# TRAINING CHECKLIST
## COUNTER OPERATIONS

TEAM MEMBER NAME: _____

## DHL Express

_____ DHL Express-all services

_____ DHL Size and Weight Restrictions

_____ DHL Shipment Value Protection rules/rates

_____ DHL Invoice reconciliation

_____ DHL Supply Orders

## U.S. Postal Service

_____ USPS  Postage Meter Operations

_____ USPS Changing date-meter

_____ USPS Loading meter ribbon

_____ USPS Resetting meter postage

_____ USPS Sealing envelopes

_____ USPS Taping over meter strips

_____ USPS Identifying correct postage

_____ USPS Online Postage account (Endicia)

_____ USPS  1st Class - Letter/Postcard

_____ USPS Shape-based Pricing

_____ USPS  Parcel Post-definition

_____ USPS  Media Mail-definition, limitations

_____ USPS  Express Mail-definition, limitations

_____ USPS  Certified-definition, application

_____ USPS Return Receipt

_____ USPS  Registered Mail & Parcels – PROHIBITED

_____ USPS  Insured Mail-forms, values, limits

_____ USPS  International Mail

_____ USPS  International Express Mail

_____ USPS  International Customs Forms

_____ USPS  Bulk Mail Quote – Call Designate For Assistance

_____ USPS  Size  & Weight Restrictions

_____ USPS  Traces & Claims

_____ USPS Meter & Online Postage Reconciliation

_____ USPS Postage Stamp Inventory & Reconciliation

_____ USPS Supply Orders

# TRAINING CHECKLIST

## United Parcel Service (UPS)

_____ UPS WorldShip installation and setup

_____UPS  Ground-Residential

_____UPS  Ground-Commercial

_____UPS  Maximum Size and Weight Limits

_____UPS  Dimensional Weight calculation

_____UPS  3 Day Select (Orange Label)

_____UPS  2 Day Air (Blue Label)

_____UPS  Next Day Air (Red Label)

_____UPS  Air Letters (2-Day & Next Day)

_____UPS  International Waybill, Customs Documents,
        SED, Certificate of Origin

_____UPS Customs credit card form

_____UPS  Hundredweight

_____ UPS  Declared Value

_____UPS  C.O.D.- At Point of Sale

_____UPS  C.O.D.- Follow-up/Log

_____UPS  Returns Plus

_____UPS  Delivery Confirmation

_____UPS  Traces & Claims-LDI #,  Claim Form Etc.

_____UPS  Size & Weight Restrictions

_____UPS  Saturday Delivery

_____UPS  Multi-Package Shipment to Same Address

_____UPS PostalMate overlay on World Ship

_____UPS Drop-off acceptance

_____UPS Drop-off reporting/compensation

_____ UPS Supply Orders


## FedEx Express

_____FedEx  Priority Letter-Standard Letter

_____FedEx  Priority Package-Standard Package

_____FedEx  Economy 2-day Service

_____FedEx  International Shipping

_____FedEx International customs

_____FedEx customs credit card waiver

_____FedEx  Insurance

_____FedEx  Saturday Services

_____FedEx  Hundred Weight-Int'l & Domestic

_____FedEx Returns processing

_____FedEx FASCnet.com

_____FedEx In Sight

_____FedEx drop-off compensation

_____ FedEx Express Supply Orders

# TRAINING CHECKLIST

## FedEx Ground

_____ FedEx Ground-Home Delivery-Residential-Date Certain, Evening Delivery, Appointment Delivery

_____ FedEx Ground-Business

_____ FedEx Ground-Declared Value coverage

_____ FedEx Ground Size and Weight Restrictions

_____ FedEx Ground Supply Orders

## Courier Service

_____ Courier Shipments-Time/Areas Etc.

_____ Courier Declared Value Coverage

## Packaging Service

_____ Pack POS Storepak Estimate, Selections, Retrieval

_____ Pack Non Fragile

_____ Pack Fragile-Double Box

_____ Pack Electronics

_____ Pack Artwork-Pictures

_____ Pack "Large Items"

_____ Pack Box Size Adjustments-Box Scoring

_____ Pack Custom Box Building

_____ Pack Crating-Call Designate For Assistance

_____ Pack Ordering Custom Boxes

_____ Pack Packing Slip

## Mailbox Rental

_____ Mailbox Full Understanding & Able To Articulate Reasons Why People Rent Mailboxes

_____ Mailbox Phone Sales

_____ Mailbox Customer In-Store Presentation

_____ Mailbox Rental Procedures (Form #1583, Cust Info etc.)

_____ Mailbox Post Rental Procedures

_____ Mailbox POS System Setup

_____ Mailbox Late Rental Policies

_____ Mailbox Cancellations

_____ Mailbox Mail Forwarding

_____ Mailbox Counter Service

_____ Mailbox Policies Concerning Privacy and Cooperation With Law Enforcement & Other Government Agencies

_____ Mailbox Change of Address Issues

# TRAINING CHECKLIST

## Postage Stamps

_____ Stamps Philosophy-Price Perception

_____ Stamps Need for Variety of Stamps

_____ Stamps Adequate Inventory Levels

## Retail Merchandise

_____ Retail  Packaging Materials-Moving Boxes, Tape, Peanuts etc.  Inventory, Ordering, Displays, Promotion

_____ Retail  Greeting Cards & Periphials-Ordering, Stock Rotation of Product, Display & Promotion

_____ Retail  Business Cards-Sales & Ordering, Promotion

_____ Retail  Rubber Stamps-Promotion, Sales, Ordering

_____ Retail  Promotion of New Products, Feedback, Requests

## Copies

_____ Copies  Regular Letter,  Legal,  Ledger

_____ Copies  Complex-Reduction, Enlargement, Two Sided,

_____  Copies Color

_____  Copies Binding, Hole Punch

_____ Copies  Trouble Shooting & Maintenance

_____  Copies Supplies & Ordering

## Fax

_____ Fax Programming & Set-up

_____ Fax Send & receive-Local & Long Distance

_____  Fax International-pricing

_____ Fax  Transmission Report

_____ Fax  Paper Change & Maintenance

_____ Fax  Trouble Shooting

# TRAINING CHECKLIST

## Key Cutting

_____ Keys  Single Sided

_____ Keys  Double Sided

_____ Keys Vendor/ordering

## Laminating

_____ Lam  All Sizes

_____ Lam  Trimming & Odd Sizes

## Point-of-Sale

_____POS  Shipping Packages via all carriers

_____ POS Adding/editing Departments

_____ POS Adding/editing Products

_____ POS Open Register Day Procedure

_____ POS Close Register Day Procedure

_____ POS End of Day Report Printing

_____POS  Cash Register Functions-Ringing Tranactions and Options for Customizing POS Features

_____POS  Label Printer Functions-Paper Change etc.

_____POS  Receipt Printer-Options,  Paper Changes etc.

_____POS  Transaction Searches-Retail And Shipments

_____POS  Opening & Closing Cash Register

_____POS  Products-Adding, Deleting, Pricing, Margins, Inventory, Purchasing, Look-up & Vendors

_____POS  Departments-Definition,  Adding, Wholesale Factors, Misc Set-up & Options

## Notary

_____Notary  Procedures-Notarizing Documents

_____Notary  Maintaining Log

_____Notary  Notary Rules and Regulations

_____ Notary Fees

_____POS  Workers-Options & Functions

_____POS  Messages Feature

_____POS  Customer & Consignee DataBases-Options

_____POS  Frequent Shipper Program

_____POS  Reports: Cash Register-Sales, Gross Profit, Register Activity, Inventory, Purchasing, By Worker.

_____POS  Reports: Shipping-Shipping Profit, Transaction Listing, Frequent Shipper, Customer Listing, UPS Zone and Rate Charts, Declared Value Report

_____POS  Setting Carrier Rates

_____POS  Accounts Receivable Program

_____POS  Mailbox Wizard

_____POS  Management of Data-When to Purge System etc..

# TRAINING CHECKLIST

## Miscellaneous

_____Maintenance: See Store Maintanence Check List

_____Credit Cards:  Credit Card Machine & Printer Operations

## Administration

_____ Banking procedures-deposit days,

_____ Store opening/closing procedures

_____ Security System operations

## Accounting

_____Accounting Programs – QuickBooks Intro

_____Accounting Sales Tax Returns - What and When

_____Accounting Accounting Cycles

_____Accounting Credit Card Fees-Treatment Options

_____Accounting Weekly Receipts Reconciliation Report

_____Accounting  Meter Reconciliation Report

_____Accounting Weekly Worksheets