments

Submit

Marketing 101 Handout 3-Rinsed Cheat Sheet

Rinsed Analytics & Member Management
CHEAT SHEET

OVERVIEW:

This section shows key details on store revenue, member count, trends and average membership price.

- **Member Revenue & Count**
  - This section will automatically display for all sites or you can filter by region or location using the top filter options.
- **Member Count**
  - This shows the total number of active members on DRB. Note this chart may not match exactly what's in the SiteWatch Pass Plan Analysis as Rinsed does not include discontinued members, so once they are discontinued it doesn't count them in this reporting.
- **Average Membership Price**
  - Shows the true value per member each month. Important to monitor as we try to grow that number and convert more members to higher packages.
- **Conversion Rate**
  - Shows how your store is performing over time on conversion rate each month. This is calculated as Plans Sold / (Total Washes – ARM Plans Redeemed – Free Washes).
- **Member Wash Usage**
  - Shows the total number of washes on average by member. We want to see this grow as the more frequently we see members washing, the more likely they are to stick and stay with the plan.

DAILY:

This section shows a lot of the same data from the Overview page, but you can look at plan sales by day here and see trends at your store based on who is working, and identify opportunities associated with the team that is working each day.

- **Daily Summary Stats**
  - View member growth month over month and year over year by location.

- o View member redemptions by day and car count by day as well as the conversion rate for your store.
- o Monitor volume along with conversion rate over time and look for trends, for example, if you were at a 10% conversion rate one day and then 5% the next, what changed?

<u>SUBSCRIBERS:</u>

This section shows your monthly churn rate, which is important to keep an eye on over time to see if we are losing members due to credit card/payment issues or if they are leaving voluntarily.

- **Subscriber Churn**
  - o You can view churn by stores and by churn type. <u>The lower the churn rate, the better</u>. Use the subscriber retention chart to understand the life of your members and identify ways to extend their lifetime with us. We want to see a higher retention curve to keep those members active for longer periods of time.
  - o **CC Churn -** When you see churn due to credit card/payment issues, mitigate those issues by making sure we collect the correct contact info at the time of the sale, so we can communicate with these customers, and make sure that we are updating their info (and not sending customers through via free washes for customers who are in decline) so if anything happens so we can keep that customer informed.
  - o **Voluntary -** For voluntary churn, educating the customer on the value of the membership and making sure they are aware of the terms and how the membership works are ways to extend.
  - o Use the subscriber retention chart to understand the life of your members and identify way to extend their lifetime with us.
- **Subscriber Retention**
  - o For the Net Members chart, you want to see more new members added than lost so we can get ahead of the natural churn.
  - o For the Cohort Triangle and other Cohort charts, this shows the stick rate or retention of members over time based on when they joined. Over a 12-month period, you want to see a higher percentage of retention to improve the lifetime value of each member.
    - ▪ We can also track how we are doing on retaining members sold in NoS by looking at the month during which they joined
  - o The LTV (Lifetime Value) charts show you the value per member over longer durations. Compare this to a customer who washes once a month to show your teams how much more valuable members are than drive-up customers.

MEMBER ENGAGEMENT:

This section shows you a lot of information about the customer including cell phone collection, credit card issues, survey responses, washbook sales, upsell campaign performance and ticket issues with details on their reasons for cancelling, changing their plan and more.

- **Credit Card Decline Follow-Up**
  - Shows details on the credit card decline and how we can try to catch those customers automatically in the customer returned section.
- **NPS Customer Review Scores & Comments**
  - You can share these details with your stores and respond to customers when necessary, by exporting the customer survey results. Their emails are included in the table.
  - We are also setting up emails to send these to the stores once a week.
- **Phone Number Collection**
  - Helps reduce involuntary churn by allowing us to text our members to remind them to update their credit card
  - We also text members to create more engagement and have them use the wash more frequently

KPIs:

This report pulls sales directly from DRB so you can see how your store is performing for a period, or week over week.

- **Dashboard**
  - This section shows you the total revenue in greater detail, per month vs. last month, month over month, and year over year.
  - You can also see volume and see what is coming from drive up, new member and existing members.
  - You can also view how many cars were washed this month compared to previous month, how your store revenue is pacing, and this report helps you keep an eye on labor and calculate you CPMH to monitor on a regular basis. (Total Volume / Total Labor Hours)

PAY STATION CASH DEPOSIT (DRB) PART 1-1111

Welcome

Welcome to part two of the Pay Station Cash Deposit Development Module. In this module, you will learn about the pay station cash deposit and the steps for completing the deposit.

Notes and Questions

As you go through the module, please follow along and take notes as you go. Taking notes will help you remember any key points or questions that you would like to discuss. Once you have completed each section and completed your quiz, you can review the information and your questions with a manager.

Quiz

Once you have finished watching the module, there will be a quiz to review the information in the module. A score of 100% must be achieved in order to pass each quiz. If you do not pass the quiz on your first attempt, retry the quiz. If you do not pass on your second attempt, locate a manager. Your manager will review the module with you and address any questions you may have. Once you have passed the quiz, exit the module and locate a manager to proceed to the Demonstration for this module. Your manager will then review the information and any questions you may have.

Why

The purpose of the pay station cash deposit is to remove all of the money that has been collected in the pay stations each week. By performing weekly deposits, we are able to limit the amount of money that is on-site, which helps to increase the safety and security of the location and its team. Additionally, performing this procedure ensures that we do not miss any steps in the process and that all of our reporting is accurate.

What

The following are the items you will need to complete the Pay Station Cash Deposit successfully:

1. General Manager or Store Manager

    The General Manager or the Store Manager must participate in the cash deposit process anytime we are adding or removing money from the XPT's.

2. One Additional Team Member

    A Team Leader, Shift Leader or another manager must accompany the manager performing the task anytime we are adding or removing money from the XPT's.

3. Safe

    The safe is located in the office and is used to hold the change order and/or the deposit.

4. Consignment Log

    The consignment log is used to record the deposits and verify that they were received by the Loomis driver. The consignment log is kept on site in the deposit box.

5. Deposit Box

    Located in the server room, the deposit box houses the necessary items for completing the deposit process.

6. Deposit Slip

    The deposit slip is used to record the deposit amount. The deposit slip has a white and a yellow copy. The white copy is placed in the deposit bag and the yellow copy is used when submitting the deposit forms on the Intranet.

7. Deposit Bag

    The deposit bag is a clear plastic bag that can be sealed when the time comes. This is also what you will give to the Loomis driver when they arrive to collect the deposit.

8. Change Order

   The change order is the money that is delivered by Loomis and used to replenish the XPT. The change order will come in bands of $1 and $5 bills. Each band will contain 100 bills of the particular denomination.
   a. One band of $1 bills is equal to $100
   b. One band of $5 bills is equal to $500

9. Change Order Receipt

   The change order receipt is brought to the location by the Loomis driver. This receipt will need to be signed by the person who accepts the change order.

10. XPT

    You will need the XPT's to add and remove money and retrieve the Vault Access Slip

11. XPT Keys & Wrench

    You will need the keys to each XPT as well as the wrench used to unlock the XPT door.

12. Traffic Cone

    The traffic cone is used when we are removing and adding money to the XPT's to close the line while we complete the process.

13. Bill Acceptor

    The bill acceptor collects all of the money inserted into the XPT.

14. Bill Dispenser

    The bill dispensers return change to cash paying customers. Each XPT contains two bill dispensers. One for $1 bills and one for $5 bills.

15. Reject Tray

    The reject tray collects any bills that cannot go through the dispenser due to damage, wear or other issues. When a damaged bill is detected, the dispenser will push the bill to the reject tray before dispensing any more money.

16. XPT Cash Audit Report

    This form is generated through Site Manager and is needed to reconcile the deposit.

17. Vault Access Slips

    These slips are receipts that are generated by the XPT. You will need these slips to complete the XPT cash audit.

18. Office Computer

    The office computer will be used to access the Intranet to submit deposit reports.

19. Company Intranet

    The company intranet is used to access the forms that need to be submitted.

20. DRB Site Manager

    You will need to access Site Manager to complete the deposit process.

21. Printer/Scanner

    The printer/scanner is used to copy and scan the information needed to submit the deposit reports on the Intranet.

22. Loomis Issue Log

    Anytime an issue arises with the Loomis portion of the deposit, you will need to document the issue in the Loomis issue log. This log can be found, and completed, on the company Intranet.

Educate

The XPT Cash Deposit is critical in ensuring that our deposits make it to the bank and that the XPT's are always able to accept and dispense money. Without proper removal and addition of money to the XPT's, the potential exists for our customers to not be served effectively. This could come from the

acceptor being too full to accepts money, or the dispensers being empty and unable to deliver change to the customer. When this occurs, we have to take time out to solve the problem. This impedes the customers quick trip to the car wash, and turns it into a longer visit than they expected. It also requires us to spend time resolving the matter, and this takes time away from other critical tasks.

Safety and Security

The XPT cash deposit procedure **MUST** be performed with a Site Manager or General Manager and one other team member. The second team member can be a Team Leader, Shift Leader or another manager. This is done in an effort to ensure your safety and the security of the money being handled.

Additionally, to ensure everyone's safety, money may only be removed from, or added to, the XPT's between **7:30am and 4:30pm**. You must also complete the process for both XPT's at the same time. If you don't feel you can efficiently complete both XPT's at the same time, you will need to plan another time to add or remove money.

In order to further ensure safety, and prevent any internal issues, we must keep our safes locked at all times. This is done without exception. The safe should only be opened to add or remove deposit bags and when adding change orders received from Loomis. It is also critical that the safe is visible on the cameras so that there is video evidence of any possible incidents.

Theft

While we have multiple safety measures in place, those measures cannot completely eliminate the possibility of theft. In this instance, we are talking about theft by someone outside our organization. In simple terms, there is a possibility, albeit small, that you could find yourself in the middle of a robbery attempt.

You, our most valuable asset, cannot be replaced. If you do find yourself in a robbery situation, it is safest to meet their demands without resistance. We have cameras located around the site, and pointed at the safe, so if any incident occurs, the cameras will capture video footage that can be used as evidence when further action is taken against the perpetrator.

Team Member Responsibilities

Robbery

As a team member, it is your responsibility to ensure the safety of yourself, your teammates and our guests. In the event of a robbery or break-in, you will need to take the following steps.

1. Remain calm.
2. Follow the robbers' directions without argument, using slow, deliberate movements.
3. Inform the robber if any employees are entering the area.
4. Be observant of the person, and take notice of any distinguishing features, clothing, tattoos, speech impediments or sayings and the details of any weapon used.
5. When the robber leaves the property, close the lanes and immediately call 911.
   - Do not touch or disturb anything that the assailant may have been in contact with.
6. Contact your Area Director and General Manager.
7. Write a detailed account of what happened and what you saw.
   - Include any additional comments from other team members.
8. Follow police instructions.

Break-In

In addition to robbery, the possibility also exists for our stores to be broken into. When this occurs, it is important to remain calm and perform the following steps:

1. All employees must retreat to a safe distance with good visibility and call 911 immediately.
2. If there are any unfamiliar vehicles near the location take note of the description from a safe distance.

3. Notify Area Director.
4. When the police arrive, they will clear the building and make sure it is safe to enter.
5. Follow police instructions.
6. Take pictures of any/all damage.
7. Go over with area director what needs to be accomplished before opening.

Management Responsibilities

As a manager, it is your responsibility to ensure the safety of our employees and guests during and after a robbery. Anytime you are informed about a robbery or break-in, you will need to take the following steps:

Robbery

1. Drive to the location as soon as you are able.
2. Ensure that staff and guests are safe.
3. Notify Regional Director, Loss Prevention and Human Resources.
4. Get an accurate assessment of the amount lost.
5. Save all relevant video footage.
6. Send relevant footage and all statements to Loss Prevention.
7. Follow police instruction.
8. Work with accounting on getting a deposit for the store if necessary.

Break-In

1. Drive to the location as soon as you are able.
2. Ensure the staff are safe.
3. Notify Regional Director, Loss Prevention and Human Resources.
4. Follow police instruction.
5. Get an accurate assessment of the amount lost.
6. Clean any debris after police have cleared to do so.
7. Work with Regional Director on what needs to be completed prior to opening.
8. Work with accounting on getting a deposit for the store if necessary.
9. Save all relevant video footage.
10. Send relevant footage to Loss Prevention.

Deposit Schedule

Depending on the location, you may have one or two deposit days each week. For information regarding your location's deposit day, or days, refer to the management team at your store.

Regardless of deposit day, or days, the XPT cash deposit must be completed before the end of the business day two days after the deposit is given to Loomis.

Process Overview

The XPT cash deposit breaks down into nine sections and 61 total steps. Each step is just as important as the next, and it is important that all steps are completed properly, and in the correct order. Remember, this process **MUST** be performed with a Store Manager or General Manager and one other team member. The second team member can be a Team Leader, Shift Leader or another manager. Additionally, to ensure everyone's safety, money may only be removed from, or added to, the XPT's between **7:30am and 4:30pm**. You must also complete the process for both XPT's at the same time.

Pay Station Cash Deposit (DRB) Part 1 Quiz

Once the team member has completed the module, they will need to complete the quiz. To pass the quiz, the team member must score a 100%. If the team member does not pass their first attempt, they must take the quiz again. If they do not pass on their second attempt, you will need to review the quiz and answers with them before they attempt the quiz again.

1. Between what hours can the XPT cash deposit procedure be performed?
    a. **7:30am—4:30pm**
    b. 7:30am—6:00pm
    c. 9:00am—6:00pm
    d. 7:00am—8:00pm
2. Which of the following are needed to complete the XPT cash deposit procedure? (Check all that apply)
    a. **XPT Keys & Wrench**
    b. **Vault Access Slip**
    c. Flashlight
    d. Handcuff and chain for the deposit box
    e. **Change Order**
3. One band of $1 bills equals _____ and one band of $5 bills equals _____.
    a. $100; $100
    b. $100; $250
    c. **$100; $500**
    d. $200, $500
4. The XPT cash deposit procedure can be performed anytime during operating hours.
    a. True
    b. **False**
5. The total amount of the change order will vary by location.
    a. **True**
    b. False

Pay Station Cash Deposit (DRB) Part 1 Demonstration

During the Demonstration, it is important that you do not stop to answer an employee's questions or provide additional information. The goal is for the employee to see the process performed as close to a real-life scenario as possible. This uninterrupted performance will help connect the steps or information learned. We will answer all questions and address any issues after the Demonstration.

Once the employee has passed the quiz, ask the employee if they have any questions and provide the answers. Then, review all the tools and resources listed in the WHAT portion of the module. Be sure to go to where each item is located. Next, review the robbery and break-in procedures with the team members, then ask if they have any questions.

Once complete and all team members' questions have been answered, give the team members their copy of the **Pay Station Cash Deposit (DRB) Part 1 Handout** to review and study. Then, proceed to the Perform & Coach step.

Pay Station Cash Deposit (DRB) Part 1 Perform & Coach

During Perform & Coach, it is important that you do not stop to answer any team member's questions, and you shouldn't stop the team member to provide additional information. The goal is for the team members to complete the process. Coaching will be provided upon completion.

Have the team member explain the steps of the robbery and break-in procedures and show you where all the tools and resources are listed in the WHAT portion of the module, where each item is located, and where replenishments are stored. Provide coaching on any items they are having trouble explaining or finding.

Repeat the Perform & Coach process until the team member has complete knowledge and understanding of all the information covered in this module.

Pay Station Cash Deposit (DRB) Part 1 Handout

The following is an overview of the information reviewed in the module:

The XPT Cash Deposit is critical in ensuring that our deposits make it to the bank and that the XPT's are always able to accept and dispense money. Without proper removal and addition of money to the XPT's, the potential exists for our customers to not be served effectively. This could come from the acceptor being too full to accepts money, or the dispensers being empty and unable to deliver change to the customer. When this occurs, we have to take time out to solve the problem. This impedes the customers quick trip to the car wash, and turns it into a longer visit than they expected. It also requires us to spend time resolving the matter, and this takes time away from other critical tasks.

Safety and Security

The XPT cash deposit procedure **MUST** be performed with a Site Manager or General Manager and one other team member. The second team member can be a Team Leader, Shift Leader or another manager. This is done in an effort to ensure your safety and the security of the money being handled.

Additionally, to ensure everyone's safety, money may only be removed from, or added to, the XPT's between **7:30am and 4:30pm**. You must also complete the process for both XPT's at the same time. If you don't feel you can efficiently complete both XPT's at the same time, you will need to plan another time to add or remove money.

In order to further ensure safety, and prevent any internal issues, we must keep our safes locked at all times. This is done without exception. The safe should only be opened to add or remove deposit bags and when adding change orders received from Loomis. It is also critical that the safe is visible on the cameras so that there is video evidence of any possible incidents.

Theft

While we have multiple safety measures in place, those measures cannot completely eliminate the possibility of theft. In this instance, we are talking about theft by someone outside our organization. In simple terms, there is a possibility, albeit small, that you could find yourself in the middle of a robbery attempt.

You, our most valuable asset, cannot be replaced. If you do find yourself in a robbery situation, it is safest to meet their demands without resistance. We have cameras located around the site, and pointed at the safe, so if any incident occurs, the cameras will capture video footage that can be used as evidence when further action is taken against the perpetrator.

Team Member Responsibilities

<u>Robbery</u>

As a team member, it is your responsibility to ensure the safety of yourself, your teammates and our guests. In the event of a robbery or break-in, you will need to take the following steps.

9. Remain calm.
10. Follow the robbers' directions without argument, using slow, deliberate movements.
11. Inform the robber if any employees are entering the area.
12. Be observant of the person, and take notice of any distinguishing features, clothing, tattoos, speech impediments or sayings and the details of any weapon used.
13. When the robber leaves the property, close the lanes and immediately call 911.
    - Do not touch or disturb anything that the assailant may have been in contact with.
14. Contact your Area Director and General Manager.
15. Write a detailed account of what happened and what you saw.
    - Include any additional comments from other team members.
16. Follow police instructions.

Break-In

In addition to robbery, the possibility also exists for our stores to be broken into. When this occurs, it is important to remain calm and perform the following steps:

8. All employees must retreat to a safe distance with good visibility and call 911 immediately.
9. If there are any unfamiliar vehicles near the location take note of the description from a safe distance.
10. Notify Area Director.
11. When the police arrive, they will clear the building and make sure it is safe to enter.
12. Follow police instructions.
13. Take pictures of any/all damage.
14. Go over with area director what needs to be accomplished before opening.

Management Responsibilities

As a manager, it is your responsibility to ensure the safety of our employees and guests during and after a robbery. Anytime you are informed about a robbery or break-in, you will need to take the following steps:

Robbery

Drive to the location as soon as you are able.

Ensure that staff and guests are safe.

Notify Regional Director, Loss Prevention and Human Resources.

Get an accurate assessment of the amount lost.

Save all relevant video footage.

Send relevant footage and all statements to Loss Prevention.

Follow police instruction.

Work with accounting on getting a deposit for the store if necessary.

Break-In

Drive to the location as soon as you are able.

Ensure the staff are safe.

Notify Regional Director, Loss Prevention and Human Resources.

Follow police instruction.

Get an accurate assessment of the amount lost.

Clean any debris after police have cleared to do so.

Work with Regional Director on what needs to be completed prior to opening.

Work with accounting on getting a deposit for the store if necessary.

Save all relevant video footage.

Send relevant footage to Loss Prevention.

Deposit Schedule

Depending on the location, you may have one or two deposit days each week. For information regarding your location's deposit day, or days, refer to the management team at your store.

Regardless of deposit day, or days, the XPT cash deposit must be completed before the end of the business day two days after the deposit is given to Loomis.

PAY STATION CASH DEPOSIT (DRB) PART 2-1112

Welcome

Welcome to part two of the Pay Station Cash Deposit Development Module. In this module, you will learn about the pay station cash deposit and the steps for completing the deposit.

Notes and Questions

As you go through the module, please follow along and take notes as you go. Taking notes will help you remember any key points or questions that you would like to discuss. Once you have completed each section and completed your quiz, you can review the information and your questions with a manager.

Quiz

Once you have finished watching the module, there will be a quiz to review the information in the module. A score of 100% must be achieved in order to pass each quiz. If you do not pass the quiz on your first attempt, retry the quiz. If you do not pass on your second attempt, locate a manager. Your manager will review the module with you and address any questions you may have. Once you have passed the quiz, exit the module and locate a manager to proceed to the Demonstration for this module. Your manager will then review the information and any questions you may have.

Why

The purpose of the pay station cash deposit is to remove all of the money that has been collected in the pay stations each week. By performing weekly deposits, we are able to limit the amount of money that is on-site, which helps to increase the safety and security of the location and its team. Additionally, performing this procedure ensures that we do not miss any steps in the process and that all of our reporting is accurate.

Educate

Let's review the steps for completing the XPT cash deposit process in detail.

Steps 1-4

The first thing you will need to do is go to the server room and retrieve the deposit box. Then, you will need to get the change order out of the safe. Place the change order in the deposit box and head outside to the XPT's. Once you are at the XPT, you will need to place a traffic cone in front of the lane you are working in. This is done to ensure that customers do not wait for, or attempt to use, the XPT that you are working at.

1. Remove the deposit box from the server room.
2. Remove the change order from the safe and place it in the deposit box.
3. Take the deposit box to the XPT's.
4. Cone off the XPT lane. One at a time.

Steps 5-7

Once you have coned off the lane, it is time to open the XPT. To start, get the XPT wrench and the appropriate set of keys for the XPT. Using the green key, unlock the top lock of the XPT. An alarm screen will appear and you will need to scan the barcode on your name badge in order to proceed with the process. Once you have scanned you badge, and the alarm screen goes away, you can continue to unlock the XPT. To do so, remove the bottom lock using the green key. Then, using the XPT wrench, unscrew the internal locks for both the top and bottom.

5. Remove the top lock from the XPT.
6. Scan the barcode on your name badge when prompted.
7. Remove the bottom lock and use the XPT wrench to unlock the door.

Steps 8-12

Once you have accessed the inside of the XPT, it is time to begin the steps for removing the money. Depending on your location, there may be one door to access both the dispensers and acceptor, or there will be two separate doors for accessing each one. Refer to your location's management team to determine how your XPT is configured.

To start, unlock the access door to the bill acceptor. Then, remove the acceptor by pressing down on the yellow button on the front of the cassette. Once the cassette is removed, take the cash out. Then hand the money to your partner so that they can rubber band the cash, and place it in the deposit bag. While your partner is banding the money, re-insert the acceptor. Then, if your XPT has two doors, close the door. If your XPT has one door, you will need to proceed to steps 13-19 before closing the door.

8. Unlock the bill acceptor access.
9. Remove the acceptor and remove the money.
10. Give the money to your partner to rubber band and put into the deposit bag.
11. Re-insert the acceptor.
12. Close and lock the acceptor access.

Steps 13-19

Now that you have completed the process with the bill acceptor, it is time to complete the process for the bill dispensers. To start, unlock the dispenser access door. Then remove the reject tray and collect any money that is in the tray. Then remove the dispensers one at a time. To remove the dispensers, press the green button on the front of the cassette and pull the dispenser out. Next, open the dispenser and remove the money. To open the dispensers, use the small key on the XPT key ring to unlock the cassette and open it from the top.

After you have removed the money from the dispenser, hand the money to your partner for them to rubber band and place in the deposit bag. Upon completion, take the money from the change order and insert the bills, either $1 or $5 bills, into the appropriate dispenser. Then, close the dispenser, ensuring that you hear it click which signals the dispenser is closed and locked. Finally, re-insert the dispenser into the appropriate slot and repeat the process for the other dispenser. After both dispensers have been completed, you will close and lock the dispenser access door.

13. Unlock the bill dispenser access.
14. Remove any bills from the reject tray.
15. Remove the dispensers, one at a time, and remove the money.
16. Hand the money to your partner to be rubber banded and placed in the deposit bag.
17. Take the change order from your partner and place it in the dispensers.
18. Re-insert the bill dispensers.
19. Close and lock the dispenser access.

Steps 20-25

Now that you have removed and added the money to the acceptor and dispensers, you are ready to close and lock the XPT. Close the door and use the XPT wrench to tighten the top and bottom internal locks, then insert the locks. To insert the locks, insert the green key into the lock and turn the key so that the catch is level with the rest of the lock. Insert the lock into the proper slot and twist the key until the lock is secure and remove the key. Once you have inserted the locks, the screen will prompt you to tell the XPT what you did in regards to money addition and removal.

On the screen, select, "I removed ALL the money from the bill and coin acceptors." Then, select, "I removed ALL the money from the bill and coin dispensers." Finally, select, "I put the following amount of money into the bill dispensers." Input the amount that was added to the acceptor in the box that

appears on the screen. Once you have completed your selections, select Post. The XPT will then print the Vault Access Slip receipt. Take the receipt and place it in the deposit box. You will use this receipt later in the process.

After you have collected the receipt, remove the cones from the XPT lane and move on to the next XPT. Then repeat the previous steps, steps 5-23, for the remaining XPT. If your location only has one XPT, you can proceed directly to step 26 and return to the office.

20. Close the XPT, use the wrench to secure the door.
21. Insert the top and bottom lock.
22. When prompted on the XPT screen:
    - Select, "I removed ALL the money from the bill and coin acceptors."
    - Select, "I removed ALL the money from the bill and coin dispensers."
    - Select, "I put the following amount of money into the bill dispensers." Then enter the amount added to the XPT.
    - Select Post then collect the receipt that is printed.
23. Remove the cone from the lane and move to the next XPT.
24. Repeat steps 5-23 for the remaining XPT.
25. Take the deposit box and go back to the office.

Steps 26-31

Upon returning to the office, you will be ready to perform the XPT cash audit and compare the cash audit report to the XPT vault access slips to ensure that the numbers are accurate.

On the XPT vault access slip, locate where it shows "Acceptor Deposits" and "Dispenser Deposits." Then, confirm that the numbers on the vault access slip, is greater than zero and that the amount matches the XPT Cash Audit line item "Money Removed from Acceptors." Then, locate the "Added to Dispensers" line on the Vault Access Slip and confirm it is equal to the amount that was added to the XPT, and the amount matches XPT Cash Audit "Money added to Dispensers" line item. If any of the amounts on the vault access slips do NOT match the amount on the XPT Cash Audit, the cash audit will need to be edited.

26. Go to Site Manager.
27. Login with your credentials.
28. Go to Site Manager → Select Reports → Sales Activity → XPT Cash Audit.
29. Set the date to the deposit date then click Generate.
30. Using the Vault Access Slips, total the amounts removed from the acceptors and dispensers.
31. Check that the Vault Access Slips from the XPTs match the XPT Cash Audit.
    - Confirm that Vault Access Slip "Acceptor Deposits" is greater than zero and amount matches XPT Cash Audit "Money Removed from Acceptors" amount.
    - Confirm that Vault Access Slip "Dispenser Deposits" is greater than zero and amount matches XPT Cash Audit "Money Removed from Dispensers" amount.
    - Confirm that Vault Access Slip "Added to Dispensers" amount matches XPT Cash Audit "Money added to Dispensers" amount.
    - Repeat for each XPT.

Steps 32-36

Once you have confirmed the amounts of the XPT cash audit and the vault access slips match, you are ready to complete the deposit slip. Before you begin filling out the deposit slip, ensure that the location listed on the top of the slip matches the location where you are performing the XPT cash deposit. If the

deposit slip does not match, try to located a deposit book with the correct information. If you are still unable to locate a deposit book with the correct location, notify your Area Director. Once you have the correct deposit book, go to the first deposit slip in the book and input the date at the top of the slip. The XPT vault access slips are used to determine the date of the deposit. The date on the deposit slip and the vault access slips should always match. Then, input the amounts that you removed from each XPT. Be sure to only include XPT deposit amounts on the deposit slip. Then, total the amount at the bottom of the slip. If there are any additional deposits, they will require additional, separate deposit slips.

32. Prepare the deposit slip.

33. Ensure that the location listed on the top of the deposit slip matches your location.

- If the location on the deposit slip does not match, see if there is another deposit book that has the correct location.
    - o If there are no deposit slips with the correct location listed, contact your General Manager or Area Director.

34. Input the date on the top of the deposit slip.

- The XPT vault access slips are used to determine the date of the deposit. The date on the deposit slip and the vault access slips should always match.

35. Input the deposit amount removed from each XPT.

- Do NOT record any other deposits on the XPT deposit slip.

36. Record the total amount removed at the bottom of the deposit slip.

Steps 37-44

Now, you are ready to complete the deposit bag and Loomis consignment log for the deposit. The first thing you will need to do is prepare the deposit bag. On the deposit bag input the To, From, Date and Deposit Amount in the appropriate places. You will also need to input the Account Number which can be found on the deposit slip you just completed. Next, remove the bag tag from the top of the deposit bag.

Once you have prepared the bag, fill out the Loomis consignment log by inputting the date, deposit amount and deposit bag number in the appropriate areas of the log. Lastly, place the white copy of the deposit slip into the deposit bag and seal the bag. Then, place the deposit bag, and its contents, in the safe and lock the safe door.

37. Prepare the deposit bag.

38. On the deposit bag input the To, From, Date, Deposit Amount and Account Number in the appropriate places.

- The account number can be found on the deposit slip.

39. Record the total deposit amount on the deposit bag.

40. Remove the bag tag from the deposit bag.

41. Input the date, deposit amount and deposit bag number on the Consignment Log.

42. Place the white copy of the deposit slip in the unsealed deposit bag.

43. Seal the deposit bag and place it in the safe.

44. Close and lock the safe.

Steps 45-53

Now that the deposit is securely in the safe, you will need to complete the Weekly XPT Deposit form on the Intranet. To complete this, login to the Intranet, click on the Finance tab and go to the WhiteWater XPT Weekly link. Then complete page 1-12 of the form with the necessary information. Once you get to page 13 of the form, you will need to scan the deposit submission packet which includes the XPT receipts, deposit bag tag and yellow deposit slip, the Loomis Change Order Receipt and any other

documents requested. Remember, if the XPT did not print a receipt, you will need to include the XPT Cash Audit. Next, complete the rest of the form and then click Submit. Finally, once you have submitted the form, return the deposit box back to the server room.

45. Go to the office computer and log in to the WhiteWater Intranet.

46. Go to the Finance tab and select XPT Weekly.

47. Fill in the required information on Page 1-11.

48. If there were any issues, be sure to record them on Page 12.

49. Attach the XPT receipts, deposit bag tag and yellow deposit slip to the Loomis Change Order Receipt. Then, scan and add the file to the deposit submission

50. Scan and add any additional documentation if necessary.

   - Remember, if the XPT did not print a receipt, you will need to include the XPT Cash Audit

51. Input the deposit bag number.

52. Click Submit.

53. Put the deposit box back in the server room.

Steps 54-61

The next steps in the process are to be performed when the Loomis driver arrives at your location. When the Loomis driver arrives, you will first need to take the change order from the driver. Then, verify the change order has the correct amount of money within, and sign the tablet from the Loomis driver to confirm receipt. Refer to location management to determine the amount of the change order. Give the deposit to the Loomis driver and have them sign the consignment log. The consignment log **MUST** be signed by the Loomis driver anytime you give them a deposit. Once you retrieve the consignment log back from the driver, you will have completed the XPT cash deposit process.

54. Retrieve the change order from the driver.

55. Verify the amount for the change order.

56. Sign the tablet from the Loomis driver to confirm receipt.

57. Place the change order in the safe.

58. Remove the deposit from the safe.

59. Close and lock the safe.

60. Give the deposit bag to the Loomis driver.

61. Give the Consignment log to the Loomis driver so they can verify the information and sign the form.

Troubleshooting

From time to time, issues may arise while performing the XPT cash deposit. Remember, anytime there is an issue it is critical that we communicate with the accounting department and any other parties necessary as soon as possible. Depending on the issue, it may also be necessary to submit a Loomis issue log through the intranet.

The following are the common issues and their resolutions:

XPT did not print a receipt

1. Go to Site Manager

2. Login with your credentials

3. Select Reports → Sales Activity → XPT Cash Audit

4. Set the date to the deposit date then click Generate

5. Total the amounts removed from the acceptors and dispensers

   - Look for the lines that say, "Money removed from acceptors/dispensers

6. Fill in the total on the deposit slip, deposit bag and Consignment log
7. When this occurs, you will need to include the XPT Audit in lieu of the Vault Access Slips

The XPT is not accessible

Wait until access is restored, then perform the procedure. If you cannot submit the deposit before the cutoff day, notify the accounting department by sending a message to accounting@whitewatercw.com

Loomis arrives without the change order

1. Complete the Loomis Issue Log
2. Notify the accounting department by sending a message to accounting@whitewatercw.com

Amount of "money added" is entered on the XPT incorrectly

1. Contact accounting by sending a message to accounting@whitewatercw.com
2. Call your Area Director to have them complete the correction process.

Did not tell XPT money was removed

1. Contact accounting by sending a message to accounting@whitewatercw.com
2. Call your Area Director to have them complete the correction process.

Multiple change orders

1. Accept extra change order and confirm the amount
2. Place the extra change order in the safe
3. Complete the Loomis Issue Log
4. Notify the accounting department by sending a message to accounting@whitewatercw.com

Loomis no show

1. Complete the Loomis Issue Log
2. Notify the accounting department by sending a message to accounting@whitewatercw.com

Procedure

Now that you have an understanding of the XPT cash deposit, let's go through the procedure for completing the XPT Cash Deposit. Remember, the XPT Cash Deposit **MUST** be performed with two people to ensure your safety and the security of the money being handled.

The following are the steps for completing the XPT Cash Deposit:

1. Remove the deposit box from the server room.
2. Remove the change order from the safe and place it in the deposit box.
3. Take the deposit box to the XPT's.
4. Cone off the XPT lane. One at a time.
5. Remove the top lock from the XPT.
6. Scan the barcode on your name badge when prompted.
7. Remove the bottom lock and use the XPT wrench to unlock the door.
8. Unlock the bill acceptor access.
9. Remove the acceptor and remove the money.
10. Give the money to your partner to rubber band and put into the deposit bag.
11. Re-insert the acceptor.
12. Close and lock the acceptor access.
13. Unlock the bill dispenser access.
14. Remove any bills from the reject tray.
15. Remove the dispensers, one at a time, and remove the money.

16. Hand the money to your partner to be rubber banded and placed in the deposit bag.

17. Take the change order from your partner and place it in the dispensers.

18. Re-insert the bill dispensers.

19. Close and lock the dispenser access.

20. Close the XPT, use the wrench to secure the door.

21. Insert the top and bottom lock.

22. When prompted on the XPT screen:

    - Select, "I removed ALL the money from the bill and coin acceptors."
    - Select, "I removed ALL the money from the bill and coin dispensers."
    - Select, "I put the following amount of money into the bill dispensers." Then enter the amount added to the XPT.
    - Select Post then collect the receipt that is printed.

23. Remove the cone from the lane and move to the next XPT.

24. Repeat steps 5-23 for the remaining XPT.

25. Take the deposit box and go back to the office.

26. Go to Site Manager.

27. Login with your credentials.

28. Go to Site Manager → Select Reports → Sales Activity → XPT Cash Audit.

29. Set the date to the deposit date then click Generate.

30. Using the Vault Access Slips, total the amounts removed from the acceptors and dispensers.

31. Check that the Vault Access Slips from the XPTs match the XPT Cash Audit.

    - Confirm that Vault Access Slip "Acceptor Deposits" is greater than zero and amount matches XPT Cash Audit "Money Removed from Acceptors" amount.
    - Confirm that Vault Access Slip "Dispenser Deposits" is greater than zero and amount matches XPT Cash Audit "Money Removed from Dispensers" amount.
    - Confirm that Vault Access Slip "Added to Dispensers" amount matches XPT Cash Audit "Money added to Dispensers" amount.
    - Repeat for each XPT.

32. Prepare the deposit slip.

33. Ensure that the location listed on the top of the deposit slip matches your location.

    - If the location on the deposit slip does not match, see if there is another deposit book that has the correct location.
        - If there are no deposit slips with the correct location listed, contact your General Manager or Area Director.

34. Input the date on the top of the deposit slip.

    - The XPT vault access slips are used to determine the date of the deposit. The date on the deposit slip and the vault access slips should always match.

35. Input the deposit amount removed from each XPT.

    - Do NOT record any other deposits on the XPT deposit slip.

36. Record the total amount removed at the bottom of the deposit slip.

37. Prepare the deposit bag.

38. On the deposit bag input the To, From, Date, Deposit Amount and Account Number in the appropriate places.

- The account number can be found on the deposit slip.

39. Record the total deposit amount on the deposit bag.

40. Remove the bag tag from the deposit bag.

41. Input the date, deposit amount and deposit bag number on the Consignment Log.

42. Place the white copy of the deposit slip in the unsealed deposit bag.

43. Seal the deposit bag and place it in the safe.

44. Close and lock the safe.

45. Go to the office computer and login to the WhiteWater Intranet.

46. Go to the Finance tab and select XPT Weekly.

47. Fill in the required information on Page 1-11.

48. If there were any issues, be sure to record them on Page 12.

49. Attach the XPT receipts, deposit bag tag and yellow deposit slip to the Loomis Change Order Receipt. Then, scan and add the file to the deposit submission

50. Scan and add any additional documentation if necessary.

- Remember, if the XPT did not print a receipt, you will need to include the XPT Cash Audit

51. Input the deposit bag number.

52. Click Submit.

53. Put the deposit box back in the server room.

54. Retrieve the change order from the driver.

55. Verify the amount for the change order.

56. Sign the tablet from the Loomis driver to confirm receipt.

57. Place the change order in the safe.

58. Remove the deposit from the safe.

59. Close and lock the safe.

60. Give the deposit bag to the Loomis driver.

61. Give the Consignment log to the Loomis driver so they can verify the information and sign the form.

Pay Station Cash Deposit (DRB) Part 2 Quiz

Once the team member has completed the module, they will need to complete the quiz. To pass the quiz, the team member must score a 100%. If the team member does not pass their first attempt, they must take the quiz again. If they do not pass on their second attempt, you will need to review the quiz and answers with them before they attempt the quiz again.

1. What should be done if Loomis brings an extra change order? (Check all that apply)
    a. Contact your Area Director
    b. **Accept extra change order, confirm amount**
    c. **Place the extra change order in the safe**
    d. Tell Loomis to take back the change order

2. When should you upload the XPT Audit with the deposit submission packet?
    a. Always
    b. If the total amount is over $5,000
    c. **Only if the amounts on the access slip and audit don't match**
    d. Only if the amounts on the access slip and audit match
    e. Never

3. Which of the following are needed to complete the XPT cash deposit procedure? (Check all that apply)
    a. **XPT Keys & Wrench**
    b. **Vault Access Slip**
    c. Flashlight
    d. Handcuff and chain for the deposit box
    e. **Change Order**

4. If Loomis arrives without a change order, what should you do?
    a. Complete the Loomis Issue Log
    b. **Complete the Loomis Issue Log and notify Accounting**
    c. Complete the Loomis Issue Log and notify your Area Director
    d. Complete the Loomis Issue Log and notify your Area Director and accounting

5. When should you unseal the deposit bag?
    a. If there is a discrepancy on the XPT Audit
    b. When Loomis arrives
    c. When you verify the amount of cash in the deposit
    d. **Never**

6. What date should be used on the deposit slip?
    a. The date it is filled out
    b. The following Loomis pickup day
    c. **The date on the XPT vault access slips**
    d. None of the above

7. If the XPT is not accessible, you should skip the XPT cash deposit for that week.
    a. True
    b. **False**

8. The location listed on the deposit slip does not have to match with the location you are at, any deposit slip will work.

    a. True

    b. False

9. The total amount of the deposit is the sum of the total money removed from all XPT's.

    a. True

    b. False

10. If the amount removed from an XPT is over $2,500, you will need a separate deposit bag for the remaining XPT.

    a. True

    b. False

Pay Station Cash Deposit (DRB) Part 2 Demonstration

During the Demonstration, it is important that you do not stop to answer an employee's questions or provide additional information. The goal is for the employee to see the process performed as close to a real-life scenario as possible. This uninterrupted performance will help connect the steps or information learned. We will answer all questions and address any issues after the Demonstration.

The Demonstration for this module is covered in the online module.

Once the team member has passed the quiz, ask the team member if they have any questions and provide the answers. Once all team member questions have been answered, give the team member their copy of **Pay Station Cash Deposit (DRB) Part 2 Handouts 1 & 2** to review and study. Then, proceed to the Perform & Coach step.

Pay Station Cash Deposit (DRB) Part 2 Perform & Coach

During Perform & Coach, it is important that you do not stop to answer any team member's questions, and you shouldn't stop the team member to provide additional information. The goal is for the team members to complete the process. Coaching will be provided upon completion.

Have the team member perform the steps of the pay station cash deposit process in role-play and real-life deposits over the next few weeks. The goal is for the team member to be knowledgeable and capable enough to complete the process unassisted. Once the team member has completed the process, provide coaching and answer any questions.

Once the team member demonstrates the ability to perform the procedure correctly, they are ready for development sign-off. Upon sign-off, the team member can complete the process anytime needed.

***Money should not be added or removed from the pay station** when completing a demonstration or during the perform & coach step.*

*You **MUST** indicate that you **"Did not add or remove any money."** after closing the pay station.*

Pay Station Cash Deposit (DRB) Part 2 Handout 1

The following are the steps for completing the XPT Cash Deposit:

1. Remove the deposit box from the server room.
2. Remove the change order from the safe and place it in the deposit box.
3. Take the deposit box to the XPT's.
4. Cone off the XPT lane. One at a time.
5. Remove the top lock from the XPT.
6. Scan the barcode on your name badge when prompted.
7. Remove the bottom lock and use the XPT wrench to unlock the door.
8. Unlock the bill acceptor access.
9. Remove the acceptor and remove the money.
10. Give the money to your partner to rubber band and put into the deposit bag.
11. Re-insert the acceptor.
12. Close and lock the acceptor access.
13. Unlock the bill dispenser access.
14. Remove any bills from the reject tray.
15. Remove the dispensers, one at a time, and remove the money.
16. Hand the money to your partner to be rubber banded and placed in the deposit bag.
17. Take the change order from your partner and place it in the dispensers.
18. Re-insert the bill dispensers.
19. Close and lock the dispenser access.
20. Close the XPT, use the wrench to secure the door.
21. Insert the top and bottom lock.
22. When prompted on the XPT screen:
    - Select, "I removed ALL the money from the bill and coin acceptors."
    - Select, "I removed ALL the money from the bill and coin dispensers."
    - Select, "I put the following amount of money into the bill dispensers." Then enter the amount added to the XPT.
    - Select Post then collect the receipt that is printed.
23. Remove the cone from the lane and move to the next XPT.
24. Repeat steps 5-23 for the remaining XPT.
25. Take the deposit box and go back to the office.
26. Go to Site Manager.
27. Login with your credentials.
28. Go to Site Manager → Select Reports → Sales Activity → XPT Cash Audit.
29. Set the date to the deposit date then click Generate.
30. Using the Vault Access Slips, total the amounts removed from the acceptors and dispensers.
31. Check that the Vault Access Slips from the XPTs match the XPT Cash Audit.
    - Confirm that Vault Access Slip "Acceptor Deposits" is greater than zero and amount matches XPT Cash Audit "Money Removed from Acceptors" amount.
    - Confirm that Vault Access Slip "Dispenser Deposits" is greater than zero and amount matches XPT Cash Audit "Money Removed from Dispensers" amount.
    - Confirm that Vault Access Slip "Added to Dispensers" amount matches XPT Cash Audit "Money added to Dispensers" amount.

- Repeat for each XPT.

32. Prepare the deposit slip.
33. Ensure that the location listed on the top of the deposit slip matches your location.
    - If the location on the deposit slip does not match, see if there is another deposit book that has the correct location.
        - o If there are no deposit slips with the correct location listed, contact your General Manager or Area Director.
34. Input the date on the top of the deposit slip.
    - The XPT vault access slips are used to determine the date of the deposit. The date on the deposit slip and the vault access slips should always match.
35. Input the deposit amount removed from each XPT.
    - Do NOT record any other deposits on the XPT deposit slip.
36. Record the total amount removed at the bottom of the deposit slip.
37. Prepare the deposit bag.
38. On the deposit bag input the To, From, Date, Deposit Amount and Account Number in the appropriate places.
    - The account number can be found on the deposit slip.
39. Record the total deposit amount on the deposit bag.
40. Remove the bag tag from the deposit bag.
41. Input the date, deposit amount and deposit bag number on the Consignment Log.
42. Place the white copy of the deposit slip in the unsealed deposit bag.
43. Seal the deposit bag and place it in the safe.
44. Close and lock the safe.
45. Go to the office computer and login to the WhiteWater Intranet.
46. Go to the Finance tab and select XPT Weekly.
47. Fill in the required information on Page 1-11.
48. If there were any issues, be sure to record them on Page 12.
49. Attach the XPT receipts, deposit bag tag and yellow deposit slip to the Loomis Change Order Receipt. Then, scan and add the file to the deposit submission
50. Scan and add any additional documentation if necessary.
    - Remember, if the XPT did not print a receipt, you will need to include the XPT Cash Audit
51. Input the deposit bag number.
52. Click Submit.
53. Put the deposit box back in the server room.
54. Retrieve the change order from the driver.
55. Verify the amount for the change order.
56. Sign the tablet from the Loomis driver to confirm receipt.
57. Place the change order in the safe.
58. Remove the deposit from the safe.
59. Close and lock the safe.
60. Give the deposit bag to the Loomis driver.
61. Give the Consignment log to the Loomis driver so they can verify the information and sign the form.

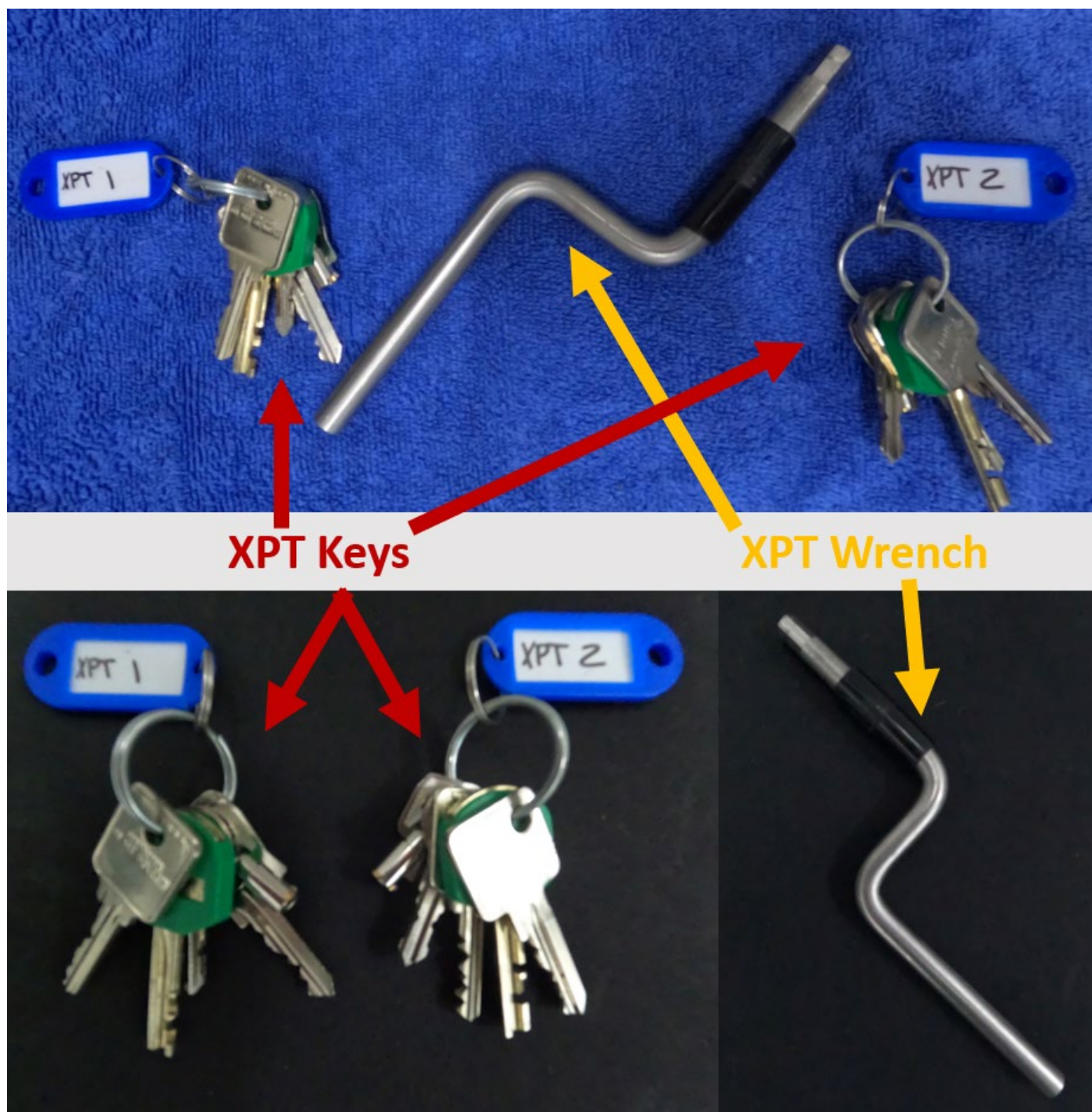*Pay Station Cash Deposit (DRB) Part 2 Handout 2*

XPT

Reject Tray   **Bill Dispenser**   **Bill Acceptor**
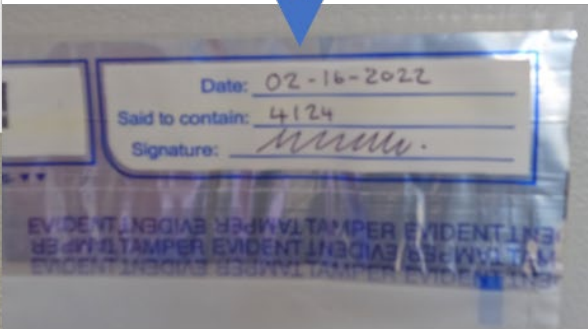
Reject Tray

XPT Keys

XPT Wrench
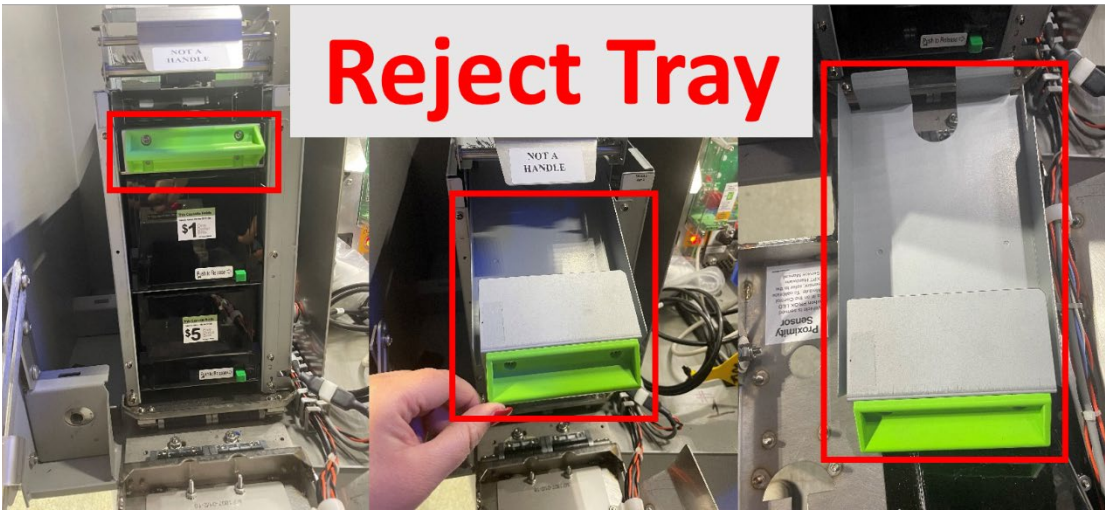
Bag Tag

Deposit Bag
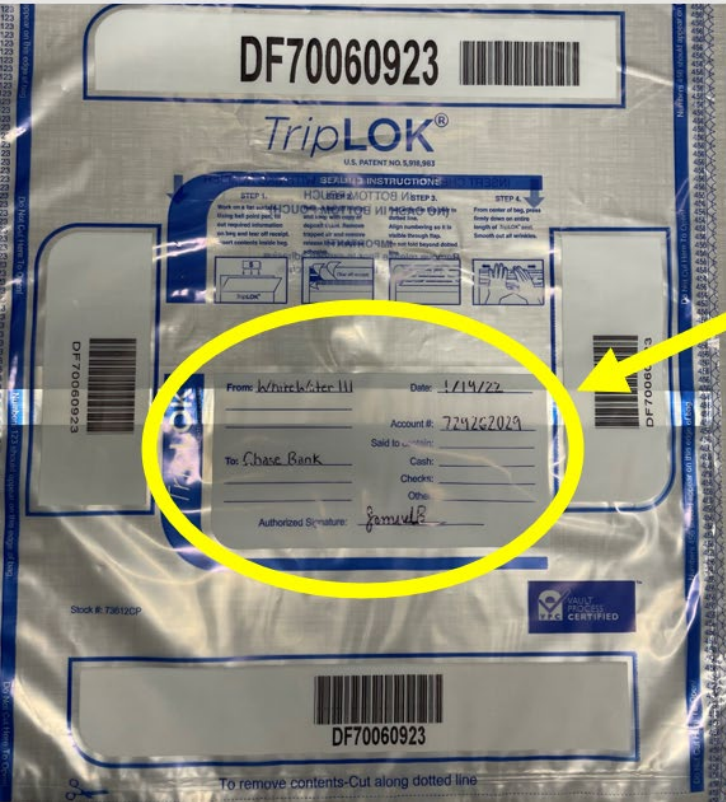
To, From, Date, Account Number

Deposit Slip

Location

Account Number

Vault Access Slip


```
    Vault Access Deposits
 WhiteWater Car Wash-Atascocit
     Empl # 3096 @ XPT2
   01/19/2022, 02:30 PM
--------------------------------
        Money Removed
--------------------------------
Acceptor Bills          -$177.00
Acceptor Coins             $0.00
                        --------
Acceptor Deposits       -$177.00

Dispenser Bills       -$1,368.00
Dispenser Coins            $0.00
                        --------
Dispenser Deposits    -$1,368.00
--------------------------------
Total Removed         -$1,545.00

--------------------------------
         Money Added
--------------------------------
Bills Added            $1,400.00
Coins Added                $0.00
                        --------
Added to Dispensers    $1,400.00

--------------------------------
Net Deposits            -$145.00
```

```
    Vault Access Deposits
 WhiteWater Car Wash-Atascocit
     Empl # 3096 @ XPT1
   01/19/2022, 02:27 PM
--------------------------------
        Money Removed
--------------------------------
Acceptor Bills          -$688.00
Acceptor Coins             $0.00
                        --------
Acceptor Deposits       -$688.00

Dispenser Bills       -$1,263.00
Dispenser Coins            $0.00
                        --------
Dispenser Deposits    -$1,263.00
--------------------------------
Total Removed         -$1,951.00

--------------------------------
         Money Added
--------------------------------
Bills Added            $1,400.00
Coins Added                $0.00
                        --------
Added to Dispensers    $1,400.00

--------------------------------
Net Deposits            -$551.00
```

Deposit Slip

WhiteWater Car Wash WX0111
8514 FM 1960 E.
Atascocita, TX 77346

CHASE
JPMorgan Chase Bank, N.A.
www.Chase.com

DATE 1/19/22

	DOLLARS	CENTS
CURRENCY	3,496	0.0
COIN		
CHECKS 1	XPT 1 1,951	.00
2		
3		
	XPT 2 1,545	.00

TOTAL FROM OTHER SIDE
OR ATTACHED LIST

3,496 00

Checks and
subject to the provisions of the Uniform Commercial
Code or any applicable collection agreement.

Vault Access Slips

Vault Access Deposits
WhiteWater Car Wash-Atascocit
Empl # 3096 @ XPT1
01/19/2022   02:27 PM
- - - - - - - - - - - - - - - -
Money Removed
- - - - - - - - - - - - - - - -
Acceptor Bills   -$688.00
Acceptor Coins $0.00
                        - - - - - - - -
Acceptor Deposits   -$688.00

Dispenser Bills   -$1,263.00
Dispenser Coins $0.00
                        - - - - - - - -
Dispenser Deposits   -$1,263.00

Total Removed   -$1,951.00
- - - - - - - - - - - - - - - -
Money Added
- - - - - - - - - - - - - - - -
Bills Added $1,400.00
Coins Added $0.00
                        - - - - - - - -
Added to Dispensers $1,400.00

- - - - - - - - - - - - - - - -
Net Deposits   -$551.00

Vault Access Deposits
WhiteWater Car Wash-Atascocit
Empl # 3096 @ XPT2
01/19/2022   02:30 PM
- - - - - - - - - - - - - - - -
Money Removed
- - - - - - - - - - - - - - - -
Acceptor Bills   -$177.00
Acceptor Coins $0.00
                        - - - - - - - -
Acceptor Deposits   -$177.00

Dispenser Bills   -$1,368.00
Dispenser Coins $0.00
                        - - - - - - - -
Dispenser Deposits   -$1,368.00

Total Removed   -$1,545.00
- - - - - - - - - - - - - - - -
Money Added
- - - - - - - - - - - - - - - -
Bills Added $1,400.00
Coins Added $0.00
                        - - - - - - - -
Added to Dispensers $1,400.00

- - - - - - - - - - - - - - - -
Net Deposits   -$145.00

XPT Cash Audit Report

XPT Cash Audit Report

WhiteWater Car Wash-
111 - Atascocita

Wed 01/19/2022 12:00:00am
Wed 01/19/2022 11:59:59pm

Date	Activity	XPT1	XPT2	DXPT1	Totals
1/19/22	Cash paid in to Acceptors		20.00		20.00
	Money removed from Acceptors	-688.00	-177.00		-865.00
	Over/Short detected in Acceptors	0.00	0.00		0.00
	Money added to Dispensers	1,400.00	1,400.00		2,800.00
	Change returned by Dispensers		-12.00		-12.00
	Money removed from Dispensers	-1,263.00	-1,368.00		-2,631.00
	Over/Short detected in Dispensers	0.00	0.00		0.00
Summary for 1/19/22 thru 1/19/22					
	Beginning balance in Acceptors	688.00	157.00	0.00	845.00
	Beginning balance in Dispensers	1,263.00	1,380.00	0.00	2,643.00
	Cash paid in to Acceptors	0.00	20.00	0.00	20.00
	Money removed from Acceptors	-688.00	-177.00	0.00	-865.00
	Over/Short detected in Acceptors	0.00	0.00	0.00	0.00
	Money added to Dispensers	1,400.00	1,400.00	0.00	2,800.00
	Change returned by Dispensers	0.00	-12.00	0.00	-12.00
	Money removed from Dispensers	-1,263.00	-1,368.00	0.00	-2,631.00
	Over/Short detected in Dispensers	0.00	0.00	0.00	0.00
	Ending balance in Acceptors	0.00	0.00	0.00	0.00
	Ending balance in Dispensers	1,400.00	1,400.00	0.00	2,800.00
	XPT Cash Sales to Account For	0.00	8.00	0.00	**8.00**
	XPT Money Accounted For	0.00	-8.00	0.00	**-8.00**
	Net XPT Money Over/Short	0.00	0.00	0.00	**0.00**

XPT Cash Audit Report

Date	Activity	XPT1
1/19/22	Cash paid in to Acceptors	
	Money removed from Acceptors	-688.00
	Over/Short detected in Acceptors	0.00
	Money added to Dispensers	1,400.00
	Change returned by Dispensers	
	Money removed from Dispensers	-1,263.00
	Over/Short detected in Dispensers	0.00
Summary for 1/19/22 thru 1/19/22		
	Beginning balance in Acceptors	688.00
	Beginning balance in Dispensers	1,263.00
	Cash paid in to Acceptors	0.00
	Money removed from Acceptors	-688.00
	Over/Short detected in Acceptors	0.00
	Money added to Dispensers	1,400.00
	Change returned by Dispensers	0.00
	Money removed from Dispensers	-1,263.00
	Over/Short detected in Dispensers	0.00
	Ending balance in Acceptors	0.00
	Ending balance in Dispensers	1,400.00
	XPT Cash Sales to Account For	0.00
	XPT Money Accounted For	0.00
	Net XPT Money Over/Short	0.00

Vault Access Slip

```
Vault Access Deposits
WhiteWater Car Wash-Atascocit
   Empl # 3096 @ XPT1
   01/19/2022, 02:27 PM
--------------------------------
       Money Removed
--------------------------------
Acceptor Bills        -$688.00
Acceptor Coins          $0.00
--------------------------------
Acceptor Deposits     -$688.00

Dispenser Bills     -$1,263.00
Dispenser Coins         $0.00
--------------------------------
Dispenser Deposits  -$1,263.00

Total Removed       -$1,951.00
--------------------------------
        Money Added
--------------------------------
Bills Added          $1,400.00
Coins Added             $0.00
--------------------------------
Added to Dispensers  $1,400.00
--------------------------------
Net Deposits          -$551.00
```

Loomis Consignment Log

CUSTOMER CONSIGNMENT LOG
Received by: **LOOMIS**

01

From _____ consignor, the following packages to be delivered to the respective consignees herein stated, it is agreed that these packages are to be distinctly and securely sealed by the consignor and that LOOMIS shall in no event be liable for any shortage by the consignor claimed in any such package delivered to it not so distinctively and securely sealed; also that in the case of the loss of any package LOOMIS shall not be liable for more than the value as herein stated of such package; and in no event for any amount in excess of the liability assumed in the service contract.

LINE	DATE	NO. OF SEALED PACKAGES	DENOMINATION	$	SEALED PACKAGES SAID TO CONTAIN	BAG NUMBER	RELEASED BY	SIGNATURE OF CUSTODIAN	ROUTE #	TIME	DATE
01	1/26		3052			DF48778059		JM SW	001055		1-26
02	1/26		1300.00			DF4877808					
03	2/2		3310			DF48778037		JM	10940		2/2
04	2/9		49.00			DF48778035			109 4:52		2/9
05	2/9		3134.00			DF48778036					
06	2/16										
07											
08											
09											
10											
11											
12											
13											
14											
15											

CCL07

Loomis Change Order Receipt

Customer Number: 9330340442
Customer Name: WHITE WATER EXPRESS WX111
Address: 8514 FM 1960 E

ATASCOCITA
TX 77346

Order Number : 6169962739
Delivery Date: 01/18/2022 Tuesday
Ship Date: 01/14/2022

Ext.Ref. No. : 898421
CHASE COMM
Courier: LOOMIS HOUSTON Rte: 1
Prepared By: _____

6169962739

Currency	Denom	$Amount
800 FIT Bill	$1	800.00
400 FIT Bill	$5	2,000.00
FIT Bill	Total	2,800.00

Total Currency:	2,800.00		Total Boxes:	0.00
Total Coin:	0.00		Total Rolls:	0.00
Total Exchange:	2,800.00			

Sample Deposit Submission

Loomis Issue Log

Loomis/Deposit Issue Log

mhord@whitewatercw.com Switch account

Saving disabled

Your email will be recorded when you submit this form

* Required

Type of Issue

Select the Type of Issue *

○ Loomis No Show

○ Loomis Arrived without Change Order

○ Loomis Did Not Take Deposit

○ Loomis Arrived with multiple XPT Change Orders

XPT Deposit Troubleshooting

XPT did not print a receipt

1. Go to Site Manager
2. Login with your credentials
3. Select Reports → Sales Activity → XPT Cash Audit
4. Set the date to the deposit date then click Generate
5. Total the amounts removed from the acceptors and dispensers
   - Look for the lines that say, "Money removed from acceptors/dispensers
6. Fill in the total on the deposit slip, deposit bag and Consignment log
7. When this occurs, you will need to include the XPT Audit in lieu of the Vault Access Slips

The XPT is not accessible

Wait until access is restored, then perform the procedure. If you cannot submit the deposit before the cutoff day, notify the accounting department by sending a message to accounting@whitewatercw.com

Loomis arrives without the change order

1. Complete the Loomis Issue Log
2. Notify the accounting department by sending a message to accounting@whitewatercw.com

Amount of "money added" is entered on the XPT incorrectly

1. Contact accounting by sending a message to accounting@whitewatercw.com
2. Call your Area Director to have them complete the correction process.

Did not tell XPT money was removed

1. Contact accounting by sending a message to accounting@whitewatercw.com
2. Call your Area Director to have them complete the correction process.

Multiple change orders

1. Accept extra change order and confirm the amount
2. Place the extra change order in the safe
3. Complete the Loomis Issue Log
4. Notify the accounting department by sending a message to accounting@whitewatercw.com

Loomis no show

1. Complete the Loomis Issue Log
2. Notify the accounting department by sending a message to accounting@whitewatercw.com