

# SOP Template: Point-of-sale (POS) System Operation Guidelines

This SOP provides comprehensive **point-of-sale (POS) system operation guidelines**, detailing procedures for transaction processing, cash handling, inventory management, user login and access controls, troubleshooting common issues, and ensuring data security. The objective is to facilitate efficient, accurate, and secure point-of-sale operations that enhance customer service and maintain financial accountability.

## 1. Purpose

To establish standardized procedures for efficient operation, accurate transaction processing, financial control, and data security using the POS system.

## 2. Scope

This SOP applies to all staff responsible for operating the POS system in sales, cashier, and inventory roles.

## 3. Responsibilities

- **Store Managers:** Ensure staff are trained and the SOP is implemented.
- **POS Operators:** Follow procedures accurately and report discrepancies or issues.
- **IT Support:** Address technical issues and maintain system security.

## 4. Procedures

### 4.1 User Login and Access Controls

1. Use individual credentials to access the POS system; sharing logins is not permitted.
2. Log out or lock the POS terminal when leaving the workstation.
3. Report suspected unauthorized access to management immediately.

### 4.2 Transaction Processing

1. Scan or manually enter items being purchased.
2. Confirm quantities and prices displayed on the POS terminal.
3. Select the payment method (cash, card, mobile payment, etc.).
4. Process payment as per method guidelines.
5. Issue a receipt to the customer and thank them for their purchase.

### 4.3 Cash Handling

1. Verify cash drawer amount at shift start and end; record discrepancies.
2. Accept payments, provide correct change, and avoid keeping excessive cash in the drawer.
3. Store large bills in the drop-safe as per store policy.
4. Reconcile cash drawer against system totals at end of shift.

### 4.4 Inventory Management

1. Record sales and returns in the POS for real-time inventory tracking.
2. Perform periodic inventory counts as scheduled.
3. Report inventory discrepancies to management immediately.

### 4.5 Troubleshooting Common Issues

- **System Freeze:** Attempt a system restart; contact IT support if unresolved.
- **POS Printer Malfunction:** Check paper supply and connections before escalating.
- **Incorrect Transaction:** Void or correct as per system protocol, document the reason for audit trail.

### 4.6 Data Security

1. Never share or write down login credentials.

2. Ensure the POS system is locked when unattended.
3. Follow IT security protocols for password updates and software updates.

## **5. Documentation**

- Transaction logs, cash count sheets, and inventory adjustment records must be updated and retained as per company policy.

## **6. Training**

- All staff must receive initial and periodic refresher training on POS operation procedures and data security.

## **7. Review**

- This SOP shall be reviewed annually and updated as required by changes to systems or policies.

## **8. Appendix**

- POS user manual
- Troubleshooting checklist
- Contact information for IT support