

SOP Template: Point-of-Sale (POS) System Setup for Promotion Tracking

This SOP details the **point-of-sale (POS) system setup for promotion tracking**, covering the configuration of promotional codes, integration with inventory and sales modules, setup of discount parameters, accurate recording of promotional transactions, and regular monitoring of promotion performance. The goal is to ensure seamless tracking of promotions to optimize marketing efforts and enhance sales accuracy.

1. Purpose

To provide step-by-step instructions for setting up and monitoring promotions within the POS system for accurate sales and inventory tracking.

2. Scope

This SOP applies to all staff responsible for configuring and managing promotions in the POS system.

3. Responsibilities

- **POS Administrator:** Configure and maintain promotion settings.
- **Sales Team:** Apply promotion codes at checkout and report issues.
- **Marketing Department:** Provide promotion details and evaluate performance reports.
- **IT Support:** Assist with integration or technical issues.

4. Procedure

1. **Login to the POS Administration Panel**
 - Use administrator credentials to access the POS backend.
2. **Configure Promotional Codes**
 - Navigate to the promotions or discounts section.
 - Click 'Create New Promotion'.
 - Enter promotion name, unique code, and description.
3. **Set Promotion Details**
 - Define start and end dates/times.
 - Select eligible products, categories, or customer segments.
4. **Setup Discount Parameters**
 - Choose the type of discount (percentage, fixed amount, buy-one-get-one, etc.).
 - Set limitations (usage per customer, overall limit, etc.).
5. **Integrate with Inventory and Sales Modules**
 - Ensure promotions are reflected in sales and inventory reports.
 - Test a sample transaction to confirm correct stock deduction and sales entry.
6. **Accurately Record Promotional Transactions**
 - Ensure each sale using a promotion code is logged correctly in the system.
 - Verify transaction logs and receipts display the applied promotions.
7. **Monitor Promotion Performance**
 - Regularly review promotional sales reports.
 - Track promotion impact on sales and inventory.
 - Share reports with marketing and management teams.
8. **Maintain Data Accuracy and Security**
 - Limit promotion edit and remove permissions to authorized staff.
 - Regularly back up POS databases.

5. Documentation & Reporting

- Maintain records of all active and expired promotions.
- Document any issues and action taken during setup or execution.
- Generate monthly promotion performance reports for review.

6. Review & Updates

- This SOP should be reviewed annually or after any major POS system updates.
- Updates must be communicated to all relevant staff.