# New Store Transition Checklist

New Store Manager Name ___________________________ Store # ___________________________

Territory Manager Name ___________________________ Date of Transition ___________________________

<table>
<thead>
<tr>
<th>Item</th>
<th>TM Initials</th>
<th>SM Initials</th>
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<tbody>
<tr>
<td>Phone Contact List</td>
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<tr>
<td>- Emergency Contact List</td>
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<tr>
<td>- Employee Contact List</td>
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<tr>
<td>- District Roster</td>
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<tr>
<td>Employee Scheduling</td>
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<tr>
<td>- Location of Employee Schedule</td>
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<tr>
<td>- Employee Scheduling Needs</td>
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<tr>
<td>Key’s to the location</td>
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<tr>
<td>- Verify keys to the necessities</td>
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<tr>
<td>Manager Codes</td>
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<tr>
<td>- Envoy login</td>
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<tr>
<td>- ePay Machine</td>
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<tr>
<td>- Talent Reef</td>
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<tr>
<td>- Passport Register</td>
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<tr>
<td>- Safe Validator</td>
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<tr>
<td>- OfficeTrax</td>
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<tr>
<td>- Security Manager Report is kept in the ____________________________</td>
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<tr>
<td>- Verification that all current employees are entered</td>
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<tr>
<td>- DVR Username &amp; Password / Code</td>
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<td></td>
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<tr>
<td>- Secondary safe keys/codes</td>
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</tbody>
</table>
New Store Transition Checklist

Fuel Pricing
- Where the competition is located
- Fuel Pricing Strategy
  The Fuel Pricing Strategy for your location is:

Safe
- Open / Close
- Manager Access
- Troubleshooting Problems if safe goes down
- DO NOT CALL SAFE COMPANY WITHOUT AUTHORIZATION

Verification of Funds
- Petty Cash Fund and Verification
- Amount of Petty Cash $____________
- Lottery Tickets verified (proper excel sheet in use; Envoy Total matches what is on hand)

Verification of Security Counts
- Storage of extra product they may not be visible
- Inventory Counts verified
- Do Outgoing Manager & Incoming Manager match on counts
- Accordion file folder

Validator
- How to Remove cassettes
- How to remove Cash
- How to reinsert cassettes
- How to handle bill jams
- How to calculate “Partial before / Partial after”
- Review Master Deposit Tracker sheet
- Programming of the Validator
- Procedure for the safe going down
- Troubleshooting Problems
- DO NOT CALL SAFE COMPANY WITHOUT AUTHORIZATION

Surveillance System (Non-Gulf Coast Stores)
- How to Operate the System
- How to review recorded video
- How to burn a DVD or copy on to CD
- Non Gulf Coast Sites with Text Inserter
New Store Transition Checklist

Surveillance System (Gulf Coast Stores Only)
- How to Operate the System
- How to review recorded video
- How to burn a DVD or copy on to CD
- Gulf Coast Exception Reports
- Has completed the Gulf Coast Associate Training on the DVR
  Date ______/_______/_______

Building Alarms (for 18hr stores)
- Alarm code
- How to arm / disarm
- Does the location have a back door alarm

Building Alarms (for 24hr stores)
- Alarm code
- How to arm / disarm
- Does the location have a back door alarm

Vendor Contact List
- Is Vendor Delivery Schedule on Desktop
- CoreMark Delivery Day and Time
- Vendor Sign In Log
- Vendor Phone List

Close of Day
- What time the day needs to close
- Store on force store close & will halt for suspended transactions
- What reports to print
- Use of pay window: Hrs. – From ___________ - To __________

Overview of Store History
- Cash & Inventory losses
- Inventory levels in the store

Food Stamps
- How to Operate the Machine
- What qualifies for Tax Exempt
- How to ring on the register
- How to account for Food Stamps in Envoy
New Store Transition Checklist

Money Orders
- How to Operate the Machine
- How to void a Money Order
- Money Order maximum purchase amounts
- How to ring on the register
- How to account for Money Orders in Envoy

Kroger Discount (Shell Only)
- How the discount works at the pump
- How you ring on the register
- Manual Key of number if no card present
- How to accounted for in Envoy

Plenti Discount (Exxon Only)
- How the discount works at the pump
- How you ring on the register
- Manual Key of number if no card present
- How to account for in Envoy

Fuelman
- How to reconcile in Envoy
- How to record on Draft Capture

Credit Card Reconciliation by Brand
- How to Reconcile Daily Credit Cards
- Batch Slips / Batch Report

Self-Banking Store
- Location of nearest Bank
- Safety procedures when going to the bank

Non Self Banking Store
- Approximate time of Armored Car Pickup
- How to order change: ACCESS _________ PIN _________
- How to be prepared for the pickup

ATM Machine
- Who to contact if there is a problem
New Store Transition Checklist

Team Binder
- Employee Overview
- Upcoming Evaluations Due
- Review each Employees file
- Current labor hours ________

Talent Reef
- Review HR Manager Reference Guide
- Help button
- What needs to be turned in to HR

Trendar (if applicable)
- How to process the transaction on the Trendar machine
- How to ring the sale thru Passport
- How to reconcile in Envoy

Signing Ordinances
- What outside signage can be hung up
- Advertisement of Tobacco within 1000ft of a church or school
- Permit Binder location: ________________________

Marketing
- Are all promotions “on sale”
- Do all the promotions have signage promoting the product
- Does the store have the specific plan-o-grams for each section of the store

City of Houston Robbery Deterrence Ordinance (if applicable)
- Copy of City Ordinance
- Robbery Deterrence Video
- Employee Training Log
- Trespass Affidavit
- Registration decal on door

Car Wash
- Daily Operation
- Troubleshooting “down” procedures
- Carwash Incidents / Claims
- Customer Wash Complaints
- Procedure for notifying repair needed
- Water shut-off valve for the Carwash Only
New Store Transition Checklist

Propane
- Employee Training & Binder
- What to do if you have a leaking tank
- What to do if you have defective tank

Gemini (Lottery Vending Machines)
- How to load new tickets
- Collection of money
- What reports to get

Red Box Vending Machines
- Who to call

Brand Specific
- Inspections
- Signage

Exxon Stores (if applicable)
- Close of Day **11:45pm** to process credit cards correctly
- Do not use the Magnetic Locks
- Code to any floor safes

OfficeTrax
- Link to OfficeTrax on desktop
- Priority Matrix review
- When to call TM?

Emergency Stop Button
- Location of inside Emergency Stop
- Location of outside Emergency Stop

Electrical Panels
- Outside Lighting override
- Submerged Pumps Breaker
- Lighting Breakers
- Breaker panel labeled and up to date

Veedor Root / ATG
- How to set date / time
- How to clear the beeping alarm
- How to reprint the last day close report
New Store Transition Checklist

- What times does veedor root print? __________
- Does stick readings import into Envoy? ________

Water Shut-offs
- Main Water Shut off Outside
- Shut off valve inside of the store
- Shut off valve at air & water machine

Fuel Inventory
- Location of Underground Storage Tanks & each grade
- Sizes of Underground Storage tank on each gasoline grade
- Does the store have:
  1. Tank gauge stick
  2. Tank charts for each grade
  3. Tank charts for each size tank
  4. Water Finding Paste

Megapath Router Connection
- How to reset Router
- Review Retail Site Internet Connectivity Issues sheet & equipment

Eateries (McDonald's, etc.)
- Meeting the Owners / Manager
- Any current issues
- Knowing their responsibilities, who is responsible for what?
  1. Cleaning
  2. Supplies for the restroom facilities
  3. Maintenance of the building
  4. Maintenance of the Common Areas
  5. Lighting responsibility

I have been trained in all area covered in the New Store Transition Checklist and have initialed accordingly. I fully understand the Store Transition Checklist I have received.

________________________________________________________________________

Employee Signature  Date

________________________________________________________________________

Territory Manager Signature  Date
New Store Transition Checklist