STEP-BY-STEP ORIENTATION Guide for your NEW HIRE: Designed to provide new associate the basic fundamentals that all associates are expected to be able to do in the Daniel's store to help your associate feel more confident and become a successful part of the team. The New Associate and Store Manager should begin this training during the first few days and estimated completion date within 30 days of the associate's employment. ASSOCIATE NAME: _____ EMP #:_____ MGR SIGNATURE: _____

MANAGER INSTRUCTIONS for your NEW HIRE

DAY 1 – 3 – "A Day at Daniel's"

I. **What to do with the Onboarding timecard?** On the first day at the store, welcome your associate! Ask for their onboarding timecard. This needs to be attached to the store schedule and manager will need to adjust their time on UltiPro

II. **Manager led training - review the Home Store Transition Outline and continued ongoing training (see page 2).** This includes a tour of your store & introduction of your team members

III. **Introduction to UltiPro Payroll, Time keeping & Learning -** If you are able to Login into Payroll and Timekeeping you will be able to access Learning. *(available after 72 hours from DOH)*

IV. **Intro to Daniel's Academy - How to Login into the UltiPro Learning?**
   User Name: 5 digit employee # (convert the letter to a number, A =10, B=11, C=12)
   Employee ID # B100 = **Example User name enter: 11100**
   Default Password: 8 digit birthdate & 5 digit home zip code
   **Be prepared to enter your new password must contain at least 8 total characters (upper, lower case letters, at least 1 number, and 1 special character (Example:!, @, #, $, ?, /, =)
   Questions or Assistance with Login/PW:
   Call Payroll at (310) 665-2100, extension 5216 or 5219 or 5618

   ☐ Login to UltiPro Learning Daniel's Academy using the Sunbit IPad. Complete the assigned Curriculum Bundles.

   ☐ Curriculum is assigned to your new associate. Follow Step 1 Orientation Training 101 through Step 5 Must read/watch lectures and pass the quiz at the end of each course to get 100%). FOLLOW UP WITH YOUR NEW ASSOCIATE!
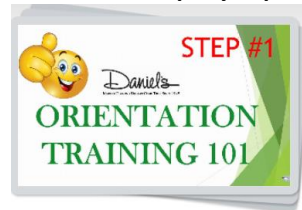
STEP 1 — ORIENTATION TRAINING 101

Note: Manager will schedule you in designated area (usually in the backroom), utilize Sunbit IPad and the Daniel's Training Kit.

COMPLETE IN COURSE ORDER (complete within **14 days**):

I. ***Welcome to Daniel's" – Hello David**
II. **LOG In and LOG Out of Daniel's POS**
III. **Intro to the Promo Planner**
IV. **Cash Drawer Opening**
V. **What is a Daniel's Cash Sale?**
VI. **What is Form 8300?**
VII. **Registry Rex (Diamond/Fine, Watch Jewelry Registries)**
VIII. **Credit is KEY to Success**
IX. **How to read/process an F8 into the POS and how to Process a Daniel's In-store Payment?**
X. **Cash Drawer Closing**
XI. **Review of Company Expectations**

STEP 2 — DIAMOND DREAM MAKER

COMPLETE IN COURSE ORDER:

I. **Diamond Dream Maker Workbook**
II. **EcoLove Lab Grown Diamonds**
III. ***Tips and Tricks on the Photo Album**
IV. ***Daniel's Website**
V. **Signature, Love Song, Love Song Color, Lab Grown and Red Hot Exclusively Daniel's**

STEP 3 — ASSOCIATE TRAINING 101 (FT)

COMPLETE IN COURSE ORDER (complete within 30 days):

I. **Daniel's Making Diamond Dreams Come True Since 1948**
II. **Importance of Quota**
III. ***Traffic Counters**
IV. **Preventing Losses**
V. ***Smash and Grab/Run**
VI. **Daniel's Product Knowledge Part 1**
VII. ***How to update customer's address/phone number?**
VIII. ***How to process a Daniel's New Charge into the POS?**
IX. ***How to process a Cash Sale Return into the POS?**

STEP 4 — CREDIT TRAINING 2

COMPLETE BONUS COURSES IN ORDER:

I. ***Maximizing All Credit Programs**
II. ***Progressive**
III. ***Effort Stats Associate Version**
IV. ***Credit Effort Tips from your RDM**
V. ***Daniel's Portal – Synchrony Features**
VI. ***Daniel's Portal – Tendering & Reporting**
VII. ***Daniel's Portal – Recurring Payments**
VIII. ***Difference Between the Two Leasing Programs**

STEP 5 — PRODUCT KNOWLEDGE 2

COMPLETE BONUS COURSES IN ORDER:

I. ***Birthstones 101**
II. ***Chains and Bracelets 101**
III. ***Ear Piercing**
IV. **Memo Call Diamonds**
V. **How to show memo Call Diamonds**
VI. **How to properly display and tag your gold and wall/display**

** ONGOING LEARNING STORE TEAM MONTHLY MEETINGS

HOME STORE TRANSITION OUTLINE

In order to ensure associates the smoothest possible transition from the training store environment, please complete this outline in your home store the first day few days while waiting to access the assigned ORIENATION TRAINING CURRICULUM bundles in UltiPro Learning Daniel's Academy. Ask your manager or other store associates for help as needed. You and your manager should sign the page 1 when you have completed.

I. **Meet other Store Associates. Learn who are Key holders and the authority and responsibilities of their position.**

II. **Store Tour - The purpose of this tour is to familiarize you with your home store environment.**
   A. SECURED AREAS
      1. Safe (Proper safe door closing procedures), Tubs and Training Tool Kit
      2. Sales charts, posters, etc.
      3. Restroom (Employees only!)
      4. Attendance Policy/Timeclock / UltiPro Time Keeping
      5. Area for personal belongings
      6. Selvyt, gold & diamond polishing cloths
      7. Ultrasonic (jewelry cleaner)
   B. OFFICE AND SALES FLOOR
      1. Sales Chart Review
      2. Add Associate to the POS System *(call Office Coordinator) and lesson in Logging on and off the POS System**
      3. Veriphone (s) and third party credit, fax machine, applications
      4. Sunbit IPad, Understanding the Various Icons on the IPad, UltiPro Time keeping/Learning
      5. Cashiering Drawer, Pending Drawers, Purchase commitment, S.O. drawer and "A" box drawer
      6. Glass cleaner & paper towels
      7. Determine type of merchandise in each case
      8. Case Count Overview
      9. Determine the case(s) where each mailer merchandise item may be displayed
   C. REPAIR DEPARTMENT
      1. Locked repair drawer, Log book, Repair envelopes, Used envelope files, Diamond tester, Tools for Sizing, Price List

III. **Administrative Overview**
   1. Security Codes – "210", show one merchandise at time, etc.…
   2. Review weekly store schedule, breaks including lunch
   3. Phone - Proper greeting, number of rings, personal calls for emergencies only
   4. Housekeeping schedule
   5. Accessing UltiPro Learning (schedule and review expected completion of all courses, review the STEP-BY-STEP GUIDE)