Inland Vet Supply Employee Training Manual

A Senior Project

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Bachelor of Science

by

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Abstract

The purpose of this senior project was to create an informative manual that would aid new employees in learning proper store protocols at Inland Vet Supply. The project included the creation of the manual based on the wants of the employer, Tammy Horal, as well as the needs of the store itself. The manual was written in a way that could be easily understood, and quickly referred to. The intended goal for the manual was to improve the ease of learning, and to reduce the amount of confusion when teaching new employees store procedures. It is with hope that once the employee training manual becomes implemented, older employees will no longer have to spend as much time training newer employees as they had in previous years. As a result, the manual covers a wide variety of procedures from in store operations to freight handling, and even working with customers.
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Chapter One

Introduction

Inland Vet Supply is a small veterinary supply company located in Norco California. Inland Vet Supply is a company that thrives on its customer service and personalized help. The employees of Inland Vet Supply assist to customer’s animal healthcare needs whether it involves livestock, or family pets. Until now, there has been no formal written training manual for new employees to follow. Due to the lack of a formally written employee training manual, new employees do not clearly understand what is expected of them. This confusion commonly results in new employees deciding to leave Inland Vet Supply. The goal of this senior project is to create an informative employee-training manual that will effectively allow new employees to fully understand what their job title entails through the duration of their employment.

Statement of the Problem

In recent years, the staff of Inland Vet Supply has acquired an immense amount of new employees. Since Inland Vet Supply has never had any type of formal written employee manual, work procedures have been continually completed in an improper fashion. As a result of this miscommunication, confusion amongst employees was generally experienced. This often lead to unhappy co-workers or worse, unhappy customers. During employee training, new employees have always relied on shadowing the older and more knowledgeable employees. Because of this practice, older employees have had the assumed responsibility of training the new employees correctly. Due to time constraints, short explanations of procedures are often
given, leading new employees to confusion and even implementation of wrong work practices. As a result of this time extensive employee training procedure, both older and newer employees productivity, as well as good customer service practices have flourished.

The Importance of the Project

The first factor of importance regarding Inland Vet Supply’s employee training manual is aiding in the reduction of stress placed on older employees when training new employees. With that being said, its purpose is not to completely take away from the assistance and mentoring of older employees during the training process, but to purely reduce the amount of time lost and the decreases in work efficiency on both parts. The second factor of importance is that the employee manual will provide procedural guidelines to new employees. As a result of these guidelines, there should be an increase in good customer service practices, as well as work efficiency. Lastly, the employee manual will also inform new employees of expectations placed on them. It is with hope that the training manual will reduce this lack of responsibility to new employees in the future, and that good work ethic will be once again restored and instilled.

Purpose(s) of the Project

The purpose for creating the employee manual for Inland Vet Supply was to establish more organization when it comes to the training of new employees. The intent of this manual is to aid in reducing the amount of lost employee productivity when training takes place. This manual will also aid in teaching new employees beneficial product knowledge, inventory knowledge, customer skills, and various other important work procedures.
Objectives of the Project

The objectives of this manual are, to increase new employee productivity, explain expectations to new employee, and reduce the overall time spent on training new employees. The manual will also help to establish a sense of order when new employees are hired and trained.

Summary

Inland Vet Supply’s scarcity of a training manual has resulted in a decrease of productivity, and improper implementation of work practices. Once the manual is established and implemented, proper work techniques and employee expectations will hopefully be fulfilled. The final outcome from implementing the employee manual should be an increased productivity of new employees, less confusion, and a decreased number of new employees quitting.
Chapter Two

Review of Literature

Employee training manuals are without a doubt the foundation upon which successful businesses rely upon. With that being said, it is accurate to assume that most thriving operational organizations have some type of criteria laid out for employees to follow. Currently, many employee-training manuals include job descriptions, procedures, and policies. Employee manuals also inform employees about workplace rules, regulations, guidelines, and even safety information. JD Supra states, “Every employee receives the same information about the rules of the workplace; employees know what is expected from them and what they can expect from the business” (Supra, 2013). Employee training manuals are also to be composed and comprehended in an understandable fashion. Once the employee has successfully understood the manual and what it represents, it can then be referenced upon, and updated as needed. An employee-training manual is a crucial asset to the success of the organization by which it was intended.

Importance of Employee Training Manuals

Employee training manuals produce a sense of structure, as well as unity to the businesses that establish and implement the use of them. Many business owners like Pat Lynch would agree that the proper use of an employee manual is vital and necessary to the success of a business (Lynch, 2008). Lynch is the president of Business Alignment Strategies, Inc. BAS is a consulting firm that helps clients optimize business results by aligning people, programs, and
processes with organizational goals. Lynch states, “The fact is that a well-written and well-executed handbook is a very powerful tool for workplace success” (Lynch, 2008). Lynch also goes into detail regarding how the use of employee manuals establishes positive effects on the employees themselves, as well as throughout the workplace. Listed are Lynch’s four positive outcomes that can be expected upon using employee manuals;

1. “Fewer complaints because decisions are made consistently across the organization.
2. Improved moral because supportive language indicates that management respects and values employees
3. Greater productivity because clear boundaries reduce the need for micromanagement
4. Alignment of employee decisions and behaviors with organizational goals because workers see the benefits that accrue when their interests coincide with those of the employer” (Lynch, 2008)

It is clear that when establishing of a proper employee handbook, employees can be expected to have a higher productivity rate. Higher productivity rates are due to positive reinforcements from the workplace. These positive reinforcements can also form a sense of belonging. Having a well executed handbook can also allow employees to have a better understanding of exactly what the employer wants from them, and how those wants and needs ultimately effects the company as whole.

**Development of an Employee Training Manual**

The development of an employee-training manual can be overwhelming to a business
owner, considering the amount of information that needs to be inserted into it. Based on the words from Small Business Support writer JD Supra, there are several vital factors that go into creating an effective employee-training manual.

1. “Paint with a broad brush
2. Include Equal Employment Opportunity & Anti-Harassment Policies
3. Include Family and Medical Leave Act Information
4. Include a Social Media Policy
5. Require Receipt and Acknowledgement
6. Review employee handbook annually
7. Just do it.” (Supra, 2013)

These seven steps are vital to the creation and completion of an employee manual. However, some of the steps are without descriptions, which makes the information hard to understand.

In summary, the first of the seven steps has to do with using a broad brush. In other words, the author trying to educate the business owner by explaining how to discuss the business philosophy as well as the general expectations held for employees. This concept can ease employees into the material, rather than directly stating work policies. The second and most important step according to Supra, has to do with equal employment opportunities that are directly related to the Non-Discrimination Policy, and the Anti-Harassment Policy. As a business owner, stating both of these policies outright will reduce the amount of lawsuits that could potentially be placed on their company. The third step pertains to family and medical leave information as well as descriptions of these benefits. The fourth step pertains to the do’s as well as the do-not’s of social media, and how the use of social media in the workplace should
only be used positively. The fifth step demonstrates the acknowledgement of information that has been put in the manual, and that it has been understood. Generally, paperwork to be signed would be included in the fifth step. The sixth step clarifies that there should be an annual review of the manual, and corrections of any irrelevant or revised procedures or policies. Step six generally has to do with the equal opportunities and harassment policies, as well as the family and medical leave acts. The last step is to simply create the training manual itself. Supra states, “As small businesses grow, it becomes increasingly important to have a structured set of rules and guidelines to address everyday issues that the employees are aware of” (Supra, 2013.) Throughout the article, the author makes it clear to the reader that once a business owner has full understanding of the conceptual information presented, creating an employee training manual can be easy, as well as assist to the success of the organization.

Important Pieces to Employee Manuals

There are many important pieces that go into an employee training manuals however, according to the US Small Business Administration, there are several pieces that must be included throughout. Those being, Non Disclosure Agreements and Conflict of Interest Statements, Anti-Discrimination Policies, Compensation (Wage and Hour Laws, Employment Taxes, Workers Compensation), Work Schedules, Standards of conduct, General Employment information, Safety and Security, Computers and Technology, Media Relations, Employee Benefits, and Leave Policies (SBA, 2014). Without these factors, it is said that employers can lose means of communication towards employees. With a properly written manual, employees
know what to expect and what their rights are. This alone can prevent confusion and frustration in the workplace.

**Implementation of Training Manuals**

The implementation of a training manual is just as important as having an employee manual in the first place. “Having an employee handbook is an entirely different issue than using it. It is critical that management’s behaviors support the states policies and that their decisions are consistent across the organization.” (Lynch, 2008) Lynch makes it clear throughout his article that management practices have a large effect on how training manuals are used and implemented. In order to have an effective use of the manual, you must have effective management practices to go along with it. For example, in an article titled, *How to Enforce Policies Consistently at Work*, written by Ruth Mayhew, Mayhew states, “Employers who selectively apply workplace policies eventually risk losing employees to substantial turnover based on low employee morale and overall dissatisfaction.” In other words, without effectively enforcing all policies, a business’s overall success can be compromised. In order to decrease the chances of hindering workplace success due to selectively applied workplace policies, Mayhew suggests several simple steps such as handbook revisions, posting policies, training for supervisors regarding policies and how to apply them, constructing disciplinary forms, and most importantly, explaining workplace policies to new hires.
Summary

Inland Vet Supply’s employee training manual will present most all of the foregoing information. The main focus of this manual was to teach as well as instill correct store procedures as well as protocols. It is with hope that at a later date more legal information will be added to the manual to fully complete it. The expectation for this manual is that the procedural information will be implemented and referred back to on a daily basis.
Chapter Three

Methodology

This senior project involves the development of the Inland Vet Supply employee training manual. The employee training manual is the first ever to be created for Inland Vet Supply in Norco, California. The manual was developed and intended to be used for quick referencing of proper work protocols. The manual will assist throughout the new employees store orientation duration phase, as well as aiding in training new employees hired to work at Inland Vet Supply. This chapter is to focus on all major considerations in developing the employee training manual including, managerial input aiding in the creation of the manual, manual content, manual design, and manual details.

Meeting with Management

A meeting with Tammy Horal, the manager of Inland Vet Supply, was conducted in order to determine the important attributes that should be included throughout the employee training manual. The initial meeting with Horal took place at Inland Vet Supply in the summer of 2014. Other meetings and conversations with Horal generally took place both in person and over the telephone on various occasions, after the initial contact. Meetings with Horal also helped to address important factors in the manual to emphasize. Throughout the development of the manual, Horal provided specific feedback and guidance.
Manual Content

The employee-training manual will consist of written explanations of Inland Vet Supply’s standard operating procedures that are executed on a daily basis. The manual will outline and identify important steps when correctly conducting store procedures. Procedures will then be broken down into an easily comprehensible step-by-step format. The directness of the manual will keep information concise; the manual is not intended to overwhelm new employees with information, it is to aid in success. The procedural steps will also teach new employees how to accurately handle situations they may come across throughout the duration of their employment at Inland Vet Supply. There will also be some store diagrams, as well as store inserts that will need to be referenced to on a daily basis.

Manual Details

The employee training manual for Inland Vet Supply was written in such a way that it would address only store policies and procedures. The manual was written in a simplistic manner, and at a high school level to avoid any possible confusion. Writing the manual at a more simplistic reading level was important due to the age differences and educational level of potential new employees. The manual will be distributed to every new employee at Inland Vet Supply. There will also be a manual permanently located in the store office. The manual will be bound in a three-ring binder. This will help keep it organized and easy to find.
Composing the Manual

The layout of the manual that was used was from a template found on Microsoft Word. This template was chosen to keep the manual simple and organized. The color scheme was part of the manual template. The font used is Arial, and Arial Black in sizes 14 to 16 depending on if the words are used in a title or if they are a description. The manual will also have a table of contents and easily referenced titles.

Manual Outline

The following is the outline for Inland Vet Supply’s employee training manual. The manual was designed with simplicity and ease when trying to find reference pages.

1. Title Page
2. Table of Contents
   I. About Inland Vet Supply
   II. Mission Statement
   III. Hours of Work, Attendance, and Punctuality
   IV. Store Procedures
   V. Product Related Procedures
   VI. Helping the Customer
   VII. Manual Inserts
Summary

Meeting with management and organizing the manual in an understandable fashion were two important factors when composing Inland Vet Supply’s employee training manual. If any forementioned procedures were absent through the creation of the manual, the manual would not have properly fit the new employees needs as well as the company’s needs.
Chapter 4

Results

The goal for this senior project was to create an employee training manual for Inland Vet Supply located in Norco California. The intent of the manual was to provide an informative resource for new employees to follow when practicing store policies and procedures. As a result of using the manual, new employees should comprehend correct store protocols and procedures, readily understand what is to be expected of them, and ultimately increase their work efficiency.
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   C. Special Orders  
   D. Customer Discounts  
   E. Customer Billing  
   F. Selling Customer Gift Certificates  
   G. Applying Customer Gift Certificates  
VII. Manual Inserts  
   A. Customer Resale Certificate  
   B. Customer Invoice Ticket  
   C. Customer Gift Certificate  
   D. Order Form Cover Sheet  
   E. Order Form Sheet  
   F. End of Day Report Sheet
I. About Inland Vet Supply:

Inland Vet Supply is a small business located in Norco Ca. It is known for its friendly customer service, knowledgeable staff, and unbeatable prices. The customer base of Inland Vet Supply varies from veterinarians, trainers, farriers, and locals. Inland Vet Supply carries an array of animal products, from supplements to vaccines, and even pesticides.

II. Mission

As an employee at Inland Vet Supply, it is our goal to provide customers with reliable product knowledge and a welcoming environment! It is important to always put the customer first and to make sure that their needs are our priority.
III. Hours of Work, Attendance, and Punctuality:

A. Hours of Work

*Inland Vet Supply Hours of Operation:*
Monday – Friday: 8:00AM – 6:00PM  
Saturday: 9:00AM – 6:00PM  
Sunday: 9:00AM – 2:00PM

- Employees may request the opportunity to vary their work schedules (within employer-defined limits) to better accommodate personal responsibilities.
- Hours may vary depending on work tasks and/or manager approval.
- The employee’s manager shall determine the hours of employment that best suits the needs of the work to be done by the individual employee.

B. Attendance and Punctuality

- Attendance is a key factor in your job performance. Punctuality and regular attendance are expected of all employees. Excessive absences (whether excused or unexcused), tardiness or leaving early is unacceptable. If you are absent for any reason or plan to arrive late or leave early, you must notify your supervisor and co-workers as far in advance as possible. In the event of an emergency, you must notify your supervisor as soon as possible.
- Excessive absences, tardiness or leaving early will be grounds for discipline up to and including termination. Depending on the circumstances, including the employee’s length of employment, Inland Vet Supply’s supervisor may advise employees prior to termination for excessive absences, tardiness or leaving early.
IV. Store Procedures:

A. Opening Store

When scheduled for a morning shift, you will have the responsibility of opening the store to the public. It is crucial that this is done correctly.

The store opens at 8:00am Monday through Friday. You MUST arrive at the store no later than 7:45am. The store opens at 9:00am Saturday and Sunday. You MUST arrive at the store no later than 8:45am.

Procedure

1. Unlock warehouse door and silence alarm code.
2. Unlock office and clock in
3. Make sure main computer is turned on*
4. Turn both register computers on and log in
5. Bring up CashBox and MicroBiz on both register computers
6. Get removable change trays out of office and place into register drawers
7. Turn on all store lights
8. Unlock all store doors
9. Unlock loading dock door in warehouse and roll the plastic horse into the parking lot
10. Place "Employee Only Sign" attached to rope across the warehouse loading dock.

* If the main computer is not turned on, the front two computers by register will not work. If there is any discrepancies when turning this computer on call Tom for further assistance.

B. Closing Store

When scheduled for the afternoon shift, you will have the responsibility of closing the store. It is crucial that this is done correctly.

The store closes at 6:00pm Monday through Saturday. The store closes at 2:00pm on Sunday. You MUST NOT close the store any earlier than the scheduled closing times.
Procedure:

1. Lock all doors
2. Turn off all lights
3. Close out of MicroBiz
4. Print off the daily credit card totals from CashBox, then close out of CashBox
5. Shut down both register computers
6. Turn off monitors
7. Remove both removable change trays from both drawers*

*When removing change trays, make sure that all cash and checks have been picked up out of drawers.

C. Closeout Procedures and Paperwork:

i. Counting Registers: Both registers will need to be counted and balanced to $200, with no bills larger than $20 (See Pg. 21) Credit/debit card receipt totals will also need to be printed out.

ii. Counting Change Reserve: Change reserve will need to be counted and balanced to $300 (See Pg. 21)

iii. End of Day Sheet: Drawer totals, change reserve totals, and any ROAs for the day will be documented here. (See Pg. 21)

iv. Counting Deposit: All remaining cash (aside from both previously balanced drawers, and change reserve) and checks will need to be totaled and written on deposit slip. This will then be put into an envelope with any checks. The deposit will then be placed into the safe.

v. End of Day Report: End of day reports will need to be printed out at the end of each workday. All cash, checks, credit and debit card totals will be added and documented here. When finished, the sheet will then be saved and emailed to Inland Vet Supply’s accountant.
D. Inventory

Inventory is completed on a bi-annual basis. It is important for all employees to be present when inventory is to be completed. All products in the store will be physically accounted for during this time, one bin letter at a time.

Procedure:

1. Print out store inventory totals each morning inventory is to be completed
2. Print out inventory sheets from MicroBiz starting with Bin A.
3. Count items in warehouse first, flag*, and mark inventory sheet
4. Count items in store, mark inventory sheet
5. As each sheet is finished, enter new quantities into computer immediately.

*Flagging items indicates that they have been counted. At the end of inventory every product should be flagged. If products are not flagged, they may have been missed.

V. Product Related Procedures:

A. Product Knowledge

Knowledge about products that Inland Vet Supply carries will benefit employees throughout the duration of their employment. Customers rely on employees to give them reliable product facts, uses, and prices. Product knowledge can be attained by:

1. Researching product and the company
2. Communicating with product representatives
3. Reading product labels
4. Personal experience with the product
5. Customer reviews

B. Checking Product In

Checking product in correctly is an important factor when it comes to Inland Vet Supply’s Inventory. Make sure to follow these steps to efficiently check product in.
Remember, always ask fellow supervisors or co-workers if unsure about products received.

Procedure:

1. Locate packing slip on or in freight shipment*
2. Indicate correct address**
3. Unpack one box at a time
4. Stay organized
5. Check off item quantities when correct
6. Circle or mark quantities if missing or broken***
7. When finished sign name and date

*If there is no packing slip, first check office or ask other employees. If no packing slip is located call company that product was sent from.

** If the address does not say Inland Vet Supply, do not open it. Call delivery company to resolve problem. (UPS, FEDEX, or other delivery company)

*** If the quantities are not correct with the packing slip or there are broken products, call company that order was received from to resolve the issue. Occasionally, products may not have a notification that they are on back order.

C. Putting Product Out/ Re-Stocking:

Restocking product is an important factor to Inland Vet Supply’s inventory, as well as customer satisfaction. When putting product out, employees will walk the isles and re-organize the shelves. This allows employees to look at product, clean product if needed, check if it’s expired, determine if more needs to be ordered, and also become aware of any price changes that need to be fixed.

Procedure:

1. Find shelf space where product usually resides*
2. Price product with most recent price as indicated in the computer
3. Look at all products (newer and older) and place new products in the back and older products in the front.
4. Place product on shelf label facing outwards**
5. Excess product will be stored in the warehouse***
*If you cannot locate where the product is, ask another employee. If no determination can be made as to where product should go, look in computer under BIN. (EX: Joint Supplements are in BIN C)

** If shelf and or products are dusty or have any type of residues, clean them off.

***Excess products should be stored in the warehouse for further stocking. MAKE SURE that when restocking shelves product in the warehouse is placed into the store BEFORE more of that same product gets ordered.

IF YOU SHOULD HAVE TO MOVE PRODUCT

1. Change bin number in computer.
2. Alert other employees immediately.

D. Entering New Product:

Entering new product into the computer is VITAL to the inventory process. Without correct descriptions, codes, or SKU (Stock Keeping Unit) numbers products cannot be found easily. This can make ringing up customers and conducting store inventory challenging.

Procedure:

1. Look for product on the invoice to confirm correct description
2. In MircoBiz under "Add Item" scan product’s SKU
3. Type into description box:
   a. Brand
   b. Product
   c. Style
   d. Size
   e. Color

Example 1: You are to enter a new wound dressing into the computer, the product reads "Super Nitrofurazone" it weighs 1lb and is from the Gateway Products company.

Product description should read, Super Nitrofurazone 1lb

Example 2: You are entering a Kensington Fly mask that has a webbing trim without ears, XL in size, and a color known as plum ice.
Product Description should read, Kens Fly Mask No Ear XL Plum Ice

4. Type under "Cost", cost given on invoice
5. Type under "Last Purchased Cost", cost given on invoice
6. Type under "Price" suggested retail or MSRP
7. Enter correct bin letter*
8. Enter correct category of product
9. Enter vendor SKU**
10. Enter vendor ID

*BIN letters are assigned to each shelving unit and or wall that products reside on. If you are unsure about a bin, look at diagram on next page. (Fig. 1)

**Vendor SKU's are important when ordering/reordering a product as well as imputing invoices. If you cannot find a vendor SKU on invoice, look in vendor catalogs.
A - Hoof and wound
B - Leather tack and splint/bell boots
C - Fly sprays and joint supplements
D - Electrolytes and vitamins
E - Liquid supplements and shampoo
F - Halter, tack, and misc.
G - Shampoo, day sheets, and fly sheets, fly masks
H - Brushes and grooming supplies
I - Dog Collars and fly masks
J - Dog wormers and horse wormers
K - Bandages and scissors
L - Vaccines, needles/syringes, and home décor
M - Insemination kits, repro products, and misc. veterinary items.
N - Blankets
O - Shoeing supplies
W - Warehouse items, feed, and grain
E. Changing Product Descriptions

Changing product descriptions is a helpful way to make sure that products are not miss-sold. Throughout time, companies may change labels of products. It is important to match the correct description to the correct products. Make sure other employees are informed of the change before any editing occurs.

Procedure:

1. Confirm that new description is correct
2. Scan product’s SKU if needed
3. Type into description box:
   a. Brand
   b. Product
   c. Style
   d. Size
   e. Color

   Example 1: You are to enter a new wound dressing into the computer, the product reads “Super Nitrofurazone” it weighs 1lb and is from the Gateway Products company.

   Product description should read, Super Nitrofurazone 1lb

   Example 2: You are entering a Kensington Fly mask that has a webbing trim without ears, XL in size, and a color known as plum ice.

   Product Description should read, Kens Fly Mask No Ear XL Plum Ice

F. Returning Product

Customers will return products for various reasons. If the reason for return is legitimate, we will gladly return, refund, or exchange product.

Procedure:

1. Scan Product in MicroBiz
2. Select “Return”
3. Select either return to inventory, or take out of inventory (damaged/used)
4. Print customers new receipt, sign old receipt and staple together
VI. Helping the Customer

A. Customer Needs

The customer is by far the most important aspect to Inland Vet Supply. It is important that all of the customer’s needs and wants are met in a timely and proper fashion.

Things to Remember!

- Attitude is key, DO NOT take your bad day out on the customer.
- If you are unsure of something ask other employees before giving customer unreliable information.
- If you are unable to assist the customer with their questions, ask another employee.
- If customers are buying heavy items or feed, ALWAYS offer to take the product out for them.
- If customers look confused, always ask customers if they need your assistance.
- Physically show customers where products are located, guide them directly to the product they are looking for.
- NEVER argue with customers, the customer is always right.

B. Ringing Customers Up

When ringing customers up there are some crucial steps to follow.

Procedure:

1. Ask customer if they currently have an account with IVS
   a. Bring up customer under the “Customer” tab in MicroBiz
   b. Type in Last Name, Company, or Phone Number
2. If customer is not in the computer you can add them into the system by creating an account**
3. If the customer is in the computer and has a discount under their name, make sure that the discount is applied to their final total**
4. Double check that all products have rung up as is
5. Discrepancies in prices may arise***
6. If everything is correct, finish ringing up and print receipt
Adding a customer to the computer is a good way to keep track of products that we have sold to them. We can look up a customer's history and inform them of products they have purchased in the past such as de-wormers and vaccines. We can also inform them of dates that they purchased certain products.

**Discounts that are set in the computer CANNOT be added on top of discount days. (EX: Tuesday; 10% off vaccines, Wednesday; 10% off de-wormers, Thursday; 10% off pesticides)**

***Customers may question our prices versus prices that they have seen in other stores. If other stores have lower prices, we can match the lower price ONLY if it is not lower than the price of our purchased cost. We also need proof to do this.***

C. Special Orders

Special orders are just one of the ways that Inland Vet serves our customers product needs and wants. Customers will sometimes come in with product labels or information regarding products that we do not carry.

Procedure:

1. Look up product in MicroBiz*
2. Look up product in order catalogs**
3. Write down product information/customers information on special order sheet
4. Follow up with customer after finalization of special order is complete***

* Some products that we are asked to carry have been ordered before. Looking up product information on MicroBiz will allow you to determine the vendor we get it from, as well as the price.

** Some products that our vendors carry are not in their catalogs. A simple phone call will determine if a product can be ordered and sent to us. We cannot carry every product because our vendors do not supply everything.

*** Before a special order is placed, call customer to verify if they still wish to purchase product. Before finalizing an order with a vendor, speak with manager. After order is placed, call customer to inform them when product will come in.

**IF PRODUCT HAS NEVER BEEN ORDERED**

Follow "Entering New Products" procedure (IV, D) when product comes in.
E. Customer Billing

Billing customers is done on a monthly basis. There are only a select few customers that are able to charge product to their account and get billed during the billing cycle. Some of these customers have discounts under their accounts, and it is important to recognize this while in the process of billing.

Procedure:

1. Ring any tickets that customers have not paid at end of the month*
2. Customer receives pink copies of invoice ticket. Inland Vet keeps yellow and white copies for customer files. (See Pg. 17)
3. Bring up customer statements in MicroBiz
4. Check all customers with a balance, print with addresses on them
5. Place invoice inside envelope, seal, stamp, and send out.

*Some customers, like farriers will often write tickets in the morning and come back in the afternoon to pay them. If they do not get paid, they will be billed. When billing customers, it is important to verify discounts on products before they are charged.

F. Selling Customer Gift Certificates

Customers will often wish to purchase gift certificates, especially around the holidays. It is important to understand the process of selling a gift certificate as well as applying that gift certificate towards a purchase.

Procedure:

1. Fill out gift certificate with amount, date, and signature (See Pg. 18)
2. Document amount on store invoice ticket (3 sheet), how paid*, and write ROA amount (See Pg. 17)
3. Give customer pink copy of invoice ticket, along with gift certificate
4. Document customer name, date sold, and invoice ticket number on notepad located in office

*Customers will either pay with cash or credit card.

1. If customers are paying with cash, ring up preexisting total separate from gift certificate total. Put cash for gift certificate with separate invoice ticket and place in office.
E. Customer Billing

Billing customers is done on a monthly basis. There are only a select few customers that are able to charge product to their account and get billed during the billing cycle. Some of these customers have discounts under their accounts, and it is important to recognize this while in the process of billing.

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3. Give customer pink copy of invoice ticket, along with gift certificate
4. Document customer name, date sold, and invoice ticket number on notepad located in office

*Customers will either pay with cash or credit card.

1. If customers are paying with cash, ring up preexisting total separate from gift certificate total. Put cash for gift certificate with separate invoice ticket and place in office.
2. If customers are paying with a credit card, apply gift certificate amount to preexisting total—if they have one. If they are only purchasing a gift certificate, charge them only through Cashbox. Reprint cashbox receipt and staple it on invoice ticket.

Make sure to write ROA (return on assets) on invoice ticket, so that it can be put into the system at a later time.

G. Applying Customer Gift Certificates

Procedure:

1. Bring up "Gift Certificate Account" in MircoBiz
2. Ring customers items under this account*
3. When finishing transaction, type in gift certificate amount and select "charge to account***

*If customer receives a discount on normal store items, look them up in MicroBiz under "customer" and apply same discount to items to be purchased with gift certificate.

**If the amount is less than gift certificate total, re-write the new balance on a new gift certificate. If amount is larger than the original gift certificate total, only charge the total gift certificate amount to the Gift Certificate account. It will be up to the customer how they will pay their remaining balance.
VII. Manual Inserts

A. Customer Resale Certificate

I hereby certify:

1. I hold valid seller's permit number: __________________________

2. I am engaged in the business of selling the following type of tangible personal property:

   __________________________________________________________

3. This certificate is for the purchase from ______________________ of the item(s) I have listed in paragraph 5 below: [vendor's name]

4. I will resell the item(s) listed in paragraph 5, which I am purchasing under this resale certificate in the form of tangible personal property in the regular course of my business operations, and I will do so prior to making any use of the item(s) other than demonstration and display while holding the item(s) for sale in the regular course of my business. I understand that if I use the item(s) purchased under this certificate in any manner other than as just described, I will owe use tax based on each item's purchase price or as otherwise provided by law.

5. Description of property to be purchased for resale:

   __________________________________________________________

6. I have read and understand the following:

   For Your Information: A person may be guilty of a misdemeanor under Revenue and Taxation Code section 6394.5 if the purchaser knows at the time of purchase that he or she will not resell the purchased item prior to any use (other than retention, demonstration, or display while holding it for resale) and he or she furnishes a resale certificate to avoid payment to the seller of an amount as tax. Additionally, a person misusing a resale certificate for personal gain or to evade the payment of tax is liable, for each purchase, for the tax that would have been due, plus a penalty of 10 percent of the tax or $500, whichever is more.

NAME OF PURCHASER:

SIGNATURE OF PURCHASER, PURCHASER'S EMPLOYEE OR AUTHORIZED REPRESENTATIVE:

PRINTED NAME OF PURCHASER:

ADDRESS OF PURCHASER:

TELEPHONE NUMBER:

DATE: ____________
# B. Customer Invoice Tickets

31534

1237 Sixth Street
Norco, CA 92860
951.272.3900
800.876.3913
FAX: 951.272.3970

32785 Temecula Pkwy
Temecula, CA 92592
951-302-3200
866-963-0483
FAX 951-302-3265

<table>
<thead>
<tr>
<th>Customer's Order No.</th>
<th>Date</th>
<th>Name</th>
<th>Address</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>SOLD BY</th>
<th>CASH</th>
<th>CHECK</th>
<th>CREDIT CARD</th>
<th>CHARGE</th>
<th>ON ACCOUNT</th>
<th>MONEY</th>
<th>REMITTANCE</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>QUANTITY</th>
<th>DESCRIPTION</th>
<th>PRICE</th>
<th>AMOUNT</th>
</tr>
</thead>
</table>

All claims and returned goods MUST be accompanied by this bill
ACCOUNT DUE UPON RECEIPT OF INVOICE. 1.5% INTEREST PER MONTH CHARGED ON OVER 30 DAY ACCOUNTS
Received By

<table>
<thead>
<tr>
<th>TAX</th>
<th>FREIGHT</th>
<th>TOTAL</th>
</tr>
</thead>
</table>

17
C. Customer Gift Certificates

Inland Vet Supply
GIFT CERTIFICATE

Amount: ______________________

IVS authorized Signature:

X __________________________

Date Issued: __________________

Norco Location;
1237 Sixth St.
Norco, Ca. 92860
951.272.3900

Temecula Location
32785 Temecula Parkway
Temecula, Ca 92592
951.302.3200
D. Order Form Cover Sheet

Inland Vet Supply

Norco Location
1237 Sixth St.
#104
Norco, Ca 92860
951.272.3900
Fax 951.272.3970

Temecula Location
32785 Temecula Pkwy.
#120
Temecula, Ca 92592
951.302.3200
Fax 951.302.3265

FOR IMMEDIATE DELIVERY

Dept. ________________________ Attn: ________________________
Fax # ________________________ Date: ________________________
From: ________________________ Phone: ________________________
Total Number of Pages (including cover sheet) _______

Special Instructions: ______ Please call or fax order confirmation.
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
# E. Order Form

**Inland Vet Supply Norco Orders Sheet**

1237 Sixth Street #104  Norco, CA 92860  (951) 272-3900  Fax (951) 272-3970

<table>
<thead>
<tr>
<th>Company:</th>
<th>Date:</th>
<th>Attn:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Vendor Fax:</th>
<th>From:</th>
<th>Number of Pages:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>ITEM #</th>
<th>DESCRIPTION</th>
<th>SIZE/COLOR</th>
<th>QTY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
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<td></td>
</tr>
</tbody>
</table>

**Notes:**
F. End of the Day Report

<table>
<thead>
<tr>
<th>Employees:</th>
<th>Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Drawer 1 count</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>50.00</td>
<td></td>
</tr>
<tr>
<td>20.00</td>
<td></td>
</tr>
<tr>
<td>10.00</td>
<td></td>
</tr>
<tr>
<td>5.00</td>
<td></td>
</tr>
<tr>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td></td>
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<tr>
<td>10</td>
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<tr>
<td>.05</td>
<td></td>
</tr>
<tr>
<td>.01</td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
</tr>
<tr>
<td>Minus drawer fund</td>
<td>-200.00</td>
</tr>
<tr>
<td>Deposit drawer 1</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Drawer 2 count</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>50.00</td>
<td></td>
</tr>
<tr>
<td>20.00</td>
<td></td>
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<tr>
<td>10.00</td>
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<tr>
<td>TOTAL</td>
<td></td>
</tr>
<tr>
<td>Minus drawer fund</td>
<td>-200.00</td>
</tr>
<tr>
<td>Deposit drawer 1</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Change fund daily</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
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<td></td>
</tr>
<tr>
<td>50.00</td>
<td></td>
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<tr>
<td>20.00</td>
<td></td>
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<td>10.00</td>
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<td>5.00</td>
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<td>1.00</td>
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<td>.25</td>
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<td></td>
</tr>
<tr>
<td>.05</td>
<td></td>
</tr>
<tr>
<td>.01</td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
</tr>
<tr>
<td>Should be 300.00</td>
<td></td>
</tr>
</tbody>
</table>

Received on Accounts:

<table>
<thead>
<tr>
<th>Customer:</th>
<th>ROA Amount:</th>
<th>Payment method:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Customer:</th>
<th>ROA Amount:</th>
<th>Payment method:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Customer:</th>
<th>ROA Amount:</th>
<th>Payment method:</th>
</tr>
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<tbody>
<tr>
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<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Customer:</th>
<th>ROA Amount:</th>
<th>Payment method:</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>

Total ROA Received $__NOTES__
Chapter 5

Summary, Recommendations, and Conclusions

Summary

The goal for this senior project was to create an employee training manual for Inland Vet Supply. The intent for the manual itself was to provide a resource that new and current employees can use when practicing store policies and procedures. This training manual will also aid in reducing any improper training of new employees. When the manual is published and distributed, new employees will then understand what is expected of them, and how to apply correct store policies and procedures to daily tasks. This manual should be continually updated as new store protocols and procedures are implemented.

Recommendations

The following recommendations should be considered prior to the revision of Inland Vet Supply’s employee training manual:

1. Handing manual out to new employees to keep for personal reference.
   - This recommendation will allow new employees to read over store procedures on their own time. This will also allow new employees to obtain knowledge for correct store procedures. This recommendation will additionally cut down the time it takes for old employees to train new employees, ultimately increasing work efficiency. Lastly, it will aid as a quick reference guide to store procedures in times of doubt or confusion.

2. Similar documents at the Temecula store.
• This recommendation will possibly help establish a similar employee training manual at Inland Vet Supply’s sister store located in Temecula California. The goal for the Temecula employee training manual will be the same as for the Norco training manual; to aid as a quick reference to correct store procedures, as well as reducing confusion, and increasing work efficiency.

3. Consult with all current employees regarding revision needs.

• This recommendation will possibly help to establish new ideas for more procedures that can be added to the manual. Employee input will be essential to keeping the manual up to date and relevant to the current store policies and procedures. Employee revision of the manual will also help reduce any confusion and allow new perspectives to be achieved.

4. Include more pictures and images of the store itself.

• New employees must familiarize themselves with the layout of Inland Vet Supply, as well as where the products in the store are located. Including more images of how products are shelved and where they are located throughout the store may be helpful throughout their learning process.

5. Include more specific step-by-step procedures.

• There are many specific details that go into all procedures and policies that occur at Inland Vet Supply. In the future, more specific details could be addressed, added onto, or completely changed before imputing into the manual. It was important that the most crucial procedures were addressed first and that they were easily understood, now that the basis is laid out more specific information can be added.
6. Input more information regarding salary, work rules, work regulations, etc.

- This recommendation will allow the manual to become more official. There are many specific rules and regulations for businesses when it comes to the workplace. The main focus for this part of the manual was to teach and establish proper store procedures to new employees.

Conclusions

This employee training manual will hopefully aid as an instructive resource for newer employees as well as seasoned employees. The manual should increase work productivity and aid in the ease of learning new protocols and procedures that may be hard to grasp. New employees should gain the proper knowledge to perform normal procedures in the event that there was a sudden situation that led to uncertainty. It is with hope that the manual always be used to its full potential and that all employees both new and old benefit from the information that has been compiled within it.
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Appendix A

Inland Vet Supply Employee Training Manual
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I. About Inland Vet Supply:

Inland Vet Supply is a small business located in Norco Ca. It is known for its friendly customer service, knowledgeable staff, and unbeatable prices. The customer base of Inland Vet Supply varies from veterinarians, trainers, farriers, and locals. Inland Vet Supply carries an array of animal products, from supplements to vaccines, and even pesticides.

II. Mission

As an employee at Inland Vet Supply, it is our goal to provide customers with reliable product knowledge and a welcoming environment! It is important to always put the customer first and to make sure that their needs are our priority.
III. Hours of Work, Attendance, and Punctuality:

A. Hours of Work

Inland Vet Supply Hours of Operation:
Monday – Friday: 8:00AM – 6:00PM
Saturday: 9:00AM – 6:00PM
Sunday: 9:00AM – 2:00PM

- Employees may request the opportunity to vary their work schedules (within employer-defined limits) to better accommodate personal responsibilities.

- Hours may vary depending on work tasks and/or manager approval.

- The employee’s manager shall determine the hours of employment that best suits the needs of the work to be done by the individual employee.

B. Attendance and Punctuality

- Attendance is a key factor in your job performance. Punctuality and regular attendance are expected of all employees. Excessive absences (whether excused or unexcused), tardiness or leaving early is unacceptable. If you are absent for any reason or plan to arrive late or leave early, you must notify your supervisor and co-workers as far in advance as possible. In the event of an emergency, you must notify your supervisor as soon as possible.

- Excessive absences, tardiness or leaving early will be grounds for discipline up to and including termination. Depending on the circumstances, including the employee’s length of employment, Inland Vet Supply’s supervisor may advise employees prior to termination for excessive absences, tardiness or leaving early.
IV. Store Procedures:

A. Opening Store

When scheduled for a morning shift, you will have the responsibility of opening the store to the public. It is crucial that this is done correctly.

The store opens at 8:00am Monday through Friday. You MUST arrive at the store no later than 7:45am. The store opens at 9:00am Saturday and Sunday. You MUST arrive at the store no later than 8:45am.

Procedure

1. Unlock warehouse door and silence alarm code.
2. Unlock office and clock in
3. Make sure main computer is turned on*
4. Turn both register computers on and log in
5. Bring up CashBox and MicroBiz on both register computers
6. Get removable change trays out of office and place into register drawers
7. Turn on all store lights
8. Unlock all store doors
9. Unlock loading dock door in warehouse and roll the plastic horse into the parking lot
10. Place “Employee Only Sign” attached to rope across the warehouse loading dock.

* If the main computer is not turned on, the front two computers by register will not work. If there is any discrepancies when turning this computer on call Tom for further assistance.

B. Closing Store

When scheduled for the afternoon shift, you will have the responsibility of closing the store. It is crucial that this is done correctly.

The store closes at 6:00pm Monday through Saturday. The store closes at 2:00pm on Sunday. You MUST NOT close the store any earlier than the scheduled closing times.
Procedure:

1. Lock all doors
2. Turn off all lights
3. Close out of MicroBiz
4. Print off the daily credit card totals from CashBox, then close out of CashBox
5. Shut down both register computers
6. Turn off monitors
7. Remove both removable change trays from both drawers*

*When removing change trays, make sure that all cash and checks have been picked up out of drawers.

C. Closeout Procedures and Paperwork:

i. **Counting Registers:** Both registers will need to be counted and balanced to $200, with no bills larger than $20 (See Pg. 21) Credit/debit card receipt totals will also need to be printed out.

ii. **Counting Change Reserve:** Change reserve will need to be counted and balanced to $300 (See Pg. 21)

iii. **End of Day Sheet:** Drawer totals, change reserve totals, and any ROAs for the day will be documented here. (See Pg. 21)

iv. **Counting Deposit:** All remaining cash (aside from both previously balanced drawers, and change reserve) and checks will need to be totaled and written on deposit slip. This will then be put into an envelope with any checks. The deposit will then be placed into the safe.

v. **End of Day Report:** End of day reports will need to be printed out at the end of each workday. All cash, checks, credit and debit card totals will be added and documented here. When finished, the sheet will then be saved and emailed to Inland Vet Supply’s accountant.
D. Inventory

Inventory is completed on a bi-annual basis. It is important for all employees to be present when inventory is to be completed. All products in the store will be physically accounted for during this time, one bin letter at a time.

Procedure:

1. Print out store inventory totals each morning inventory is to be completed
2. Print out inventory sheets from MicroBiz starting with Bin A.
3. Count items in warehouse first, flag*, and mark inventory sheet
4. Count items in store, mark inventory sheet
5. As each sheet is finished, enter new quantities into computer immediately.

*Flagging items indicates that they have been counted. At the end of inventory every product should be flagged. If products are not flagged, they may have been missed.

V. Product Related Procedures:

A. Product Knowledge

Knowledge about products that Inland Vet Supply carries will benefit employees throughout the duration of their employment. Customers rely on employees to give them reliable product facts, uses, and prices. Product knowledge can be attained by:

1. Researching product and the company
2. Communicating with product representatives
3. Reading product labels
4. Personal experience with the product
5. Customer reviews

B. Checking Product In

Checking product in correctly is an important factor when it comes to Inland Vet Supply’s Inventory. Make sure to follow these steps to efficiently check product in.
Remember, always ask fellow supervisors or co-workers if unsure about products received.

Procedure:

1. Locate packing slip on or in freight shipment*
2. Indicate correct address**
3. Unpack one box at a time
4. Stay organized
5. Check off item quantities when correct
6. Circle or mark quantities if missing or broken***
7. When finished sign name and date

*If there is no packing slip, first check office or ask other employees. If no packing slip is located call company that product was sent from.

** If the address does not say Inland Vet Supply, do not open it. Call delivery company to resolve problem. (UPS, FEDEX, or other delivery company)

*** If the quantities are not correct with the packing slip or there are broken products, call company that order was received from to resolve the issue. Occasionally, products may not have a notification that they are on back order.

C. Putting Product Out/ Re-Stocking:

Restocking product is an important factor to Inland Vet Supply’s inventory, as well as customer satisfaction. When putting product out, employees will walk the isles and re-organize the shelves. This allows employees to look at product, clean product if needed, check if it’s expired, determine if more needs to be ordered, and also become aware of any price changes that need to be fixed.

Procedure:

1. Find shelf space where product usually resides*
2. Price product with most recent price as indicated in the computer
3. Look at all products (newer and older) and place new products in the back and older products in the front.
4. Place product on shelf label facing outwards**
5. Excess product will be stored in the warehouse***
*If you cannot locate where the product is, ask another employee. If no determination can be made as to where product should go, look in computer under BIN. (EX: Joint Supplements are in BIN C)

** If shelf and or products are dusty or have any type of residues, clean them off.

***Excess products should be stored in the warehouse for further stocking. MAKE SURE that when restocking shelves product in the warehouse is placed into the store BEFORE more of that same product gets ordered.

IF YOU SHOULD HAVE TO MOVE PRODUCT
  1. Change bin number in computer.
  2. Alert other employees immediately.

D. Entering New Product:

Entering new product into the computer is VITAL to the inventory process. Without correct descriptions, codes, or SKU (Stock Keeping Unit) numbers, products cannot be found easily. This can make ringing up customers and conducting store inventory challenging.

Procedure:

1. Look for product on the invoice to confirm correct description
2. In MircoBiz under “Add Item” scan product’s SKU
3. Type into description box:
   a. Brand
   b. Product
   c. Style
   d. Size
   e. Color

Example 1: You are to enter a new wound dressing into the computer, the product reads “Super Nitrofurazone” it weighs 1lb and is from the Gateway Products company.

Product description should read, Super Nitrofurazone 1lb

Example 2: You are entering a Kensington Fly mask that has a webbing trim without ears, XL in size, and a color known as plum ice.
Product Description should read, Kens Fly Mask No Ear XL Plum Ice

4. Type under “Cost”, cost given on invoice
5. Type under “Last Purchased Cost”, cost given on invoice
6. Type under “Price” suggested retail or MSRP
7. Enter correct bin letter*
8. Enter correct category of product
9. Enter vendor SKU**
10. Enter vendor ID

*BIN letters are assigned to each shelving unit and or wall that products reside on. If you are unsure about a bin, look at diagram on next page. (Fig. 1)

** Vendor SKU’s are important when ordering/reordering a product as well as imputing invoices. If you cannot find a vendor SKU on invoice, look in vendor catalogs.
A- Hoof and wound
B- Leather tack and splint/bell boots
C- Fly sprays and joint supplements
D- Electrolytes and vitamins
E- Liquid supplements and shampoo
F- Halter, tack, and misc.
G- Shampoo, day sheets, and fly sheets, fly masks
H- Brushes and grooming supplies
I- Dog Collars and fly masks
J- Dog wormers and horse wormers
K- Bandages and scissors
L- Vaccines, needles/syringes, and home décor
M- Insemination kits, repro products, and misc. veterinary items.
N- Blankets
O- Shoeing supplies
W- Warehouse items, feed, and grain
E. Changing Product Descriptions

Changing product descriptions is a helpful way to make sure that products are not miss-sold. Throughout time, companies may change labels of products. It is important to match the correct description to the correct products. Make sure other employees are informed of the change before any editing occurs.

Procedure:

1. Confirm that new description is correct
2. Scan product’s SKU if needed
3. Type into description box:
   a. Brand
   b. Product
   c. Style
   d. Size
   e. Color

**Example 1:** You are to enter a new wound dressing into the computer, the product reads “Super Nitrofurazone” it weighs 1lb and is from the Gateway Products company.

Product description should read, Super Nitrofurazone 1lb

**Example 2:** You are entering a Kensington Fly mask that has a webbing trim without ears, XL in size, and a color known as plum ice.

Product Description should read, Kens Fly Mask No Ear XL Plum Ice

F. Returning Product

Customers will return products for various reasons. If the reason for return is legitimate, will gladly return, refund, or exchange product.

Procedure:

1. Scan Product in MicroBiz
2. Select “Return”
3. Select either return to inventory, or take out of inventory (damaged/used)
4. Print customers new receipt, sign old receipt and staple together
VI. Helping the Customer

A. Customer Needs

The customer is by far the most important aspect to Inland Vet Supply. It is important that all of the customer’s needs and wants are met in a timely and proper fashion.

Things to Remember!

✓ Attitude is key, DO NOT take your bad day out on the customer.
✓ If you are unsure of something ask other employees before giving customer unreliable information.
✓ If you are unable to assist the customer with their questions, ask another employee.
✓ If customers are buying heavy items or feed, ALWAYS offer to take the product out for them.
✓ If customers look confused, always ask customers if they need your assistance.
✓ Physically show customers where products are located, guide them directly to the product they are looking for.
✓ NEVER argue with customers, the customer is always right.

B. Ringing Customers Up

When ringing customers up there are some crucial steps to follow.

Procedure:

1. Ask customer if they currently have an account with IVS
   a. Bring up customer under the “Customer” tab in MicroBiz
   b. Type in Last Name, Company, or Phone Number
2. If customer is not in the computer you can add them into the system by creating an account*
3. If the customer is in the computer and has a discount under their name, make sure that the discount is applied to their final total**
4. Double check that all products have rung up as is
5. Discrepancies in prices may arise***
6. If everything is correct, finish ringing up and print receipt
*Adding a customer to the computer is a good way to keep track of products that we have sold to them. We can look up a customer’s history and inform them of products they have purchased in the past such as de-wormers and vaccines. We can also inform them of dates that they purchased certain products.

**Discounts that are set in the computer CANNOT be added on top of discount days. (EX: Tuesday; 10% off vaccines, Wednesday; 10% off de-wormers, Thursday; 10% off pesticides)

***Customers may question our prices versus prices that they have seen in other stores. If other stores have lower prices, we can match the lower price ONLY if it is not lower than the price of our purchased cost. We also need proof to do this.

C. Special Orders

Special orders are just one of the ways that Inland Vet serves our customers. Customers will sometimes come in with product labels or information regarding products that we do not carry.

Procedure:

1. Look up product in MicroBiz*
2. Look up product in order catalogs**
3. Write down product information/customers information on special order sheet
4. Follow up with customer after finalization of special order is complete***

* Some products that we are asked to carry have been ordered before. Looking up product information on MicroBiz will allow you to determine the vendor we get it from, as well as the price.

** Some products that our vendors carry are not in their catalogs. A simple phone call will determine if a product can be ordered and sent to us. We cannot carry every product because our vendors do not supply everything.

*** Before special order is placed, call customer to verify if they still wish to purchase product. Before finalizing an order with a vendor, speak with manager. After order is placed, call customer to inform them when product will come in.

IF PRODUCT HAS NEVER BEEN ORDERED

Follow “Entering New Products” procedure (IV, D) when product comes in.
D. Customer Discounts

Inland Vet Supply often gives discounts to customers with high purchasing volumes. There are also certain days of the week when normal customers will receive discounts on select items. Farriers also get discounts on select items. It is important to know the differences between the discounts and the reasons for them.

Customers with High Purchasing Volumes:

These customers either manage racetrack barns, ranches, boarding facilities, breeding facilities, or non-profit organizations.

1. It is important that ONLY the customers authorized to use the account are using the account.
2. These customers are also required to turn in a CA Resale Certificate, Resale License number, identification, address, and phone number to keep on file. This information will need to be updated annually. (See Pg. 16)
3. After information has been processed, their discount will automatically show up under their account information.

Normal Customers

These customers come in on a weekly basis in order to acquire product that is discounted on certain days of the week.

1. Tuesday: 10% off Vaccines
2. Wednesday: 10% off De-wormers
3. Thursday: 10% off Pesticides

Discounts CANNOT be given on top of items that are already on sale.

Farriers

Farriers ALWAYS get 10% off horseshoe nails. Some farriers also receive special discounts on certain types of specialty horseshoes.

1. Farriers have an account in the computer*
2. All farriers receive 10% off all products in store, excluding horseshoes and horseshoeing items.

*Some farriers will often write tickets to be charged to their accounts at a later time.
E. Customer Billing

Billing customers is done on a monthly basis. There are only a select few customers that are able to charge product to their account and get billed during the billing cycle. Some of these customers have discounts under their accounts, and it is important to recognize this while in the process of billing.

Procedure:

1. Ring any tickets that customers have not paid at end of the month*
2. Customer receives pink copies of invoice ticket. Inland Vet keeps yellow and white copies for customer files. (See Pg. 17)
3. Bring up customer statements in MicroBiz
4. Check all customers with a balance, print with addresses on them
5. Place invoice inside envelope, seal, stamp, and send out.

*Some customers, like farriers will often write tickets in the morning and come back in the afternoon to pay them. If they do not get paid, they will be billed. When billing customers, it is important to verify discounts on products before they are charged.

F. Selling Customer Gift Certificates

Customers will often wish to purchase gift certificates, especially around the holidays. It is important to understand the process of selling a gift certificate as well as applying that gift certificate towards a purchase.

Procedure:

1. Fill out gift certificate with amount, date, and signature (See Pg. 18)
2. Document amount on store invoice ticket (3 sheet), how paid*, and write ROA amount (See Pg. 17)
3. Give customer pink copy of invoice ticket, along with gift certificate
4. Document customer name, date sold, and invoice ticket number on notepad located in office

*Customers will either pay with cash or credit card.

1. If customers are paying with cash, ring up preexisting total separate from gift certificate total. Put cash for gift certificate with separate invoice ticket and place in office.
2. If customers are paying with a credit card, apply gift certificate amount to preexisting total—if they have one. If they are only purchasing a gift certificate, charge them only through Cashbox. Reprint cashbox receipt and staple it on invoice ticket.

Make sure to write ROA (return on assets) on invoice ticket, so that it can be put into the system at a later time.

G. Applying Customer Gift Certificates

Procedure:

1. Bring up “Gift Certificate Account” in MircoBiz
2. Ring customers items under this account*
3. When finishing transaction, type in gift certificate amount and select “charge to account”**

*If customer receives a discount on normal store items, look them up in MicroBiz under “customer” and apply same discount to items to be purchased with gift certificate.

**If the amount is less than gift certificate total, re-write the new balance on a new gift certificate. If amount is larger than the original gift certificate total, only charge the total gift certificate amount to the Gift Certificate account. It will be up to the customer how they will pay their remaining balance.
VII. Manual Inserts

A. Customer Resale Certificate

BOE-230 (7-02)
GENERAL RESALE CERTIFICATE

STATE OF CALIFORNIA
BOARD OF EQUALIZATION

California Resale Certificate

I HEREBY CERTIFY:

1. I hold valid seller's permit number: _____________________________

2. I am engaged in the business of selling the following type of tangible personal property:

3. This certificate is for the purchase from _________________________ of the item(s) I have listed in paragraph 5 below. [Vendor's name]

4. I will resell the item(s) listed in paragraph 5, which I am purchasing under this resale certificate in the form of tangible personal property in the regular course of my business operations, and I will do so prior to making any use of the item(s) other than demonstration and display while holding the item(s) for sale in the regular course of my business. I understand that if I use the item(s) purchased under this certificate in any manner other than as just described, I will owe use tax based on each item's purchase price or as otherwise provided by law.

5. Description of property to be purchased for resale:

6. I have read and understand the following:

   For Your Information: A person may be guilty of a misdemeanor under Revenue and Taxation Code section 6094.5 if the purchaser knows at the time of purchase that he or she will not resell the purchased item prior to any use (other than retention, demonstration, or display while holding it for resale) and he or she furnishes a resale certificate to avoid payment to the seller of any amount as tax. Additionally, a person misusing a resale certificate for personal gain or to evade the payment of tax is liable, for each purchase, for the tax that would have been due, plus a penalty of 10 percent of the tax or $500, whichever is more.

NAME OF PURCHASER

SIGNATURE OF PURCHASER, PURCHASER'S EMPLOYEE OR AUTHORIZED REPRESENTATIVE

PRINTED NAME OF PERSON SIGNING

ADDRESS OF PURCHASER

TELEPHONE NUMBER

DATE
### B. Customer Invoice Tickets

<table>
<thead>
<tr>
<th>ORDER NO.</th>
<th>DATE</th>
<th>NAME</th>
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**Address**: 

<table>
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<tr>
<th>SOLD BY</th>
<th>CASH</th>
<th>CHECK</th>
<th>CREDIT CARD</th>
<th>CHARGE</th>
<th>ON ACCT.</th>
<th>MISC. RETD.</th>
<th>QUANTITY</th>
<th>DESCRIPTION</th>
<th>PRICE</th>
<th>AMOUNT</th>
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All claims and returned goods MUST be accompanied by this bill.

ACCOUNT DUE UPON RECEIPT OF INVOICE. 1.5% INTEREST PER MONTH CHARGED ON OVER 30 DAY ACCOUNTS.

Received By: __________________________

<table>
<thead>
<tr>
<th>TAX</th>
<th>FREIGHT</th>
<th>TOTAL</th>
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</table>

1237 Sixth Street  
Norco, CA 92860  
951.272.3900  
800.876.3913  
FAX: 951.272.3970

32785 Temecula Pkwy  
Temecula, CA 92592  
951-302-3200  
866-963-0483  
FAX 951-302-3265
C. Customer Gift Certificates

Inland Vet Supply
GIFT CERTIFICATE

Amount: ____________________________

IVS authorized Signature: ____________________________

X ____________________________

Date Issued: ____________________________

Norco Location;
1237 Sixth St.
Norco, Ca. 92860
951.272.3900

Temecula Location
32785 Temecula Parkway
Temecula, Ca 92592
951.302.3200
Inland Vet Supply

Norco Location
1237 Sixth St.
#104
Norco, Ca 92860
951.272.3900
Fax 951.272.3970

Temecula Location
32785 Temecula Pkwy.
#120
Temecula, Ca 92592
951.302.3200
Fax 951.302.3265

FOR IMMEDIATE DELIVERY

Dept. ____________________ Attn: ____________________

Fax # ____________________ Date: ____________________

From: ____________________ Phone: ____________________

Total Number of Pages (including cover sheet) ________

Special Instructions: _____ Please call or fax order confirmation.

_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________

_________________________________________________________________
## E. Order Form

**Inland Vet Supply Norco Orders Sheet**

1237 Sixth Street #104  Norco, CA 92860  (951) 272-3900  Fax (951) 272-3970

**Company:** ___________________________  **Date:** _____________  **Attn:** _______________

**Vendor Fax:** _______________________  **From:** _______________  **Number of Pages:** ___________

<table>
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<th>ITEM #</th>
<th>DESCRIPTION</th>
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**Notes:**

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# F. End of the Day Report

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<th>Date: __________</th>
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<td>Minus drawer fund</td>
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<table>
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<tr>
<td>Minus drawer fund</td>
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<td>Deposit drawer 1</td>
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<table>
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~NOTES~