

Oracle® Retail Xstore Point of Service
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Primary Author: Tracy Gunston

Contributor: Alex Meske, John Becker

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Oracle® Retail Xstore Point of Service User Guide, Release 20.0.

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Preface

This document describes the Oracle Retail Xstore Point of Service user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

Audience

This document is for users and administrators of Oracle Retail Xstore Point of Service. This includes merchandisers, buyers, business analysts, and administrative personnel.

Documentation Accessibility

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Related Documents

For more information, see the following documents in the Oracle Retail Xstore Suite Release 20.0 documentation set:

- *Oracle Retail Xstore Suite Release Notes*
- *Oracle Retail Xstore Suite 19.0/Merchandising 16.0.2 Implementation Guide*
- *Oracle Retail Xstore Suite Implementation Guide*
- *Oracle Retail Xstore Point of Service Mobile User Guide*
- *Oracle Retail Xstore Point of Service Reports Guide*
- *Oracle Retail Xstore Point of Service Manager's Guide*
- *Oracle Retail Xstore Point of Service Shipping, Receiving, and Inventory Guide*
- *Oracle Retail Xstore Point of Service Frameworks and Technologies Guide*
- *Oracle Retail Xstore Suite Deal Pricing Guide*

- *Oracle Retail Xenvironment User Guide*
- *Oracle Retail Xstore Point of Service Services Guide*
- *Oracle Retail Xstore Point of Service Technical Guide*
- *Oracle Retail Xstore Point of Service Host Interface Guide*
- *Oracle Retail Xstore Point of Service POS Log Changes*
- *Oracle Retail Xstore Point of Service Database Dictionary Guide*
- *Oracle Retail Xstore Suite Country Accelerator User Guide*
- *Oracle Retail Xstore Suite Country Accelerator Technical Guide*

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<https://support.oracle.com>

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 20.0) or a later patch release (for example, 20.0.1). If you are installing the base release and additional patch releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

Improved Process for Oracle Retail Documentation Corrections

To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times not be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced at the Oracle Help Center (OHC) website, or, in the case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

This process will prevent delays in making critical corrections available to customers. For the customer, it means that before you begin installation, you must verify that you have the most recent version of the Oracle Retail documentation set. Oracle Retail documentation is available at the Oracle Help Center at the following URL:

<https://docs.oracle.com/en/industries/retail/index.html>

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If a more recent version of a document is available, that version supersedes all previous versions.

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Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Documentation and Screen Conventions

This chapter describes the Oracle Retail Xstore Point of Service screen and documentation conventions and provides brief descriptions and examples of the methods used to initiate Oracle Retail Xstore Point of Service features.

- Refer to the [Documentation Conventions](#) section below for a description of the documentation conventions used in this User Guide.
- Refer to the [Touch-Screen Functions](#) section for touch-screen and key functions.
- Refer to the [Register Screen Conventions Overview](#) section for a description of the Oracle Retail Xstore Point of Service application features.
- Refer to the [Prompts and Forms](#) section for a description of the prompts and screens that Xstore Point of Service uses to provide or request information.

Note: The Xstore screen shots in the guide do not match the new user interface. It is now configurable to either use the new user interface or the one in this guide. The functionality of Xstore POS was not impacted by this change.

Documentation Conventions

The following explains the conventions used throughout the *Oracle Retail Xstore Point of Service User Guide* to denote task-related information, highlight information for special emphasis, or to bring your attention to an important point.

Text Conventions

Due to the flexibility of the system, menu options in this guide are not identified by a function key number (for example, [F2] or [F3]). Instead, the name on the button is used throughout the procedures and processes.

Table 1–1 Documentation Conventions in the User Guide

When you see...	Then...
Select xxxx	Refers to a menu button or list option displayed on the Oracle Retail Xstore Point of Service application screen. The bolded text is the button or menu option text. Since all menu text is configurable, the text you see on your screen may be different than the text used in the procedure.
Press [xxx]	Refers to a key on the keyboard. The text inside the brackets is the name of the key.

Table 1–1 (Cont.) Documentation Conventions in the User Guide

When you see...	Then...
Blue text	Indicates the tagged text is a link to another area of the user document. Click the link to jump to related information. This feature is used when viewing the document online. For printed documents, a page number has also been provided.

Information Conventions

Special information can be called out in the document.

Note: This information is provided to improve your understanding, simplify a task, or point out special circumstances.

Touch-Screen Functions

The following sections explain how to navigate with a touch-screen or keyboard.

Touch-Screen Navigation

Oracle Retail Xstore Point of Service uses multi-touch gesture navigation throughout to allow for full touch-screen transactions.

Note: Touch-screen navigation is configurable by your corporate office; all features may not be activated on your system.

Sale Screen Touch-Screen Navigation

The Sale screen contains the following touch components.

Figure 1–1 Sales Screen Touch-Screen Navigation

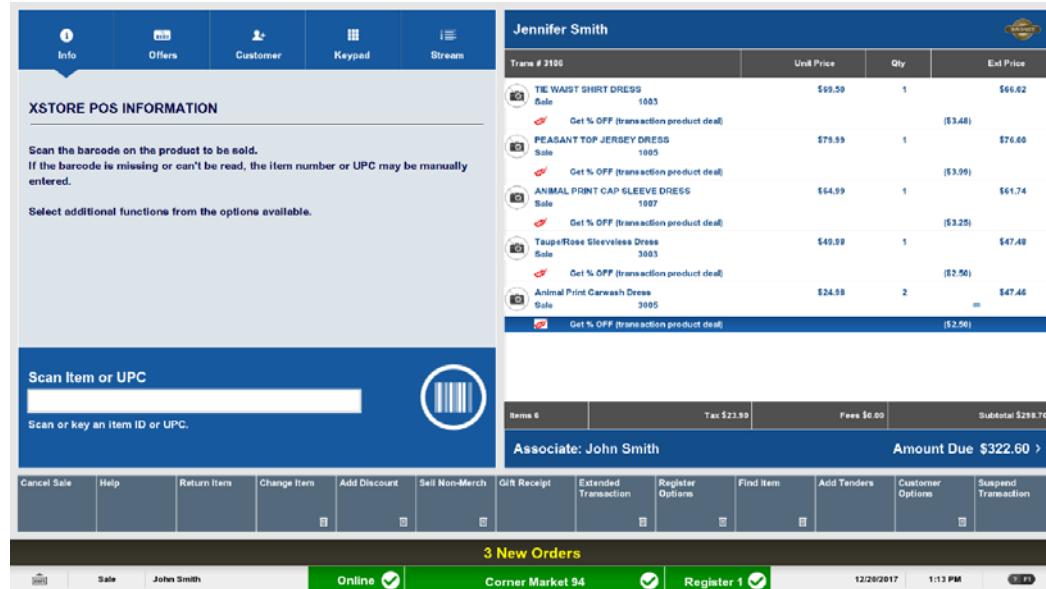


Table 1–2 Touch-Screen Actions

Touch-Screen Action	Description
Tap Customer Loyalty Banner	If no customer is attached, Oracle Retail Xstore Point of Service invokes the add-customer process.
Swipe Customer Loyalty Banner	If a customer has been assigned to the transaction, Oracle Retail Xstore Point of Service opens the customer maintenance screen.
Swipe Customer Loyalty Banner	Swiping from left to right opens a prompt to remove the assigned customer.
Tap Bar Code Graphic	Invokes the find item feature. Oracle Retail Xstore Point of Service Base is set to open the item matrix.
Tap Item ID	Displays item information.
Tap item quantity	Invokes the change quantity process. This displays the numeric keypad.
Swipe Item	Swiping from left to right opens a prompt to void the item.
Tap Unit Price	Invokes the change price process. This displays the numeric keypad.
Tap Associate Area	Invokes the change commissioned associate process (with an item selected)
Tap Amount Due	Invokes Add Tenders.

Customer Maintenance Touch-Screen Navigation

The following touch-screen components are available in the Customer Maintenance screen:

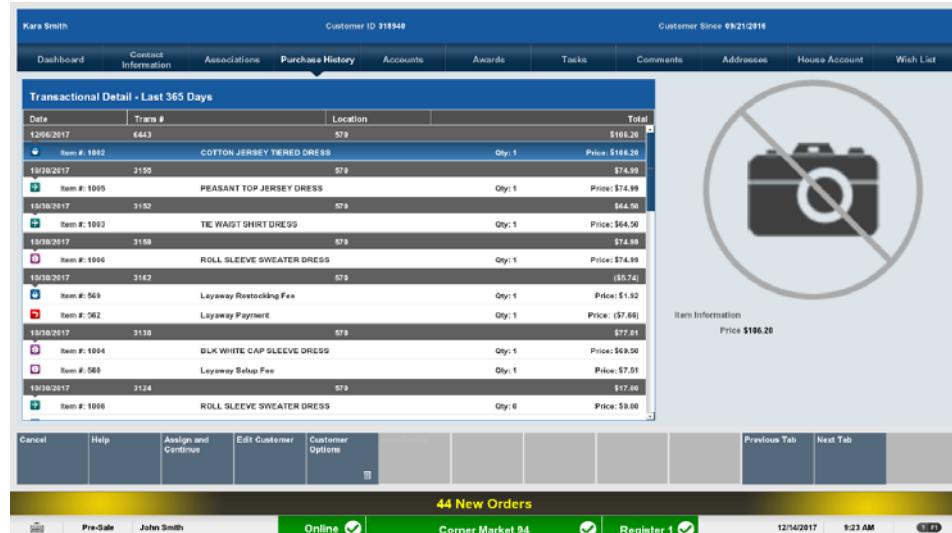
Contact Information Tab The Customer Maintenance tab has the following touch-screen elements:

Figure 1–2 Customer Maintenance Touch-Screen Navigation

Table 1–3 Customer Maintenance Touch-Screen Navigation

Touch-Screen Action	Description
Tap Header	Tap the Customer Header to return to the previous screen while in a transaction.
Swipe Form	Swipe from left to right in the form area to open editing mode.

Purchase History Tab The Purchase History tab has the following touch-screen elements:

Figure 1–3 Purchase History Tab Touch-Screen Navigation**Table 1–4 Purchase History Tab Touch-Screen Navigation**

Touch-Screen Action	Description
Swipe Transaction Detail Header	Swipe from right to left in the Transaction Detail Header to collapse the history display.
Swipe Transaction Detail Header	Swipe from left to right in the Transaction Detail Header to open the history display.
Tap Transaction Header	Tap one Transaction Header to collapse the selected transaction.
Tap Transaction Header	Tap a collapsed Transaction Header to open the selected transaction.
Tab Item	Tap a specific item and the INFO tab to display the item detail.

Virtual Keyboard

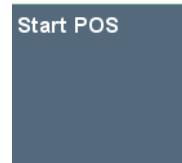
Figure 1–4 Virtual Keyboard

The following table describes how to use the virtual keyboard:

Table 1–5 Virtual Keyboard Navigation

Function	Navigation
Launch virtual keyboard	Do one of the following: <ul style="list-style-type: none"> ▪ Swipe the keyboard icon up. ▪ Tap the keyboard icon. ▪ Tap a text field.
Switch virtual keyboard layouts	If your store has multiple keyboards configured, swipe left or right to select a different keyboard.
Data entry	Tap keyboard keys to enter information into a field.
Close virtual keyboard	Do one of the following: <ul style="list-style-type: none"> ▪ Swipe the keyboard down. ▪ Swipe down on the keyboard icon. ▪ Tap the keyboard icon.
	
	<ul style="list-style-type: none"> ▪ Tap anywhere outside the keyboard.
Switch to Xenvironment	Tap the Xenvironment button on the keyboard to open Xenvironment.
	

To return to Oracle Retail Xstore Point of Service, tap or click the **Start POS** button.



Active Keyboard Keys

Use the following guidelines to navigate through the Oracle Retail Xstore Point of Service system:

Table 1–6 Active Keyboard Keys

Key	Description
arrows	Use the up and down arrow keys to browse through list boxes.
Enter	Press Enter to select OK at any prompt that includes OK (Enter) as an option. Also press Enter in active list boxes to select the highlighted option.

Table 1–6 (Cont.) Active Keyboard Keys

Key	Description
Esc	Press Esc to exit any prompt that has Back or Cancel as an option. You can also press Esc to exit the current menu and return to the previous menu. In either case, if changes were made that were not saved, you must verify that you want to exit without saving your changes.
Function keys	On each Oracle Retail Xstore Point of Service window, the F1 through F12 function keys correspond to the menu options. Press the function key that corresponds to the option to choose it.
Home/End	Use these keys to jump to the top (Home) or bottom (End) of the current page of a report that you are viewing.
Plus (+)/Minus(-)	Use these two keys to increase (+) or decrease (-) the on-screen magnification level of a report that you are viewing.
Shift+Tab	Press Shift+Tab to move to the previous list box on an Oracle Retail Xstore Point of Service window. When the first list box is reached, press Shift+Tab to activate the last list box on the window.
Tab	Press Tab to move from the first list box to the next list box on the window. When the last list box is reached, press Tab to activate the first list box on the window.
Spacebar	Press Spacebar to select items in multiple-select lists.
Ctrl+Tab	Press Ctrl+Tab to access the Information, Coupon, Task, Message, Sales Goals, and Associated Items tabs and move one tab forward on the Register Login screen and the Back Office Login screen.
Ctrl+Shift+Tab	Press Ctrl+Shift+Tab to access the Information, Coupon, Task, Message, Sales Goals, and Associated Items tabs and move one tab backward on the Register Login screen and the Back Office screen.

Register Screen Conventions Overview

The Oracle Retail Xstore Point of Service system includes a variety of elements that comprise its user interface. Those elements have been grouped into the following categories, and each of the individual elements in them are described in this chapter.

Note: The Xstore screen shots in this guide do not match the new user interface. The functionality of Xstore POS was not impacted by this UI change

Dual Screen

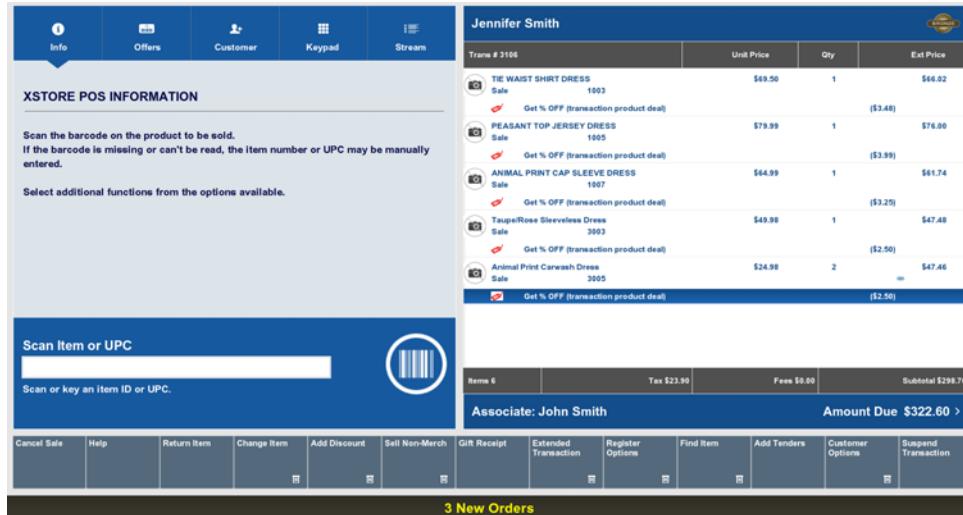
Your store may be equipped with a dual screen which contains a customer facing display. The customer facing display is controlled by the corporate office. It may contain:

- Videos
- Suggested Items
- Customer Messages

Screen Layout Overview

The layout and design for all screens used for register functions have the following organization:

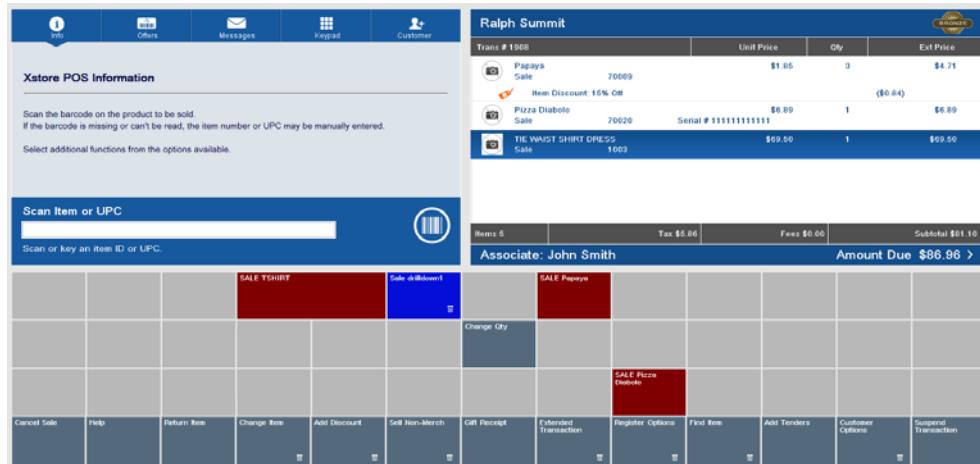
Figure 1–5 Typical Sale Screen Layout



Item Selection Layout

An alternative sales screen layout is available that provides three rows of thirteen quick buttons above the bottom row of menu buttons. This matrix style layout with configurable button size and color allows quick selection of items and menus. The drill-down buttons lead to further options and the Home and Back buttons for navigation in this grid.

Figure 1–6 Item Selection Layout



Both screen layout styles contain the following components:

- **Menu Buttons**
- **Message Window**
- **Focus Bar**

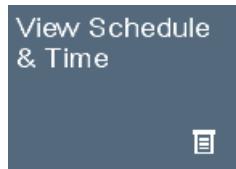
- Customer Loyalty Banner
- View Port
- Message Bar
- Status Bar

Menu Buttons

Menu buttons can be found near the bottom of the screen. The buttons are used to perform actions specific to the functional area in which they are found.

- Buttons with a pull-down menu icon in the lower-right corner indicate that the button will open a sub-menu of choices.

Figure 1–7 Button with Sub-Menu Choices



- Buttons with a lock icon in the lower-right corner indicate that the button is not available to the current user.
- An ellipsis (usually after the word More) indicate that there are additional menu buttons available at this screen. Clicking or tapping the button will display those menu buttons.

Figure 1–8 Additional Menu Buttons



Function Keys The Oracle Retail Xstore Point of Service menu buttons show the keyboard functions that appear on each Oracle Retail Xstore Point of Service window.

Each menu button has a function key F1 through F12 assigned to it. Because each Oracle Retail Xstore Point of Service menu is configurable, the button functions on your system may appear in a different order or have different text than examples shown in this manual.

Some menu buttons may not be available to every associate. Security configuration determines which options are available to an individual associate. Security may be configured for each associate, by employee group, or by register group.

Note: Because of the flexibility of the system, menu options in this guide are not identified by a function key number (F2, F3, and so on.). The procedures and processes in this guide use the name of the button.

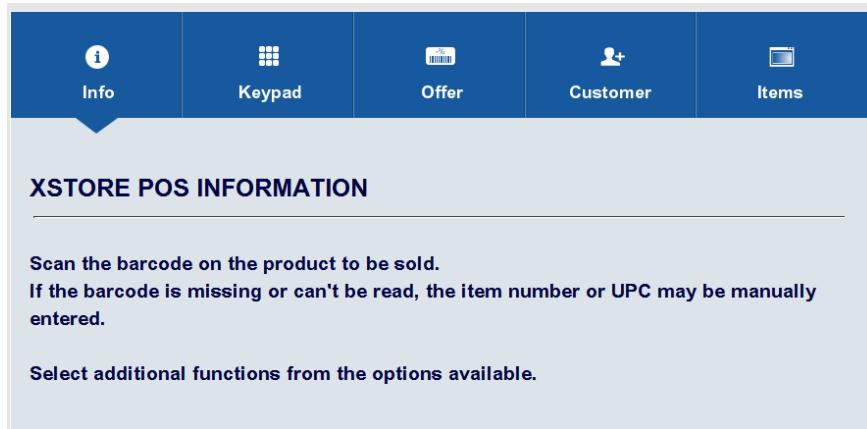
Figure 1–9 Menu Buttons

Message Window

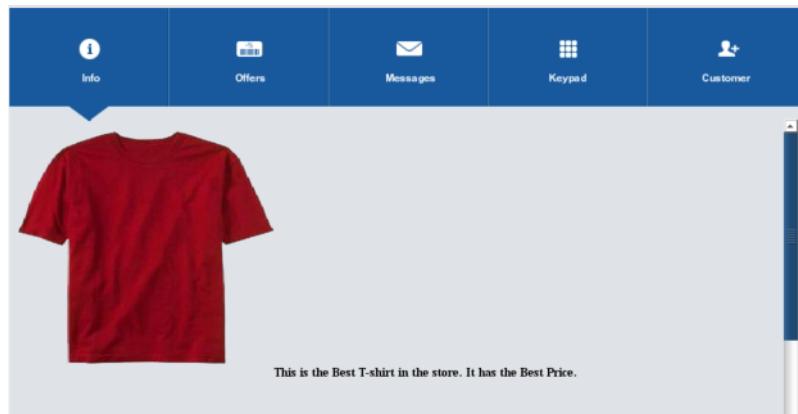
The message window is located in the left section of most register screens. This window displays different messages that are selected by the tabs at the top of the window.

Tabs In a base implementation, Oracle Retail Xstore Point of Service displays the following tabs:

- **Info Tab:** The Info tab may display product-specific information for an item-entry scenario, customer/item detail information for a layaway transaction, or instructions for recording a repair or alteration selection.

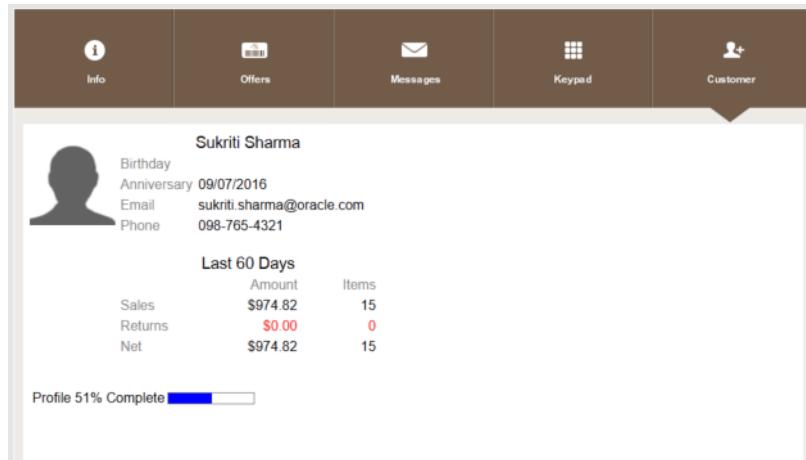
Figure 1–10 Default Info Tab

Only one message displays per item in the Info tab. This may be a text message, an image or a composite message (graphic and text). This information may relate to the item directly or to recommend other products that relate to the item being purchased. A couple examples of this would be a customer purchasing a shirt that has a coordinating jacket and tie. These two items, the jacket and tie, could be set up to display on the Information Tab in Xstore for the associate to recommend to the customer. Another example would be the purchase of an item that would require another purchase, for instance a watch that does not come with a battery.

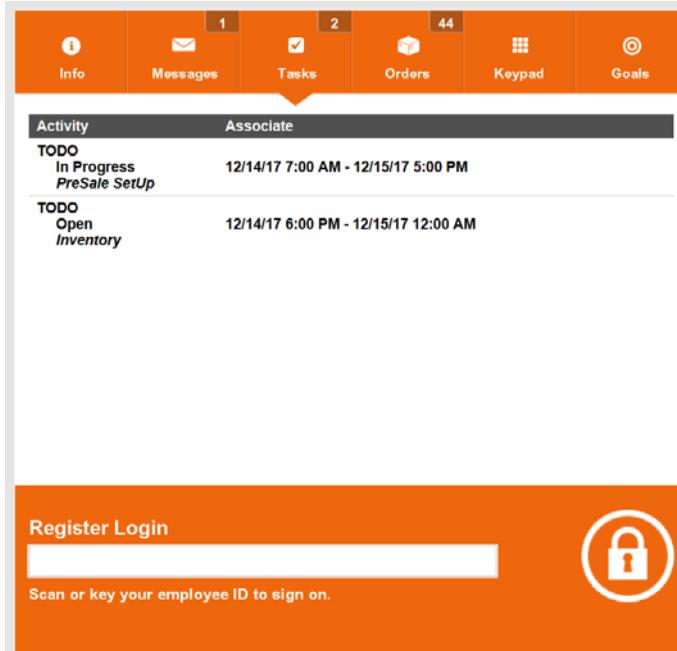
Figure 1–11 Info Tab Showing Item Information

If DisplayMessageAsNotify setting is configured, then multiple item text messages pop up in Xstore during the sales process.

- **Customer Tab:** Shows customer detail.

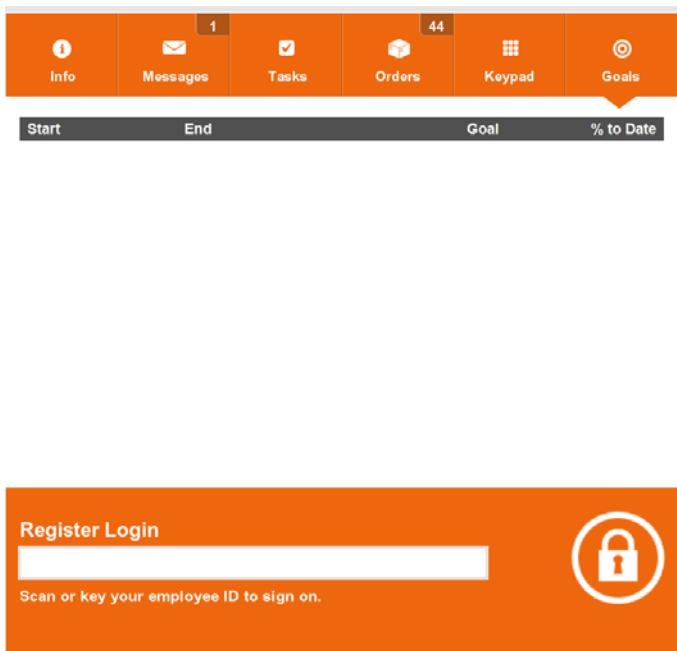
Figure 1–12 Customer Tab

- **Tasks Tab:** The Tasks tab displays open and in progress tasks with start date/time prior to the current date and end date/time equal to the current date or in the future. Tasks shown here are view only.

Figure 1–13 Tasks Tab

The following information is displayed for each task:

- **Activity** - The type, status, and description associated with the task.
- **Associate** - The assigned associate, appointment start date and time, and end date and time.
- **Goals Tab:** The Goals tab displays information from the corporate office about the goals set for your store for a specified date range. You are not required to log in to view store goals. These goals are visible to all employees.

Figure 1–14 Goals Tab

The goals are listed in the following order:

1. Completed goals
2. Active goals
3. Future goals

The goals are displayed in color, based on their status:

- **Green** - Goals completed and met.
- **Red** - Goals completed but not met.
- **Black** - Active, current, and future goals.

Each goal has an effective date and an end date. The store goal is shown in the **Goal** column and the current amount achieved toward the goal is shown in the **% To Date** column.

Note: Future goals display "N/A" in the % To Date column until they become active.

Sales Goal to date progress is calculated using net sales. Progress toward store goals can also be found in the Store Goals report and on the Dashboard.

- **Offers Tab:** The Offers tab displays e-awards, coupons and entitlements that are available and whether they have been applied to the transaction. When a customer is linked to a transaction, the number of offers is displayed. As qualifying items are added to the transaction, entitlements are automatically applied to the basket. Coupons need to be scanned or entered to be applied to the transaction. The different offer types are represented by distinguishing icons on both the offers tab and the sales display panel.

The following information is displayed for each offer:

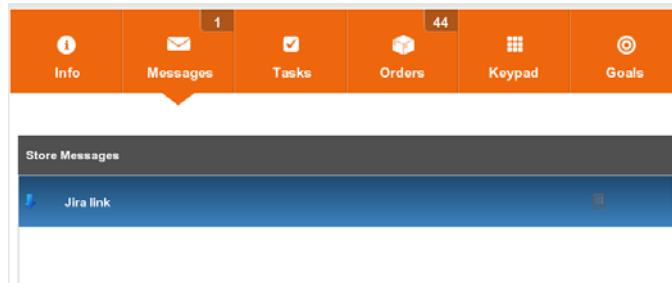
- Offer ID - ID for the e-award, coupon or entitlement.
- **Description** - Description of the coupon.
- **Expires** - Expiration of offer.
- **Applied?** - Indicates whether the coupon has been applied to the transaction.

If a customer decides they do not want to use an offer for that transaction, it can be removed manually. To remove an offer, select the discount from the sales display panel and void the line from the transaction. The offer shows as canceled under the applied column.

- **Associated Items Tab:** This tab allows users to call customers' attention to items they may be interested in, based upon their purchases. Oracle Retail Xstore Point of Service displays a picture of each item, with a description of the item beneath it.
- **Messages Tab:** You are not required to log in to view messages. These messages are visible to all employees. The information shown on the Messages tab may be from the corporate office, or from your store management.

Messages require no action, and may be store-specific (only displayed in your store, not corporate-wide) or register-specific (only displayed on a designated register).

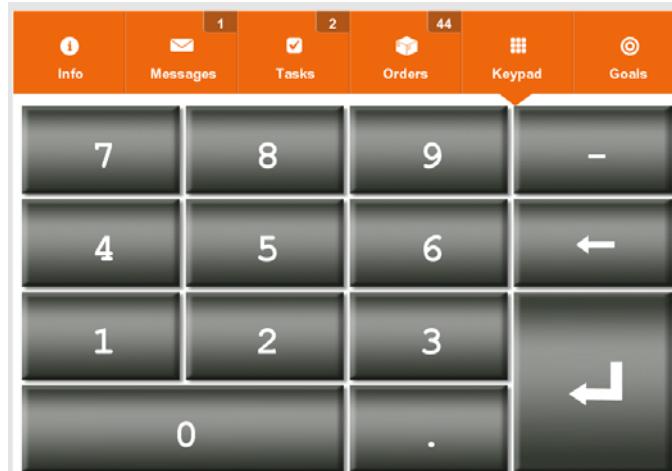
These messages are time-based and do not display after the expiration date has passed.

Figure 1–15 Messages Tab

Note: If the message contains a URL, click the link icon to open the URL.

Messages use icons to indicate priority:

- **Exclamation Point** - High priority
 - **No icon** - Medium priority
 - **Down Arrow** - Low Priority
- **Keypad Tab (Touch-Screen Only):** When using a touch-screen, the keypad option displays a numeric keyboard for entering numbers. The keypad automatically displays when you are in a field requiring a numeric value such as the Tender field.

Figure 1–16 Keypad Tab

Focus Bar

The focus bar new the lower-left corner of the screen provides a single-entry field, that is, a data entry form in which only one entry for a specified piece of data may be captured and then stored in the database.

The text above the data-entry field shows the title of the focus bar.

The message area below the data-entry field displays instructions for the current operations.

Figure 1–17 Focus Bar (Scan Item or Enter UPC Example)



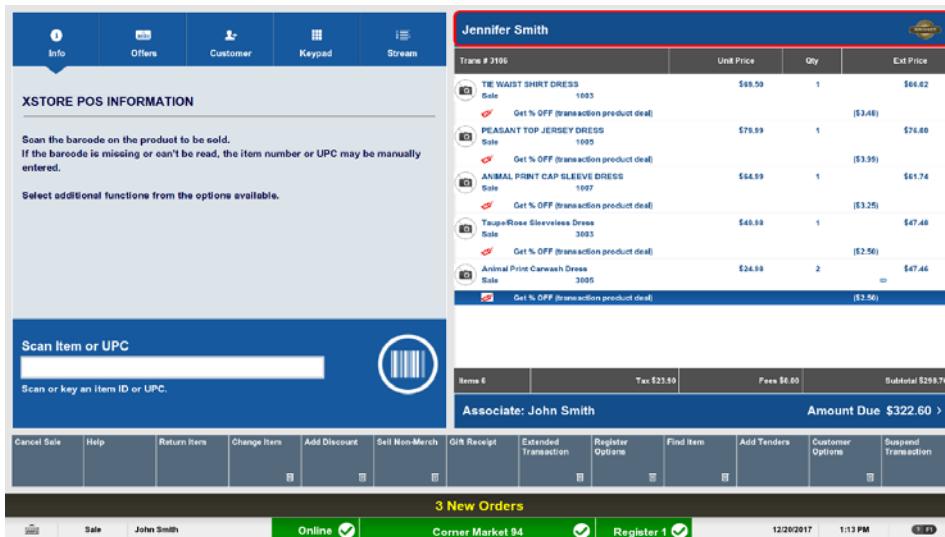
The focus bar changes color to indicate the specific function you are performing. The base version of Oracle Retail Xstore Point of Service uses the following color conventions:

- **Blue** - sale transaction
- **Orange** - login
- **Yellow** - clock in
- **Red** - return merchandise
- **Brown** - send sale
- **Green** - back office login
- **Purple** - layaway and order transactions
- **Light Blue** - pre-sale transaction
- **Olive Green** - hold account transaction
- **Light Purple** - special order transaction

Note: The image on the focus bar provides a visual clue for the type of data being entered. For example, on a login screen, a lock image indicates that an Employee ID number or password should be entered, which a fingerprint image indicates that a fingerprint should be scanned on a biometric device.

Customer Loyalty Banner

When a customer is attached to a transaction and your store has a loyalty program, a Customer Loyalty Banner opens in the upper-right corner of the screen.

Figure 1–18 Customer Loyalty Banner

The information in the Customer Loyalty Banner will depend upon the customer and your loyalty program:

- If a customer is not signed up for the loyalty program, it will prompt whether the customer would like to sign up for the loyalty program.
- If a customer is signed up for rewards, it will display the customer's reward information and a loyalty badge (if any).
- If your store does not have rewards, it will display your store banner.

View Port

The View Port area opens in the middle right of the interface. It presents all relevant information about the current function to the register operator. For example, in a sale transaction, the View Port displays the sale transaction information for items, taxes, discounts, tenders or any other detailed data about the current sales transaction.

Item images are displayed on the left. If an item image does not exist, the image avatar (camera with line through) is shown.

Figure 1–19 View Port

Loyalty Points: 2,950,932.95 Awards: \$0.00				
Trans # 6511	Unit Price	Qty	Ext Price	
TIE WAIST SHIRT DRESS Sale 1003	\$69.50	1	\$69.50 E	
BLK WHITE CAP SLEEVE DRESS Sale 1004	\$69.50	1	\$69.50 E	
PEASANT TOP JERSEY DRESS Send Sale 1005	\$79.99	1	\$79.99 E	Account ID: H0570001000068
Shipping Fee \$ Send Sale 608	\$15.95	1	\$15.95 E	Account ID: H0570001000068
Timeless Black Leather Watch Sale 6011	\$350.00	1	\$0.00 E	
			(-\$350.00)	
Warrantied Jewelry D Sale 9103	\$750.00	1	\$750.00 E	
Warranty - Fixed \$49.99 Warranty 9000010	\$49.99	1	\$49.99	Kara Smith
Items 4	Tax \$0.00	Fees \$15.95	Subtotal \$1,018.98	
Associate: John Smith, Eddie Money				Amount Due \$1,034.93 >

Note: The “Items” count in the lower left section of the View Port displays the number of items the customer will physically take out of the store. For example, if a customer has purchased a total of 3 items, but one of the items will be shipped directly to the recipient via a Send Sale process, the Items count will be 2.

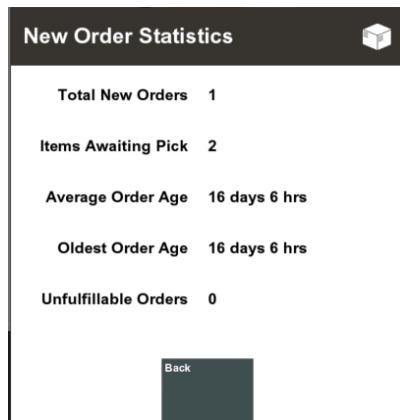
Message Bar

The message bar is located above the [Status Bar](#). The Message Bar indicates when there are new orders. The yellow portions fade in and out when messages are available.

Figure 1–20 Message Bar

Select the message to view information about order statuses:

- **Total New Orders** - The total number of new orders.
- **Ship Orders** - The number of orders waiting to be shipped from this store.
- **Customer Pick Up Orders** - The number of orders to be picked up in this store.
- **Items Awaiting Pick** - The number of items that must be set aside for the orders.
- **Average Order Age** - The average age of the orders awaiting fulfillment, in days and hours, or minutes.
- **Oldest Order Age** - The age of the oldest order awaiting fulfillment, in days and hours, or minutes.
- **Unfulfillable Orders** - The number of orders that cannot be filled.

Figure 1–21 New Order Statistics

See the *Oracle Retail Xstore Point of Service Manager's Guide* for more information about processing orders.

Status Bar

The Status Bar is found at the bottom of the screen. It displays color-coded information about the store and database:

Figure 1–22 Status Bar

- **Red** - Not able to perform actions.
- **Yellow** - System is able to perform some actions, but some functionality is not available.
- **Green** - All functionality working.

The Status Bar displays the following information:

- **Keyboard Icon:** The keyboard icon is displayed on touchscreen-enabled devices to indicate that the on-screen keyboard is available (see [Virtual Keyboard](#)).
- **Area Locator:** Indicates where you are in the system (for example, Sale, Return, and so on).
- **Signed-In User Identifier:** Identifies the currently signed-in user.
- **Database Status Indicator:** Indicates the current status of the database.
 - **Green** indicates all data sources are online.
 - **Yellow** indicates at least one WAN data source is offline. The system is using the local data source.
 - **Red** indicates at least one LAN data source is offline. The system is using the offline process set up for your store.

Note: Touch-screen users can tap the indicator to open the Datasource Status window.

- **Store Identifier:** Identifies your store name and store number.

- **Green** indicates the store is open.
- **Yellow or Red** indicates the store is closed.

Note: Touch-screen users can tap the store identifier to open the store.

Touch-screen users can also swipe the store identifier to the right to open the dashboard.

- **Register Identifier:** identifies the register number.
 - **Green** indicates the register is open.
 - **Red** indicates the register is closed.

Note: Touch-screen users can tap the register area to open the register.

- **Date:** Current register date.
- **Time:** Current register time.
- **? F1:** Click or tap to open the help window.

Prompts and Forms

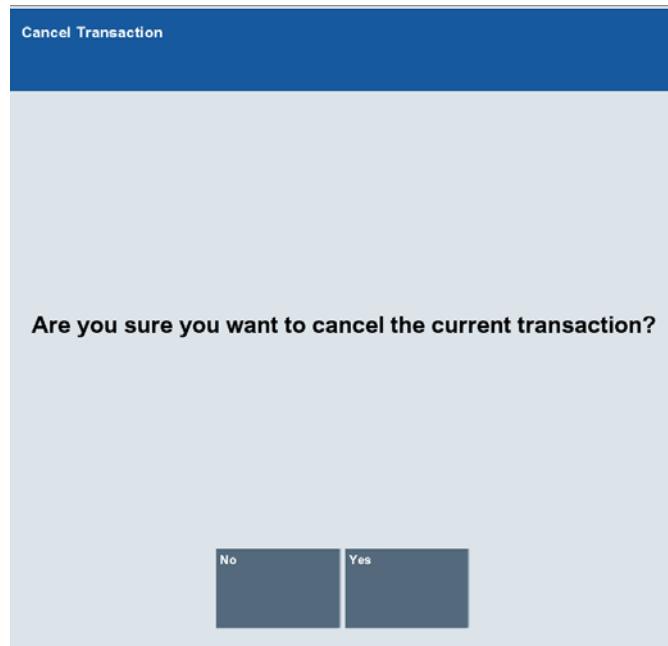
During various system operations, you may be prompted to confirm a procedure, select from a list of options, acknowledge a system action, enter/select information, and so on. Oracle Retail Xstore Point of Service provides several different types of prompts and forms to help you complete a task.

Note: On-screen buttons can be activated through keyboard shortcuts.

Response Required Prompt

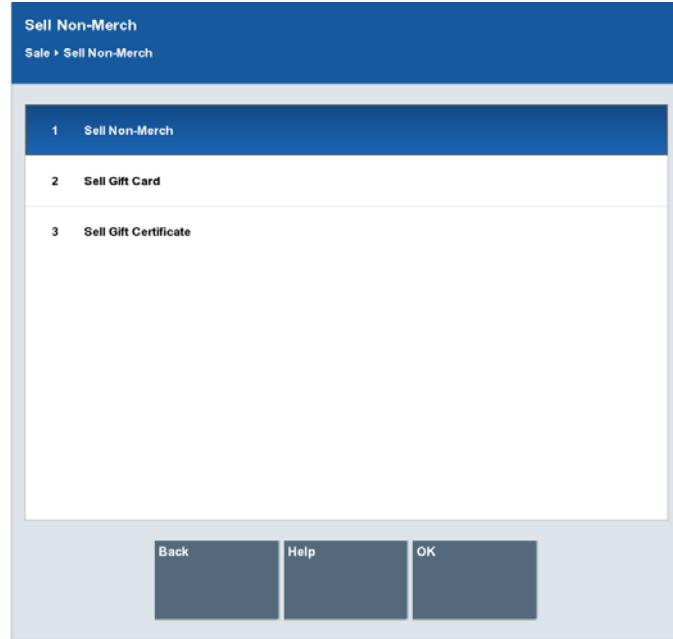
During a transaction process, you may be required to confirm an action. These prompts will require you to either confirm the action, or cancel the action and return to the transaction without making the change.

Figure 1–23 Response Required Prompt



Selection Required Prompt

Figure 1–24 Selection Required Prompt



Entry Required Prompt

During a transaction process, you may be required to enter a value before continuing. Enter the necessary values, then either click or tap **Process** to continue. Or, if necessary, click or tap **Back** to cancel the action.

Figure 1–25 Entry Required Prompt

The screenshot shows a search form titled "Gift Registry Search" with a sub-instruction "Enter search criteria.". It contains four text input fields: "Registry #", "Registry Name", "Owner Last Name", and "Owner First Name". Below these is a dropdown menu labeled "Event Type". At the bottom are three buttons: "Back", "Help", and "Process".

Search Prompt

In a search form, enter parameters or criteria to initiate a database search. Oracle Retail Xstore Point of Service displays a search form automatically when you need to retrieve specific information.

To initiate a search, you need to enter only the first few letters or numbers in the appropriate search criteria fields. The more parameters you enter, the narrower the scope of the search becomes. That results in a decreased number of records being found. When one of the parameters is not matched, the system uses the remaining parameters to conduct a broader search. If the system cannot find any matches, Oracle Retail Xstore Point of Service displays a message indicating that no information was found.

Because each Oracle Retail Xstore Point of Service search form is configurable, the search parameters on your system may be different than the search forms described in this guide.

Figure 1–26 Search Form (Customer Search)

The screenshot shows a 'Customer Search' form with a blue header bar containing the title and a sub-instruction 'Enter search criteria.' Below the header are several input fields:

- Phone # (text input field with value '- -')
- Last Name (text input field)
- First Name (text input field)
- City (text input field)
- State (dropdown menu currently set to 'US - United States')
- Postal Code (text input field)
- Loyalty # (text input field)
- Customer # (text input field)

At the bottom of the form are five buttons: Back, Help, Skip, Change Country, and Process.

Change Country

When applicable, a **Change Country** button associated with an address search will allow you to filter the values in drop-down menus to values for the selected country. This makes it easier to find the correct value in the drop-down menus.

Figure 1–27 Change Country

The screenshot shows the same 'Customer Search' form as Figure 1–26, but the 'State' dropdown menu is open, displaying a list of Canadian provinces and territories:

- AB - Alberta
- BC - British Columbia
- MB - Manitoba
- NB - New Brunswick
- NL - Newfoundland and Labrador
- NS - Nova Scotia
- NT - Northwest Territories
- NU - Nunavut

Below the dropdown menu are the same five buttons: Back, Help, Skip, Change Country, and Process.

Country-specific forms and address layouts are defined in the base config path directory and not in a configuration accelerator config path, so the layouts are accessible regardless of the country a store is running in.

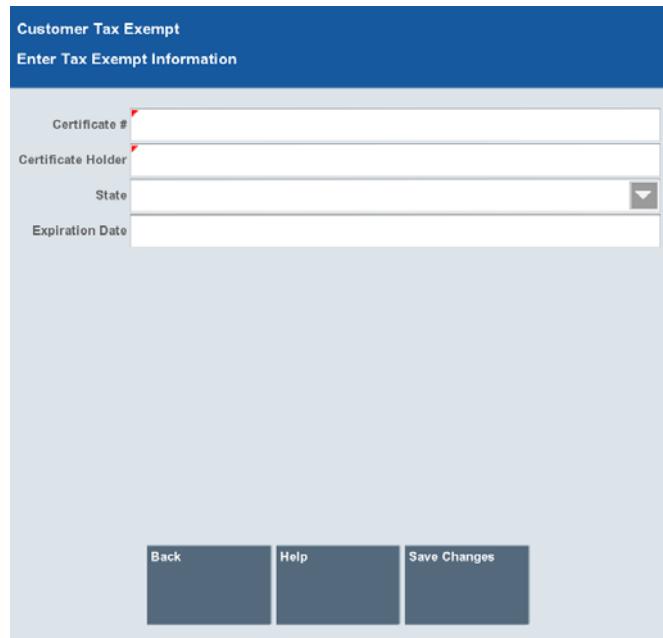
When the **Change Country** function is used on any form that supports it such as Customer Search, Customer Maintenance, and so on, you can change to any of the country-specific layouts that exist.

Data Entry Form

In a data entry form, you enter specific information about the initiated activity. Enter the information as required and click or tap **Save Changes** to continue, or click or tap Back to cancel the action.

If you click or tap **Save Changes** before completing all the required fields, Oracle Retail Xstore Point of Service displays a message explaining the error.

Figure 1–28 Data Entry Form (Tax Exempt Form)



Acknowledgement Prompts

Oracle Retail Xstore Point of Service will sometimes prompt users with information to be acknowledged by users. For example, these prompts can display data entry errors, informational messages, or indications of the completion of actions. These prompts will only display one button to be tapped or clicked.

Help Desk Error

If Oracle Retail Xstore Point of Service encounters a major error that cannot be handled as part of an action, Oracle Retail Xstore Point of Service alerts you that you should contact the help desk for help with the error.

If you receive this message, do one of the following:

- Acknowledge the message and continue.
- Call the help desk phone number displayed on the screen and follow the instructions given to you by the help desk.

- If available, select the **Open Support Ticket** option. Enter the requested information, then click or tap **Process**.

An e-mail is automatically sent to the help desk describing the date, time, location, and system where the problem occurred, as well as the entered information and additional system log files.

2

Basic Transaction Entry

A basic transaction consists of the exchange of store merchandise for a customer's tender. No transactions can be entered into Xstore Point of Service until you log in at the Register Login screen (see [Log In to Xstore Point of Service](#)). This prevents unauthorized personnel from accessing the register. Logging in also allows the system to record each associate's sales, calculate commissions, and compare sales to employee goals.

Note: Ensure that the store and register are open, the cash drawer/till has been counted, the associate is clocked in (if required), and the till is attached to the register (if required) before beginning a transaction.

Depending upon your system's configuration, you may be required to clock in before logging in. For more information about the clock-in procedure, refer to [Clock In and Clock Out](#).

Note: Your store may have a dual screen which displays items that the customer may be interested in purchasing. Depending on your store's policy, you may want to discuss these with the customer during check out.

Your system may have a Self Check-Out (SCO) function whereby the customer scans items and pays by card only.

Log In to Xstore Point of Service

Use the following steps to log in to Xstore Point of Service:

1. At the Register Login screen, scan or key your employee ID number, then press **Enter** to continue.

Figure 2-1 Register Login ID Prompt



Note: If your system is set up to use a Biometric Fingerprint device, use the device to scan your fingerprint rather than entering your user ID and password.

Note: Keyed entry and card scan are also supported here

2. The system prompts for your password. Type your password and press **Enter** to continue. For security purposes, your password displays as a row of asterisks.

Figure 2–2 Employee Login Password Prompt



Note: You may be prompted to clock in and select a work code.

Entering Pre-Sale Information

Depending on your store configuration, one or more of the following actions may be required when beginning a sale transaction:

- [Associate Flight Information](#)
- [Select Commissioned Associates](#)
- [Associate a Customer with a Transaction](#)
- [Enter Loyalty Information](#)

Select Commissioned Associates

If your store tracks the associates' sales for commissions and sales goals, you may be prompted to select a commissioned associate (or associates) to be linked to the items in a sale transaction.

Xstore Point of Service awards commissions on a per-item basis, either automatically based on the associates selected at the start of a retail transaction, or by prompting for the commissioned associate (or associates) each time an item is added to the transaction.

Note: If your system is not set up for automatic commissioned associate prompting, you also have the option to link an associate (or associates) to individual items in a sale transaction.

Figure 2–3 List of Commissioned Associates

In	Name	Employee ID
⌚	Smith, John	100
	Clark, Vanessa	040100100002
	Sakthi, Shree	101
	Smith, Joe	102
	Jones, James	103
	Black, Jeff	104
	Gagnon, Jean	200
	Dubois, Marie	201

Back **Select By ID** **OK**

Use one of the following procedures to select commissioned associates for the transaction:

Enter an Associate ID

To select an associate by ID:

1. Click Select By Associate ID.

Figure 2–4 Commissioned Associate Prompt

Commissioned Associate

100

#

Enter the ID of an associate to receive commission. The maximum allowed is 3. You have selected 0.

2. Enter the associate ID.

3. Press Enter.

Select Associates from a List

1. Use the up and down arrow keys to highlight an associate.

Note: The clock icon in the “In” column indicates the Associate has clocked in (see [Clock In and Clock Out](#)).

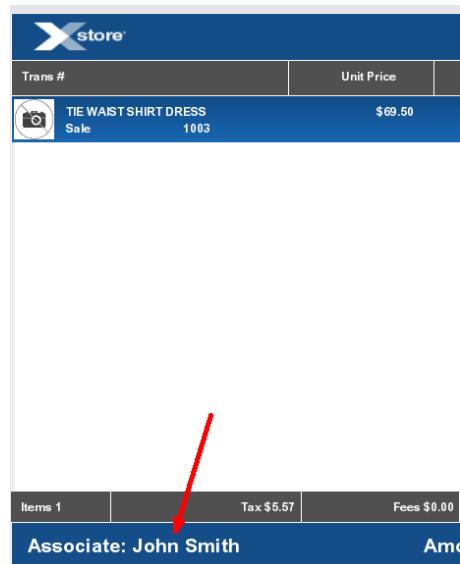
2. Press the Spacebar.

3. Repeat Steps 1 to 2 for each associate to add to the transaction.

Note: To remove an associate from a transaction, highlight the associate in the list and press the Spacebar.

The system adds the associates to the sale transaction and displays the associates' names on the view port.

Figure 2–5 Associate Name in View Port



Note: You also have the option to link an associate (or associates) to individual items in a sale transaction. See [Change the Commissioned Associate](#) for more information about associating a commissioned associate with a specific item in a transaction

Associate a Customer with a Transaction

Depending upon your system's configuration, you may be prompted for customer information so that a customer may be assigned to the transaction.

Note: If a customer is not required for this transaction, you may click [Skip](#) to continue with the sale process.

To associate a customer with a transaction, do one of the following:

- [Loyalty Card](#)
- [Search for Customer](#)

Loyalty Card

A customer can be associated with a transaction by scanning or swiping a loyalty card.

Search for Customer

Do the following at the Customer Search screen:

Figure 2–6 Customer Search Form

The form is titled "Customer Search" with the sub-instruction "Enter search criteria." Below the title are several input fields: "Phone #", "Last Name", "First Name", "City", "State" (with a dropdown menu showing "US - United States"), "Postal Code", "Loyalty #", and "Customer #". At the bottom are four buttons: "Back", "Help", "Change Country", and "Process".

1. Enter the customer search criteria.
2. Click Process.

Note: The maximum number of returned records is configurable. If your search results exceed that number, you may see a message indicating there are too many results.

You should enter as much information as possible in the Customer Search form. This will limit the number of customer records that are returned. If your search results exceed that number, you may see a message indicating there are too many results.

Xstore Point of Service displays a list of customers matching the search criteria.

Figure 2–7 Customer Search Multiple Results

The interface shows a search bar with "Customer Search" and "Source: StorePrimary". Below it is a search icon. The main area is titled "Customers" and lists several customer entries with their names and addresses. The first entry is highlighted. At the bottom are four buttons: "Back", "Select & View", "New", and "Select & Continue".

Customer	Address
Smith, John	30500 Bruce Industrial Pkwy Solon, OH 44139
Sakthi, Shree	30500 Bruce Industrial Pkwy Solon, OH 44139
Smith, Joe	
Schrantz, Johann	Triebelstrasse 301 8025 Graz-Puntigam Austria
Summit, Ralph	5523 Parker Dr Mentor, OH 44060
Smurta, James	30500 Bruce Road Solon, OH 44139

3. Click to select a customer.
 - Click to select a customer and cl
4. Do one of the following:
 - Click **Select & Continue** to assign the customer and continue the transaction.
 - Click **Select & View** to view the customer record.
 - Click **New** to create a new customer record.
 - Click **Back** to return to the Customer Search screen.

Tax Exemption If the customer has a tax exemption on file, you will be prompted whether to apply the exemption. Do one of the following:

- Click **Yes** to select a tax exemption:
 1. Click a tax exemption in the list.
 2. Do one of the following:
 - Click **Select & Continue** to select the tax exemption and continue the transaction.
 - Click **Select & View** to select view the details of the tax exemption.
- Click **No** to continue the transaction.

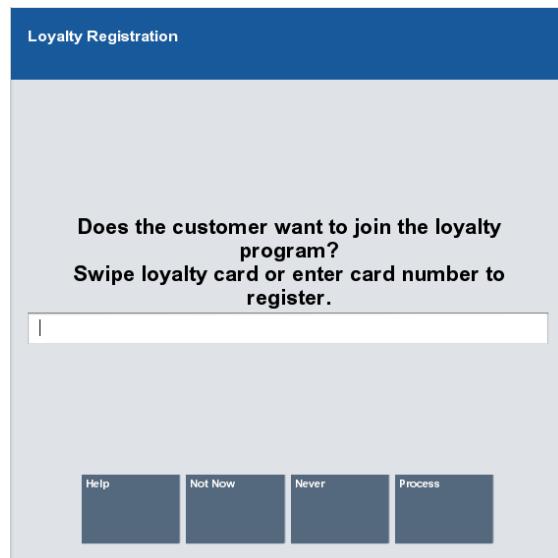
Enter Loyalty Information

If your store has a loyalty program there are several possible scenarios that may occur after assigning a customer to the sale:

- [Enroll Customer](#)
- [Customer Has Multiple Loyalty Cards](#)
- [Expired Loyalty Card](#)

Enroll Customer

The system prompts you whether to enroll the customer:

Figure 2–8 Loyalty Registration Prompt

- Click Not Now to continue the transaction without enrolling the customer.
- Click Never to continue the transaction without enrolling the customer and never display the enrollment prompt again.
- To enroll the customer:
 1. If necessary, swipe or scan a new loyalty card.
 2. Click Process to enroll the customer.

Note: If the customer agrees to join the loyalty program and then decides not to sign up during the transaction, void the loyalty card line item ([Void an Item](#)) or cancel the sale ([Cancel a Transaction](#)).

If you have completed the sale and the customer decides not to enroll in the loyalty program, you will need to post void the sale ([Post Void](#)) to disassociate the customer.

Customer Has Multiple Loyalty Cards

If the customer is associated with more than one loyalty account:

1. Click the proper account in the list.
2. Click OK.

Expired Loyalty Card

If the customer's loyalty card has expired:

- Click Yes to renew the card.
A confirmation prompt displays with the new expiration date.
- Click No to keep the card expired.

A message prints on the receipt indicating that the loyalty card has expired. The card expiration information also displays on the Customer Maintenance Activity Stream Contact Information Tab.

Entering Items

You can enter items in several ways. To enter items into a transaction:

Figure 2–9 Scan Item Prompt



- Scan the item.
- Enter the item ID or UPC code and press **Enter**.
- Choose the item from the Quick Pick screen.
- Use [Item Lookup](#) to find an item and add it to the sales transaction.

Xstore Point of Service looks up item and displays it in the [View Port](#).

After entering an item, other prompts may open.

Barcodes with Properties

This section describes all possible barcodes with properties.

Weight in Barcode

If you scan the barcode below, the system converts the data in the given order and sells the weight of the barcode item.

Example 2–1 Weight in Barcode

2150101020006

(21) Weight prefix, (50101) Item number, (02000) weight in grams = 2,0 kg, (6) Check sum



Note: If the store has a service or self-service scale, creating barcodes with encoded weight, the system decodes the label and sells the item (coded in the barcode) with the calculated price.

Calculated Price = Item price × Weight from the barcode

Quantity in Barcode

If you scan the barcode below, the system converts the data in the given order and sells the quantity of the barcode item.

Example 2–2 Quantity in Barcode

2570018000036

(25) Quantity prefix, (70018) Item number, (00003) Quantity number, (6) Check sum



Note: If the store has a service or self-service scale, creating barcodes where the quantity is coded, the system decodes the label and sells the item (coded in the barcode) with the calculated price.

Calculated Price = Item price x Quantity from the barcode.

Price in Barcode

If you scan the barcode below, the system converts the data in the given order and sells for the price of the barcode item.

Example 2-3 Price in Barcode

2250102003005

(22) Price prefix, (50102) Item number, (00300) price (3,00 \$), (5) Check sum



Note: If the store has a service or self-service scale, creating barcodes where the price is coded, the system decodes the label and sells the item with the price from the barcode.

Press Barcode with Age Verification

If you scan the barcode below, the system converts the data in the given order and sells the press product barcode with the age verification.

Example 2-4 Press Barcode with Age Verification

4343000105396

(43) Prefix with age verification, (4) full VAT, (30001) item number, (0539) price 5,39 \$, (6) Check sum



Manual GS1 Entry

If you cannot scan a barcode, use the **Manual GS1 Entry** menu button to enter the barcode, for example, (01) 02570016000052.

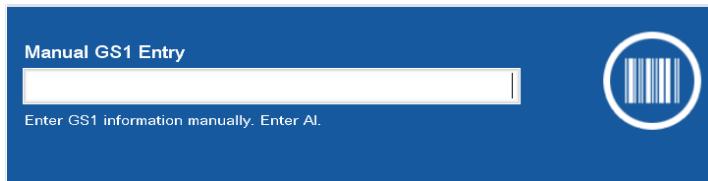
1. Select **Find Item**. Press the **Manual GS1 Entry** menu button.
2. You are prompted for the AI. Enter the application identifier (AI) - the number shown in brackets, for example, (01) and press **Enter**.

Figure 2–10 Manual GS1 Entry - AI

3. You are prompted for the value. Enter the digits after the AI - number in brackets, for example, 02570016000052 and press **Enter**.

Figure 2–11 Manual GS1 Entry - Value

4. The system shows the following prompt.

Figure 2–12 Manual GS1 Input

5. Repeat the process until you have entered the entire barcode. Press **Finish** to complete the Manual GS1 Entry. The item is shown on the Sales Display Panel. Complete the transaction as usual.

Note: To cancel the Manual GS1 Entry, press **Back**.

RFID

To support RFID (radio-frequency) scanning, Xstore POS can be integrated to the Motorola Zebra DS9808-R Scanner. This scanner scans both the product ID and RFID Tag Reference Number simultaneously.

Scan the RFID tag on the item.

Xstore reads the RFID Electronic Product Code (EPC) tag whilst the product barcode provides the product ID and the RFID tag extracts the unique reference number of the product.

If the scanner is not working, manually enter the product ID.

Serial Number

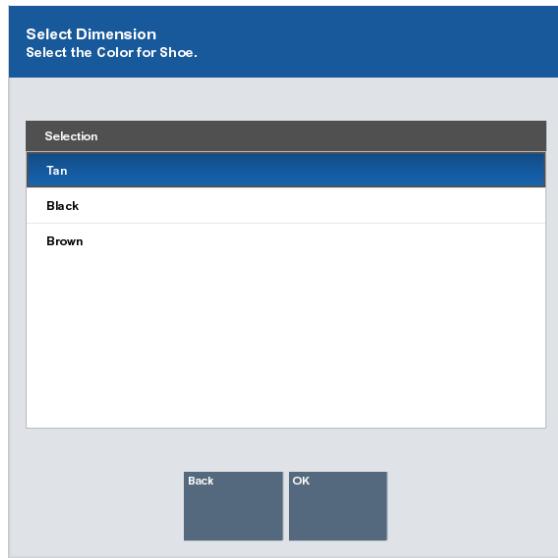
For items that require a serial number:

1. Enter the serial number.
2. Press Enter.

Style

A style is an entry in the Item database that has properties such as size, color, and width.

Figure 2–13 Select Dimension



To select a style:

1. Click the style in the list.
2. Click **OK**.

Attached Item

When an item with an associated attached item is added to a sale, you may be prompted whether or not this additional item should be added to the sale.

Note: In some cases, the item will be added automatically without prompting the user.

- Click **Yes** to add the item.
- Click **No** to not include the attached item.
- If multiple attached items are available:
 1. Click the items to be added to the transaction.
 2. Click **OK**.

Note: Attached items are shown with a Link icon next to them.

Kit

When a Kit is added to a sale, the component items are automatically shown in rows below the parent Kit line. Each component item in the Kit shows the quantity included in the Kit, along with the component's description. The component items that make up a Kit cannot be changed using the change item function in Xstore Point of Service, only the parent Kit can be changed using the change item function.

If not all kit components can be shown on the View Port due to limited space, the last component row displays an ellipsis (...) to indicate there are additional items in the kit. However, the receipt shows all items that are part of the kit.

Serialized Kit Items

If one or more items in a kit require a serial number, enter the serial number for each serialized item.

Originating Inventory Location

If prompted for an originating inventory location:

1. Click the inventory location that will originate the item.

Note: To leave the location pending, leave the inventory location blank.

2. Click **Process**.

Item Restrictions

When certain items are selected, restrictions may apply. These include the following:

- [Customer Age Verification](#)
- [Cashier Age Restrictions](#)
- [Time Restrictions](#)

Customer Age Verification

Xstore Point of Service allows you to configure customer age verifications to determine whether a customer meets the age requirements to buy certain items. You can set different age levels for verification (for example, 18 years and 21 years).

An additional age verification is only requested, if an item with a higher restriction is added to the transaction. For example, if the first purchased item has an age limit of 21 and the second item has an age limit of 18, there is only an age verification for the first item, but not for the second one.

To sell an item with an age verification, follow the steps below.

1. Enter an item where an age verification is necessary. Xstore Point of Service displays a prompt relating to the date of birth of the customer is before a specified date.

Figure 2–14 Customer's Minimum Age Prompt



- Select **Yes** to confirm the prompt. The item is shown on the Sales Display Panel. For additional items requiring an age verification 18 years, no prompt is displayed.
- Select **No**. The item is not added to the Cart. If additional items with an age verification are entered, the prompt is shown again.

Cashier Age Restrictions

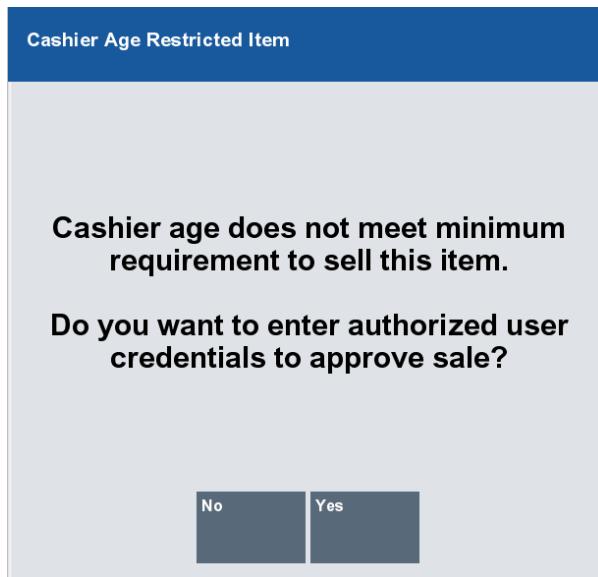
Xstore Point of Service allows you to configure cashier age restrictions to determine whether a cashier has the permission to sell certain items. You can activate/deactivate the cashier age restriction per store.

An additional age verification is only requested if an item with a higher restriction is added to the transaction. For example, if the first purchased item has an age limit of 18, there is only an age verification for the first item, but not for the second one.

If the cashier age restriction is activated and there is no date of birth entered for the cashier, the system displays the cashier age restriction prompt.

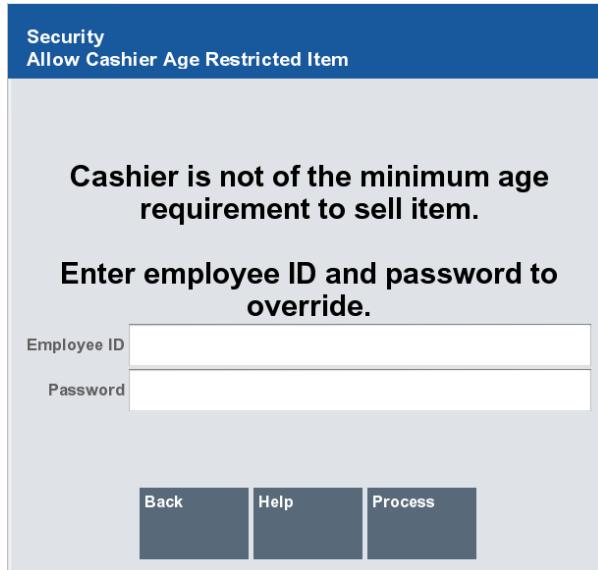
1. Enter an item with a cashier age restriction. Xstore POS displays a prompt requesting authorization of the transaction.

Figure 2–15 Cashier Age Restricted Item



2. Select **Yes** to authorize the transaction. If **No** is selected, the item is not added to the sale.

Figure 2–16 Cashier Age Restricted Item Override



3. Users holding the required security privileges must:
 - a. Enter your user name.
 - b. Enter your password.

The item is added to the sales transaction and shown on the Sales Display Panel.

Time Restrictions

Xstore Point of Service allows you to configure a time frame in which certain items cannot be sold and/or returned, for example, alcohol. If this function is enabled, items with a restricted time frame can only be sold during authorized hours and days. You can activate/deactivate the time frame restriction by item, department and sub-department.

To sell an item with a time restriction, follow the steps below.

1. Enter an item with a restricted time frame.
2. Xstore Point of Service validates the system time and day against the configured restricted time frame.
3. The system displays the prompt, that the item is currently restricted and not available for sale.
4. Press **OK** to close the prompt.

Add Wish List Items to a Transaction

Wish list items are purchased through the wish list tab of the Customer Maintenance screen.

1. Start a transaction.
2. If necessary, click **Customer Options**.

Note: For extended transactions (for example, layaway, send sale, or special order), go directly to Step 3.

3. Click **View Customer**.
4. Click the **Wish List** tab.

Figure 2–17 Customer - Wish List Tab

Megan Sanders Customer ID 317784 Customer Since 02/03/2016

Item ID	Description	Orderable
1004	BLK WHITE CAP SLEEVE DRESS	✓
1005	PEASANT TOP JERSEY DRESS	✓
1008	DRAWSTRING PEASANT DRESS	✓

No Purchase

Item Information
Price \$69.50

Back Help **Customer Options** Edit Customer Modify Items Wish List Options Purchase Items Order Items View List Previous Tab Next Tab **Purchase Items**

5. Do one of the following:

- Click **Purchase Items** to add Wish List items to a sale transaction.

Figure 2–18 Purchase Items

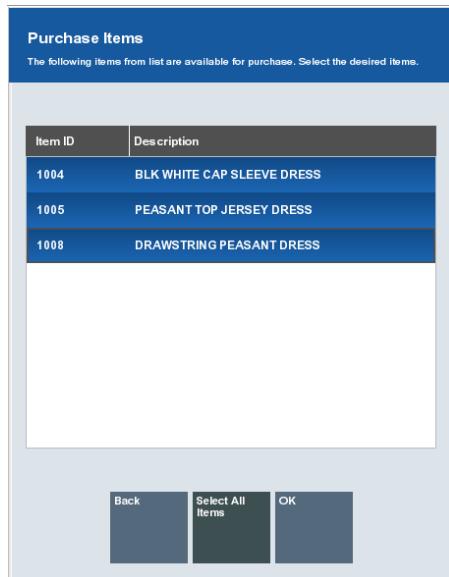
Purchase Items
The following items from list are available for purchase. Select the desired items.

Item ID	Description
1004	BLK WHITE CAP SLEEVE DRESS
1005	PEASANT TOP JERSEY DRESS
1008	DRAWSTRING PEASANT DRESS

Back Select All Items OK

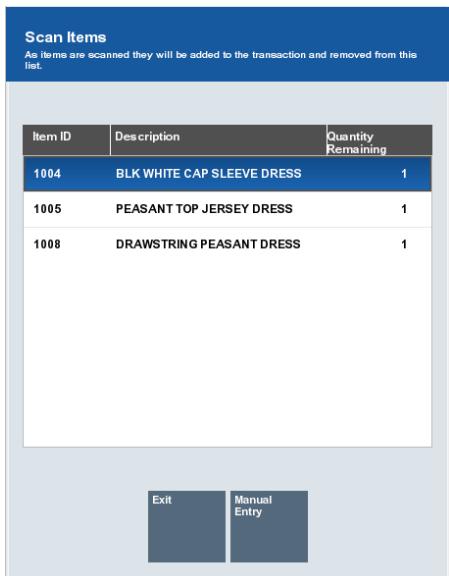
- Click **Order Items** to add Wish List items to an order.
- 6. Click the items to include. This will highlight the items.

Note: Click **Select All Items** to select all the items in the Wish List.

Figure 2–19 Purchase Items Selected

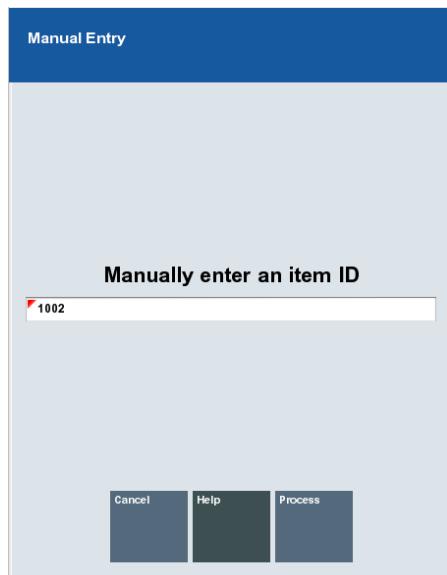
7. If your system has the **Scan Items Prior to Adding to Transaction** setting configured, the items display in a list to scan from to confirm they are the correct items.

If your system does not have the **Scan Items Prior to Adding to Transaction** setting configured, no scanning is required. The Wish List Confirmation Prompt opens. Select **OK** and continue at step 8.

Figure 2–20 Purchase Item Scan Items Prompt

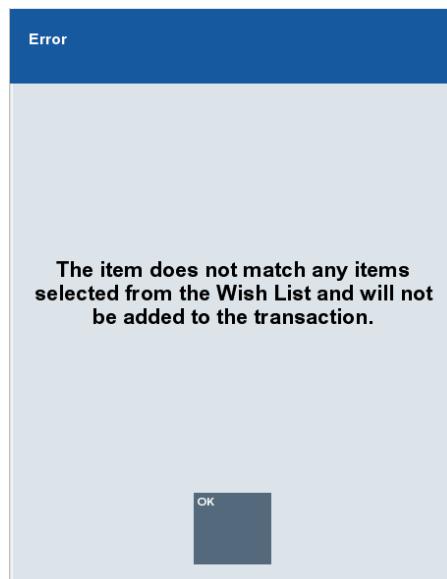
If the item does not scan, select **Manual Entry**, enter the ID of the item and select **Process**.

Figure 2–21 Purchase Items Manual Entry



If an item is scanned or entered that does not match any items selected from the Wish List, a warning message is shown and the item is not added to the transaction. Select **OK** to continue.

Figure 2–22 Purchase Items Wrong Item Scanned



After an item has been scanned or manually entered, it is added to the transaction and removed from the scan items list.

Figure 2–23 Purchase Items After Scan

The screenshot shows a software interface titled "Scan Items" with a sub-instruction: "As items are scanned they will be added to the transaction and removed from this list." Below this is a table with three columns: Item ID, Description, and Quantity Remaining. Two items are listed:

Item ID	Description	Quantity Remaining
1005	PEASANT TOP JERSEY DRESS	1
1008	DRAWSTRING PEASANT DRESS	1

At the bottom of the screen are two buttons: "Exit" and "Manual Entry".

When all required items have been chosen, select **Exit**.

8. Indicate whether to keep the items in the Wish List:

Figure 2–24 Wish List Confirmation

The screenshot shows a software interface titled "Wish List Confirmation". The main message in the center is: "Do you wish to remove the selected items from the wish list after the sale is completed?" At the bottom are two buttons: "No" and "Yes".

- Click **Yes** to add the items to the sale transaction and remove the items from the Wish List.

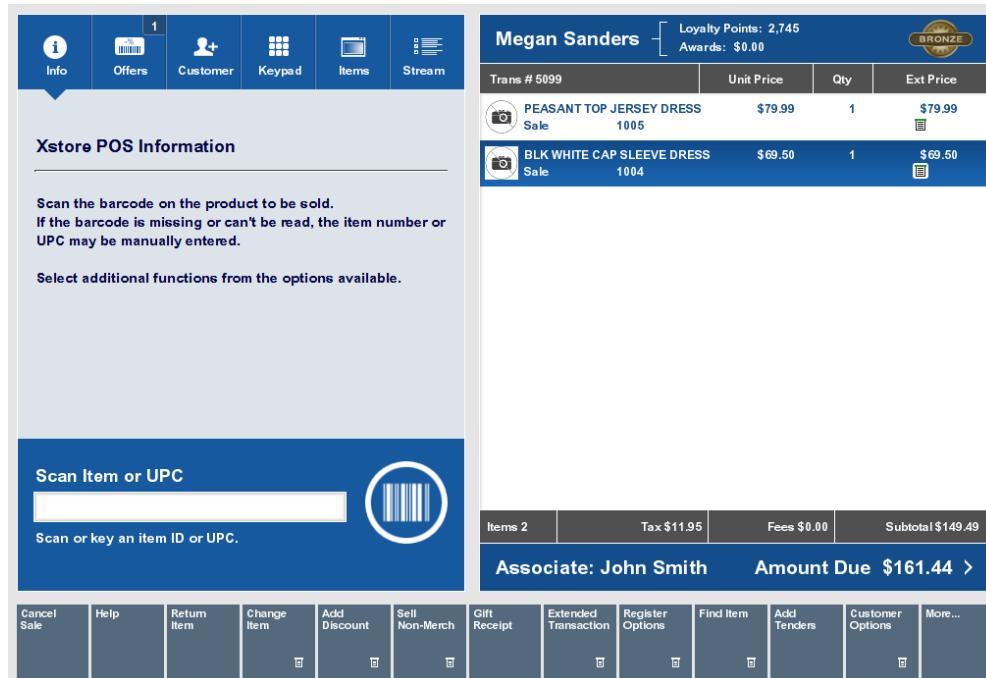
Caution: If the transaction is post-voided or returned, the wish list items are not reinstated to the Wish List.

- Click **No** to add the items to the sale transaction but not remove the items from the Wish List.

9. Continue the transaction.

The items appear in the Sale screen [View Port](#) with a Wish List icon.

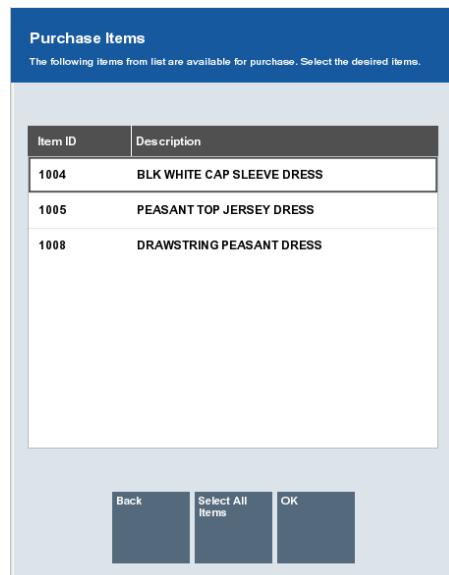
Figure 2–25 Sales Screen Showing Wish List item Added



Add Digital Cart Items to a Transaction

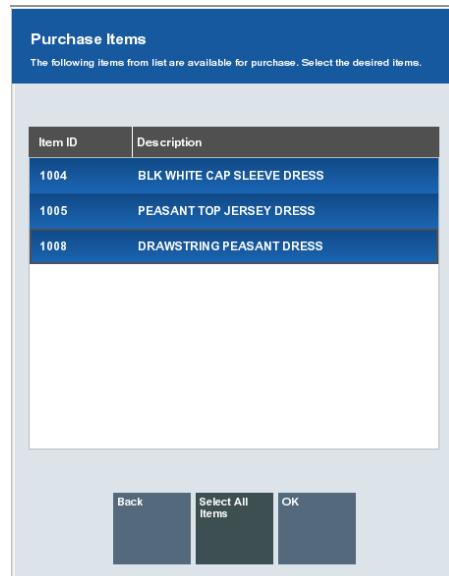
To add Digital Cart items to a transaction for customers who want to purchase items from their Digital Cart:

1. Start a transaction.
2. If necessary, click **Customer Options**.
3. Click **View Customer**.
4. Click the **Digital Cart** tab.
5. Do one of the following:
 - Click **Purchase Items** to add items to a sale transaction.

Figure 2–26 Purchase Items

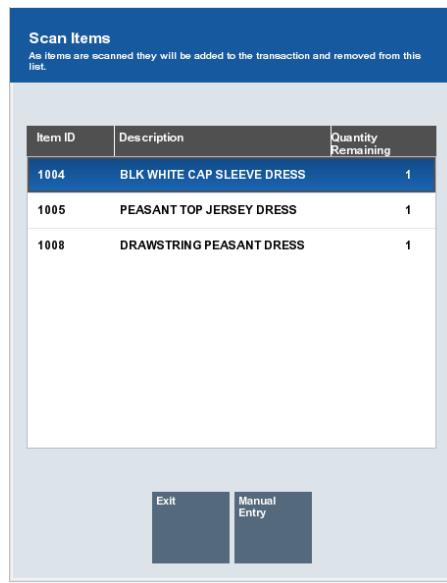
- Click **Order Items** to add items to an order.
6. Click the items to include. This will highlight the items.

Note: Click **Select All Items** to select all the items in the Digital Cart.

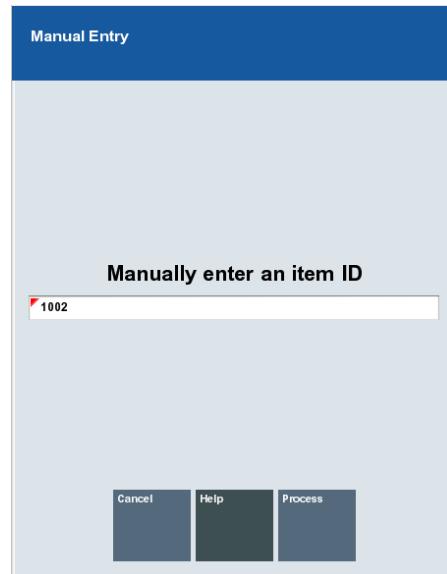
Figure 2–27 Purchase Items Selected

7. If your system has the **Scan Items Prior to Adding to Transaction** setting configured, the items display in a list to scan from to confirm they are the correct items.

If your system does not have the **Scan Items Prior to Adding to Transaction** setting configured, no scanning is required. The Digital Cart Confirmation Prompt opens. Select **OK** and continue at step 8.

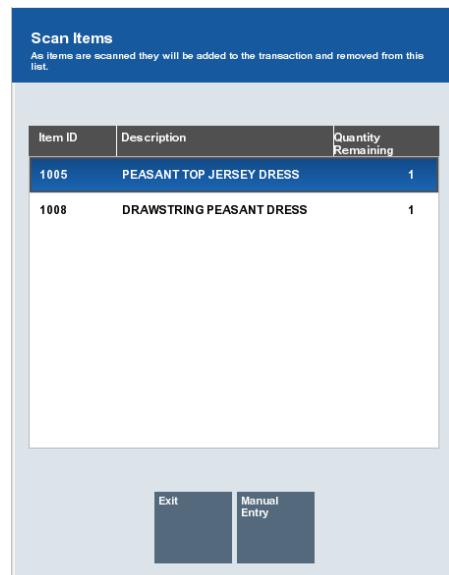
Figure 2–28 Purchase Item Scan Items Prompt

If the item does not scan, select **Manual Entry**, enter the ID of the item and select **Process**.

Figure 2–29 Purchase Items Manual Entry

If an item is scanned or entered that does not match any items selected from the Digital Cart, a warning message is shown and the item is not added to the transaction. Select **OK** to continue.

After an item has been scanned or manually entered, it is added to the transaction and removed from the scan items list.

Figure 2-30 Purchase Items After Scan

When all required items have been chosen, select **Exit**.

8. Indicate whether to keep the items in the Digital Cart:
 - Click **Yes** to add the items to the sale transaction and remove the items from the Digital Cart.

Caution: If the transaction is post-voided or returned, the items are not reinstated to the Digital Cart.

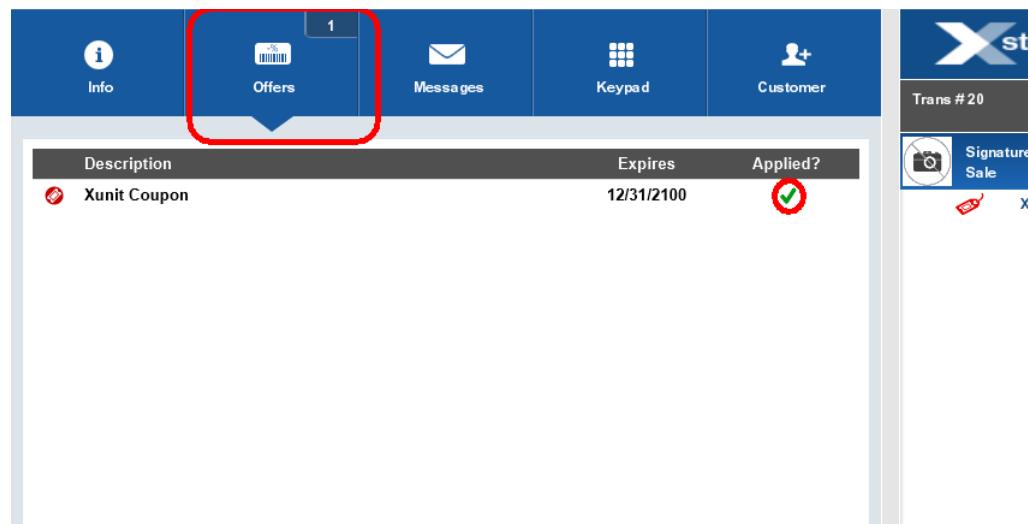
 - Click **No** to add the items to the sale transaction but not remove the items from the Digital Cart.
9. Continue the transaction.

The items appear in the Sale screen [View Port](#) with a Digital Cart icon.

Add Item Coupons

To add a coupon to a sale, scan the coupon or enter coupon ID in the Scan Item or UPC prompt and press Enter. The coupon appears in the Offers tab in the [Message Window](#). The tab displays a number in the upper-right corner indicating the number of coupons entered into the system.

Note: When a coupon is actually applied to the transaction, a green check mark appears next to coupon.

Figure 2–31 Offers Tab

Redeem a Rain Check

Rain checks allow customers to purchase out-of-stock items for the same price at a later date.

Note: Rain checks can only be applied to sale transaction; it cannot be applied to extended transactions (for example, layaways, special orders, or send sales). Once a rain check is redeemed, it cannot be used again.

Depending upon the configuration of your system, you may not be able to redeem rain checks issued by other stores.

To redeem a rain check:

1. Click **Register Options** in the Sale screen.
2. Click **Redeem Rain Check**.
3. Scan the rain check or enter the rain check ID.

The Redeem Rain Check prompt opens.

Note: If the rain check has expired a message displays indicating it has expired and cannot be redeemed.

4. Click **Yes** to redeem the rain check.

The rain check item appears in the **View Port** with a rain check icon.

Tendering a Transaction

The tendering process requires that you select or enter two basic items of information:

- Tender type (for example, cash, check or credit card)
- Amount paid with that tender type

Depending upon the form of payment and your store's policies, you may have to enter or select additional information; for example:

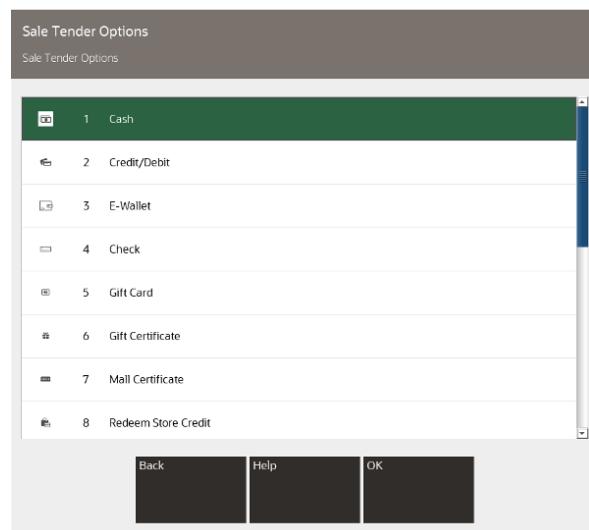
- Credit card account number, CID number, and expiration date
- Customer name
- Customer address
- Security approval for large sales or refunds
- Additional tender types if the first tender type did not pay the total due
- Additional forms of customer ID (driver's license number, birth date, credit card number, or other ID)

Refer to [Chapter 4, Processing Tenders](#) for additional information about specific tenders.

Start Tendering

1. Start tendering by doing one of the following:
 - Press Enter in the empty item prompt.
 - Click **Add Tenders**.
2. Tender the transaction. See [Chapter 4, Processing Tenders](#)
3. If prompted to round up the amount for a charitable donation:
 - Click **No** to continue with tendering without adding the amount.
 - Click **Yes** to add the charitable donation to the transaction, then continue with tendering.
4. Select the tender by doing one of the following:

Figure 2–32 List of Tender Types



- Click the tender in the list.
- Use the up and down arrows to highlight the tender.

A tender amount prompt opens.

5. Add the tender amount by doing one of the following:

Figure 2–33 Tender Cash Amount Prompt

The screenshot shows a green-themed user interface for a cash tender. At the top left is a text input field labeled "Tender" containing the value "75.07". To the right of the input field is a large white dollar sign (\$) symbol inside a circle. Below the input field is a placeholder text "Enter Cash amount.".

- Enter the amount to apply to the tender.
- For cash tenders, click a quick cash amount in the [Menu Buttons](#).

Figure 2–34 Quick Cash Buttons



6. Press Enter.
- If you entered less than the total amount due, repeat Steps 4 to 6.
- If you entered the amount due or greater, continue the transaction.
7. If you are prompted whether to complete the transaction:

Note: Your system may automatically print receipts without prompting whether to complete the transaction.

- Click **Y** to print receipts.
- Click **N** to return to the Sale Tender screen (Step 4).

Xstore Point of Service prints receipts.

Note: If you are prompted for e-mail receipt information, see [E-mail Receipt Options](#).

8. Depending on the configuration of your system, you may be prompted to scan a cash drawer. Scan the appropriate cash drawer, if necessary.
9. On occasion, upon completing a transaction, a prompt may open asking whether to apply a system update. If you are prompted to apply a system update:

Caution: If you agree to perform the system update, you will not be able to create any new transactions for a certain grace period. Existing transactions can be completed during the grace period.

Once the system is not in a transaction, or if the required period has expired, the update will be automatically applied without asking the user. You cannot use the system during system updates.

- Click **No** to be asked again after a period of time.
 - Click **Yes** to apply the update.
- A confirmation prompt opens:
- Click **Apply** to perform the update.
 - Click **Cancel** to cancel the update and be asked to perform the update after a period of time.

The transaction completes.

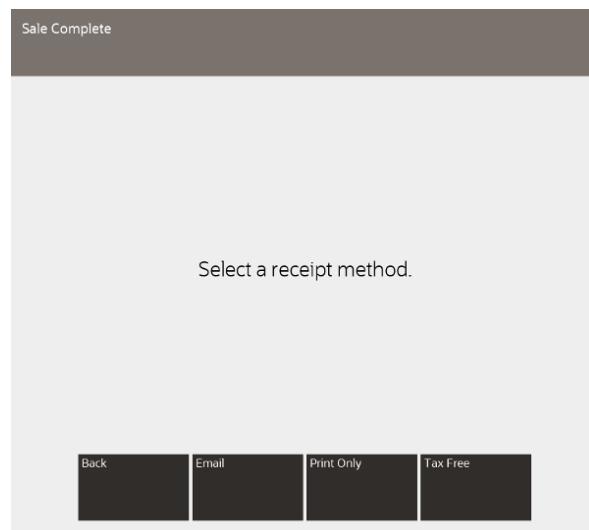
E-mail Receipt Options

If your store issues e-mail receipts, you may be prompted for more information after the sale is tendered. Any receipts that have been set up for e-mail delivery are generated as PDF documents and sent to the customer's e-mail address as an e-mail attachment. This e-mail receipt process assumes the customer has an active e-mail address and has given permission to receive e-mail from the store.

After tendering the sale:

1. Select the receipt method:

Figure 2-35 Sale Complete Prompt - Email Receipts Enabled



Note: This choice applies to all receipts. For example, if you choose to e-mail receipts, then all receipts such as Gift and Customer receipts are sent in an e-mail. You cannot print one but e-mail the other.

- Click **Print Only** to print the receipts. The receipts print and the transaction completes.
 - Click **Email** to either e-mail the receipt or e-mail and print the receipts. Continue with the next step.
2. Confirm, enter, or change the customer's e-mail address.

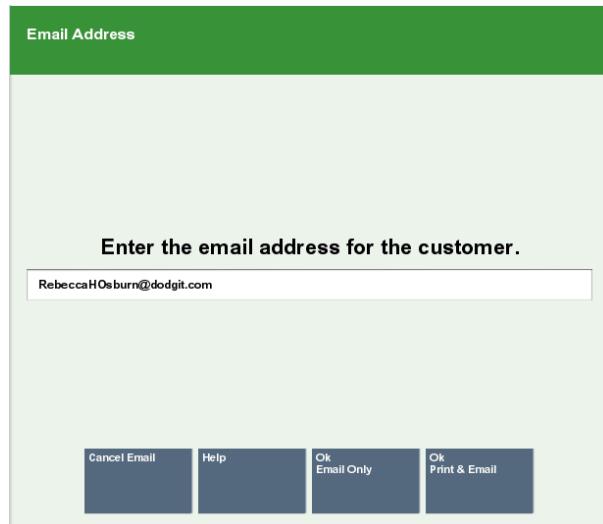
Note: If you make changes to the e-mail address, you may be prompted whether to change the e-mail address for the customer.

Click **Yes** to change the e-mail address.

Click **No** to keep the existing e-mail address.

3. Choose an option:

Figure 2–36 Email Address Form

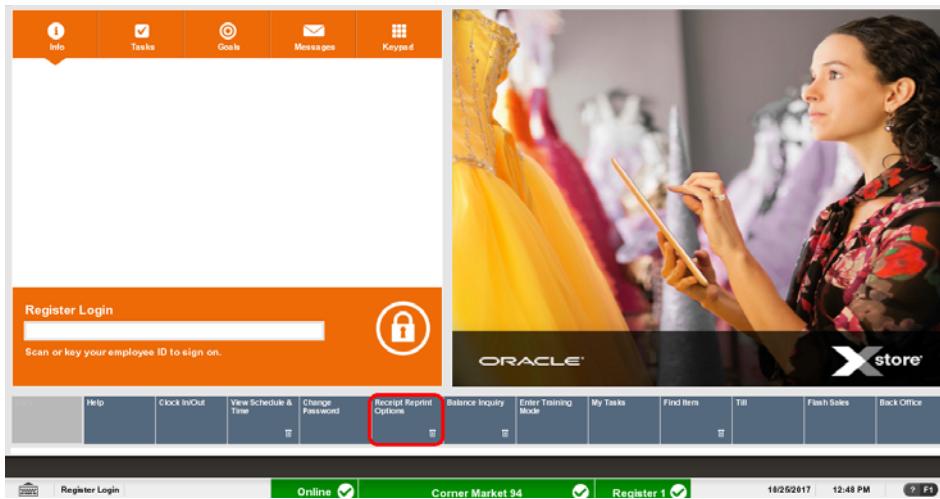


Note: If the e-mail address is not formatted correctly, a confirmation prompt opens indicating it is not correct. Press Enter then correct the e-mail address.

- Click **OK Email Only** to send the receipts in an e-mail.
- Click **OK Print & Email** to send the receipts in an e-mail and print them on the receipt printer.
- Click **Cancel Email** to cancel the e-mail and return to the Sale Complete prompt.

Reprint Receipts and Documents

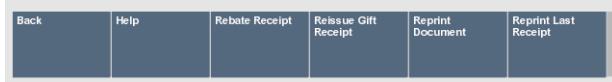
The reprint options provide a way to recover when there is a printer error or the printer jams. They allow you to reprint a receipt or a rebate offer for the customer.

Figure 2-37 Login Screen - Receipt Reprint Options Menu Button

Reprint the Last Receipt

To reprint the last receipt created by the register:

1. Go to the register login screen.
2. Click **Receipt Reprint Options**.

Figure 2-38 Receipt Reprint Options Menu

3. Click **Reprint Last Receipt**.

Xstore Point of Service prompts whether to reprint the last receipt.

4. Click **Y** to reprint the last receipt.

Note: The receipt is clearly labeled as a reprinted receipt.

Reprint a Document

To reprint a document (such as a rebate offer):

1. Go to the register login screen.
2. Click **Reprint Document**. See [Figure 2-38](#).

The Reprint Document Lookup window opens.

Figure 2–39 Reprint Document Lookup Form

The screenshot shows a user interface for reprinting documents. The top section has a solid orange background with white text. Below this, there are three input fields: 'Series ID' (a text box containing a single character), 'Document Type' (a dropdown menu with a small arrow icon), and 'Vendor' (a text box). At the bottom of the form are three dark blue rectangular buttons labeled 'Back', 'Help', and 'Process'.

3. Enter the search information for the document:
 - **Series ID** - Enter the ID for the document series.
 - **Document Type** - Select the type of document.
 - **Vendor** - Enter the name of the vendor who produced the document.

4. Click **Process**

Xstore Point of Service displays a list of documents matching the search criteria.

5. Click the correct document.

6. Press Enter.

Xstore Point of Service reprints the document on the report printer.

Note: If the document is not in PDF format, it may also print on the receipt printer.

Print a Rebate Receipt

Rebate receipts may be offered to customers so that they can retain the original receipt for a purchase, and mail in the rebate receipt as proof of purchase.

1. Go to the register login screen.

2. Click **Rebate Receipt**.

The system prompts for transaction information.

3. Enter the transaction information by doing one of the following:

- Scan the barcode on the original sale receipt.
- Enter the barcode information and press Enter.

The rebate receipt prints on the receipt printer.

Note: The receipt is clearly labeled as a rebate authorization receipt. This receipt cannot be used for merchandise returns.

Print a Gift Receipt

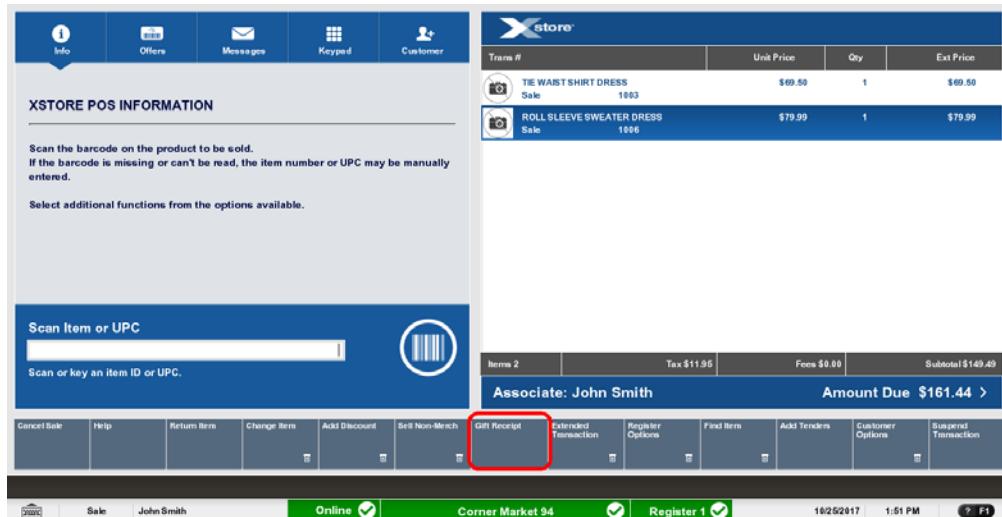
During a transaction, items may be selected for a gift receipt before a tender is selected, or between adding tenders. Gift receipts can also be issued immediately after a completed sale transaction, or from the Electronic Journal for eligible items in a transaction. Eligible items include regular sale items, special order pickup items, and layaway pickup items.

Select Gift Certificate Items in a Sale

While a sale transaction is being performed, you may use the following steps to select items to be issued gift certificates:

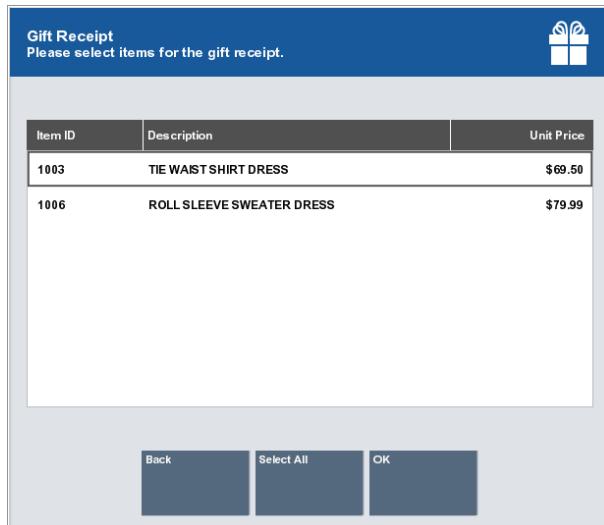
1. Click **Gift Receipt** during a sale transaction.

Figure 2–40 Sale Menu - Gift Receipt Button



Xstore Point of Service displays a list of items eligible for gift receipts.

Figure 2–41 List of Items Eligible for a Gift Receipt



2. Select the gift certificate items by doing one of the following:

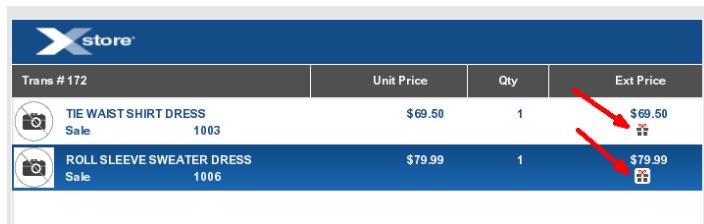
- Click each item.
- Use the up and down arrows to move to the correct item, then press the Spacebar to highlight it.

Note: Click **Select All** to select all items in the list.

3. Click **OK**.

The gift certificate items are labeled in the **View Port** with a gift icon. Gift certificates will be printed at the end of the transaction.

Figure 2–42 Gift Icon



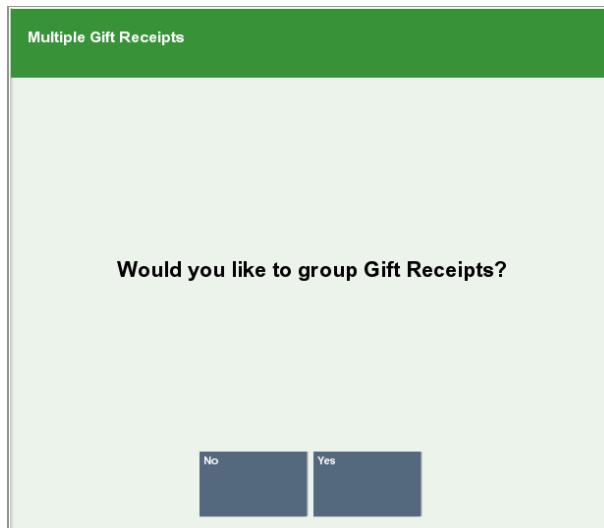
Trans # 172	Unit Price	Qty	Ext Price
TIE WAIST SHIRT DRESS Sale 1003	\$69.50	1	\$69.50
ROLL SLEEVE SWEATER DRESS Sale 1006	\$79.99	1	\$79.99

4. At the end of the transaction, if you are prompted whether to group gift certificate items, see [Group Gift Receipt Items](#).
5. At the end of the transaction, you may be prompted whether to print a gift certificate for each item:
 - Click **Yes** to print a gift certificate for each item.
 - Click **No** to print one gift certificate for all items.

Group Gift Receipt Items

After tendering the sale, if there are multiple items that have been labeled as requiring a gift receipt, you may be prompted whether to group items on separate gift receipts. For example, you can group 2 items on one receipt, and 3 items on another receipt.

Figure 2–43 Multiple Gift Items - Group Receipts Prompt



To group items on gift receipts:

1. If you are prompted whether to group gift receipts, select an option:
 - Click **Yes** to group gift receipt items.
A gift receipt grouping window opens.
 - Click **No** to continue the transaction without creating gift receipt groups.

Figure 2-44 Items for Gift Receipts

Item ID	Description	Unit Price
1003	TIE WAIST SHIRT DRESS	\$69.50
1006	ROLL SLEEVE SWEATER DRESS	\$79.99
1007	ANIMAL PRINT CAP SLEEVE DRESS	\$64.99

2. Select the items to group on one gift receipt by doing one of the following:
 - Click each item.
 - Use the up and down arrows to select an item, then press Spacebar to highlight it.
3. Click **Add Grouping**.
The selected items are grouped into one gift receipt and removed from the list.
4. Repeat Steps 2 to 3 for each gift receipt group.
5. Click **Finish and Print** to print the gift receipts and complete the transaction.

Create Gift Receipts After a Sale

To create gift receipts for a previously completed transaction:

1. Click **Receipt Reprint Options** at the register login screen. See [Figure 2-37](#).
2. Select a receipt reprint option:
 - Click **Reissue Gift Receipt** reprint only the gift receipts.
 - Click **Reprint Last Receipt** to reprint gift receipts and the transaction sale receipt.

A Transaction Lookup prompt opens.

Figure 2–45 Transaction Lookup Prompt



3. Enter the transaction barcode by doing one of the following:
 - Scan the barcode on the transaction receipt.
 - Enter barcode information and press Enter.Xstore Point of Service displays a list of items eligible for a gift receipt.
4. Select the gift receipt items using the appropriate procedure:
 - [Select Gift Certificate Items in a Sale](#)
 - [Group Gift Receipt Items](#)
5. Xstore Point of Service prints the receipts.

Return Transactions

Returns allow you to create transactions for returned merchandise and to associate the reason the item was returned with the transaction. Xstore Point of Service allows you to create return transactions both with and without the original receipt.

Depending on your store policy, you may not be able to return merchandise purchased in another country. If your store restricts cross-border returns, a message displays indicating that cross-borders returns cannot be processed.

Returns of Tax Free Invoice Transactions

If a Tax Free Invoice (TFI) was issued from one or more transactions from which one or more items were returned:

Note: For more information on Tax Free Invoices, including the procedure for issuing them, see [Tax Free Invoices](#).

- The item(s) must be returned to the store where the purchase was made.
- Items from multiple TFIs cannot be returned in the same transaction. Only one return transaction is permitted for each TFI.
- The old TFI is voided automatically and a new TFI is issued at the end of the return transaction.
- If the TFI cannot be voided, the return cannot be performed.
- If there are remaining items on sales transactions from the original TFI, and if any of these sales transactions are now too old to be placed on a TFI, then Xstore Point of Service warns the user that the old TFI will be voided, but that it will not be possible to issue a new TFI for the remaining items. The user can cancel the return or proceed with the process.
- If there are new items on the current transaction and remaining items on sales transactions from the original TFI, and they breach the receipt consolidation rules, Xstore Point of Service prompts the user that the old TFI will be voided, but that it will not be possible to issue a new TFI including its items. The user can cancel the return or proceed with the process.
- If there are no time limitations, Xstore Point of Service prompts the user that the old TFI will be voided and that, at the end of the transaction, they will have a chance to issue a new TFI, with items from the current transaction and from the original TFI. The user will have a choice to proceed or cancel the return.

- At the end of the transaction, when the tendering function selected, if a TFI item was returned and either remaining items and/or new items are eligible for TFI, then the user is given the option to have a new TFI issued.
- After tender completion, if a TFI item was returned, before saving the transaction Xstore Point of Service tries to void the original TFI. If the TFI cannot be voided because of an error, the cashier is returned to the tendering screen and can either complete tendering and retry, or cancel tenders and the transaction.
- If the user requests a new TFI, a new TFI is created that includes the items from the current transaction and any remaining items from the original TFI. Minimum amount limitations are still enforced.

Verified Returns

If the customer has the original receipt or credit card, the system verifies that the receipt that accompanies the return, or the original credit card used in the sale, is found either on the local system or the home office system. When the original transaction is found, the system displays the original sale information in the [View Port](#). A return using the customer's original sale receipt or credit card to locate the transaction information stored in the database is a verified return.

Start the Return

You can start a return by doing one of the following:

- [Scan the Original Transaction Receipt](#)
- [Swipe a Credit Card or Enter the Receipt Data](#)

Scan the Original Transaction Receipt

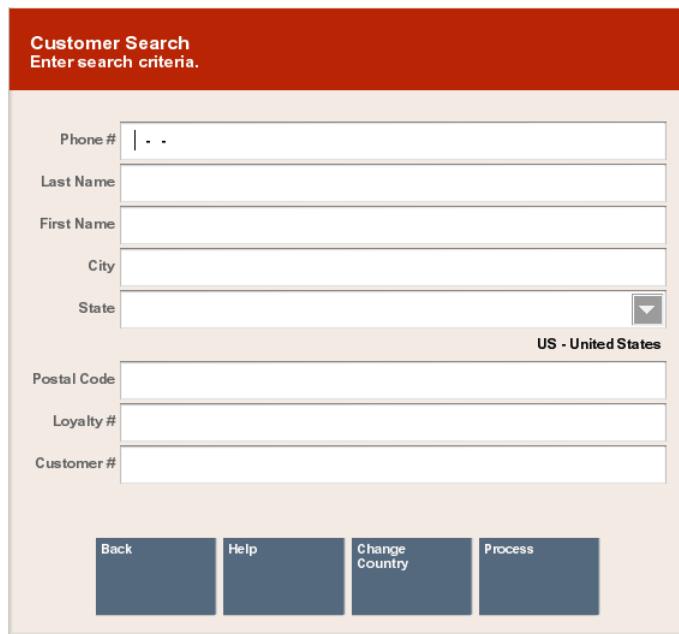
To start a verified return:

1. Scan the barcode on the customer's original receipt at the Register Sale screen.
2. If you are prompted to enter customer information:
 - a. Enter customer search information.
 - b. Click **Process**.Xstore Point of Service displays a list of customer matching the search criteria.
 - c. Select the customer from the list.
 - d. Click **OK**.Continue with [Return Items](#).

Swipe a Credit Card or Enter the Receipt Data

To start a verified return:

1. Click **Return Item** in the Register Sale menu.
2. If you are prompted for customer information, enter the customer information.

Figure 3–1 Customer Search Form

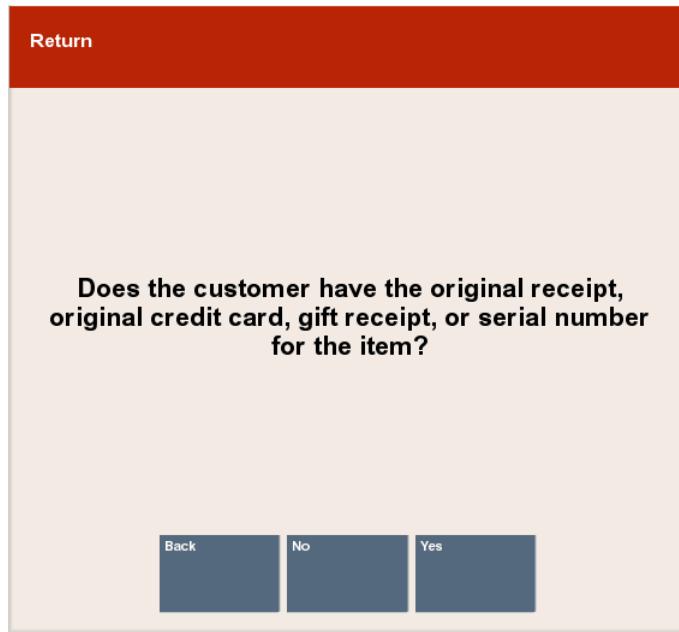
The Customer Search Form interface has a red header bar with the title "Customer Search" and the sub-instruction "Enter search criteria." Below the header is a light gray input area containing fields for Phone #, Last Name, First Name, City, State (with a dropdown arrow pointing down), Postal Code, Loyalty #, and Customer #. A "US - United States" label is positioned above the State field. At the bottom of the input area are four dark blue buttons labeled "Back", "Help", "Change Country", and "Process".

3. Select Process.

Xstore Point of Service displays a list of customer matching the search criteria.

4. Select the customer from the list.**5. Click OK.**

Xstore Point of Service displays a prompt asking whether the customer has the original receipt, original credit card, gift receipt, or serial number for the item.

Figure 3–2 Return Original Receipt Prompt

The Return Original Receipt Prompt interface has a red header bar with the word "Return". Below the header is a large white input area containing a question in bold black text: "Does the customer have the original receipt, original credit card, gift receipt, or serial number for the item?". At the bottom of the input area are three dark blue buttons labeled "Back", "No", and "Yes".

6. Click Yes.

The system prompts for information about the original sale transaction.

Figure 3–3 Original Transaction Return Information

Return Information
Enter the original transaction information for the return item.

Gift Receipt?

Trans Barcode Or

Orig Ticket ID

Orig Trans Date

Orig Store ID

Orig Register ID Or

Credit Card # Or

Serial Number

Back **Help** **Process**

7. Do one of the following:

- Enter the credit card or debit card used in the transaction (enter the card in the chip reader, or swipe the card).

Xstore Point of Service prompts for an item ID. Continue with Step 8.

- Enter the receipt barcode information and click **Process**.

Continue with [Return Items](#).

- Scan the receipt barcode.

Continue with [Return Items](#).

8. Scan the item or enter the item ID.

9. If prompted to select a transaction:

- a. Click the correct transaction or use the up and down arrows to highlight the correct transaction.

- b. Click **OK**.

Continue with [Return Items](#).

Search for the Transaction

To start a verified return:

1. Click **Return Item** in the Register Sale menu.
2. If you are prompted for customer information, enter the customer information. See [Figure 3–1](#).
3. Click **Process**.

Xstore Point of Service displays a list of customer matching the search criteria.

4. Select the customer from the list.
5. Click **OK**.

Xstore Point of Service displays a prompt asking whether the customer has the original receipt, original credit card, gift receipt, or serial number for the item. See [Figure 3-2](#).

6. Click **Yes**.

The system prompts for information about the original sale transaction. See [Figure 3-3](#).

7. Enter search information for the transaction and click **Process**.

This prompt has the following criteria:

- **Orig Ticket ID** - ID of the original transaction.
- **Orig Trans Date (MM/DD/YYYY)** - Date of the original transaction.
- **Orig Store ID** - ID of the store where the original transaction was performed.
- **Orig Register ID** - ID of the register where the original transaction was performed.

8. Click **Process**.

Enter Web Order ID

If customers can return items from online purchases at a store (cross-channel returns), do the following to perform a cross-channel return:

1. Enter the ID from the shipping document in the **Web Order ID** field.
2. Click **Process**.

Note: Freight, handling, or other delivery changes are not returnable.

Transaction Not Found

If the transaction is not found, a prompt opens:

- Click **Yes** to continue with an unverified return. See [Blind & Unverified Returns](#).
- Click **No** to re-enter transaction information. See [Start the Return](#).

Return Items

After attaching a transaction to the return transaction, enter items:

Note: Click **Return All** to return all items in the original transaction.

Figure 3–4 Original Transaction Information

Original Transaction
Select line items to return.

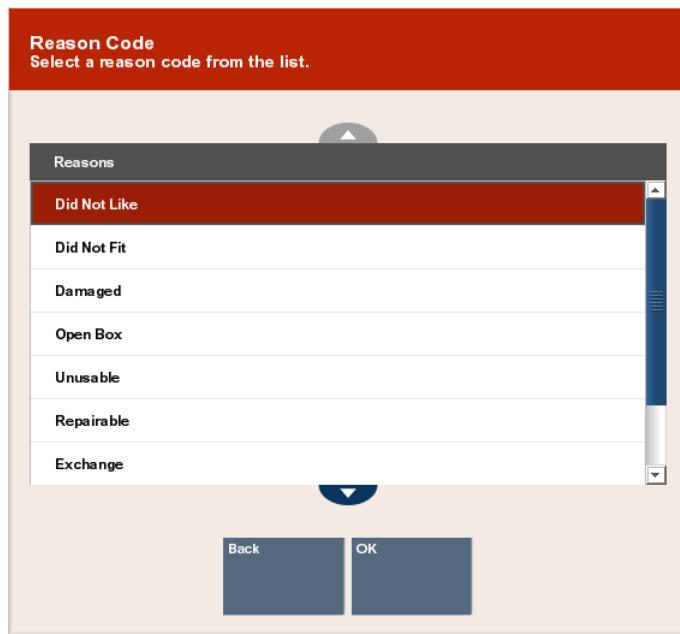
Item ID Description	Qty	Ext Price
1006 ROLL SLEEVE SWEATER DRESS	1	\$67.99

Back Return All Scan Item Return Selected Items

1. Select the items to return:
 - Click items to select them.
 - Use the up and down arrows to highlight items, then press the Spacebar to select them.
2. Click **Return Selected Item(s)**.
3. If you are prompted for the quantity of an item:
 - a. Enter the quantity of the item.
 - b. Click **OK**.
 - c. Repeat Steps a to b for each item quantity prompt.

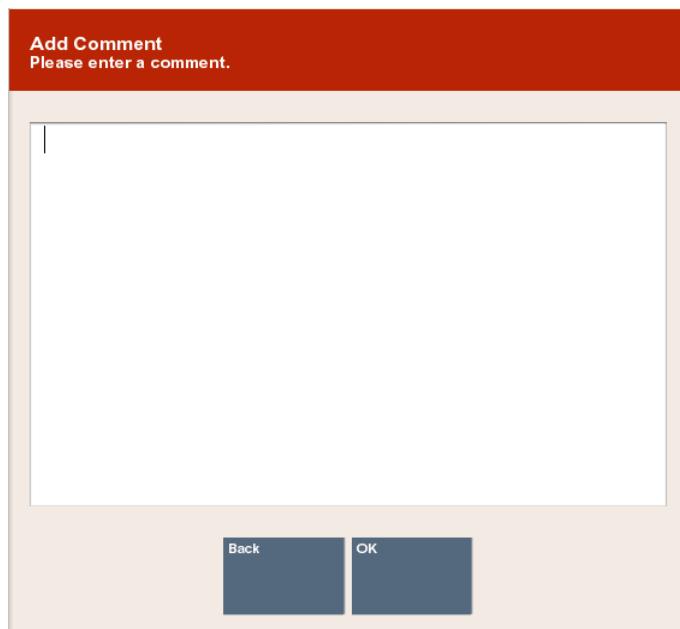
Xstore Point of Service prompts for a reason for the return.

Figure 3–5 Return Reason Code List



4. Select the reason for the return:
 - Click the reason.
 - Use the up and down arrows to select the reason, then press the Spacebar.
5. Click OK.

Figure 3–6 Return Comment Form



6. If you are prompted for comments:
 - a. Enter additional information about the return.
 - b. Click OK.

7. If the item is part of a kit, indicate whether all kit items are available:
 - Click **No** if all items in the kit are not available. The return item is removed from the transaction. If no other items are included, return to Step 1.
 - Click **Yes** if all items in the kit are available. The return continues.
8. If an acknowledgement prompt opens, read the message and click **OK** to continue.
Xstore Point of Service returns to the return items screen.

Note: The return item quantity has been decremented by the quantity returned for each item that was added to the return.

9. Repeat Steps 1 to 8 to return additional items from the transaction.

Note: Depending upon your return policy, certain items may be returned at a prorated value from their original purchase price. If so, the amount refunded for these prorated items is determined by the number of days between the original date of purchase and the date of return.

For example, some store return policies offer a full refund if the item is returned within 30 days. After 30 days, a reduced refund (declining over time following the purchase date) is calculated automatically.

10. Continue the transaction:

- Click **Add Tenders** tender the transaction.
- Click **Exit Return** to return to the sales transaction.
- Click **New Return** to return more items from a different transaction.

Verified Returns through Customer History

If a customer does not have the original receipt, or the receipt cannot be verified, the return item price may be determined from the customer's purchase history. To perform a return through a customer's purchase history, perform the procedure [Blind & Unverified Returns](#) and select the transaction in Step 9. The transaction will continue as a verified return.

Blind & Unverified Returns

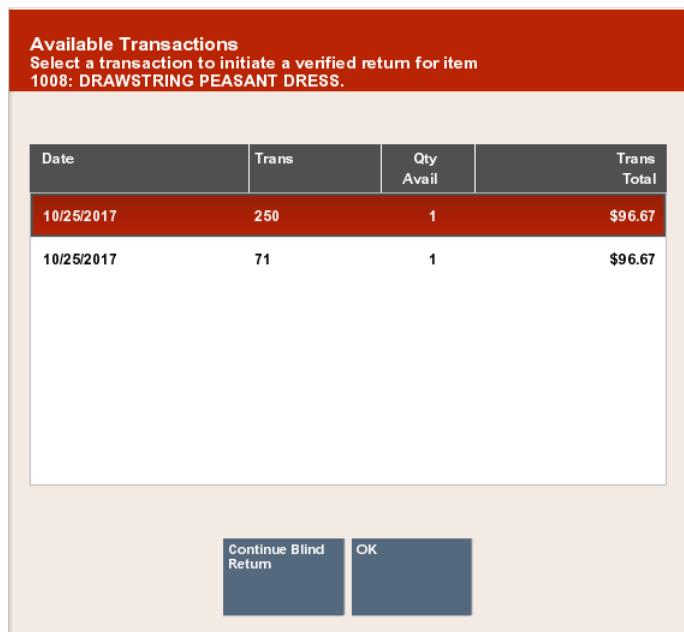
A blind return is a return without a receipt. An unverified return is a return where the customer has a sale receipt, but it cannot be found in the database. These two return procedures are essentially the same.

If the customer does not have the original receipt for the return item, or the customer's receipt cannot be verified, perform the following procedure to complete the return transaction.

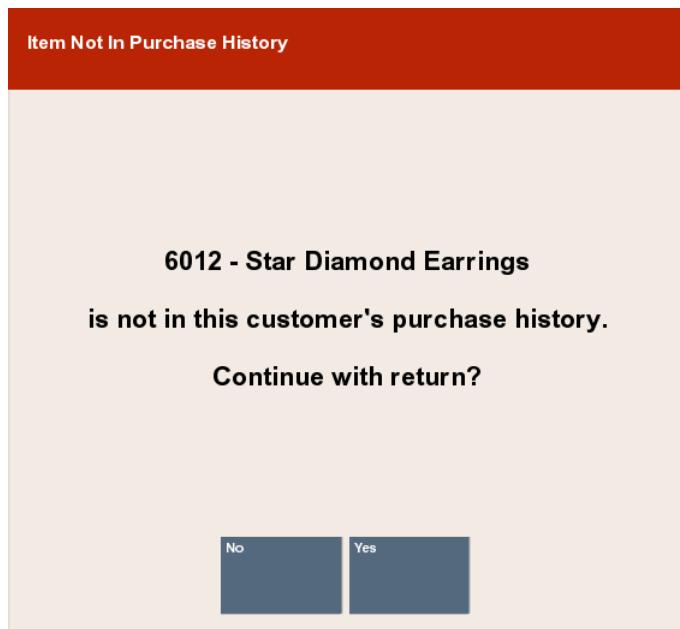
Start the Return

To start a blind or unverified return:

1. Click **Return Item** in the sale screen.
 - If you are prompted to enter customer information, continue with Step 2. See [Figure 3-1](#).
 - If you are prompted for a receipt, continue with Step 6. See [Figure 3-2](#).
2. Enter the customer search information:
 - **Phone #** - Customer phone number.
 - **Last Name** - Customer last name.
 - **First Name** - Customer first name.
 - **City** - City for customer's address.
 - **State** - State in the customer's address.
 - **Postal Code** - Postal code or zip code for the customer's address.
 - **Loyalty #** - ID number for the customer's loyalty account.
 - **Customer #** - Customer ID number.
3. Click **Process**.
4. If necessary, select the customer in the search results:
 - Click the customer.
 - Use the up and down arrows to highlight the correct customer, then press Spacebar.
5. Click **OK**.
6. Indicate whether the customer has the original receipt:
 - Click **Yes** if the customer has the receipt.
 - Click **No** if the customer does not have the receipt.
7. Enter an item:
 - Scan the item.
 - Enter the item ID and press Enter.
8. If prompted for an item quantity, enter the quantity, then click **OK**.

Figure 3–7 Item Found In Customer’s Transaction History

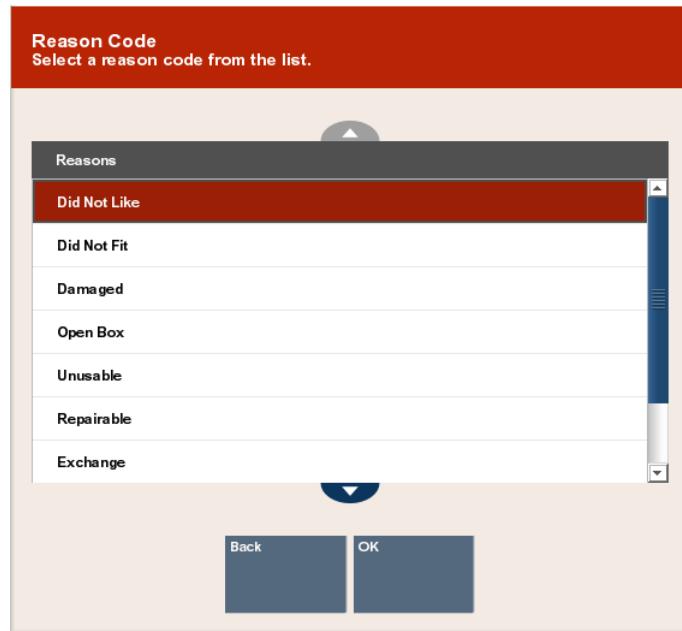
9. If the item is found in the customer’s transaction history:
 - Click **Continue Blind Return** to continue with Step 14 as a blind return.
 - Create a verified return. Continue with Step 10.
10. Select a transaction from the list.
11. Click **OK**.
12. Continue with [Return Items](#) in [Verified Returns](#).

Figure 3–8 Item Not In Purchase History

13. If prompted that the item was not found in the customer’s transaction history:

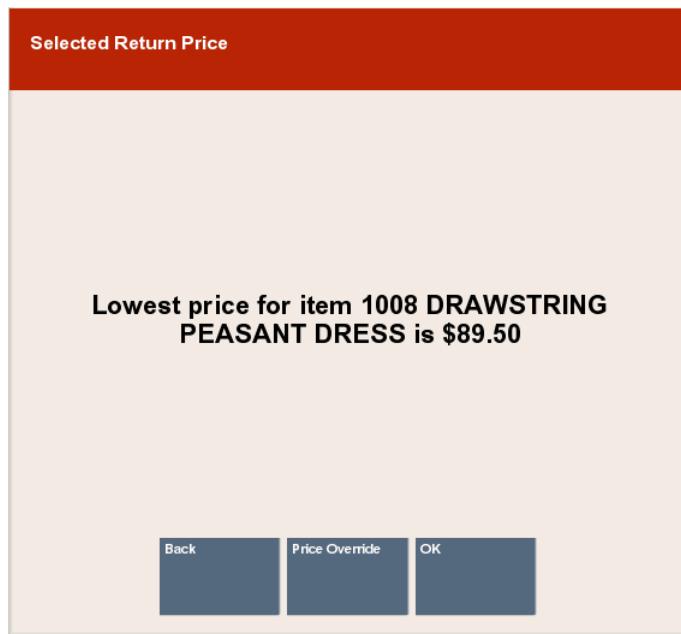
- Click **Yes** to continue the return.
- Click **No** to cancel the return transaction and return to the sale screen.

Figure 3-9 List Of Return Reason Codes



14. Select the reason for the return:
 - Click the reason.
 - Use the up and down arrows to highlight the reason, then press the Spacebar.
15. Click **OK**.
16. If you are prompted for additional information:
 - a. Enter the information.
 - b. Click **OK**.
17. If you are prompted with a list of previous prices for an item:
 - a. Select the item:
 - * Click the reason.
 - * Use the up and down arrows to highlight the reason, then press the Spacebar.
 - b. Click **OK**.
18. If a notification prompt opens indicating that a restocking fee is applied, click **OK** to acknowledge the prompt.

Figure 3–10 Lowest Item Price



19. If a notification prompt opens, indicating the lowest price for the item:

Figure 3–11 Price Override Prompt



- a. Click **Price Override** to change the price.
 - b. Click **OK** to continue the return with the listed price.
20. If you are prompted for a serial number:
- a. Enter the serial number.
 - b. Click **OK**.
21. If the item is part of a kit, indicate whether all kit items are available:
- Click **No** if all items in the kit are not available. The return item is removed from the transaction. If no other items are included, return to Step 7.
 - Click **Yes** if all items in the kit are available. The return continues.
- Xstore Point of Service returns to the return screen.

Figure 3–12 *Return Items Displayed in View Port*

22. Do one of the following:

- Click **Add Tenders** to tender the transaction.

Note: If your store has a maximum amount for a blind return, you may be prompted for manager approval, or you may not be permitted to complete the transaction. Ask your manager for assistance.

- Click **Exit Return** to return to the sale screen to continue selling items.
- Click **Return Item** to perform another return (for example, items that appear on an original receipt).
- Click **Change Item** to modify an item. See [Modify a Line Item](#) for more information.
- Click **Add Discount** to reduce the amount due to the customer.
- Click **Return Non-Merch** to return a non-merchandise item. See [Return Non-Merchandise Items in a Blind Return](#).
- Click **Item Lookup** to find a return item Item ID for a return item. See [Item Lookup](#).

Non-Merchandise Items in a Blind Return

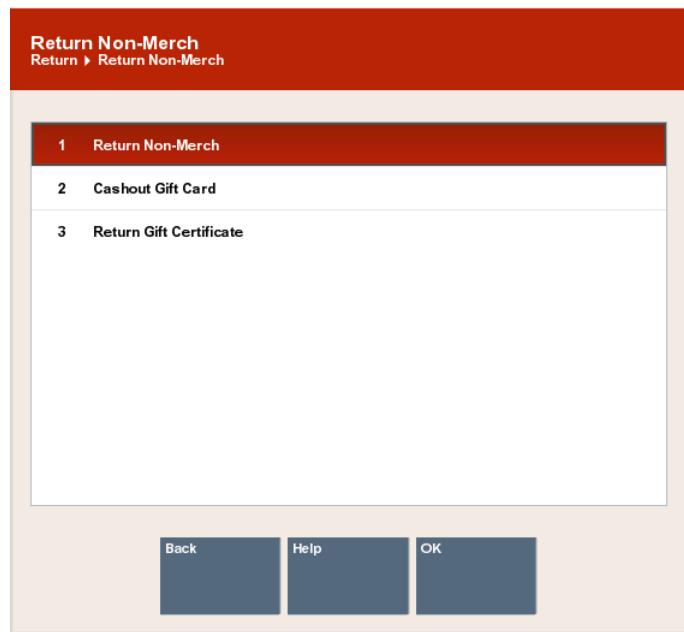
To return non-merchandise items in a blind return:

1. Click Return Item option in the sale screen.

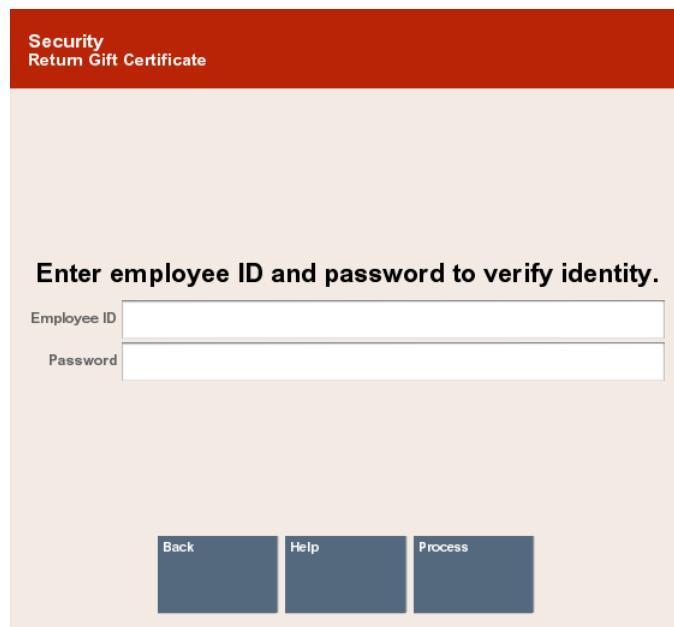
The system prompts whether the customer has a receipt or serial number for the return item.

2. Click **No**.
3. Click **Return Non-Merchandise**.

Xstore Point of Service prompts for the category of non-merchandise item.

Figure 3–13 List of Non-Merchandise Categories

4. Select the category of the non-merchandise item:
 - Click the category.
 - Use the up and down arrows to highlight the correct category, then press the Spacebar.
5. Click **OK**.

Figure 3–14 Security Verification Prompt

6. If prompted for a security login to return a gift card or gift certificate, enter the security information or request access from a person with the appropriate security permissions.

7. Enter the information required for the item. This will vary depending upon the configuration of your system and the category of the item returned.
8. Select the reason for the return:
 - Click the reason.
 - Use the up and down arrows to highlight the reason, then press Spacebar.
9. Click **OK**.
10. If you are prompted for additional information:
 - a. Enter the information.
 - b. Click **OK**.
11. Do one of the following:
 - Click **Add Tenders** to tender the transaction.

Note: If your store has a maximum amount for a blind return, you may be prompted for manager approval, or you may not be permitted to complete the transaction. Ask your manager for assistance.

- Click **Exit Return** to return to the sale screen to continue selling items.
- Click **Return Item** to perform another return (for example, items that appear on an original receipt).
- Click **Change Item** to modify an item. See [Modify a Line Item](#) for more information.
- Click **Add Discount** to reduce the amount due to the customer.
- Click **Return Non-Merch** to return a non-merchandise item. See [Return Non-Merchandise Items](#).
- Click **Item Lookup** to find a return item Item ID for a return item. See [Item Lookup](#).

Taxes for Return Items

Taxes for return items are determined by the taxes for the store associated with the original transaction.

Note: If an original store number is not available (for example, for an unverified return), the return store's tax rate is used.

To change the taxes on an item, see [Change the Tax for an Item](#) for more information about changing taxes.

4

Processing Tenders

Tendering is the last step that occurs just before completing a sale. You must select a form of payment or refund, and it may involve check or credit card authorizations, if any of these tender types are selected.

For all tender types, you must select or enter two basic items of information:

1. Form of payment or tender type (for example, cash, check, or credit card)
2. Amount paid for each selected tender type

Depending upon the form of payment and your system's requirements, you may have to enter or select additional information. For example:

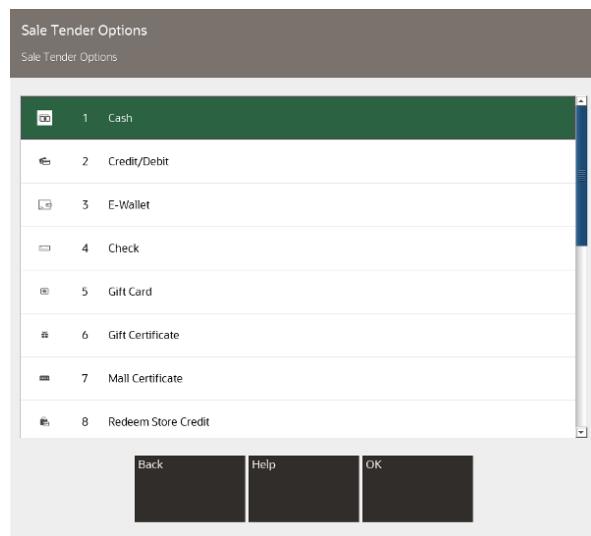
- Additional tender types if the first tender type did not pay the total due
- Additional forms of customer ID (driver's license number, birth date, credit card number, hotel guest's room number, or other ID)
- Customer name
- Customer address
- Security approval for large sales or refunds

Selecting Tenders

The exchange of tender for merchandise or the remitting of a tender for a return is the final step in a transaction. To select a tender for a transaction:

1. Click **Add Tenders** when you are ready to complete the transaction.

Xstore Point of Service displays a list of tender types:

Figure 4–1 Sale Tender List

2. Select a tender:
 - Click the tender.
 - Use the up and down arrows to highlight the correct tender, then press Spacebar.
3. Click **OK**.
4. Continue with the selected tender. See [Sale Tenders](#).

Sale Tenders

To tender a sale, refer to the section for the appropriate tender type:

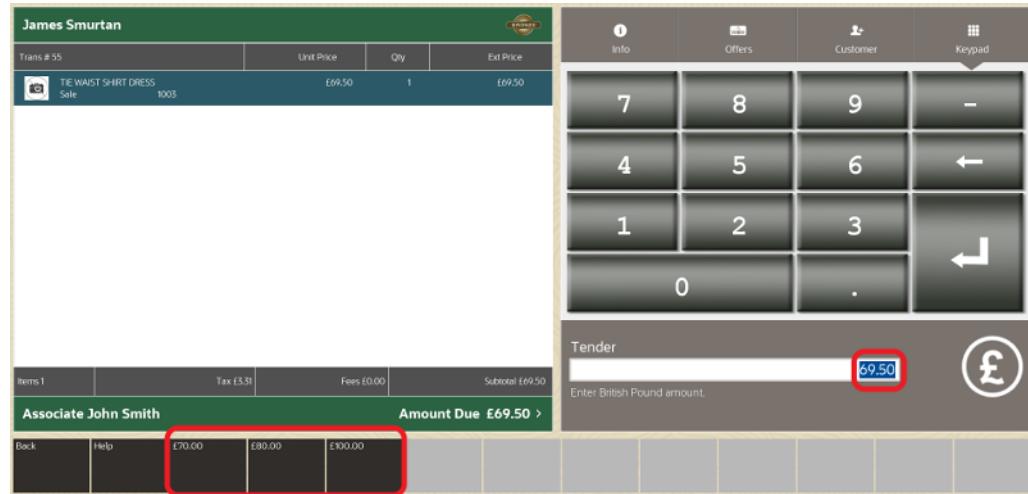
- [Cash](#)
- [Credit /Debit Card](#)
- [eWallet](#)
- [Gift Card](#)
- [Merchandise Credit Card](#)
- [Store Credit](#)
- [Gift Certificate](#)
- [Personal Check](#)
- [Traveler's Check](#)
- [Foreign Currency](#)
- [Coupon Tender](#)
- [House Account](#)
- [Room Charge](#)

Cash

To tender a transaction in cash:

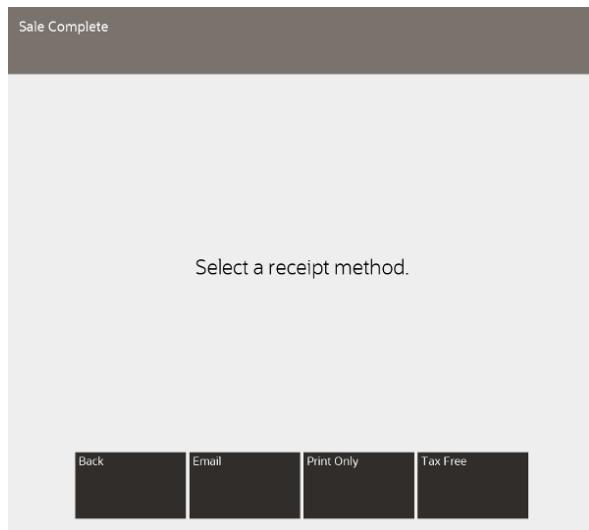
- Select **Cash** in the menu of tenders. See [Selecting Tenders](#).

Figure 4-2 Cash Tender



- Enter the amount of cash presented by the customer:
 - Xstore displays the remaining balance by default.
 - Enter a different the amount if required.
 - Click the amount in the **Menu Buttons** (also known as Quick Cash buttons).
- Press **Enter**.
- If prompted, scan the cash drawer you are using.
The cash drawer opens. If configured, a prompt displays reminding you to close the cash drawer.
- Place the cash in the cash drawer and return any change due to the customer.
- Close the cash drawer.
If there is still an outstanding balance to pay then the **Sale Tender Options** screen is re-displayed for the cashier to select another tender.
The Sale Complete prompt is displayed and the cashier is prompted to select a receipt method.

Figure 4–3 Sale Complete Prompt - Email Receipts Enabled



The cashier can select to email or to print the receipts.

Note: These options are configurable and may be different on your system.

Xstore completes the transaction.

Note: In some countries, a maximum cash tender amount is implemented via Xstore configurations, in order to comply with local tax authority regulations. Please see the *Oracle Retail Xstore Suite Configuration Accelerator Guide* for full details of the restrictions by country.

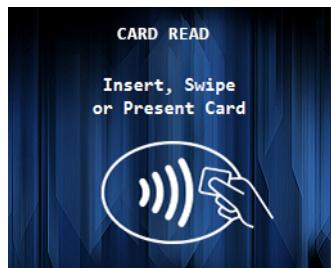
Credit /Debit Card

You can read a credit and debit cards on a payment terminal. The entry modes available are governed by the payment terminal capabilities and payment processor, plus also the transaction amount. The possible entry modes on the payment terminal include:

- Dip (Insert) the card: Chip and PIN (or Chip and Signature)
- Card Swipe in the MSR (Magnetic Stripe Reader)
- Tap the card: NFC Tap & Go

Note: NFC enabled smartphones can also be used to perform an NFC Tap payment if the payment terminal allows, using payment apps such as ApplePay, SamsungPay and GooglePay.

Figure 4–4 Card Read Prompt



Note: The payment terminal itself will decide on the authentication required, and can be influenced based on:

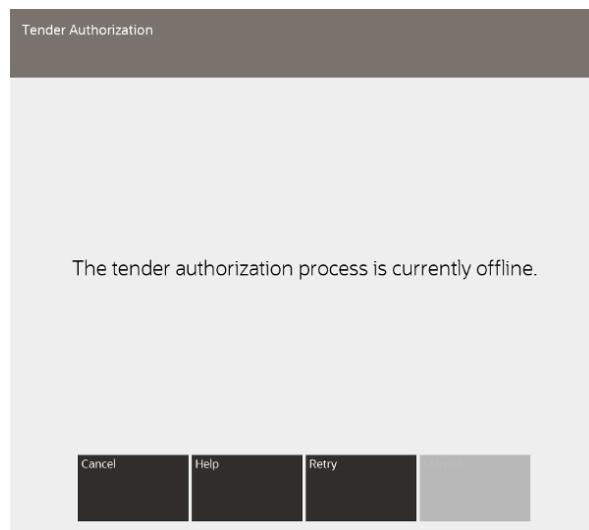
- the country
 - the card type
 - the card entry mode
 - the recent card usage
 - other criteria as determined by the payment provider
-

1. Select **Credit/Debit** in the menu of tenders. See [Selecting Tenders](#).
2. Confirm the amount to be tendered (usually the full transaction amount) or key a different amount.
3. Press **Enter**.

Note: When tendering a transaction with a prepaid credit card, if the amount remaining on the customer's prepaid card is less than the amount owed, the transaction is credited with the remainder of the prepaid card balance. Another tender is then required to complete the sale. If the transaction is canceled, the original amount is returned to the prepaid card.

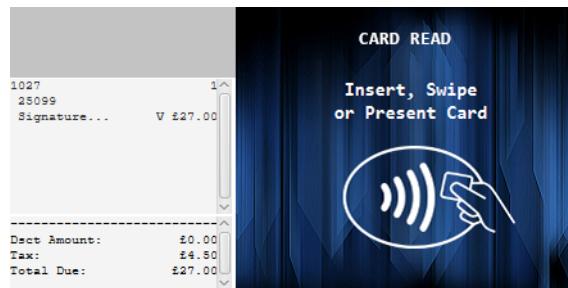
4. If the tender authorization is currently offline, a message displays prompting you to perform one of the following activities.

Figure 4–5 Tender Authorization Offline Prompt

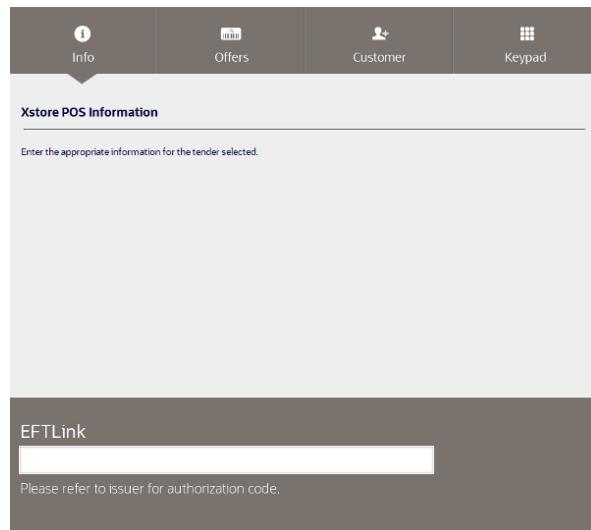


- Click the **Cancel** to cancel the tender and return to the tender selection screen.
See [Selecting Tenders](#).
 - Select the **Retry** option to attempt to process the card payment again.
5. The tender amount is displayed onto the Payment Terminal.

Figure 4–6 Payment Terminal



6. The customer will present the payment card using the desired method.
7. It's possible that the Payment Terminal will sometimes request a "manual authorization" from the cashier on the POS.

Figure 4–7 Manual Authorization

- Call the authorizing agent to request and receive an authorization code.
- Enter the authorization code.
- Click **OK**.

The Manual Authorization code is transmitted to the Payment Terminal for approval.

8. The customer may be prompted by the Payment Terminal to authenticate the card payment:
 - If necessary, wait for the customer to enter their PIN.
 - If necessary, wait for the customer to sign the signature capture device.
 - If necessary, verify the customer signature.

Figure 4–8 Customer Signature

9. If necessary, ask the customer to sign the receipt.

10. The Payment Terminal either Approves or Rejects the payment.
 11. If the system recognizes that a customer is eligible for a Tax Free Invoice (TFI), and if the receipt satisfies all the eligibility requirements, but the customer did not request a TFI, Xstore Point of Service asks whether to issue a TFI:
 - Click **Yes** to issue a TFI. See [Tax Free Invoices](#) for instructions on issuing a TFI.
 - Click **No** to complete the transaction without issuing a TFI.
 12. If there is still an outstanding balance to pay then the **Sale Tender Options** screen is re-displayed for the cashier to select another tender.
 13. The **Sale Complete** prompt is displayed and the cashier is prompted to select a receipt method.
 14. The cashier can select to email or to print the receipts as the Xstore configuration dictates.
- Xstore completes the transaction.

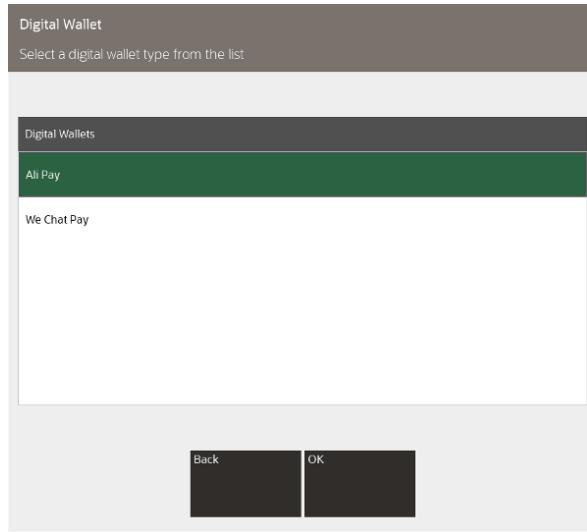
eWallet

Digital Wallets (eWallets) are new payments methods typically implemented using digital wallet apps on smartphones. Alipay and WeChat Pay are two of the largest providers, but numerous other brands also exist.

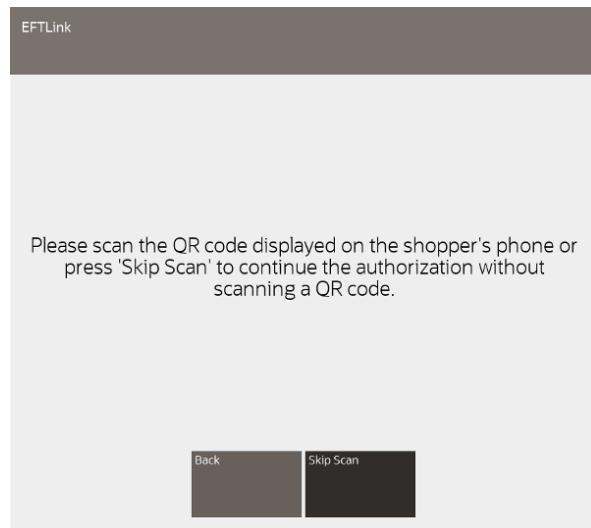
To tender a transaction with an eWallet tender:

1. Select **E-Wallet** in the menu of tenders. See [Selecting Tenders](#).
2. Depending on the number of wallet types available, you may be prompted to select the required eWallet type.

Figure 4–9 Digital Wallet Type Prompt



3. Xstore prompts the cashier to scan the QR Code displayed on the shoppers phone.

Figure 4–10 Scan QR Code Prompt

4. If the customer has a QR Code displayed in the eWallet app on their phone, then the cashier will scan the QR Code.
If not, then the cashier will select to **Skip Scan**.
 5. Confirm the amount to be tendered (usually the full transaction amount) or key a different amount.
If the cashier selected to **Skip Scan**:
 - The Payment Terminal will display the amount to pay, and a QR Code and prompt the customer to scan the eWallet QR Code, on their mobile phone.
 - Wait for the customer to scan the QR Code.
 The Payment Terminal either Approves or Rejects the payment.
 6. If there is still an outstanding balance to pay then the **Sale Tender Options** screen is re-displayed for the cashier to select another tender.
 7. The **Sale Complete** prompt is displayed and the cashier is prompted to select a receipt method.
 8. The cashier can select to email or to print the receipts as the Xstore configuration dictates.
- Xstore completes the transaction.

Gift Card

Gift Cards will either be authorized via Oracle Retail Customer Engagement ([ORCE](#)) or via [EFTLink](#).

EFTLink

To tender a 3rd party gift card using EFTLink:

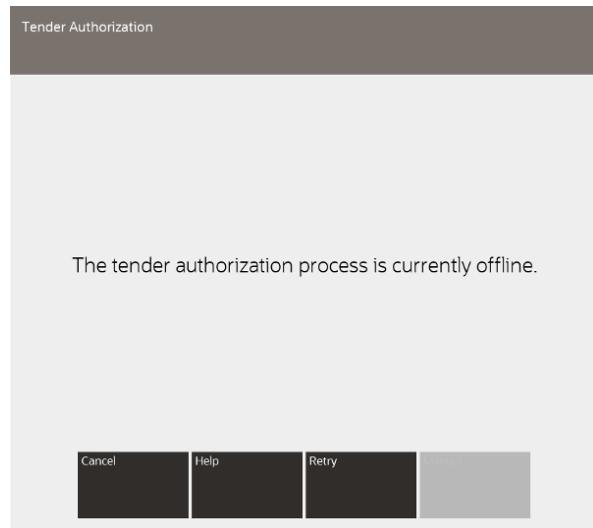
1. Select **Gift Card** in the menu of tenders. See [Selecting Tenders](#).

Figure 4–11 Gift Card Amount Prompt

2. If necessary, change the amount to tender on the gift card.
3. Press **Enter**.

Note: When tendering a transaction with a gift card, if the amount remaining on the gift card is less than the amount owed, the transaction is credited with the remainder of the gift card balance. Another tender is then required to complete the sale. If the transaction is canceled, the original amount is returned to the gift card.

4. If the tender authorization is currently offline, a message displays prompting you to perform one of the following activities.
 - Click **Cancel** to cancel the tender and return to the tender selection screen. See [Selecting Tenders](#).
 - Select the **Retry** option to attempt to process the tender again.
5. If the tender authorization is currently offline, a message displays prompting you to perform one of the following activities.

Figure 4–12 Tender Authorization Offline Prompt

- Click the **Cancel** to cancel the tender and return to the tender selection screen. See [Selecting Tenders](#).
 - Select the **Retry** option to attempt to process the card payment again.
6. The tender amount is displayed onto the Payment Terminal.

Figure 4–13 Payment Terminal - Redeem

7. The customer will present the gift card using the desired method.
 8. The Payment Terminal either Approves or Rejects the payment.
 9. If there is still an outstanding balance to pay then the **Sale Tender Options** screen is re-displayed for the cashier to select another tender.
 10. The **Sale Complete** prompt is displayed and the cashier is prompted to select a receipt method.
 11. The cashier can select to email or to print the receipts as the Xstore configuration dictates.
- Xstore completes the transaction.

FORCE

To tender a transaction with a Customer Engagement (Relate) gift card:

1. Select **Gift Card** in the menu of tenders. See [Selecting Tenders](#).

Figure 4–14 Gift Card Number Prompt

2. Enter the card:
 - Insert the card into the chip reader. Continue with Step 7.
 - Swipe the card in the MSR. Continue with Step 7.
 - Enter the card manually. Continue with Step 3.
3. Enter the card number.
4. Press **Enter**.
5. Enter the card expiration date.
6. Press **Enter**.

Figure 4–15 Gift Card Amount Prompt

7. If necessary, change the amount to tender on the gift card.
8. Press Enter.

Note: When tendering a transaction with a gift card, if the amount remaining on the gift card is less than the amount owed, the transaction is credited with the remainder of the gift card balance. Another tender is then required to complete the sale. If the transaction is canceled, the original amount is returned to the gift card.

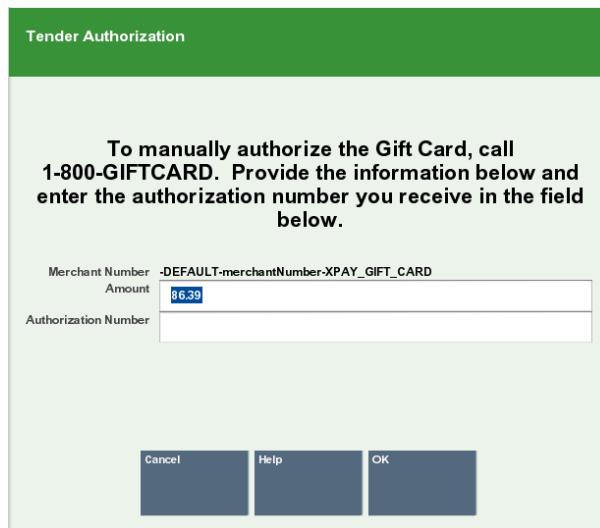
9. If the tender authorization is currently offline, a message displays prompting you to perform one of the following activities.
 - Click **Cancel** to cancel the tender and return to the tender selection screen. See [Selecting Tenders](#).
 - Select the **Retry** option to attempt to process the tender again.
 - Select the **Manual** option to begin the manual authorization process. See [Manual Authorization](#).
10. If prompted to complete the transaction:
 - Click **Yes** to complete the transaction.
The transaction completion process begins.
 - Click **No** to return to the tender selection screen. See [Selecting Tenders](#).

Manual Authorization

To perform a manual authorization:

1. Call the authorizing agent to request and receive an authorization code.

Figure 4–16 Gift Card Manual Authorization Prompt



2. Enter the authorization code.
3. Click **OK**.

The authorization is complete.

Merchandise Credit Card

To redeem a merchandise credit card:

- Select **Redeem Merch Credit Card** in the menu of tenders. See [Selecting Tenders](#).

Figure 4–17 Merchandise Credit Card Number Prompt



- Enter the merchandise credit card number:
 - Scan the merchandise credit card.
 - Enter the merchandise credit card number and press Enter.
- If necessary, change the amount to tender on the merchandise credit card.
- Press Enter.
- If prompted to complete the transaction:
 - Click **Yes** to complete the transaction.
The transaction completion process begins. Continue the transaction.
 - Click **No** to return to the tender selection screen. See [Selecting Tenders](#).

Store Credit

To tender a transaction with store credit:

- Select **Redeem Store Credit** in the menu of tenders. See [Selecting Tenders](#).

Figure 4–18 Store Credit Number Prompt



- Enter the store credit serial number:
 - Scan the serial number.
 - Enter the serial number and press Enter.
- Xstore Point of Service applies the store credit to the transaction:
 - If the store credit is worth more than the amount of the purchase, a store credit, gift card, cash, or other tender is issued as change for the remaining balance, depending upon your store's policy.
 - If the store credit does not cover the entire amount of the purchase, the screen automatically returns to the tender selection screen. See [Selecting Tenders](#).
- If prompted to complete the transaction:
 - Click **Yes** to complete the transaction.
The transaction completion process begins. Continue the transaction.

- Click **No** to return to the tender selection screen. See [Selecting Tenders](#).

Gift Certificate

To tender a transaction with a gift certificate:

1. Select **Gift Certificate** in the menu of tenders. See [Selecting Tenders](#).

Figure 4–19 Gift Certificate Number Prompt



2. Enter the gift certificate number:
 - Scan the gift certificate.
 - Enter the gift certificate number and press **Enter**.
3. If the gift certificate value is less than the total due, return to the tender selection screen. See [Selecting Tenders](#).
4. If prompted to complete the transaction:
 - Click **Yes** to complete the transaction.
The transaction completion process begins. Continue with Step 5.
 - Click **No** to return to the tender selection screen. See [Selecting Tenders](#).
5. If the gift certificate is worth more than the amount of the purchase, a store credit, gift card, cash, or other tender is issued as change for the remaining balance, depending upon your store's policy.

Personal Check

A personal check is a type of tender that can be exchanged for merchandise.

Depending upon your store policy, the prompts for additional tender information may be different from the prompts shown here. These prompts display when a MICR is not available, or if your store policy requires additional information for check processing.

1. Select **Check** in the menu of tenders. See [Selecting Tenders](#).

Figure 4–20 Check MICR Number Prompt



2. Enter MICR number (Route number + Account number + Check number).
3. Press **Enter**.
4. If prompted, enter the check number.

Figure 4–21 Check Number Prompt

Check
Enter check number.

Note: Must be the same check number that you entered when the system prompted for the MICR number.

5. Press **Enter**.
6. If prompted, enter the state from which the customer's ID was issued.

Figure 4–22 Tender State Prompt

ID Information
Enter the state that issued the ID.

7. Press **Enter**.
8. If prompted, enter the customer's driver's license number, a credit card number, ID number from another form of ID.

Figure 4–23 ID Prompt

ID Information
Enter the ID number.

9. Press **Enter**.
10. If prompted, enter the customer's birth date.

Figure 4–24 Check Birth Date Prompt

ID Information
Enter birth date.

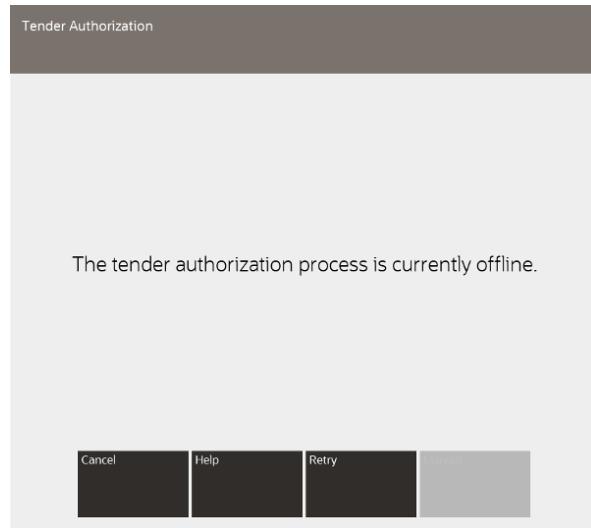
11. Press **Enter**.
12. Enter the amount of the check.

Figure 4–25 Check Amount Prompt

Tender
Enter Check amount.

13. Press **Enter**.
14. If the tender authorization is currently offline, a message displays prompting you to perform one of the following activities.

Figure 4–26 Tender Authorization Offline Prompt



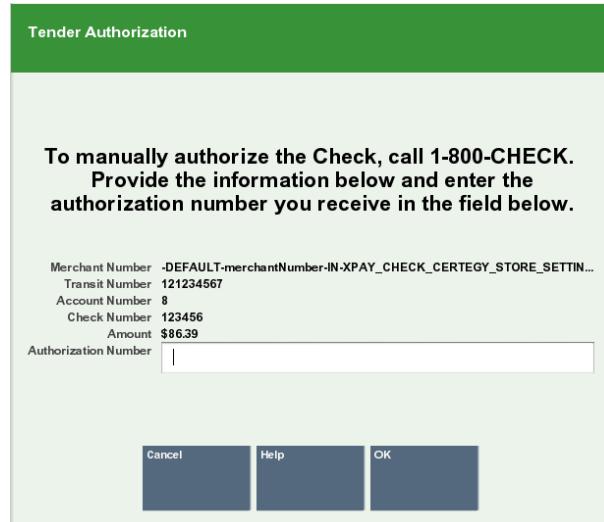
- Click **Cancel** to cancel the tender and return to the tender selection screen. See [Selecting Tenders](#).
 - Select the **Retry** option to attempt to process the tender again.
 - Select the **Manual** option to begin the manual authorization process. See [Manual Authorization](#).
15. If prompted to complete the transaction:
 - Click **Yes** to complete the transaction.
The transaction completion process begins. Continue with Step 16.
 - Click **No** to return to the tender selection screen. See [Selecting Tenders](#).
 16. If prompted, scan the cash drawer you are using.
If the cash drawer opens, a prompt may open to remind you to close the cash drawer.
 17. Place the check in the cash drawer and, if necessary, return change to the customer.
 18. Close the cash drawer.
After the cash drawer has been closed, the sale receipt prints and the system is ready for the next transaction.

Manual Authorization

To perform a manual authorization:

1. Call the authorizing agent to request and receive an authorization code.

Figure 4-27 Manual Tender Authorization



2. Enter the authorization code.

3. Click **OK**.

The authorization is complete.

Traveler's Check

A traveler's check is a type of tender that is issued to an individual by a financial institution and can be exchanged for merchandise. Traveler's checks are issued in set denominations.

1. Select **Traveler's Check** in the menu of tenders. See [Selecting Tenders](#).

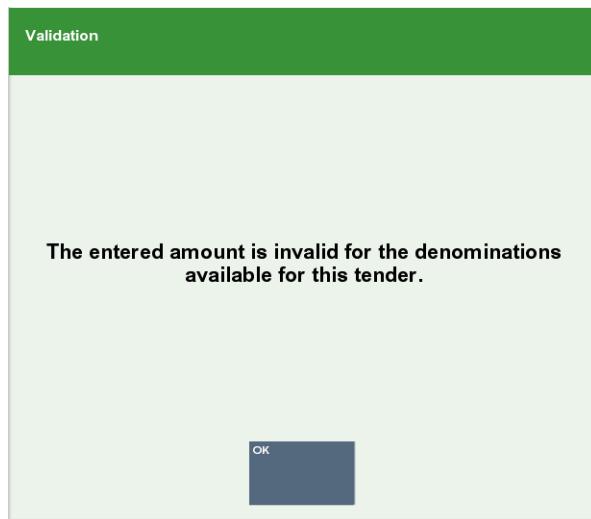
Figure 4-28 Traveler's Check Amount Prompt



2. Enter the traveler's check amount.
3. Press **Enter**.

Note: Traveler's checks are issued in specific and pre-determined denominations. The system displays a message if you enter an invalid amount for this tender type.

Figure 4–29 Traveler’s Check Validation Amount

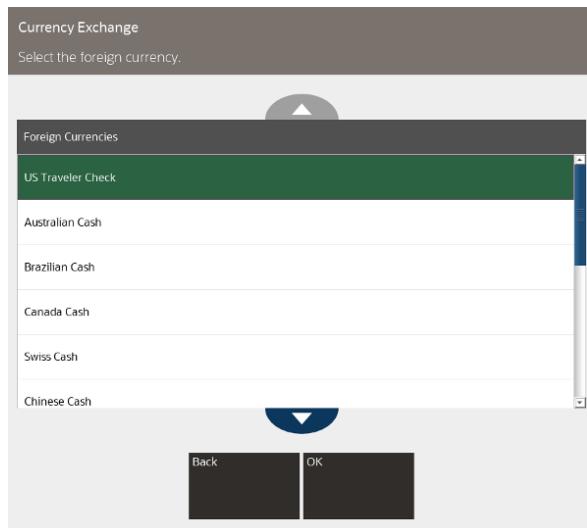


4. If the traveler’s check value is less than the total due, return to the tender selection screen. See [Selecting Tenders](#).
5. If prompted to complete the transaction:
 - Click **Yes** to complete the transaction.
The transaction completion process begins. Continue with Step 6.
 - Click **No** to return to the tender selection screen. See [Selecting Tenders](#).
6. If the traveler’s check is worth more than the amount of the purchase, a store credit, gift card, cash, or other tender is issued as change for the remaining balance, depending upon your store’s policy.

Foreign Currency

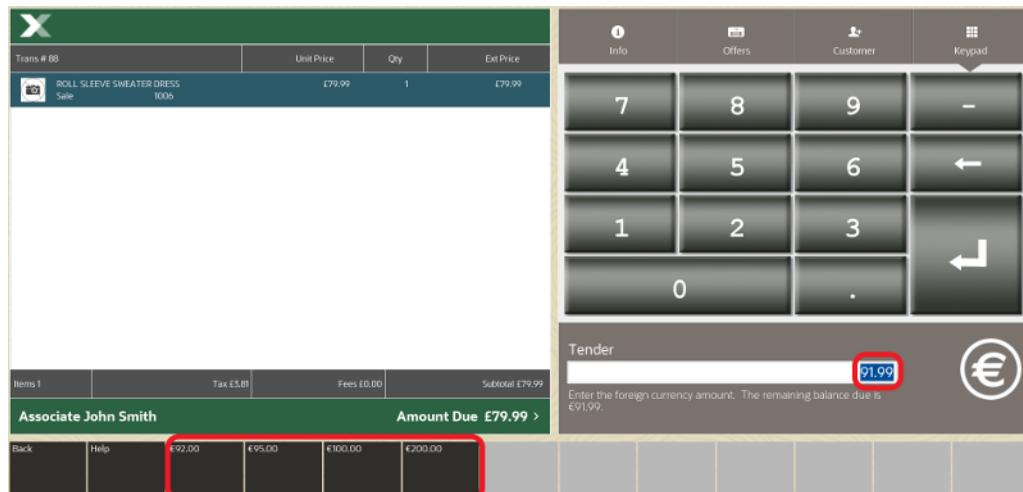
When sales are tendered in a foreign currency, the amount entered is automatically converted to your local currency. Any change due to the customer displays in local currency.

1. Select **Foreign Currency** in the menu of tenders. See [Selecting Tenders](#).
Xstore Point of Service prompts for the type of foreign currency.

Figure 4–30 List of Foreign Currency Types Accepted

2. Select the foreign currency:

- Click the currency.
- Use the up and down arrows to highlight the correct currency, then press Spacebar.

Figure 4–31 Foreign Currency Amount Prompt/Quick Cash Buttons

3. Enter the currency amount:

- Enter the amount.

Note: Xstore Point of Service displays the required amount in the foreign currency selected in Step 2.

- Click the amount in the **Menu Buttons** (also known as Quick Cash buttons).

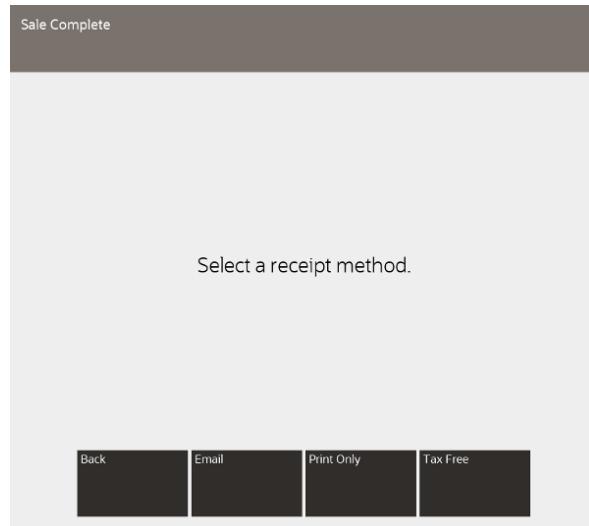
The foreign currency amount is converted to local currency for display in the **View Port**.

4. If prompted, scan the cash drawer you are using.
The cash drawer opens. If configured, a prompt displays reminding you to close the cash drawer.
5. Place the cash in the cash drawer and return change to the customer.

Note: To issue foreign currency as change, see .

6. Close the cash drawer.
7. If there is still an outstanding balance to pay then the **Sale Tender Options** screen is re-displayed for the cashier to select another tender.
8. The **Sale Complete** prompt is displayed and the cashier is prompted to select a receipt method.

Figure 4–32 Sale Complete Prompt - Email Receipts Enabled



9. The cashier can select to email or to print the receipts as the Xstore configuration dictates.

Note: These options are configurable and may be different on your system.

Xstore completes the transaction.

Foreign Currency as Change

If Xstore Point of Service is configured to provide foreign currency as change, Xstore Point of Service opens a change prompt with a list of all foreign tenders that were used in the transaction, as well as the local currency:

1. Select the change from the list:
 - Click the currency.
 - Use the up and down arrows to highlight the correct currency, then press Spacebar.

2. Press Enter.

- If there is enough of the selected currency in the till, a prompt indicates the amount of foreign currency due.
- If there is not enough of the selected currency in the till, the transaction will either require a manager's override or you will have to select a different currency
 - If a manager override is allowed, a manager must enter an **Employee ID** and **Password** to override.
 - If a manager override is not allowed, click the **Back** button to display the cash currency list. Continue with Step 1.

Note: If the amount due exceeds the cash change limit, Xstore Point of Service will prompt for the tender your home office has configured. For example, your store may be configured to issue a store credit when the amount exceeds the cash change limit.

3. If prompted, scan the cash drawer you are using.

The cash drawer opens. If configured, a prompt displays reminding you to close the cash drawer.

4. Close the cash drawer after giving change to the customer.
5. Continue the transaction.

Coupon Tender

To redeem a coupon tender:

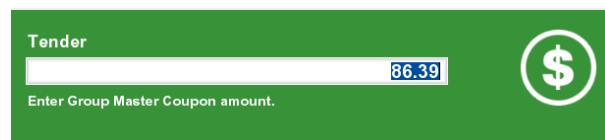
1. Select **Coupon** in the menu of tenders. See [Selecting Tenders](#).

Figure 4-33 Coupon ID Prompt



2. Enter the coupon serial number:
 - Scan the serial number.
 - Enter the serial number and press Enter.
3. Depending upon the coupon type, you may be prompted to enter the coupon value. If prompted, enter the coupon amount and press Enter.

Figure 4-34 Coupon Amount Prompt



4. Xstore Point of Service applies the coupon to the transaction:

- If the coupon is worth more than the amount of the purchase, a store credit, gift card, cash, or other tender is issued as change for the remaining balance, depending upon your store's policy.
 - If the coupon does not cover the entire amount of the purchase, the screen automatically returns to the tender selection screen. See [Selecting Tenders](#).
5. If prompted to complete the transaction:
 - Click **Yes** to complete the transaction.
The transaction completion process begins. Continue the transaction.
 - Click **No** to return to the tender selection screen. See [Selecting Tenders](#).

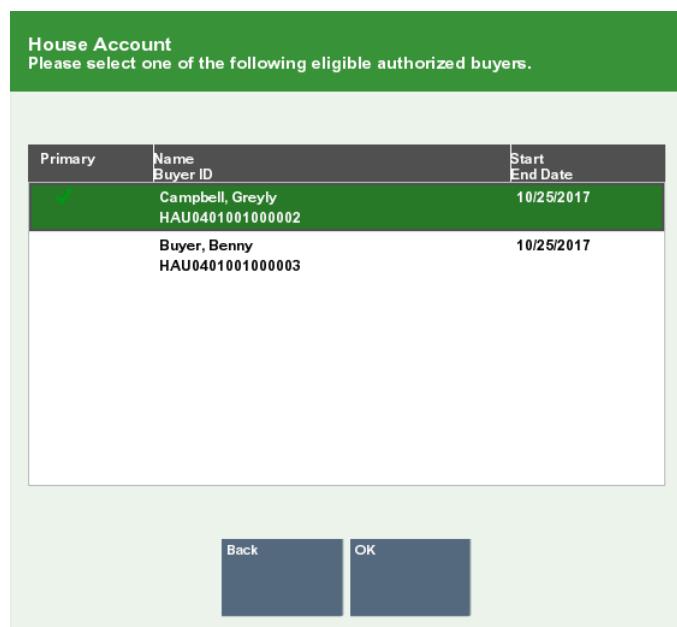
House Account

To tender a transaction with a house account:

1. Select **House Account** in the menu of tenders. See [Selecting Tenders](#).
 - If there is no customer assigned to the transaction, you are prompted to add one. Click **Yes** if prompted.
 - If the customer does not have an active house account set up, this tender will not be available.
 - If a house account payment is part of the sales transaction, the House Account tender option will not be available.
 - If the customer's house account has been closed, this tender is not available.
 - If the customer's house account is on hold, this tender is not available.

Xstore Point of Service displays a list of authorized buyers associated with this house account.

Figure 4–35 House Account Authorized Buyer List



2. Select the authorized buyer from the list:

- Click the buyer.
 - Use the up and down arrows to highlight the correct buyer, then press Spacebar.
3. If necessary, change the amount to tender on the house account.

Figure 4-36 House Account Amount Prompt



4. Press **Enter**.
5. If the amount to tender exceeds the account limit:
 - If the amount is within the override limit, Xstore Point of Service opens a prompt:
 - Click **Yes** to use the house account tender and continue the transaction.
 - Click **No** to either use a different tender, or apply a smaller amount to the house account and use a different tender for the remainder.
 - If the amount exceeds the account limit and is greater than the override limit, the transaction cannot be tendered for the full amount using the house account.

Click **OK** to close the prompt and change the amount to apply to the house account.
6. If prompted, ask the customer to sign on the PIN pad device.
7. Verify the customer's signature.
8. Press **Enter**.
9. If prompted to complete the transaction:
 - Click **Yes** to complete the transaction.
The transaction completion process begins. Continue the transaction.
 - Click **No** to return to the tender selection screen. See [Selecting Tenders](#).

Room Charge

A room charge is a tender type used in hotels. Select the Room Charge tender option in a sale transaction to apply the total of the transaction to the guest's room bill.

1. Select **Room Charge** in the menu of tenders. See [Selecting Tenders](#).
A Guest Lookup form opens.
2. Enter lookup information in any one of the fields:

Note: Any additional information you enter into another field is ignored.

- **Room #:** Guest room number.

- **Guest Name:** Full name of the guest.
 - **Guest #:** ID number for the guest.
3. Click **Process**.
- Xstore Point of Service displays a list of customers matching the search information.
4. Select the guest's name in the list:
 - Click the customer.
 - Use the up and down arrows to highlight the correct customer, then press Spacebar.
 5. Click **OK**.
 6. If necessary, change the amount to the charged to the guest's room bill.
 7. Press **Enter**.
 8. If prompted to complete the transaction:
 - Click **Yes** to complete the transaction.
The transaction completion process begins. Continue with Step 9.
 - Click **No** to return to the tender selection screen. See [Selecting Tenders](#).
 9. When prompted, ask the customer to sign the receipt for the room charge.

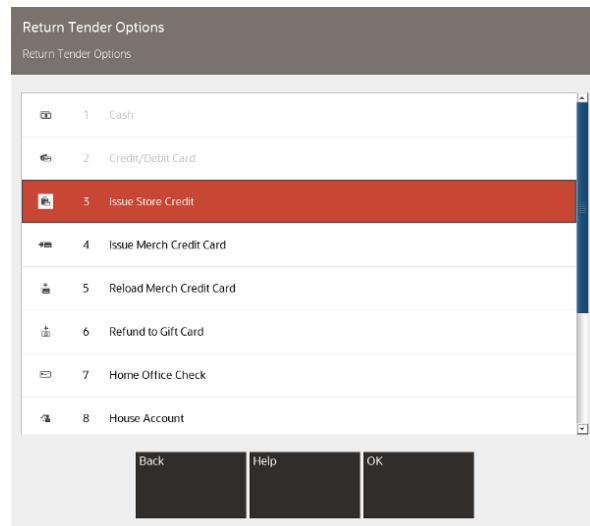
Return Tenders

To select a return tender for a refund transaction:

1. Click **Add Tenders** when you are ready to complete the transaction.

Xstore Point of Service displays a list of return tender types:

Figure 4–37 Return Tender List - Cash Option



The list of return tenders available for issuing refunds will be determined by type of return (verified or unverified / blind return) and the Xstore configurations for return tenders.

To tender a refund, select the tender required, and refer to the section for the appropriate tender type:

- [Cash](#)
- [Credit/Debit Card](#)
- [eWallet](#)
- [Gift Card](#)
- [Store Credit](#)
- [Merchandise Credit Card](#)
- [Mail Check Refund - Home Office Check](#)
- [House Account](#)
- [Room Charge](#)

Currency Rules

Verified returns always are processed in the local currency.

If the originating currency is different than your local currency, the refund amount is automatically converted into your local base currency, using the current currency exchange rate stored in the system.

These exchanged values are used as the refund amount for the return transaction.

Cash

To tender a return transaction in cash:

1. Select **Cash** in the menu of tenders. See [Selecting Tenders](#).

Figure 4–38 Cash Refund Amount Prompt



2. Enter the amount of cash to be returned to the customer:
 - Enter the amount.
 - Click the amount in the **Menu Buttons** (also known as Quick Cash buttons).
3. Press **Enter**.
4. If prompted to complete the transaction:
 - Click **Yes** to complete the transaction.
The transaction completion process begins. Continue with Step 5.
 - Click **No** to return to the tender selection screen. See [Selecting Tenders](#).
5. If prompted, scan the cash drawer you are using.
The cash drawer opens. If configured, a prompt displays reminding you to close the cash drawer.
6. Take the cash from the cash drawer and return it to the customer.

7. Close the cash drawer.

After the cash drawer has been closed, the sale receipt prints and the system is ready for the next transaction.

Credit/Debit Card

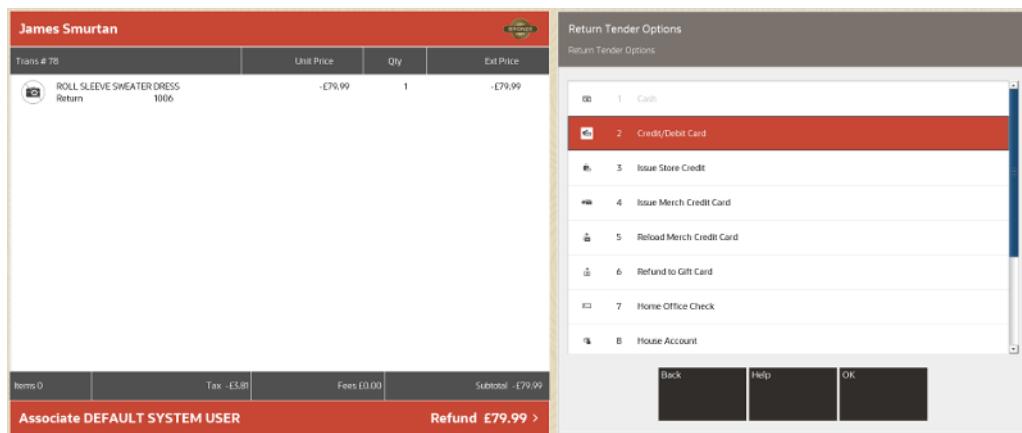
The procedure for tendering a return on a credit/debit card will change depending upon whether the card is selected from the [Selecting Tenders](#) list, or if it is automatically selected by a verified return:

- [Select from the List of Tenders](#)
- [Automatically Selected Credit Card](#)

Select from the List of Tenders

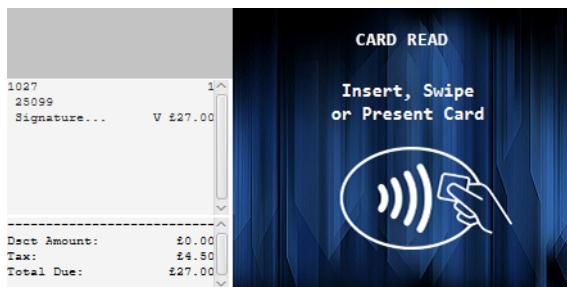
To tender a return with a Credit Card selected from the [Selecting Tenders](#) list:

Figure 4–39 Return Tender Options



1. Select **Credit/Debit** in the menu of tenders. See [Selecting Tenders](#).
2. Confirm the amount to be refunded (usually the full transaction amount) or key a different amount.
3. Press **Enter**.
4. The tender amount is displayed onto the Payment Terminal.

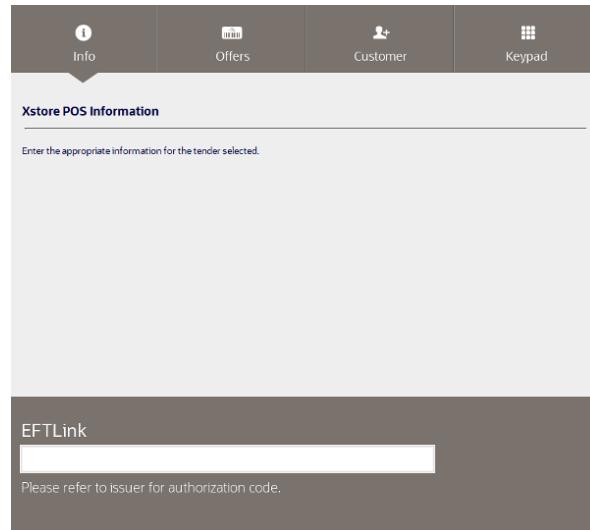
Figure 4–40 Payment Terminal



5. The customer will present the payment card using the desired method.

6. It's possible that the Payment Terminal will sometimes request a "manual authorization" from the cashier on the POS.

Figure 4-41 Manual Authorization



- Call the authorizing agent to request and receive an authorization code.
 - Enter the authorization code.
 - Click **OK**.
- The Manual Authorization code is transmitted to the Payment Terminal for approval.
7. The customer may be prompted by the Payment Terminal to authenticate the card payment:
 - If necessary, wait for the customer to enter their PIN.
 - If necessary, wait for the customer to sign the signature capture device.
 - If necessary, verify the customer signature.

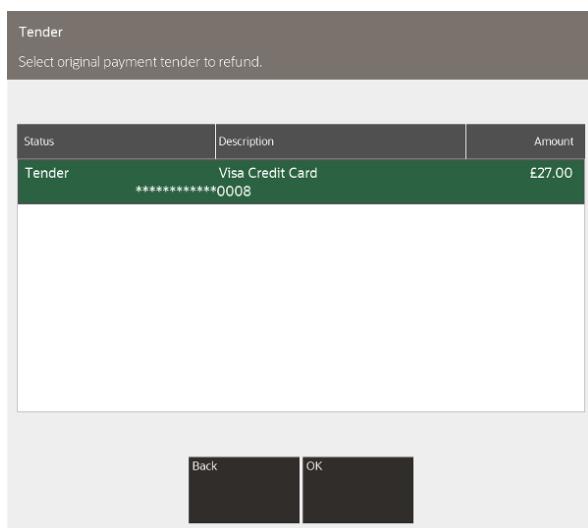
Figure 4–42 Customer Signature

8. If necessary, ask the customer to sign the receipt.
9. The Payment Terminal either Approves or Rejects the refund.
10. If there is still an outstanding balance to refund then the **Return Tender Options** screen is re-displayed for the cashier to select another tender.
11. The **Sale Complete** prompt is displayed and the cashier is prompted to select a receipt method.
12. The cashier can select to email or to print the receipts as the Xstore configuration dictates.

Xstore completes the transaction.

Automatically Selected Credit Card

Xstore Point of Service automatically displays the credit card information for the original transaction when you tender a verified return. To tender the return:

Figure 4–43 Automatically Selected Credit Card

1. Select the return tender:
 - Click **OK** to apply the tender to the card used in the original transaction. This is called a tokenized refund and uses the saved transaction token on Xstore from the original card payment, and thus the customer does not need to re-present the card. Continue with Step 2.
 - If the original card is not suitable to be used, for example it has expired, or a different card or tender is required, click **Back** to change tenders. Continue with **Selecting Tenders**.
2. Confirm the amount to be refunded or key a different amount (cannot refund a higher amount than was originally tendered on this card).

Figure 4-44 Refund Amount Prompt



3. If necessary, ask the customer to sign the receipt.
 4. The Payment Terminal either Approves or Rejects the refund for the verified refund.
 5. If there is still an outstanding balance to be refunded then the **Return Tender Options** screen is re-displayed for the cashier to select another tender.
 6. The **Sale Complete** prompt is displayed and the cashier is prompted to select a receipt method.
 7. The cashier can select to email or to print the receipts as the Xstore configuration dictates.
- Xstore completes the transaction.

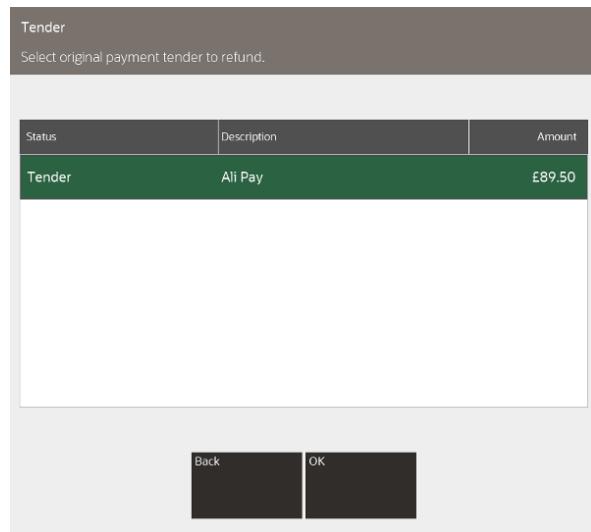
eWallet

The procedure for tendering a return on an eWallet tender is similar to that with a Credit / Debit card, that was used as payment on the original sale transaction. It is not possible to perform a blind return to an eWallet tender, it can only be selected from the original tenders on a verified return.

Automatically Selected eWallet Tender

Xstore Point of Service automatically displays the eWallet information for the original transaction when you tender a verified return. To tender the return:

Figure 4–45 Automatically Selected eWallet



1. Select the return tender:

- Click **OK** to apply the tender to the eWallet used in the original transaction. This is called a tokenized refund and uses the saved transaction token on Xstore from the original eWallet payment, in order to refund to the original eWallet account. Continue with Step 2.
- If the original eWallet is not suitable to be used, for example it has expired, or a different tender is required, click **Back** to change tenders. Continue with [Selecting Tenders](#).

2. Confirm the amount to be refunded or key a different amount (cannot refund a higher amount than was originally tendered on this card).

Figure 4–46 Refund Amount Prompt



3. If necessary, ask the customer to sign the receipt.
 4. The Payment Terminal either Approves or Rejects the refund for the verified refund.
 5. If there is still an outstanding balance to be refunded then the **Return Tender Options** screen is re-displayed for the cashier to select another tender.
 6. The **Sale Complete** prompt is displayed and the cashier is prompted to select a receipt method.
 7. The cashier can select to email or to print the receipts as the Xstore configuration dictates.
- Xstore completes the transaction.

Gift Card

To issue or reload a gift card:

1. Select **Issue Gift Card** or **Reload Gift Card** in the menu of tenders. See [Selecting Tenders](#).

Note: Select the **Issue Gift Card** option to issue a new gift card.
Select the **Reload Gift Card** option to put the refund value onto the customer's current gift card.

Figure 4–47 Return Gift Card Number Prompt



2. Enter the gift card number:
 - Scan the gift card.
 - Enter the gift card number and press **Enter**.

Figure 4–48 Return Gift Card Amount Prompt



3. If necessary, change the amount to refund.
4. Press **Enter**.
5. If prompted to complete the transaction:
 - Click **Yes** to complete the transaction.
The transaction completion process begins.
 - Click **No** to return to the tender selection screen. See [Selecting Tenders](#).

Store Credit

To issue store credit:

1. Select **Issue Store Credit** in the menu of tenders. See [Selecting Tenders](#).

Figure 4–49 Issue Store Credit Amount Prompt

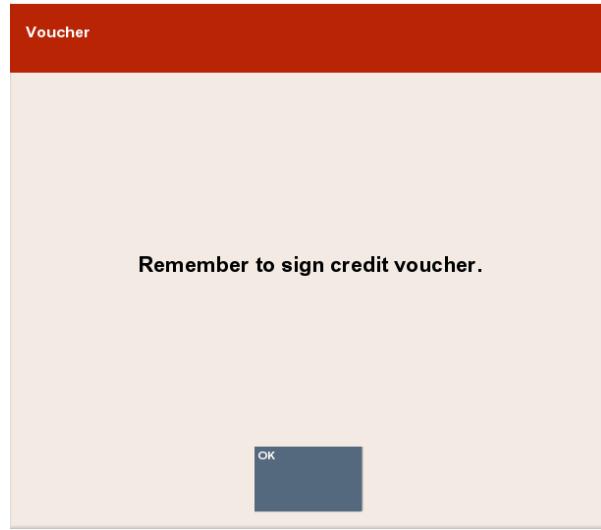


2. If necessary, change the amount of store credit to issue.

Note: If the total return amount is greater than the maximum allowed value of store credit to issue, Xstore Point of Service will show the maximum allowed value of store credit.

3. Press **Enter**.
4. Click **OK** if prompted sign the store credit voucher.
5. If prompted to complete the transaction:
 - Click **Yes** to complete the transaction.
The transaction completion process begins.
 - Click **No** to return to the tender selection screen. See [Selecting Tenders](#).

Figure 4–50 Store Credit Voucher Signature Prompt



6. If necessary, sign the store credit voucher.
7. Give the customer the store credit voucher along with the receipt.

Merchandise Credit Card

To issue or reload a merchandise credit card:

- Select **Issue Merch Credit Card** or **Reload Merch Credit Card** in the menu of tenders. See [Selecting Tenders](#).

Note: Select the **Issue Merch Credit Card** option to issue a new merchandise credit card. Select the **Reload Merch Credit Card** option to put the refund value onto the customer's current merchandise credit card.

Figure 4–51 Merchandise Credit Card Number Prompt



- Enter the merchandise credit card number:
 - Scan the merchandise credit card.
 - Enter the merchandise credit card number and press Enter.
- If necessary, change the amount to refund.
- Press **Enter**.
- If prompted to complete the transaction:
 - Click **Yes** to complete the transaction.
The transaction completion process begins.
 - Click **No** to return to the tender selection screen. See [Selecting Tenders](#).

Mail Check Refund - Home Office Check

A mail check refund may be used when a customer returns an item that was paid with a personal check, but the waiting period has not yet elapsed for the check to clear the bank. After the check has cleared, a refund check is mailed to the customer.

To tender a return transaction with a home office check:

- Select **Home Office Check** in the menu of tenders. See [Selecting Tenders](#).
Xstore Point of Service prompts to confirm recipient information.
- If necessary, make changes to the recipient information.
- Press **Save Changes**.

Figure 4–52 Home Office Check Amount Prompt



4. If necessary, change the tender amount.
5. Press **Enter**.
6. If prompted to complete the transaction:
 - Click **Yes** to complete the transaction.
The transaction completion process begins.
 - Click **No** to return to the tender selection screen. See [Selecting Tenders](#).

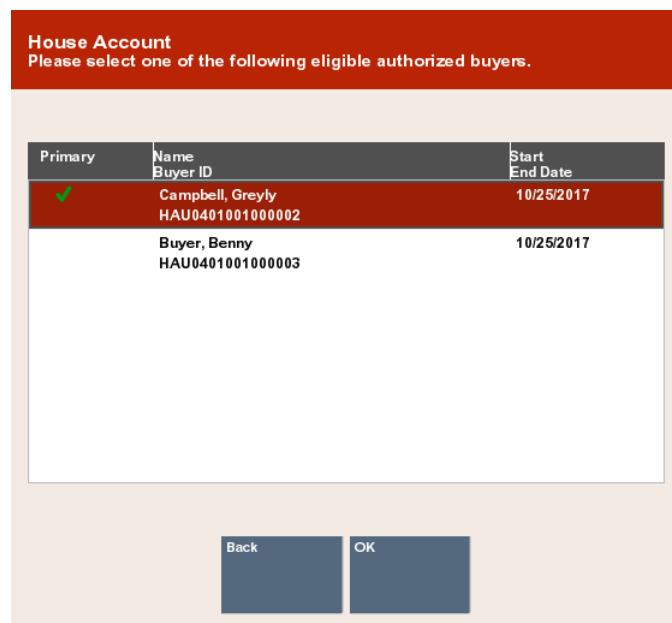
House Account

To tender a transaction with a house account:

1. Select **House Account** in the menu of tenders. See [Selecting Tenders](#).
 - If there is no customer assigned to the transaction, you are prompted to add one. Click **Yes** if prompted.
 - If the customer does not have an active house account set up, this tender will not be available.
 - If a house account payment is part of the sales transaction, the House Account tender option will not be available.
 - If the customer's house account has been closed, this tender is not available.
 - If the customer's house account is on hold, this tender is not available.

Xstore Point of Service displays a list of authorized buyers associated with this house account.

Figure 4–53 Return House Account



2. Select the authorized buyer from the list:
 - Click the buyer.
 - Use the up and down arrows to highlight the correct buyer, then press Spacebar.

3. If necessary, change the amount to return on the house account.

Figure 4-54 Refund House Account Prompt



4. Press **Enter**.
5. If the amount to tender exceeds the account limit:
 - If the amount is within the override limit, Xstore Point of Service opens a prompt:
 - Click **Yes** to use the house account tender and continue the transaction.
 - Click **No** to either use a different tender, or apply a smaller amount to the house account and use a different tender for the remainder.
 - If the amount exceeds the account limit and is greater than the override limit, the transaction cannot be tendered for the full amount using the house account.
 Click **OK** to close the prompt and change the amount to apply to the house account.
6. If prompted, ask the customer to sign on the PIN pad device.
7. Verify the customer's signature.
8. Press **Enter**.
9. If prompted to complete the transaction:
 - Click **Yes** to complete the transaction.
 The transaction completion process begins. Continue with Step 10
- Click **No** to return to the tender selection screen. See [Selecting Tenders](#).
10. If prompted, ask the customer to sign the receipt.

Room Charge

A room charge is a tender type used in hotels. Select the **Room Charge** tender option to remove the total of the transaction from the guest's room bill.

1. Select **Room Charge** in the menu of tenders. See [Selecting Tenders](#).

A Guest Lookup form opens.

2. Enter lookup information in any one of the fields:

Note: Any additional information you enter into another field is ignored.

- **Room #:** Guest room number.
- **Guest Name:** Full name of the guest.

- Guest #: ID number for the guest.
3. Click **Process**.
- Xstore Point of Service displays a list of customers matching the search information.
4. Select the guest's name in the list:
- Click the customer.
 - Use the up and down arrows to highlight the correct customer, then press Spacebar.
5. Click **OK**.
6. If necessary, change the amount to charged to the guest's room bill.
7. Press **Enter**.
8. If prompted to complete the transaction:
- Click **Yes** to complete the transaction.
The transaction completion process begins. Continue with Step 9.
 - Click **No** to return to the tender selection screen. See [Selecting Tenders](#).
9. When prompted, ask the customer to sign the receipt for the room charge.

Splitting Tenders

A customer may use multiple tenders when paying for an item. To use multiple tenders:

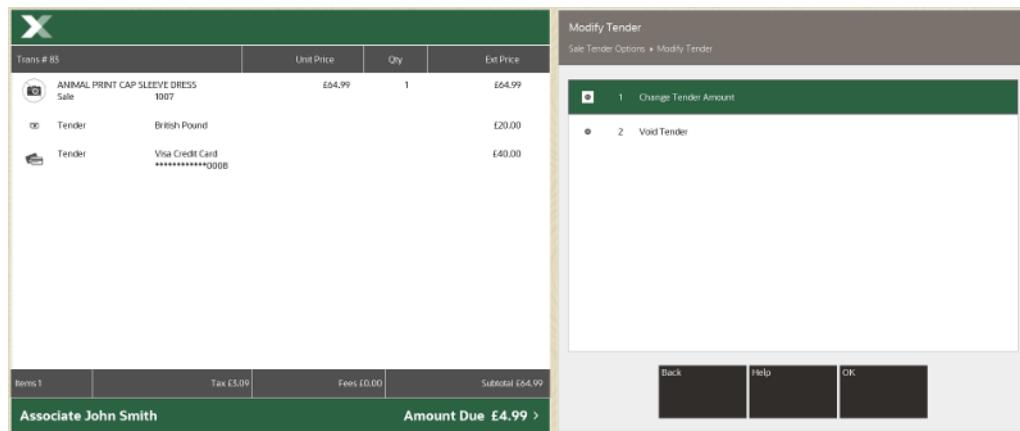
1. Select a method of payment. See [Selecting Tenders](#).
2. Enter the amount to apply to the tender.
3. Follow all prompts for the tender.
4. Repeat Steps 1 to 3 for each tender to apply to the transaction.

Note: The tender list will continue to display as long as there is an outstanding balance. You may select as many tender types as necessary to satisfy the balance.

Void a Tender

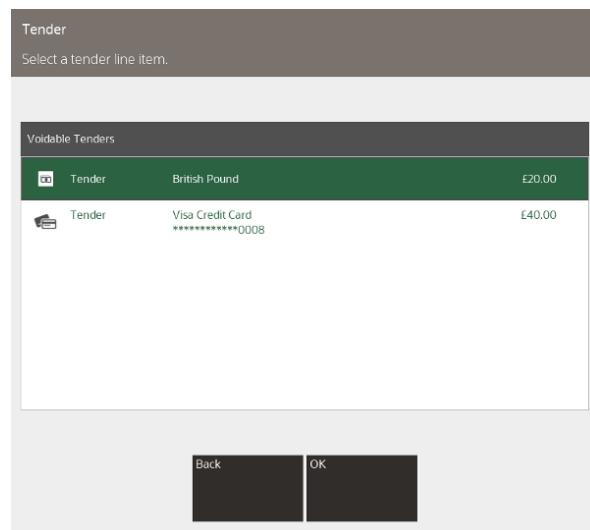
To void a tender:

1. Select **Modify Tender** at the tender selection screen (see [Selecting Tenders](#)):
 - Click **Modify Tender**.
 - Use the up and down arrows to highlight **Modify Tender**, then press Spacebar.
2. Click **OK**.

Figure 4–55 Modify Tender Menu

3. Select the **Void Tender** action:
 - Click **Void Tender**.
 - Use the up and down arrows to highlight **Void Tender**, then press Spacebar.
4. Click **OK**.

Xstore Point of Service displays a list of tenders applied to the transaction.

Figure 4–56 Voidable Tenders List

5. Select the tender to void:
 - Click the tender.
 - Use the up and down arrows to highlight the tender, then press Spacebar.
6. Click **OK**.

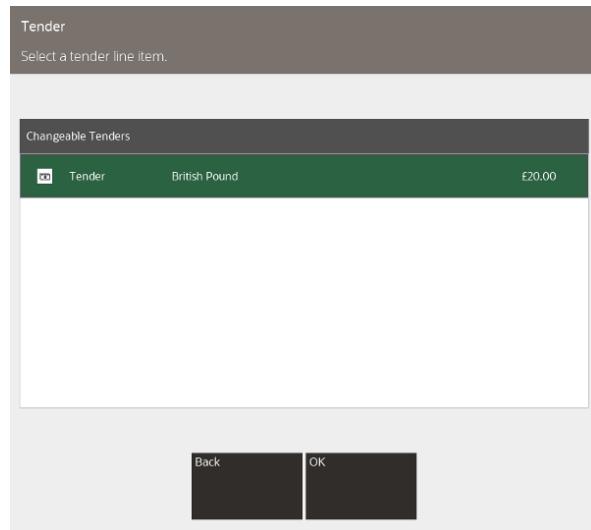
Xstore Point of Service returns to the tender selection screen. See [Selecting Tenders](#).

Change Tender Amount

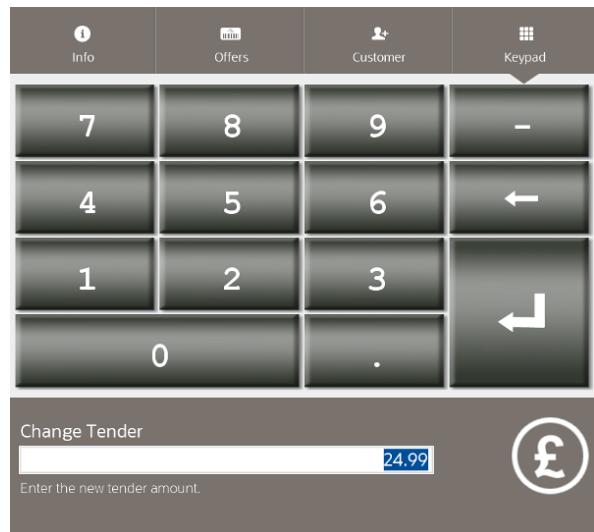
To change a tender amount:

1. Select **Modify Tenders** at the tender selection screen (see [Selecting Tenders](#)):
 - Click **Modify Tenders**.
 - Use the up and down arrows to highlight **Modify Tenders**, then press Spacebar.
2. Click **OK**.
3. Select the tender to be modified from the list of modifiable tenders (not all tender types can be modified), then click **OK**.

Figure 4–57 Changeable Tender List



4. Select the **Change Tender Amount** action:
 - Click **Change Tender Amount**.
 - Use the up and down arrows to highlight **Change Tender Amount**, then press Spacebar.
5. Click **OK**.

Figure 4–58 Change Tender Amount

Xstore Point of Service prompts for the new tender amount.

6. Enter the new amount to apply to the tender.

Xstore Point of Service returns to the tender selection screen. See [Selecting Tenders](#).

Currency Rounding

Currency rounding refers to the process of rounding the cost of a purchase (which is to be paid for in cash) to the nearest multiple of the smallest denomination of currency.

Low denomination coins in some currencies were removed from circulation and are no longer available. Because it may not be possible to make exact change for a cash purchase, amounts must be rounded to the lowest available denomination of coinage. For these currencies, Xstore Point of Service automatically applies rounding rules that enforce the minimum denomination value that can be accepted or refunded.

For example, in Australia, the 5-cent coin is the smallest-valued denomination currently in circulation. Because of this, all transaction amounts using Australian currency must be multiples of 5 cents.

When currency rounding is in use, a Cash Total is displayed below the transaction Subtotal. The Cash Total is rounded to the nearest multiple of the Minimum Cash Denomination Value for the currency.

For example, a tender with a Minimum Cash Denomination Value of 5 cents (\$0.05) results in the following totals in a sale transaction:

- If the Transaction Total=\$161.44, then the Cash Total is \$161.45 (rounded up).
- If the Transaction Total=\$236.51, then the Cash Total is \$236.50 (rounded down).

If your system is configured to default to the Amount Due when prompting for a tender amount, the Cash Total amount appears in the Enter Cash Amount text field, where it may be accepted or edited. However, tenders can only be accepted (and refunded in return transactions) in amounts that are even multiples of its Minimum Cash Denomination Value.

These values are also printed on the receipt.

Customer Maintenance

Customer Maintenance includes activities that relate to entering new customers into the customer database, updating customer information and preferences, viewing or printing customer information, and deleting a customer record.

Customer Maintenance is typically required when an associate discovers that a customer's name is not in the database and must be entered for the first time. Other common situations that trigger customer maintenance occur when incorrect customer information is found and must be revised, and when information is lacking and must be entered.

These screens can also be accessed through the back office Customer Maintenance menu options.

Note: Customer maintenance activities are controlled by user security. You must have privileges in the system to perform any customer maintenance activities.

This chapter describes the following sections:

- [Associate a Customer with the Transaction](#)
- [Customer Information Consent](#)
- [Add a Customer Record](#)
- [Edit a Customer Record](#)
- [Address Lookup](#)
- [Customer Maintenance Fields](#)
- [Additional Customer Options](#)

Associate a Customer with the Transaction

To search for a customer record from the Customer Search window:

Figure 5–1 Customer Search Form

The form is titled "Customer Search" with the sub-instruction "Enter search criteria." It contains the following fields:

- Phone # (text input field)
- Last Name (text input field)
- First Name (text input field)
- City (text input field)
- State (dropdown menu currently set to "US - United States")
- Postal Code (text input field)
- Loyalty # (text input field)
- Customer # (text input field)

At the bottom are five buttons: Back, Help, Skip, Change Country, and Process.

1. Enter the customer search criteria:

Note: Enter as much information as possible to limit the number of customer records returned.

- **Phone #** - Phone number associated with the customer.
- **Last Name** - Customer last name.
- **First Name** - Customer first name.
- **City** - City in the customer's address.
- **State** - State in the customer's address.

Note: Values in this drop-down menu can be changed using the [Change Country](#) button.

- **Postal Code** - Postal or zip code.
- **Loyalty #** - Customer loyalty number.
- **Customer #** - Customer ID number.

2. Click **Process**.

Xstore Point of Service displays a list of customers matching the search criteria.

Note: If no customer record matches the criteria, Xstore Point of Service displays a message indicating that no customer records have been found. Click [New](#) to [Add a Customer Record](#), or click **Back** to return to Step 1.

3. If necessary, select the correct customer from the list:

Figure 5–2 Customer Search Results

Customer Search
Source: StorePrimary

Customers

Meijer, Lucas	Summerswaldstr 27 2595 GJ DEN HAAG ZH Netherlands
Meier, Johannes	Trieblstrasse 301 8005 Graz-Puntigam Austria
Maurer, Franz	Trieblstrasse 301 8005 Graz-Puntigam Austria

Back **Select & View** **New** **Select & Continue**

Note: If only one customer matches the search criteria, Xstore Point of Service may open the selected customer record for viewing, editing, or printing. Continue with Step 5.

- Click the customer.
 - Use the up and down arrows to highlight the correct customer, then press the Spacebar.
- 4.** Click the proper button:
- **Back** – Return to the Customer Search form (Step 1) Select this option if the correct customer is not listed and you want to change the search criteria.
 - **Select & Continue** – Assign the selected name to the transaction. Continue the transaction.
 - **Select & View** – Open the selected customer record for viewing, editing, or printing. Continue with Step 5.
 - **New** – Display a form for adding a new customer record to the customer database. Select this option if the customer is not in the database. See [Add a Customer Record](#).
- 5.** Click the proper button:
- **Back** – Returns to the Customer Search form (Step 1).
 - **Assign and Continue** - Associates the customer with transaction. Continue the transaction.
 - **Edit Customer** - Allows you to change information in the customer record. See [Edit a Customer Record](#).
 - **Customer Options** – Displays a list of customer options. See [Additional Customer Options](#).
 - **Previous Tab and Next Tab** - Navigate through the tabs.

Note: See [Customer Maintenance Fields](#) for more information about each tab.

Customer Information Consent

Xstore allows retailers to capture a customer's consent for collecting their personal information.

If this functionality is enabled, when creating a new customer record or by accessing the customer record in the transaction, you are automatically prompted with a Consent Preferences pop up. If the customer has already given consent and the terms and conditions are current, then they will not be prompted again. However, if the terms and conditions have been updated, the customer will be prompted to update their consent preferences.

The terms and conditions are provided by the retailer. Xstore provides the ability to configure multiple consent check boxes for the customer to select.

Once the customer has agreed to the terms and conditions and the consent boxes have been checked, select the **Accept** button.

If the customer declines consent, the consent captured date is cleared and it may impact the ability to perform some specific transaction types depending on the retailer's configurations.

After selecting the **Accept** button, the terms and conditions may be reviewed, printed on a receipt, and signed by the customer.

Customers and employees may ask the retailer to remove their personal information by anonymizing or deleting it from their records. If a customer or employee requests to remove their data, a check is made to ensure that the customer or employee is eligible to be removed from the application. For example, customers with any open transactions would not be eligible for data removal. Open transactions include open orders, a house account balance, or open layaway transactions, and so on.

Add a Customer Record

To create a new customer record:

1. Click **New** at a customer prompt.

If customer information consent functionality is not enabled, continue at step 4.

If customer information consent functionality is enabled, a terms and conditions screen opens showing consent preferences and requesting that the customer accepts or declines to the terms and conditions listed. See [Customer Information Consent](#) for more information.

Figure 5–3 Customer Information Consent Form

Use of Customer Information Consent
Review with the customer the terms and conditions for the use of their information.

We are asking your consent to keep your information on file so that we may send you store information. You may accept or decline this offer. You will only receive information twice a month just to inform you of current or upcoming sales.

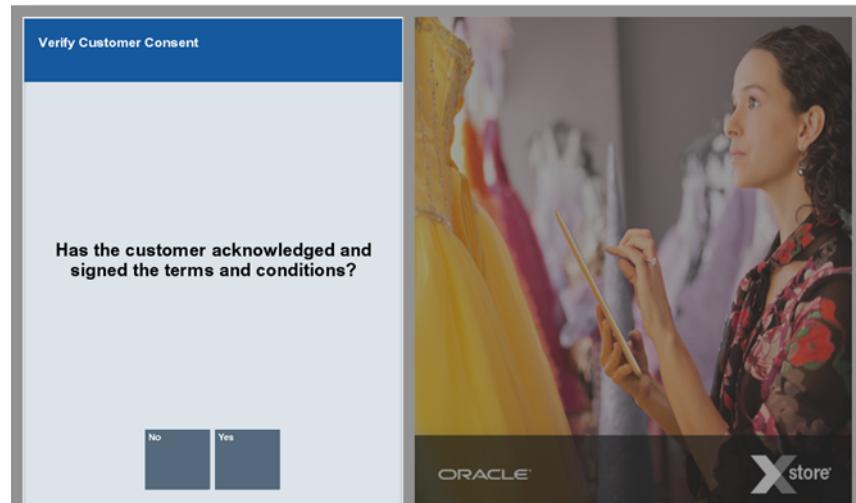
Customer agrees to terms and conditions
 Customer will sign terms and conditions receipt
 Customer agrees to receive mail
 Customer agrees to receive emails
 Customer agrees to receive phone calls

Back **Help** **Decline** **Accept**

Select the relevant check boxes if the customer agrees to accept the terms and conditions, and consent preferences.

To refuse consent, select Decline to return to the previous screen.

2. Select **Accept**. The terms and conditions print on the receipt for the customer to sign manually and a prompt is displayed to confirm the customer acknowledges the terms and conditions. Ask the customer to sign the receipt.

Figure 5–4 Verify Customer Consent

3. Select **Yes** to confirm the customer has acknowledged the terms and conditions, and signed the receipt. The customer's acceptance is associated to the customer record.

A confirmation screen is displayed indicating that the customer's consent selections have been updated in the system. Select **OK** to continue. The customer maintenance screen opens with editable fields.

If **No** is selected on the consent confirmation screen, the customer's refusal of consent is recorded.

Figure 5–5 Contact Information Tab

The screenshot shows the 'Contact Information' tab for a customer named 'James'. The interface is divided into several sections: 'Contact Information' (with fields for First, Middle, Last names, and various address details), 'Personal Information' (with fields for Contact, Anniversary Date, Birth Date, Gender, and Language), and a 'Profile' status bar at the bottom indicating '0 % Complete'. Navigation buttons for 'Undo Changes', 'Help', 'Save Changes', 'Previous Tab', and 'Next Tab' are visible at the bottom.

Note: If you provided consent as part of Customer Search rather than Add New Customer, Xstore Point of Service automatically populates the new customer fields with the information from the customer search.

4. Enter the information into the customer maintenance fields.
 - See [Customer Maintenance Fields](#) for a description of the organization of the Customer Maintenance screen and the information in each field.
 - Required fields are marked with a red triangle  in the upper-left corner.
 - Fields with a selectable list of options are labeled with a down arrow button in the right side of the field.
 - If your system is configured to provide [Address Lookup](#) functionality, an **Address Lookup** button will be available to allow you to quickly look up customer addresses using minimal information.

Note: When you enter a valid postal code for the customer, the system automatically enters the city and state information.

5. Click **Save Changes** when all information has been added to the customer record.
6. If necessary, indicate whether to add the customer to the loyalty program:
 - Scan or enter the card number, the click **Process** to add the customer to the loyalty program (card-centric programs).
 - Click **Yes** to add the customer to the loyalty program (non-card-centric programs).
 - Click **Not Now** to not add the customer to the loyalty program, but open the prompt the next time the customer performs a transaction.
 - Click **Never** to not add the customer to the loyalty program and never ask the customer again.
7. If necessary, click **Assign Customer To Tran** to add the customer to the transaction and return to the sale.

Edit a Customer Record

To edit a customer record in the Customer Maintenance screen:

1. Click **Edit Customer**.
2. Select the tab in which to change the customer information.
3. Click the field to change.
4. Enter or select the new information.

Note: If necessary, click **Undo Changes** to discard the changes and exit customer editing.

5. Click **Save Changes** to save the changes and exit customer editing.

Address Lookup

Address Lookup allows users to quickly locate accurate addresses using minimal information, instead of manually keying the entire address. When enabled, this function is available in most Xstore Point of Service address capture screens, including handheld and tablet.

Note: The Address Lookup function may not be available for all countries.

To use address lookup:

1. Select the **Address Lookup** function.

The Address Lookup window opens.

2. Enter the first line of the address, followed by the postal code.

Note: The search terms used in some countries can be different, and a number of different search terms can be used within a country. For example, instead of a postal code, some countries can search using a city or town and a state or province. Or, in some countries, the postal code can be replaced by just a city or town.

3. Click **Address Lookup**.

- If more than one address is found, continue with Step 5.
- If only one address is found, continue with Step 6.

4. If necessary, refine the address:

- Enter the street number or apartment number as requested and then click **Refine Address**.

5. Select the correct address:

- Click the address.
- Use the up and down arrows to highlight the correct address, then press the Spacebar.

6. Indicate whether the address is correct:
- Click **Yes** to continue with the address.
 - Click **No** to return to the Address Lookup window. Return to Step 2.
 - Click **Cancel** to exit Address Lookup without selecting an address.

Customer Maintenance Fields

The Customer Maintenance screen is divided into several tabs containing information about the customer.

- [Dashboard](#)
- [Contact Information](#)
- [Associations](#)
- [Purchase History](#)
- [Accounts](#)
- [Awards](#)
- [Tasks](#)
- [Comments](#)
- [Addresses](#)
- [House Account](#)
- [Wish List](#)
- [Digital Cart](#)

Dashboard

This tab shows the customer's loyalty information, and recent purchase information.

Figure 5–6 Customer Dashboard Tab

The screenshot shows the Oracle Retail Xstore Point of Service User Guide. The top navigation bar includes 'Customer Maintenance Fields' and other tabs like 'Dashboard', 'Contact Information', etc. The main content area is titled 'Customer Dashboard' and displays the following information:

- Loyalty #:** Not Enrolled
- Birth Date:** 09/12/1988
- Last Purchase:** 09/12/2018
- Address:** PULLAB
12345 CLOVER LANE
CLOVER, OH 44139
United States
- Email:** sukriti.sharma@oracle.com
- Phone #:** 091-765-4321

A bronze badge indicates the customer has been a member since 09/07/2016.

My WishList (1 of 3)

Item ID	Description	Price
1002	COTTON JERSEY TIERED DRESS	\$118.00
1003	TIE WAIST SHIRT DRESS	\$69.50
1004	BLK WHITE CAP SLEEVE DRESS	\$69.50
1006	ROLL SLEEVE SWEATER DRESS	\$79.99

Last 60 Days

Category	Items	Amount
Sales	21	\$1,855.05
Returns	1	(\$100.16)
Net	20	\$1,754.89

Last 60 Days

The graph tracks sales and returns over a 60-day period from July to October 2018. Sales (blue line) start at ~150 in July and rise steadily to ~750 by October. Returns (red line) remain relatively flat, starting at ~100 and ending at ~100.

The Dashboard tab displays the following information:

- Loyalty # - Loyalty number.

- **Birth Date** - Date of birth.
- **Last Purchase** - Last purchase date.
- **Address** - Primary address.
- **Email** - Primary e-mail address.
- **Phone #** - Primary phone number.
- Summary of the transactions in the last year. See [Transaction Summary](#).
- **Wish List** - Items in the customer's wish list.
- **Last xx Days** - Graph of the transactions in a set number of days.

Transaction Summary

The transaction summary table displays the following columns:

- **Last xx Days** - Types of transactions performed in a set number of days.
- **Items** - Total number of items in the transaction type.
- **Amount** - Total amount in each transaction type.

Wish List

The Wish List table displays the following information about each item in the customer's wish list:

- **Item ID** - ID of the item.
- **Description** - Description of the item.
- **Price** - Price of the item.

Last xx Days

The Last xx Days graph is a line graph plotting the amount of each transaction plotted the date of the transaction. This graph displays one line for sale transactions and one line for return transactions.

Contact Information

This tab shows the customer name, address, phone and email information, contact preferences, and profile completeness progress bar. Your store may be configured to display anniversary, birthday, and language options.

Figure 5–7 Contact Information Tab

The screenshot shows the 'Contact Information' tab for customer 'Sukriti Sharma'. At the top, it displays the customer ID (318906) and the date since the customer was added (09/07/2016). The main area is divided into two sections: 'Contact Information' on the left and 'Personal Information' on the right.

Contact Information:

- First Name: Sukriti
- Middle Name: (empty)
- Last Name: Sharma
- Company: (empty)
- Address: PUNJAB
- Postal Code: 44129
- City: SOLON
- Home Phone: 098-765-4321
- Work Phone: (empty)
- Mobile Phone: (empty)
- Email: sukritisharma@oracle.com
- Contact checkbox: (unchecked)
- Email Receipts checkbox: (unchecked)

Personal Information:

- Anniversary Date: 09/07/2016
- Birth Date: (empty)
- Gender: (empty)
- Language: English

At the bottom, there is a progress bar indicating 'Profile 51% Complete' and a set of navigation buttons: Back, Help, Edit Customer, Customer Details, Previous Tab, and Next Tab.

The Contact Information tab contains the following fields:

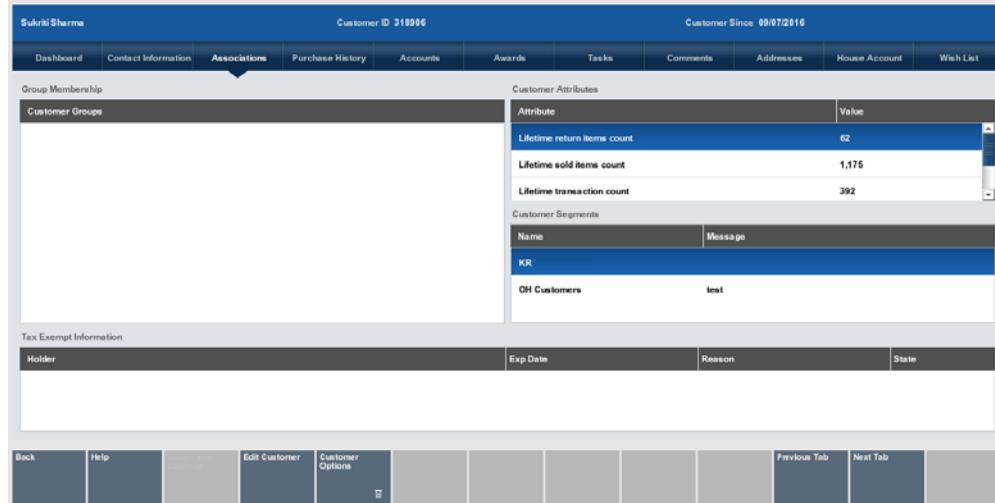
- **First** - First name.
- **Middle** - Middle name or middle initial.
- **Last** - Last name.
- **Company** - Company or organization associated with the customer.
- **Type** - Type of company or organization.
- **Address** - Primary street address.
- **Apartment** - Primary address apartment.
- **Country** - Country of primary address.
- **Postal Code** - Postal or zip code.
- **City** - City of the primary address.
- **State** - State or province of the primary address.
- **Home** - Home telephone number.
- **Work** - Work telephone number.
- **Mobile** - Mobile telephone number.
- **Email** - Primary e-mail address.
- **Contact** - Indicates whether the customer permits the store to contact them through the associated telephone number or e-mail address.
- **Email Receipts** - Indicates whether the customer allows the store to send e-mail receipts to the primary e-mail address.
- **Anniversary Date** - Date on which the customer was added to the system.
- **Birth Date** - Customer birthdate.
- **Gender** - Customer gender.
- **Language** - Primary language for the customer.
- **Profile x% Complete** - Percentage of customer record completion.

If [Customer Information Consent](#) functionality is enabled, the consent preferences are accessible via the [Review Customer Consent](#) option within the Customer Options menu.

Associations

This tab lists any company-defined groups to which the customer belongs, and additional personal identifying information (customer attributes, tax exemption information, and so on.)

Figure 5–8 Associations Tab



The Associations tab contains the following fields:

- **Group Membership** - The group to which the customer belongs. Groups are defined by the store or home office. A customer may be associated with one or more groups. If groups are not defined, no customer groups are listed in this section.
- **Customer Attributes** - Attributes for the customer. Attribute categories are defined by the home office and provide additional information about the customer.
- **Customer Segments** - Segments to which the customer belongs. Segments are groupings that share common criteria. This information is provided by Customer Engagement. Identifying a customer with a segment may be helpful in customer analysis and in sale promotions.

Note: This field cannot be edited. Segments are provided by Oracle Retail Customer Engagement.

- **Tax Exempt Information** - Tax exemptions associated with the customer. A customer may have one or more exemptions.

Purchase History

This tab shows a detailed sales transaction listing for the customer for a set number of days. If available, a picture displays with item details in the Information tab.

Figure 5–9 Purchase History Tab

Sukriti Sharma Customer ID: 318906 Customer Since: 09/07/2016

Dashboard Contact Information Associations Purchase History Accounts Awards Tasks Comments Addresses House Account Wish List

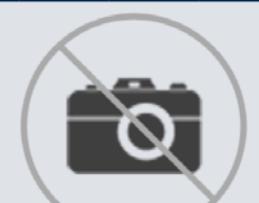
Transactional Detail - Last 60 Days

Date	Trans #	Location	Qty:	Total
09/12/2018	952	Order Deposit	1	\$260.96
09/12/2018	952	275		\$235.20
09/12/2018	1002	COTTON JERSEY TIERED DRESS	1	\$101.87
09/12/2018	1003	TIE WAIST SHIRT DRESS	1	\$66.67
09/12/2018	1004	BLK WHITE CAP SLEEVE DRESS	1	\$66.66
09/12/2018	947	275		\$165.70
09/12/2018	1002	COTTON JERSEY TIERED DRESS	1	\$100.16
09/12/2018	1003	TIE WAIST SHIRT DRESS	1	\$65.54
09/12/2018	290	275		\$50.50
09/23/2018	708	275		(\$100.16)
09/23/2018	1002	COTTON JERSEY TIERED DRESS	1	(\$100.16)

Item Information
Price \$101.87

Back Help Edit Customer Customer Options

Previous Tab Next Tab



This tab shows detailed information about sales transactions for the customer within the last xx days. This tab displays the following rows:

- **Transaction Row** - Displays information about a transaction.
 - **Item Row** - Displays information about an item within a transaction.
 - **Item Information** - Displays information about a selected item.

Note: The information in this tab cannot be edited.

Transaction Row

Transaction rows display the following information:

- **Date** - Date of the transaction.
 - **Trans #** - ID number of the transaction.
 - **Location** - Location ID.
 - **Total** - Total amount of the transaction.

Item Row

Item rows display the following information:

- **Item #** - ID number of the item.
 - **Description** - Description of the item.
 - **Qty** - Quantity of the item.
 - **Price** - Price of the item.

Item Information

After selecting an item row, this area displays information about the selected item:

- Picture of the item (if available).
 - **Price** - Price of the item.
 - **Style** - ID of the item style (if available).

- Item dimensions (if available).

Accounts

Your system's configuration determines the information displayed on this tab.

Figure 5-10 Customer Accounts Tab

The screenshot shows the 'Customer Accounts' tab for customer ID 318906. At the top, it displays the customer's name, ID, and since date. Below this is a 'Loyalty Cards' section with columns for Card #, Expires, Loyalty Account, Points, Award Account, and Awards. The main area is titled 'Customer Account Activity' and lists various account types and their associated activity. The table includes columns for Account Type, Account ID, Activity, Date, and Amount. Activities listed include Pre-Sale, Deposit, Picked Up Item, Added 2 Items, Setup Fee, Shipping Fee, and Added 1 Item. At the bottom, there are navigation links for Cancel, Help, Edit Customer, Customer Options, View Loyalty History, Print Balance Receipt, Print Loyalty History, Previous Tab, and Next Tab.

Loyalty Cards		Customer Account Activity			
Card #	Expires	Loyalty Account	Points	Award Account	Awards
Pre-Sale	P6401002000006	Added 1 Item	12/13/2017 02:47:01 PM	\$10.55	
Pre-Sale	P6401002000006	Deposit	12/13/2017 02:47:07 PM	\$96.67	
Pre-Sale	P6401002000006	Picked Up 1 Item	12/13/2017 02:48:01 PM	\$89.58	
Special Order	S6401001000002	Added 2 Items	10/31/2017 11:03:44 AM	\$149.49	
Special Order	S6401001000002	Setup Fee	10/31/2017 11:04:11 AM	\$6.87	
Special Order	S6401001000002	Shipping Fee	10/31/2017 11:04:12 AM	\$18.95	
Special Order	S6401003000003	Added 1 Item	12/19/2017 11:08:32 AM	\$79.99	

If your system is configured for a loyalty program, this tab lists the customer's loyalty program information.

If your system is not configured for a loyalty program, this tab lists any of the customer's special accounts such as work order accounts, layaway accounts, pre-sale accounts, hold accounts, and send sale accounts.

Note: The information in this tab cannot be edited.

Loyalty Configured

If loyalty is configured on your system, the Accounts tab will display the following information:

- [Loyalty Cards](#) - Information about the loyalty cards associated with the customer.
- [Customer Account Activity](#) - Loyalty activity for the customer.

Loyalty Cards This section displays the following information for each loyalty card:

- **Card #** - Card number.
- **Expires** - Card expiration date.
- **Loyalty Account** - Loyalty account ID.
- **Points** - Number of points accumulated in the loyalty account.
- **Award Account** - Award account ID.
- **Awards** - Awards in the awards account.

Customer Account Activity This section displays the following information about the customer's account activity:

Note: Activity rows that have been voided show a line through the entire row.

- **Account Type** - Type of customer account.
- **Account ID** - ID of the account.
- **Activity** - Type of activity.
- **Date** - Date of the activity.
- **Amount** - Amount associated with the activity.

Menu Buttons The Customer Account tab includes the following [Menu Buttons](#) specific to this tab:

- **View Loyalty History** - Displays the loyalty history for the customer.
- **Print Balance Receipt** - Prints a receipt showing loyalty account balance information.
- **Print Account History** - Prints a Loyalty Account History report on the report printer. The information in this report includes the information shown in the Customer Account History section of the Customer Account tab. See the *Oracle Retail Xstore Point of Service Reports Guide* for more information about this report.

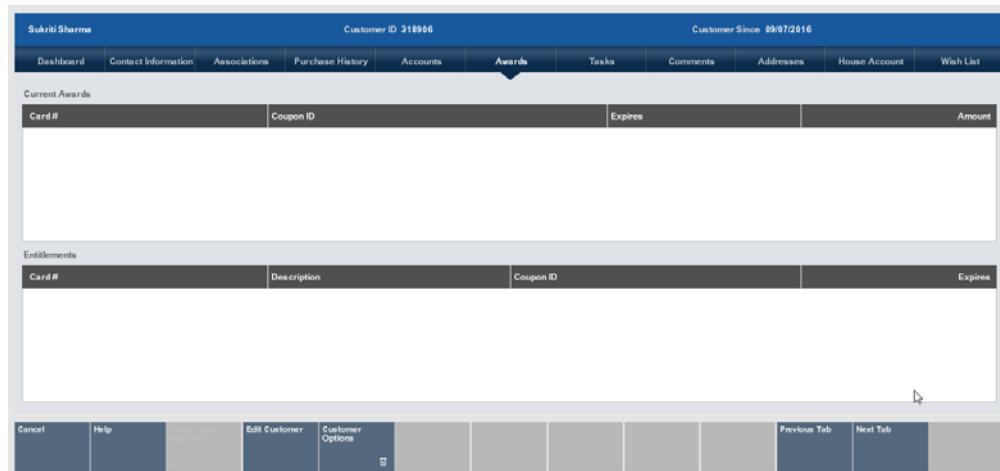
No Loyalty Programs

If loyalty programs are not used by your system, the Accounts tab will display the Customer Account Detail information.

The Customer Account Detail lists special accounts that are owned by the customer. The account status (such as OPEN or CLOSED) is noted along with a date and current amount due on the account if applicable.

Awards

The Awards tab is for viewing the customer's current awards and entitlements information in separate sections. You can edit the customer and loyalty information within customer maintenance but the award and entitlement information is for viewing only. You cannot apply the awards or entitlements to the transaction from this screen.

Figure 5–11 Awards Tab

Current Awards

This section displays the following information for each loyalty award:

- **Card #** - Card number associated with the award.
- **Coupon ID** - ID of the award coupon.
- **Expires** - Expiration date of the coupon.
- **Amount** - Amount of the coupon.

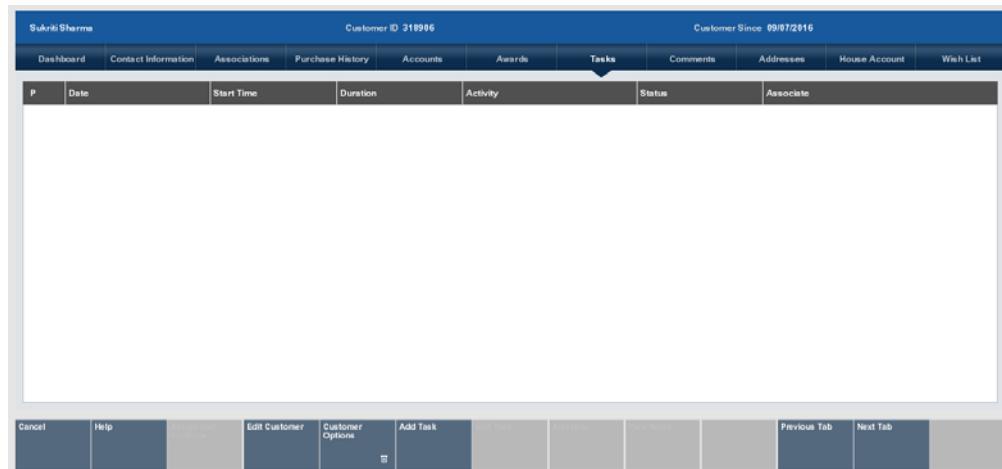
Entitlements

This section displays the current entitlements:

- **Card #** - Card number associated with the entitlement.
- **Description** - Description of the entitlement.
- **Coupon ID** - ID of the award coupon.
- **Expires** - Expiration date of the coupon.

Tasks

The Tasks tab displays all tasks associated with the customer.

Figure 5–12 Tasks Tab

This tab displays the following information for each task:

- **Priority** - Importance of the task: high, medium, or low.
- **Date** - Date the task should begin.
- **Start Time** - Time the task should begin.
- **Duration** - Length of time designated for the task.
- **Activity** - Type of task.
- **Status** - Indicates the progress of the task.
- **Associate** - The employee or employee group responsible for completing the task.

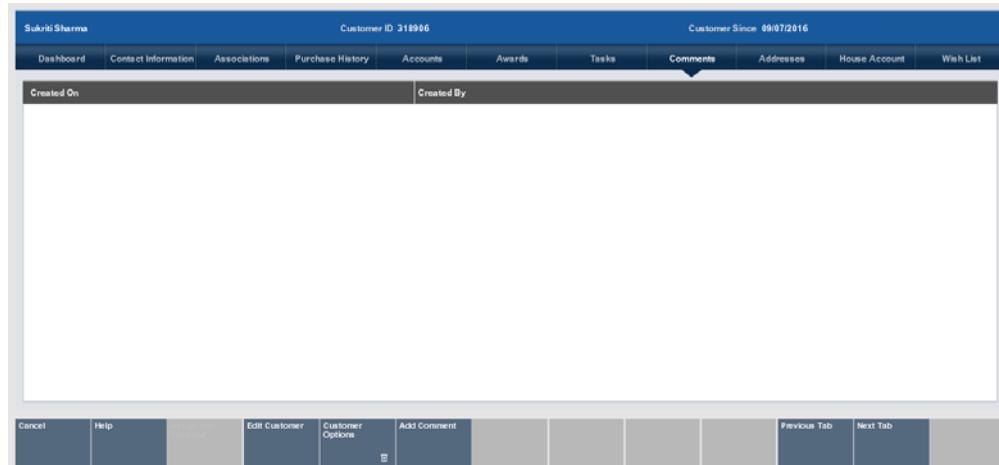
Status

The status field can have one of the following values for a task:

- **Open** - The task is open, but not started.
- **In Progress** - The task has been started, but not completed.
- **Cancelled** - The task has been cancelled and cannot be reopened or edited.
- **Closed** - The task has been completed and cannot be reopened or edited.

Comments

The Comments tab shows any comments associated with this customer.

Figure 5–13 Comments Tab

This tab displays the following information for each comment:

- **Created on** - Information about when the comment was created, and the comment itself.
- **Created by** - ID of the employee who entered the comment.

Adding a Comment

To add a comment:

1. If necessary, click **Save Changes** to save the customer record.

Note: When creating a new customer, comments cannot be added until the information for the new customer has been saved.

2. Click **Add Comment**.

An Add Comment window opens.

3. Enter the comment.
4. Click **OK**.

The comment is saved and added to the customer record.

Addresses

The Addresses tab shows all the addresses associated with the customer, and provides the ability to add new addresses as needed; for example, a work location or vacation home address.

Figure 5–14 Addresses Tab

Sukriti Sharma		Customer ID 318986		Customer Since 09/07/2016						
Dashboard	Contact Information	Associations	Purchase History	Accounts	Awards	Tasks	Comments	Addresses	House Account	Wish List
Address Type		Address								
Primary	Home		PUNJAB SOLON, OH 44139 United States							
	GIFTREGISTRY156		PUNJAB MANKATO, MN 560037 United States							
	GIFTREGISTRY158		PUNJAB MANKATO, MN 560037 United States							
	GIFTREGISTRY159		PUNJAB MANKATO, MN 560037 United States							
	GIFTREGISTRY289		PUNJAB SOLON, OH 44139 United States							
	GIFTREGISTRY297		PUNJAB SOLON, OH 44139 United States							

The screenshot shows a list of customer addresses for Sukriti Sharma, Customer ID 318986, with a primary address listed. The primary address is PUNJAB, SOLON, OH 44139, United States. There are also five other addresses listed, each with a unique identifier (GIFTREGISTRY156, GIFTREGISTRY158, GIFTREGISTRY159, GIFTREGISTRY289, GIFTREGISTRY297) and the same address details.

This tab displays the following information for each customer address:

- **Address Type** - Type of address. For example, Home, Work, or Primary.
- **Address** - The address.

To make changes to the addresses for a customer, perform the appropriate procedure:

- [Add an Address](#) - Add an address to a customer record.
- [Edit an Address](#) - Edit an address assigned to a customer record.
- [Designate a Primary Address](#) - Change the primary address for a customer.
- [Delete an Address](#) - Remove an address from a customer record.

Add an Address

To add an address for a customer:

1. Click **Add Address**.

An Add Customer Address window opens.

2. If necessary, change the country for the address. [Change Country](#).
3. If it is available, use [Address Lookup](#) to find the address.
4. If necessary, enter the address information:

Note: Required fields are marked with a red triangle in the upper-left corner.

- **Address** - The first and second lines of the address.
- **Zip** - Postal or zip code for the address.
- **State** - State or province for the address.
- **City** - City for the address.
- **Apartment** - Apartment for the address.

- **Country** - Country of the address. Click the **Change Country** button to change this value. See [Change Country](#).
 - **Type** - Type of address (for example, Home, Work, or Vacation).
5. Click **Process**.

The address is added to the list of customer addresses.

Edit an Address

To edit an address for a customer:

1. Select the address to edit in the list of addresses:
 - Click the address.
 - Use the up and down arrows to highlight the correct address, then press the Spacebar.
2. Click **Edit Address**.
An Edit Customer Address window opens.
3. If it is available, use [Address Lookup](#) to find the address.
4. If necessary, make changes to the address information:

Note: Required fields are marked with a red triangle in the upper-left corner.

- **Address** - The first and second lines of the address.
 - **Zip** - Postal or zip code for the address.
 - **State** - State or province for the address.
 - **City** - City for the address.
 - **Apartment** - Apartment for the address.
 - **Country** - Country of the address. Click **Change Country** to change this value. See [Change Country](#).
 - **Type** - Type of address (for example, Home, Work, or Vacation).
5. Click **Process**.

The address is added to the list of customer addresses.

Designate a Primary Address

To change the primary address for a customer:

1. Select the address to set as the primary address in the list of addresses:
 - Click the address.
 - Use the up and down arrows to highlight the correct address, then press the Spacebar.
2. Click **Set Primary Address**.
Xstore Point of Service opens a confirmation prompt.
3. Click **Yes** in the confirmation prompt.

Note: Click **No** if it is the incorrect address. Xstore Point of Service returns to the Addresses tab.

The address is set as the primary address for the customer. The new primary address is displayed on the top of the list of customer addresses.

Delete an Address

To delete an address from a customer record:

1. Select the address to delete in the list of addresses:

Note: You cannot delete the primary address for the customer.

- Click the address.
 - Use the up and down arrows to highlight the correct address, then press the Spacebar.
2. Click **Delete Address**.
- Xstore Point of Service opens a confirmation prompt.
3. Click **Yes** in the confirmation prompt to delete the address.

Note: Click **No** to return to the Addresses tab without deleting an address.

The address is deleted from the customer record.

House Account

Figure 5–15 House Account Tab

Date	Store	Trans #	Account ID	Name	Type	Amount	Balance

The House Account tab displays the following types of information about the customer's house account:

- [House Account Details](#) - Details about the house account.
- [Authorized Buyers](#) - Information about each buyer authorized to use the house account.
- [Journal](#) - Information about each activity performed on the house account.

Note: This information is only available for customers who have set up a valid house account.

To make changes to the information in the House Account tab:

- [Change House Account Status](#) - Change the status of a house account.
- [Change House Account Limit](#) - Change the credit limit for a house account.
- [Change Authorized Buyers](#) - Make changes to the authorized buyers associated with a house account.

House Account Details

This section displays the following information about the house account:

- **Account #** - ID number for the house account.
- **Status** - Status of the account: OPEN, HOLD, or CLOSED.
- **Corporate Account** - If Yes, this is a corporate House Account and cannot be changed.
- **Account On-Hold** - If Yes this account cannot be used for purchases; however, payments can be made on the account.
- **Setup Date** - Date the account was created.
- **Last Activity Date** - Date of the most-recent activity on the account.
- **Last Payment Date** - Date of the most-recent payment on the account.
- **Last Payment Amount** - Most-recent payment amount on the account.
- **Credit Limit** - Credit limit on the account.
- **Balance** - Balance amount on the account.
- **Available Credit** - Difference between the credit limit and the outstanding balance on the account that is available for purchases.

Authorized Buyers

This section displays the following information about the people authorized to use the house account:

- **Primary** - A green check mark is displayed in this column for the primary authorized buyer for the account.
- **Buyer ID** - House account ID of the buyer.
- **Name** - Name of the buyer.
- **Start** - Date on which the buyer is first permitted to use the account.
- **End** - Date on which the buyer is no longer permitted to use the account.

Journal

This section displays the following information for each activity performed on the account:

- **Date** - Date of the activity.
- **Store** - ID of the store where the activity took place.
- **Trans #** - ID number for the transaction in which the activity took place.
- **Account ID** - ID of the house account.
- **Name** - Name of the customer.
- **Type** - Type of activity performed.
- **Amount** - Amount of the activity.
- **Balance** - Balance of the account following the activity.

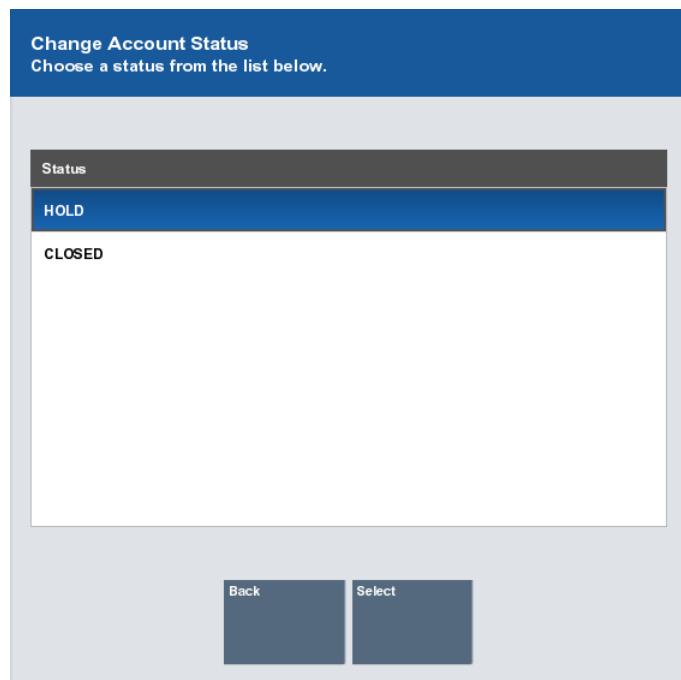
Change House Account Status

To make changes to a customer's house account:

1. Select **Change Status**.

A **Change Account Status** window opens.

Figure 5–16 Change Account Status



2. Select the new status for the account:

- **HOLD** - The authorized buyer cannot use the account for new purchases, but can make payments on the account. The edit options for account limit and authorized buyer options are not available for accounts that are on hold.
- **CLOSE** - The house account is no longer available for any activity.
- **REINSTATE** - An account with a status of HOLD can be activated again by selecting this option.

- **OPEN** - An account with a status of CLOSED can be activated again by selecting this option.
3. Click **Select**.
- The status of the house account is changed.

Change House Account Limit

To change the credit limit for a house account:

1. Click **Edit Credit Limit**.

A House Account Information window opens with the current credit limit for the account.

Figure 5-17 House Account Credit Limit

The screenshot shows a software interface titled "House Account Information" with a sub-section "Enter Credit Limit". In the center, there is a text input field containing the value "1000.00". Above this field, a placeholder text reads "Enter new credit limit amount.". At the bottom of the window, there are three buttons arranged horizontally: "Back", "Help", and "Process".

2. Enter the new credit limit for the house account.
3. Click **Process**.

The credit limit for the house account is changed to the new value.

Change Authorized Buyers

A house account can have more than one buyer associated with it. To make changes to the authorized buyers for a house account, use the appropriate procedure:

- [Add an Authorized Buyer](#) - Add an authorized buyer to a house account.
- [Edit an Authorized Buyer](#) - Edit information for an authorized buyer.
- [Deactivate an Authorized Buyer](#) - Deactivate an authorized buyer.
- [Designate a Primary Buyer](#) - Change the primary buyer to another person.

Add an Authorized Buyer To add an authorized buyer to a house account:

1. Click **Add Buyer**.

An Add Buyer window opens.

Figure 5–18 House Account Add Buyer

The screenshot shows a modal window titled "Add Buyer" with the sub-instruction "Enter the buyer's information below." It contains four text input fields: "First Name" (with a red triangle icon), "Last Name" (with a red triangle icon), "Start Date" (containing "10/25/2017"), and "End Date". At the bottom are three buttons: "Back", "Help", and "Process".

2. Enter the information for the buyer:

Note: Required fields are marked with a red triangle in the upper-left corner of the field.

- **First Name** - First name of the new buyer.
- **Last Name** - Last name of the new buyer.
- **Start Date** - Date on which the buyer will first be permitted to use the house account.
- **End Date** - Date on which the buyer will no longer be permitted to use the house account.

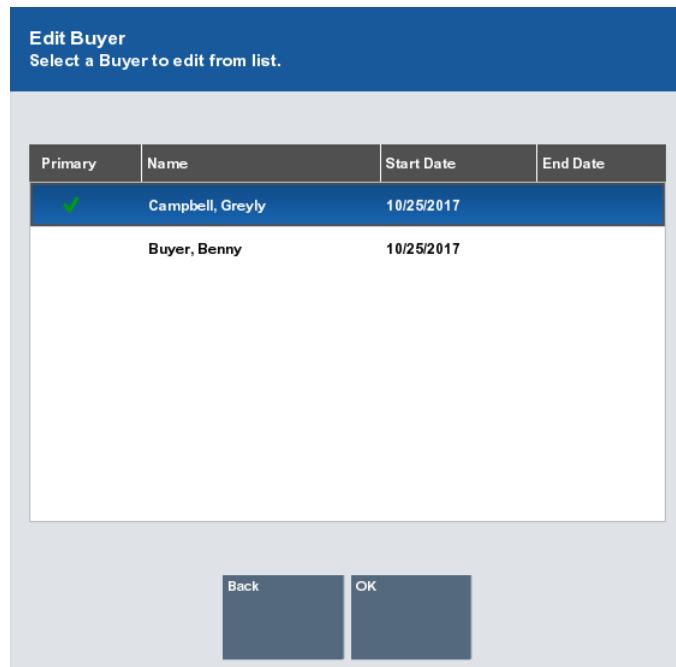
3. Click **Process**.

The name of the new authorized buyer is listed in the Authorized Buyers section of the House Account tab.

Edit an Authorized Buyer To edit an authorized buyer associated with a house account:

1. Click **Edit Buyer**.

An Edit Buyer window opens.

Figure 5–19 House Account Edit Buyer

2. Select the buyer to edit:
 - Click the buyer.
 - Use the up and down arrows to highlight the correct buyer, then press the Spacebar.
3. Select **OK**.
4. Enter the updates for the buyer:

Note: Required fields are marked with a red triangle in the upper-left corner of the field.

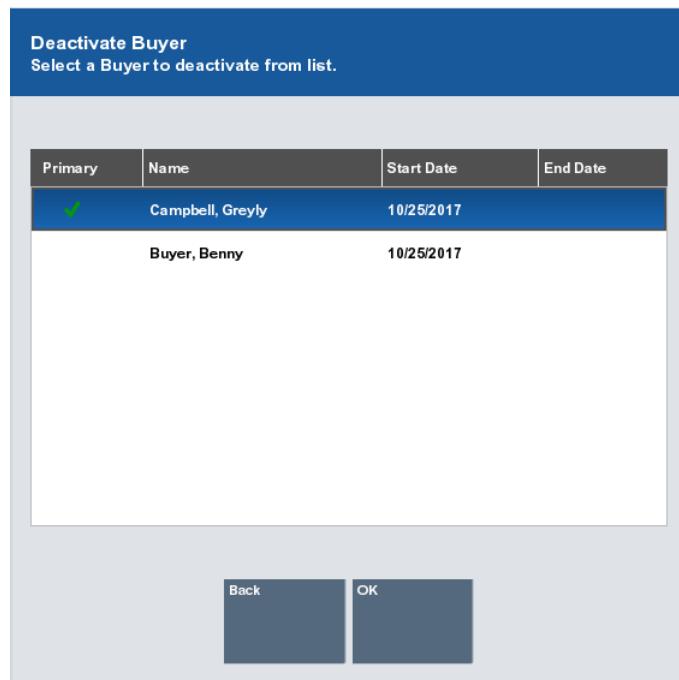
- **First Name** - First name of the buyer.
 - **Last Name** - Last name of the buyer.
 - **Start Date** - Date on which the buyer will first be permitted to use the house account.
 - **End Date** - Date on which the buyer will no longer be permitted to use the house account.
5. Click **Process**.

The information for the buyer is updated in Xstore Point of Service.

Deactivate an Authorized Buyer To deactivate an authorized buyer associated with a house account:

1. Click **Deactivate Buyer**.

A Deactivate Buyer window opens.

Figure 5–20 House Account Deactivate Buyer

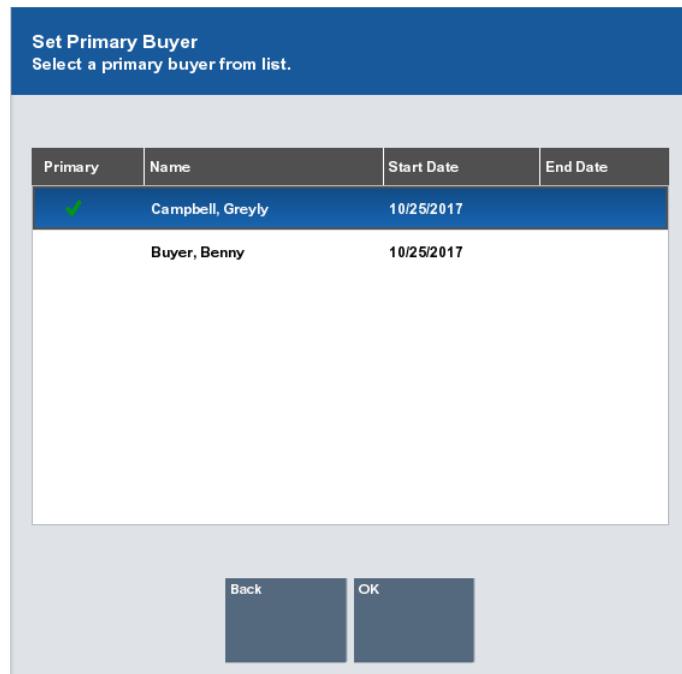
2. Select the buyer to deactivate:
 - Click the buyer.
 - Use the up and down arrows to highlight the correct buyer, then press the Spacebar.
3. Select **OK**.

The End Date for the selected buyer is set to today's date.

Designate a Primary Buyer To change the primary buyer for a house account:

1. Click **Set Primary Buyer**.

A Set Primary Buyer window opens.

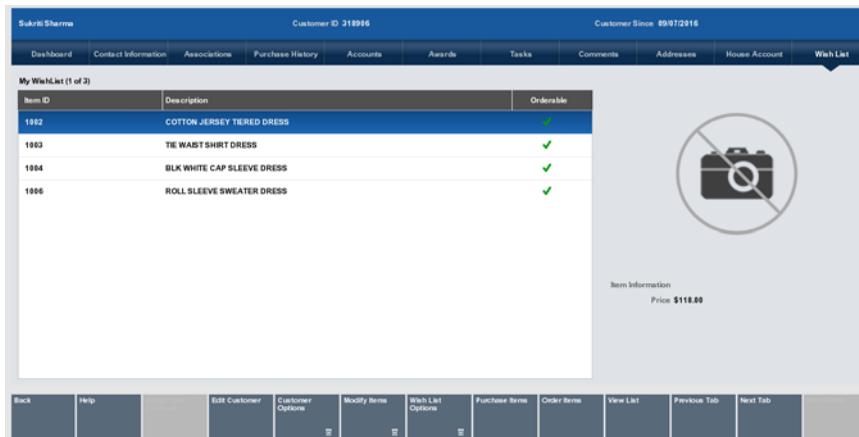
Figure 5–21 House Account Set Primary Buyer

2. Select the buyer to designate as the primary buyer:
 - Select the buyer.
 - Use the up and down arrows to highlight the correct buyer, then press the Spacebar.
3. Select **OK**.

The selected buyer is designated as the primary buyer and moved to the top of the Authorized Buyers list, with a green check mark next to their name. The list is sorted alphabetically below the primary buyer's name.

Wish List

If Xstore Point of Service is integrated with Oracle Retail Customer Engagement, this tab displays any items in the customer's personal wish list. A customer account may have multiple wish lists associated with it, but only one wish list can be viewed at a time. To view another wish list, select the **Wish List Options** button then select **Another Wish List** option.

Figure 5–22 Wish List Tab

This tab displays the following information for each wish list item:

- **Item ID** - ID of the item.
- **Description** - Description of the item.
- **Date Added** - Date the item was added to the wish list.
- **Orderable** - Indicates whether the item can be ordered.
- **Image** - A picture of the item (if available).

The following functions can be performed in the Wish List tab:

- [View Additional Item Information](#) - View more detailed information about an item.
- [Add a Wish List Item - Scan an Item](#) - Add an item to the wish list by scanning the item.
- [Add a Wish List Item - Search for an Item](#) - Add an item to the wish list by searching for the item.
- [Remove Wish List Items](#) - Remove items from the wish list.
- [Print a Wish List](#) - Print a list of the items in the wish list.

View Additional Item Information

To view additional information about an item:

1. Select an item in the list:
2. Click **Item Info**.

Add a Wish List Item - Scan an Item

To add an item to a wish list:

1. If necessary, click **Save Changes**.

Note: When creating a new customer, wish list items cannot be added until the information for the new customer has been saved.

2. Scan the item.

3. Verify the added item displays on the wish list. The newly added item appears at the top of the list.

Add a Wish List Item - Search for an Item

To add items to a wish list:

1. If necessary, click **Save Changes**.

Note: When creating a new customer, wish list items cannot be added until the information for the new customer has been saved.

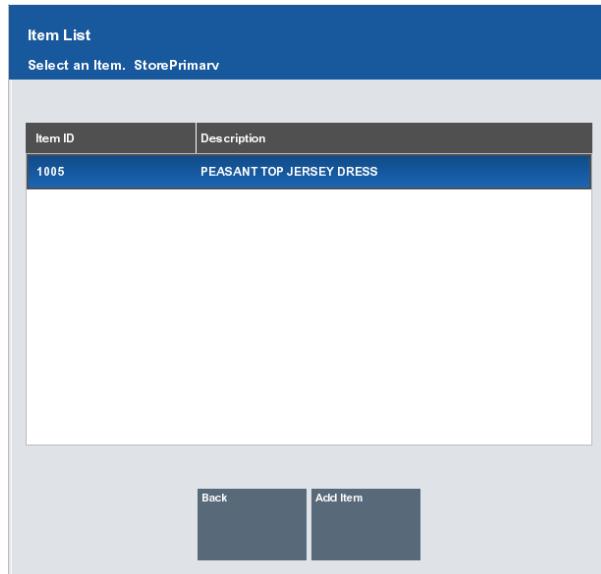
2. Click **Add Items**.

Figure 5–23 Item Lookup

The screenshot shows a web-based application window titled "Item Lookup". At the top, a blue header bar contains the title and a sub-instruction: "Enter search criteria.". Below this is a form area with several input fields and dropdown menus. The fields are labeled: "Item ID" (with an empty input field), "Department" (set to "All Departments"), "Subdepartment" (set to "All Subdepartments"), "Class" (set to "All Classes"), "Subclass" (set to "All Subclasses"), "Style ID" (with an empty input field), and "Description" (with an empty input field). At the bottom of the form are three buttons: "Back", "Help", and "Process".

3. Enter the search criteria:
 - **Item ID** - ID of the item.
 - **Department** - Department to which the item belongs.
 - **Subdepartment** - Subdepartment to which the item belongs.
 - **Class** - Class to which the item belongs.
 - **Subclass** - Subclass to which the item belongs.
 - **Style ID** - ID of a style for the item.
 - **Description** - Content within the description of the item.
4. Click **Process**.
 - If several items match the entered criteria, continue with Step 5.
 - If only one item matches the entered criteria, continue with Step 7.
5. Select an item in the list:
 - Click the item.

- Use the up and down arrows to highlight the correct item, then press the Spacebar.

Figure 5–24 Item List

- 6.** Click Add Item.

Figure 5–25 Wish List Item Added

- 7.** Verify the added item displays on the wish list. The newly added item appears at the top of the list.

Remove Wish List Items

To remove items from the wish list:

1. Click Remove Items.

Xstore Point of Service opens a list of items in the wish list.

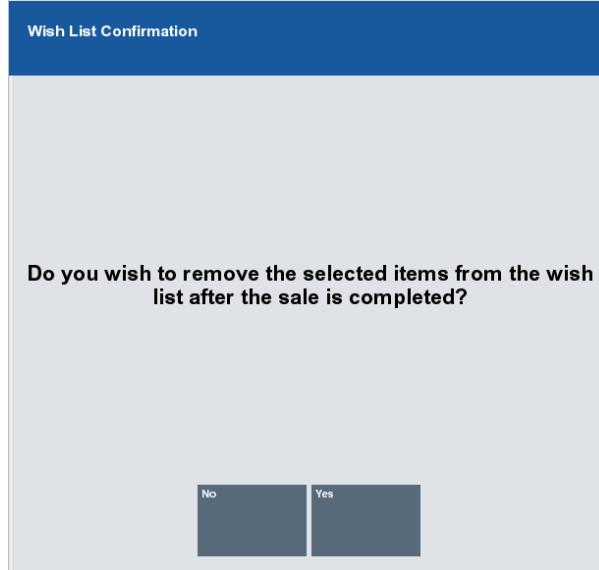
2. Select the items in the list:

- Click the item.

- Use the up and down arrows to highlight the correct item, then press the Spacebar.
 - Click **Select All** to select all items in the list.
3. Click **Remove Items**.

Xstore Point of Service opens a confirmation prompt.

Figure 5–26 Remove Wish List Item Confirmation



4. Select whether to remove the items:

- Click **Yes** to remove the items and return to the Wish List tab.
- Click **No** to return to the Wish List tab without removing items.

Print a Wish List

Click **Print List** to print a customer wish list.

The Customer Wish List Report opens. Use report printing functionality to print the wish list.

For more detail about the Customer Wish List Report, see the *Oracle Retail Xstore Point of Service Reports Guide*.

Digital Cart

If Xstore Point of Service uses Retail Extension Module (RXM), this tab displays any items the customer has in their digital shopping cart. The Digital Cart tab includes the following information:

- [Item List](#) - Items in the customer's digital cart.
- [Item Information](#) - Information about a selected item.

To remove items from the digital cart, see [Remove Digital Cart Items](#).

Item List

The item list displays the following information for each item in the list:

- **Item ID** - ID of the item.
- **Description** - Description of the item.
- **Quantity** - Quantity of the item.
- **In Stock** - Number of items in stock.
- **Orderable** - A green check mark in an item row indicates that the item can be ordered.

Item Information

The Item Information section displays the following information about the item selected in the [Item List](#):

- Picture of the item (if available).
- **Price** - Price of the item.
- **Style** - ID of the item style (if available).
- Item dimensions (if available).

Remove Digital Cart Items

To remove items from the digital cart:

1. Click **Remove Items**.

Xstore Point of Service opens a list of items in the digital cart.

2. Select the items in the list:

- Click the item.
- Use the up and down arrows to highlight the correct item, then press the Spacebar.
- Click **Select All** to select all items in the list.

3. Click **Remove Items**.

Xstore Point of Service opens a confirmation prompt.

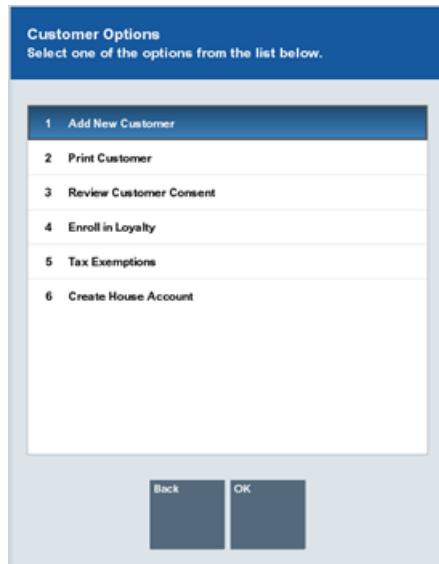
4. Select whether to remove the items:

- Click **Yes** to remove the items and return to the Digital Cart tab.
- Click **No** to return to the Digital Cart tab without removing items.

Additional Customer Options

Click [Customer Options](#) to perform the actions in this section.

Figure 5–27 Customer Options Menu



This includes the following options:

- [Add New Customer](#)
- [Print Customer](#)
- [Review Customer Consent](#)
- [Enroll in Loyalty](#)
- [Tax Exemptions](#)
- [Create House Account](#)

Add New Customer

To add a new customer:

1. Click **Add New Customer** in the Customer Options window.
2. Follow the steps in [Add a Customer Record](#).

Print Customer

Click **Print Customer** in the Customer Options window to print the customer record.

Review Customer Consent

This option is only shown when [Customer Information Consent](#) functionality is enabled.

To access the consent preferences:

1. Select Review Customer Consent in the Customer Options window. See [Figure 5–3](#).
Update the relevant check boxes as required.
2. Select Accept. The terms and conditions print on the receipt for the customer to sign manually and a prompt is displayed to confirm the customer acknowledges the terms and conditions. Ask the customer to sign the receipt. See [Figure 5–4](#).

3. Select Yes to confirm the customer has acknowledged the terms and conditions, and signed the receipt. The customer's acceptance is associated to the customer record.

A confirmation screen is displayed indicating that the customer's consent selections have been updated in the system. Select OK to continue.

Enroll in Loyalty

Many stores offer Loyalty Programs to their customers. A Loyalty Program typically offers benefits (such as savings) to the customer and provides the store with information about customer shopping preferences.

The store may offer various levels of programs that are available to customers.

To enroll a customer in a loyalty program:

1. Click **Enroll in Loyalty** in the Customer Options window.

Xstore Point of Service prompts whether to add the customer to a loyalty program. See [Figure 2-8](#).

2. Select whether to add the customer to a loyalty program:

- Scan or enter the card number, the click **Process** to add the customer to the loyalty program (card-centric programs).
- Click **Yes** to add the customer to the loyalty program (non-card-centric programs).
- Click **Not Now** to not add the customer to the loyalty program, but open the prompt the next time the customer performs a transaction.
- Click **Never** to not add the customer to the loyalty program and never ask the customer again.

3. Click **Save Changes** to save the new loyalty configuration for the customer.

About Loyalty Programs

Loyalty values are accumulated according to the rules for each individual program. Rules for assigning points and awards are defined in Oracle Retail Customer Engagement. Swiping or entering a loyalty card number during a transaction records the customer's participation in the program so that the loyalty values may be adjusted in the system.

Tax Exemptions

To manage customer tax exemptions in Xstore Point of Service, perform the proper procedure:

- [Add a Tax Exemption](#)
- [Edit a Tax Exemption](#)
- [Delete a Tax Exemption](#)

Add a Tax Exemption

To add a tax exemption to a customer record:

1. Click **Tax Exemptions** in the Customer Options window.

The Select Exemption window opens.

Figure 5–28 Customer Tax Select Exemption

The screenshot shows a software interface titled "Select Exemption" with the sub-instruction "Select the tax exemption to edit." A table displays one record:

Holder	Reason	Exp Date
James Smith 123456	Agricultural	

At the bottom are four buttons: "Back", "New", "Delete", and "Select & Continue".

2. Select New.

A blank Customer Tax Exempt window opens.

Figure 5–29 Customer Tax Exempt Form

The screenshot shows a software interface titled "Customer Tax Exempt" with the sub-instruction "Enter Tax Exempt Information". It contains the following form fields:

Certificate #	<input type="text"/>
Certificate Holder	<input type="text"/>
State	<input type="text"/> <input type="button" value="▼"/>
Expiration Date	<input type="text"/>

At the bottom are three buttons: "Back", "Help", and "Save Changes".

3. Enter the information for the tax exemption:

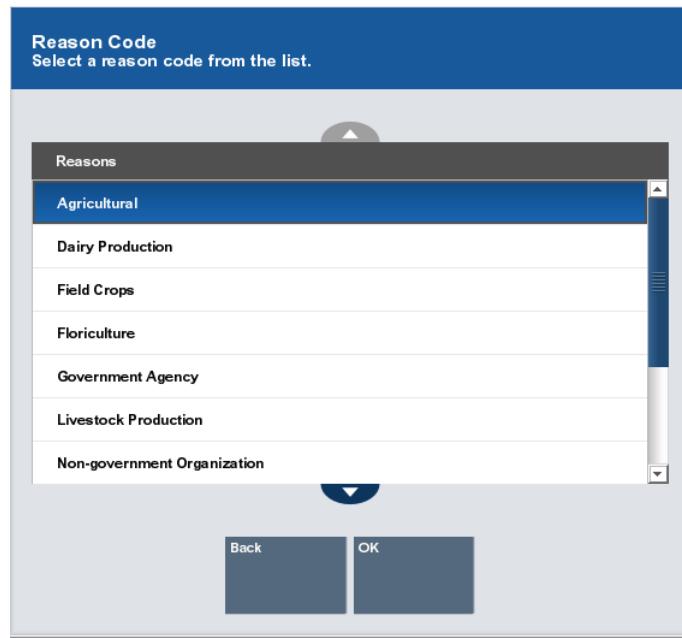
Note: Required fields are marked with a red triangle in the upper-left corner.

- **Certificate #** - ID number for the certificate.

- **Certificate Holder** - Name of the entity to whom the certificate belongs.
 - **State** - If applicable, the state or province to which the certificate belongs.
 - **Expiration Date** - Expiration date of the certificate.
4. Select **Save Changes**.

A Reason Code window opens.

Figure 5–30 Tax Exemption Reason Codes



5. Select the reason for adding the tax exemption:
- Click the reason.
 - Use the up and down arrows to highlight the correct reason, then press the Spacebar.
6. Select **OK**.

The Tax Exemption is added to the system and associated with the customer.

Edit a Tax Exemption

To edit an existing tax exemption:

1. Click **Tax Exemptions** in the Customer Options window.
The Select Exemption window opens. See [Figure 5–28](#).
2. Select the tax exemption:
 - Click the tax exemption.
 - Use the up and down arrows to highlight the correct tax exemption, then press the Spacebar.
3. Click **Select & Continue**.
The tax exemption opens in a Customer Tax Exempt window.
4. Make any necessary changes to the tax exemption:

Note: Required fields are marked with a red triangle in the upper-left corner.

- **Certificate #** - ID number for the certificate.
- **Certificate Holder** - Name of the entity to whom the certificate belongs.
- **State** - If applicable, the state or province to which the certificate belongs.
- **Expiration Date** - Expiration date of the certificate.

5. Select Save Changes.

A Reason Code window opens.

6. Select the reason for the changes to the tax exemption:

- Select the reason.
- Use the up and down arrows to highlight the correct reason, then press the Spacebar.

7. Click OK.

The changes to the Tax Exemption saved in the system.

Delete a Tax Exemption

To delete a tax exemption:

1. Click Tax Exemptions in the Customer Options window.

The Select Exemption window opens. See [Figure 5–28](#).

2. Select the tax exemption:

- Click the tax exemption.
- Use the up and down arrows to highlight the correct tax exemption, then press the Spacebar.

3. Click Delete.

Caution: There is no confirmation prompt after clicking **Delete**.

Double-check that you have selected the correct tax exemption before deleting it.

The tax exemption is deleted from the system.

Create House Account

To create a house account for a customer:

1. Click Create House Account in the Customer Options window.

The House Account Credit Limit window opens with the default initial credit limit for a house account.

Figure 5–31 House Account Credit Limit

The screenshot shows a software interface titled "House Account Information" with the sub-section "Enter Credit Limit". A central instruction "Enter new credit limit amount." is displayed above a text input field containing the value "1000.00". At the bottom of the screen are three buttons: "Back", "Help", and "Process".

2. If necessary, change the initial credit limit for the house account.
3. Click **Process**.

The house account is created with the customer as the primary buyer.

6

Search for an Item

During a transaction you may need to search for a particular item. Xstore Point of Service provides the following methods for performing an item search:

- [Item Lookup](#)
- [Item Viewer](#)
- [Inventory Lookup](#)
- [Item Matrix Search](#)

Item Lookup

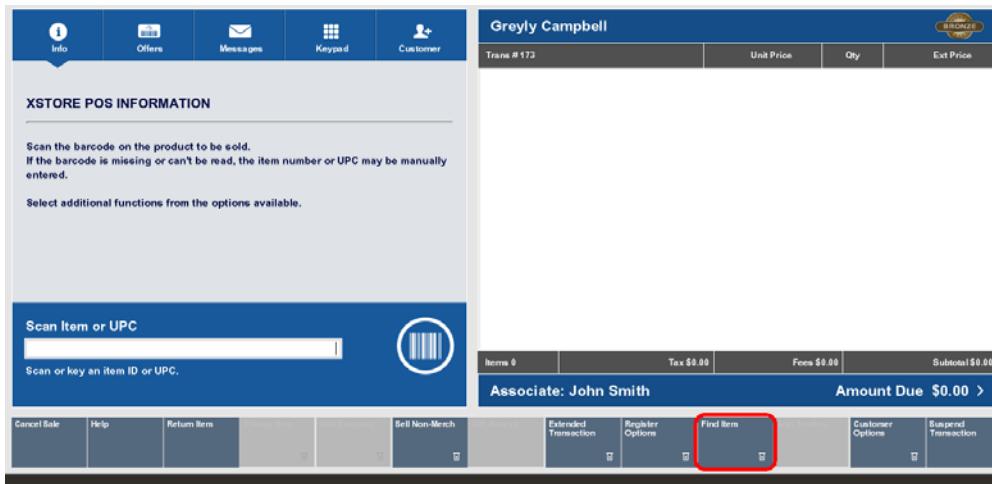
Item Lookup searches for an item based on any of a number of criteria (for example, SKU, style, or department) and retrieves detailed information about the item. For kits, Item Lookup finds the component items that make up the kit.

Item lookups can be performed while Xstore POS is at a Register or Back Office login prompt without the need to login.

If item lookup is initiated from a sale, you can add the item to the sale directly from the lookup screen if all eligibility parameters have been met.

If your system has the **Scan Items Prior to Adding to Transaction** setting configured, the item is scanned to confirm it is the correct item being added to the transaction.

1. Click **Find Item** in the Register Sale screen.

Figure 6–1 Register Sale Screen

2. Click Item Lookup.

Figure 6–2 Item Lookup Form

Item Lookup Enter search criteria.	
Item ID	<input type="text"/>
Department	<All Departments>
Subdepartment	<All Subdepartments>
Class	<All Classes>
Subclass	<All Subclasses>
Style ID	<input type="text"/>
Description	<input type="text"/>
<input type="button" value="Back"/> <input type="button" value="Help"/> <input type="button" value="Process"/>	

The Item Lookup window opens.

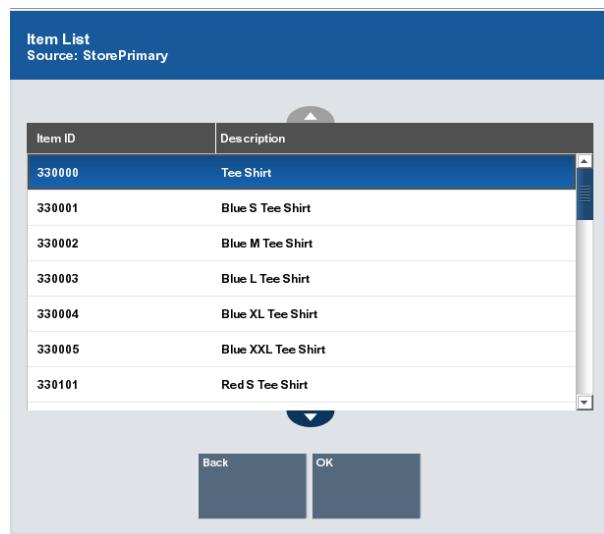
3. Enter the search criteria for the item:

- **Item ID** - ID of the item.
- **Department** - Department to which the item belongs.
- **Subdepartment** - Subdepartment to which the item belongs.
- **Class** - Class to which the item belongs.
- **Subclass** - Subclass to which the item belongs.
- **Style ID** - ID of the style assigned to the item.
- **Description** - Content in the description of the item.

If advanced search options are configured on your systems, use the advanced options to further refine the search:

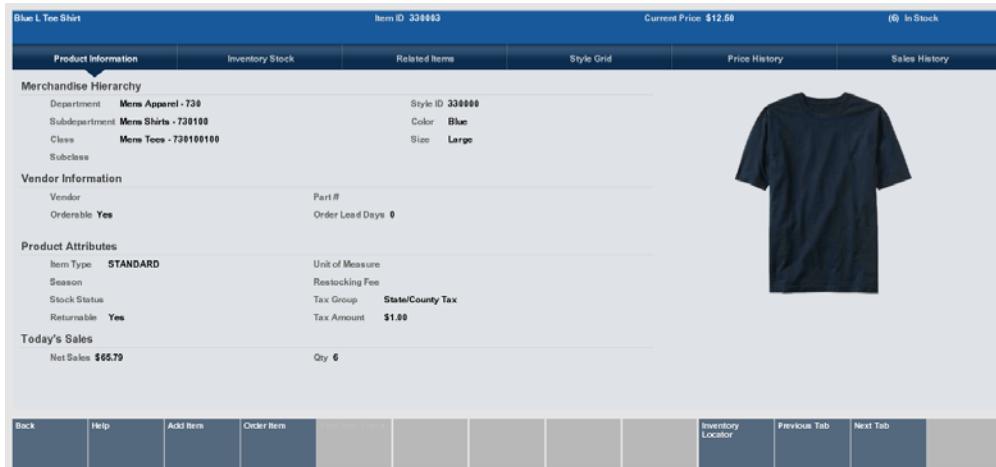
- Select the value for any search criteria you are using.
 - Click **Exclude** for any unused search criteria.
- 4.** Click **Process**.
- If more than one item matches the search criteria, continue with Step 5.
 - If only one item matches the search criteria, the item opens in the [Item Viewer](#).
- 5.** If necessary, select an item in the Item List window:

Figure 6–3 Item Selection

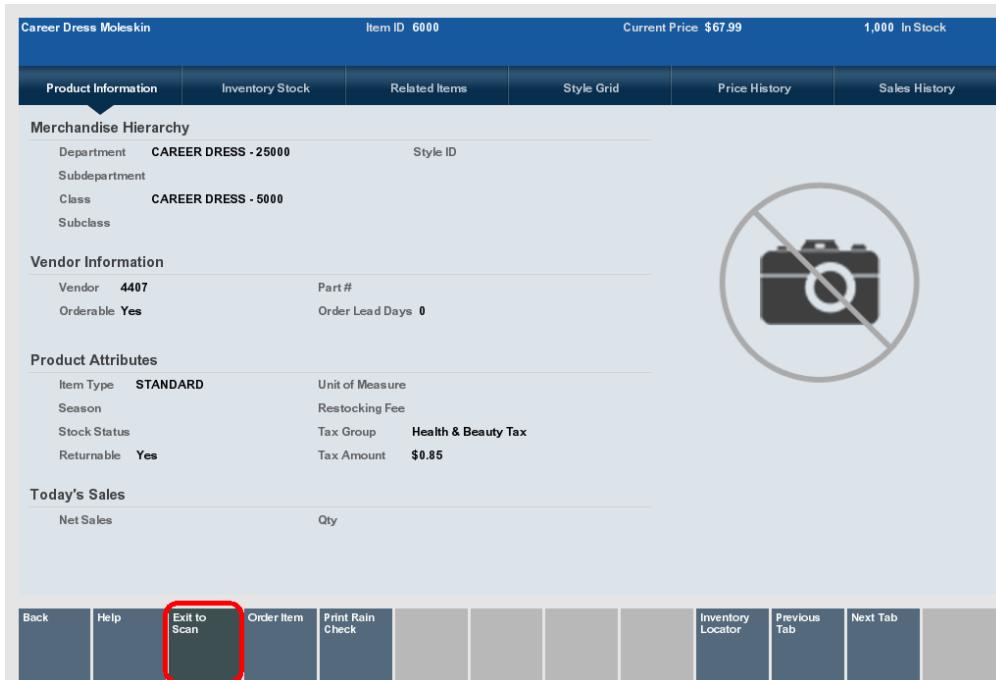


- Click the item.
 - Use the up and down arrows to highlight the correct item, then press the Spacebar.
- 6.** Click **OK**.

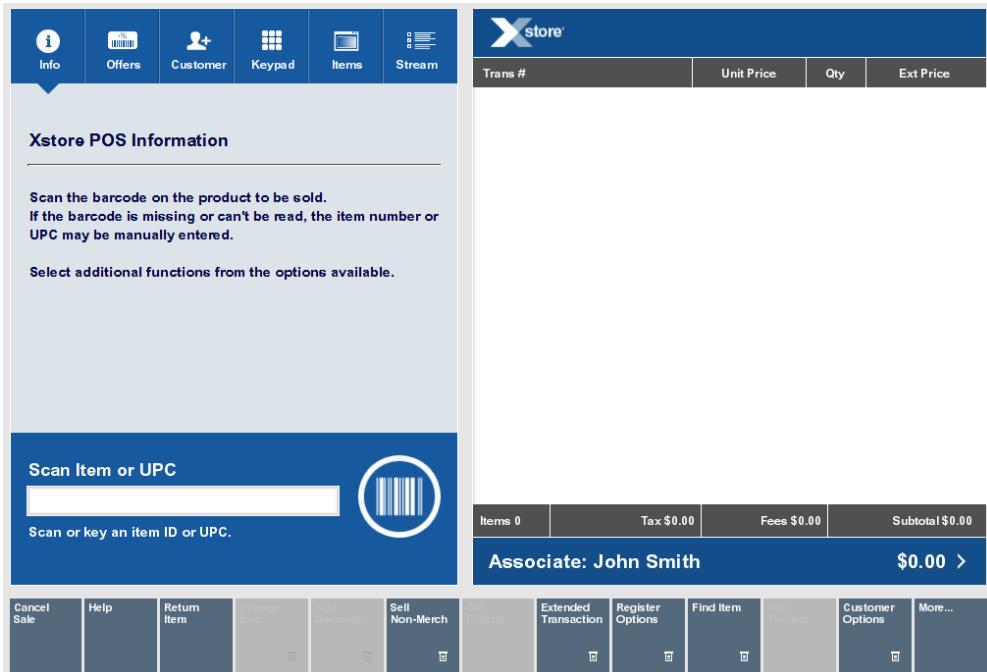
The item opens in the [Item Viewer](#).

Figure 6–4 Item Viewer

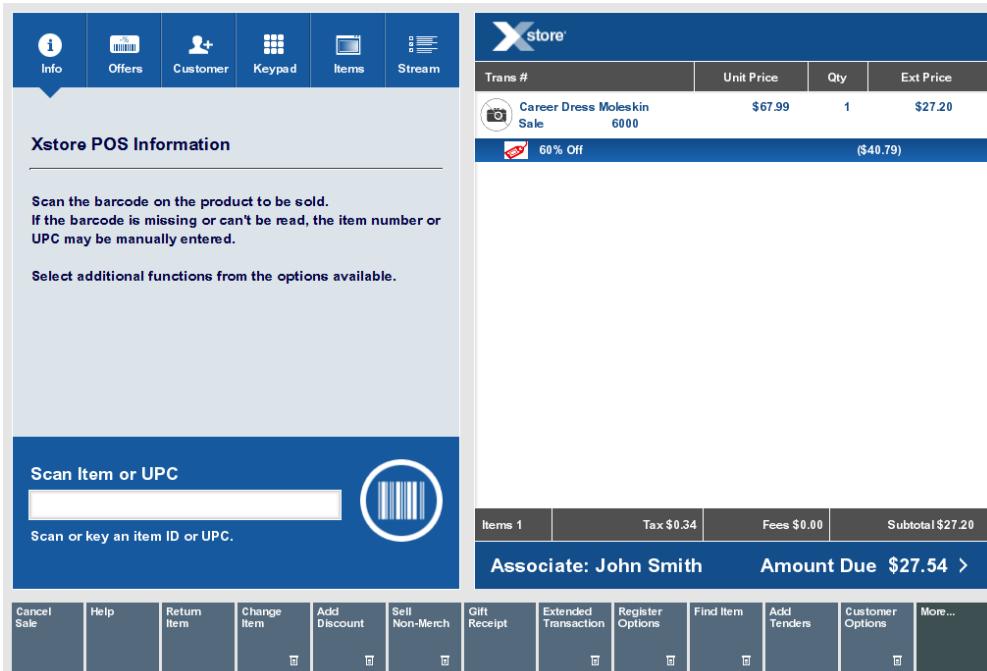
7. If your system has the **Scan Items Prior to Adding to Transaction** setting configured, you need to scan the item to confirm it is the correct item.

Figure 6–5 Item Viewer with Exit to Scan Button Highlighted

Select Exit to Scan. You are returned to the Sales screen and must scan the item in order to add it to the transaction.

Figure 6–6 Sales Screen Awaiting Item Scan

Once an item is scanned it is added to the transaction:

Figure 6–7 Sales Screen After Item Scan

Item Viewer

The Item Viewer provides information about an item. The Item Viewer displays the following information along the top of the screen:

- Name of the item.
- **Item ID** - ID of the item.
- **Current Price** - Current price of the item.
- Quantity of the item currently in stock.

The Item Viewer has the following tabs:

- [Product Information](#) - Information about the item.
- [Inventory Stock](#) - Current inventory information for the item.
- [Related Items](#) - Information about items related to the selected item.
- [Style Grid](#) - Grid showing on-hand quantities of the item with one dimension cross-referenced with another dimension.
- [Price History](#) - Past prices for the item.
- [Sales History](#) - Past sales data for the item.

You can also print a rain check from the Item Viewer. See [Print a Rain Check](#).

Product Information

The Product Information tab, (see [Figure 6-4](#)), displays the sections that display information about an item:

- A picture of the item (if available).
- [Merchandise Hierarchy](#) - Merchandise hierarchy to which the item is assigned.
- [Vendor Information](#) - Vendor that provides the item.
- [Product Attributes](#) - Attributes of the item.
- [Today's Sales](#) - Sales information for the item on the current day.

Merchandise Hierarchy

The Merchandise Hierarchy section displays the following information:

- **Department** - Item department.
- **Subdepartment** - Item subdepartment.
- **Class** - Item class.
- **Subclass** - Item subclass.
- **Style ID** - ID of the style for the item (if available).
- Dimension information for the item.

Vendor Information

The Vendor Information section displays the following information about the item's vendor:

- **Vendor** - Name of the vendor.
- **Orderable** - Indicates whether the item can be ordered.

- **Part #** - Part number used by the vendor.
- **Order Lead Days** - Number of lead days required when ordering the item.

Product Attributes

The Product Attributes section displays the following information:

- **Item Type** - Type of item.
- **Season** - Season for the item.
- **Stock Status** - Current stock status.
- **Returnable** - Indicates whether the item can be returned.
- **Unit of Measure** - Unit used to measure the item (if applicable).
- **Restocking Fee** - Restocking fee applied to the item when it is returned (if applicable).
- **Tax Group** - Tax group for the item.
- **Tax Amount** - Amount of tax applied to the item.

Today's Sales

The Today's Sales section displays the following information:

- **Net Sales** - Net amount of sales minus returns for the item on the current day.
- **Qty** - Number of items sales of the item on the current day.

Inventory Stock

Figure 6-8 Inventory Stock Tab

The screenshot shows the 'Inventory Stock' tab for a product named 'Blue L Tee Shirt'. At the top, it displays the Item ID (338883), Current Price (\$12.50), and quantity (6) in stock. Below this, there are three main sections: 'Stock Ledger', 'Serial Inventory', and a bottom navigation bar.

Stock Ledger		Serial Inventory	
Inventory Bucket	Location	Item ID	Description
On Hand	Default	(6)	

At the bottom, there is a navigation bar with buttons for Back, Help, Add Item, Order Item, Inventory Locator, Previous Tab, and Next Tab.

The Inventory Stock tab contains the following areas:

Stock Ledger

The Stock Ledger table displays the following information for each inventory bucket in which the item is located:

- **Inventory Bucket** - Inventory bucket in which the item is located.
- **Location** - Location of the item.

- **Quantity** - Quantity of the item in the inventory bucket.

Kit Component Items

If the item is a kit, this table displays information about each item in the kit:

- **Item ID** - ID of the kit item.
- **Description** - Description of the kit item.
- **Quantity** - Quantity of the item included in one kit.

Serial Inventory

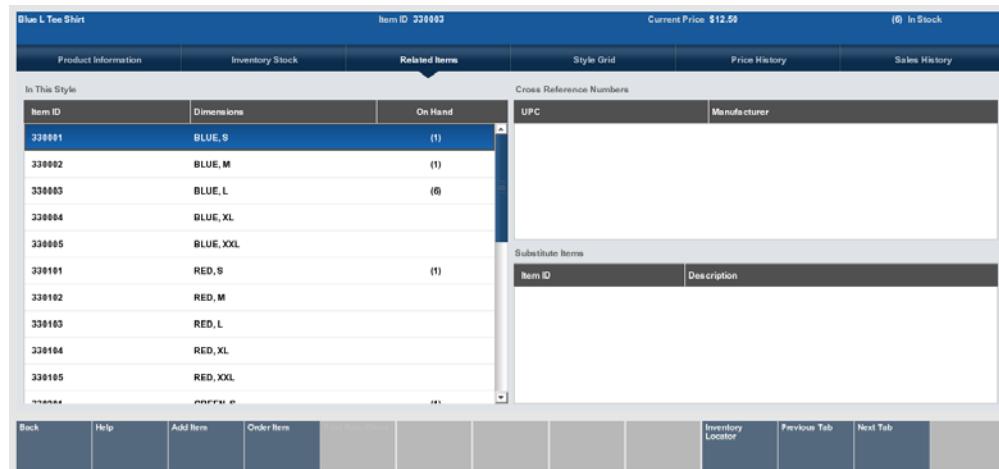
If the item is a serialized item, the Serial Inventory table displays the following information about each serial number:

- **Inventory Bucket** - Inventory bucket in which the serialized item is located.
- **Location** - Location of the item.
- **Serial #** - Serial number.

Note: No item quantity is displayed. For all items with one item ID, only one of those items will be assigned an individual serial number.

Related Items

Figure 6–9 Related Items Tab



The Related Items tab includes information about items similar to the selected item. The following tables display information about related items:

- **In This Style** - Displays information about items assigned to the same style as the selected item.
- **Cross Reference Numbers** - Displays information about items cross-referenced with the selected item.
- **Substitute Items** - Displays information about items indicated to be substitutes for the selected item.

In This Style

The In This Style table displays the following information about each item that has the same style ID as the selected item:

- **Item ID** - ID of the item.
- **Dimensions** - Values of the dimension attributes configured for the item.
- **On Hand** - Count of the item on-hand.

Cross Reference Numbers

The Cross Reference Numbers table displays the following information about items cross-referenced with the selected item.:

- **UPC** - UPC for the item.
- **Manufacturer** - Manufacturer that produces the item.

Substitute Items

The Substitute Items table displays the following information about items that are indicated to be substitutes for the selected item:

- **Item ID** - ID of the substitute item.
- **Description** - Description of the item.

Style Grid

Figure 6–10 Style Grid Tab

Blue L Tee Shirt		Item ID 300003		Current Price \$12.50		(0) In Stock				
Product Information		Inventory Stock		Style Grid		Price History		Sales History		
DEFAULT: N/A		Small	Medium	Large	X-Large	XX-Large				
Blue	(1)	(1)	(0)	(0)	0	0				
Red	(1)	0	0	0	0	0				
Green	(1)	0	0	0	0	0				
Grey	0	0	0	0	0	0				
Black	0	0	0	0	0	0				

Back Help Previous Tab Next Tab

The Style Grid displays a grid showing the grid that shows the on-hand quantity of items with one dimension cross-referenced with another dimension.

Price History

Figure 6–11 Price History Tab

Effective Date	Expiration Date	Price
09/24/2017		\$12.50

The Price History tab shows the past history of all prices that have been assigned to an item. The Price History shows the following information for each of the past prices:

- **Effective Date** - Date on which the price first became effective.
- **Expiration Date** - Date on which the price was no longer valid. This field will be blank for the current price.
- **Price** - Price for the item from the Effective Date up to the Expiration Date.

Sales History

Figure 6–12 Sales History Tab

Week	Units	Net Sales
10/22/2017 to 10/29/2017	6	\$65.79
10/15/2017 to 10/22/2017	0	
10/08/2017 to 10/15/2017	0	
10/01/2017 to 10/08/2017	0	
09/24/2017 to 10/01/2017	0	
09/17/2017 to 09/24/2017	0	
09/10/2017 to 09/17/2017	0	
09/03/2017 to 09/10/2017	0	
08/27/2017 to 09/03/2017	0	
08/20/2017 to 08/27/2017	0	

Year	Units	Net Sales
2017 (YTD)	6	\$65.79

12 Week Unit Sales Trend

The Sales History tab displays sales data for the item. The Sales History tab displays the following information:

- [Weekly Sales](#) - Table of weekly sales data for the item.
- [Annual Sales](#) - Table of annual sales data for the item.

- [12 Week Unit Sales Trend](#) - Graph of weekly sales data over the past twelve weeks.

Weekly Sales

Displays sales data for the item by week. This table displays the following sales information for each week:

- **Week** - Date range for the week.
- **Units** - Net quantity of the item sold.
- **Net Sales** - Net amount of all sales and returns of the item.

Annual Sales

Displays sales data for the item by year. This table displays the following sales information for each year:

- **Year** - Year of the data.
- **Units** - Net quantity of the item sold.
- **Net Sales** - Net amount of all sales and returns of the item.

12 Week Unit Sales Trend

Graph displaying week-by-week net sales data for the item over the past twelve weeks. This graph has the following axes:

- Start date for the week.
- Number of items sold.

Print a Rain Check

A Rain check is an optional feature that allows customers to purchase out of stock items for the same price at a later date. To print a rain check:

1. Click **Print Rain Check** in the Item Viewer.

Note: The **Print Rain Check** button will be grayed out if a rain check cannot be issued for the item

A confirmation prompt opens.

2. Click **Yes** to print the rain check.

Xstore Point of Service prints a rain check for the item.

Inventory Lookup

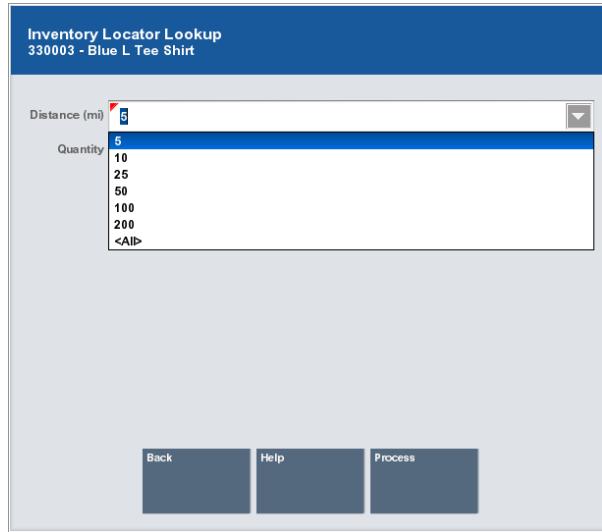
Occasionally an item may not be available in your store inventory, but the customer would like to see which stores in your chain have the item in stock. You can use the inventory lookup process to search a centralized database to locate these items within a set parameter range. For example, you could locate a specified item at a store within 25 miles of your location that has at least three of the specified item on hand.

To perform an inventory lookup:

1. Click **Find Item** in the Register Sale screen ([Figure 6-1](#)).
2. Click **Inventory Lookup**.

The Inventory Locator Lookup window opens.

Figure 6–13 Inventory Locator Lookup



3. Enter the lookup information for the item:

- **Item ID** - ID of the item.
- **Style ID** - ID of a style assigned to the item.

Note: Either the Item ID or Style ID field must be populated. Information in the Style ID field is ignored if the Item ID field is also populated.

- **Distance** - Distance from the local store.
- **Quantity** - Minimum quantity of the item that the store must have on hand. For example, if the customer needs three of the item, enter "3".

4. Click **Process**.

Figure 6–14 Inventory Locator Results

Count	Location	Phone	Distance
101	Corner Market, 101 38080 Bruce Industrial Pkwy Solon, OH 44139	440-498-4414	
102	Oriole Park, 102 333 W Camden St. Baltimore, MD 21281	410-123-4567	
193	Cleveland Outlet, 193 34319 Aurora Rd Solon, OH 44139	440-498-4419	
301	Weiss Furs, 301		
302	Culp's Collectibles, 302		
383	Terry's Toy Town, 383		
384	Jeff's Junk, 384		

Xstore Point of Service returns a list of stores with the item. The following information will be displayed for each location:

- **Count** - On-hand quantity of the item at the store.
 - **Location** - Address for the store.
 - **Phone** - Phone number for the store.
 - **Distance** - Distance of the store from the local store.
5. Click **OK** to close the window.

Item Matrix Search

The Item Matrix can be used to find items by navigating through the merchandise hierarchy. Starting at the Department level, you can move to the lowest level of merchandise hierarchy and find a specific item. The merchandise hierarchy levels are color-coded to help you navigate through the different levels. When the item is located, it can be added to the sale transaction.

Note: Item Matrix is configured off by default.

To find an item in the Item Matrix:

1. Click **Find Item** in the Register Sale screen ([Figure 6-1](#)).
2. Click **Item Matrix**.

The Item Matrix window opens at the highest merchandise level.

3. Click the next merchandise level in which the item is located.
4. Repeat Step 3 until the Item Matrix displays the correct item.
5. Click the item to add it to the transaction.

Discounts and Awards

You can apply a discount to a single line item, multiple line items, or entire transactions. You can also apply an award to a transaction.

Transaction-level discounts are applied in the same manner as a line item discount. A transaction discount is applied equally to each eligible item in the transaction, a line item discount is applied to a single item, and a group discount is applied to a group of selected items in a transaction. Discounts may be specified as either amounts (for example, \$5.00 off) or percentages (for example, 10% off) for both item and transaction discounts.

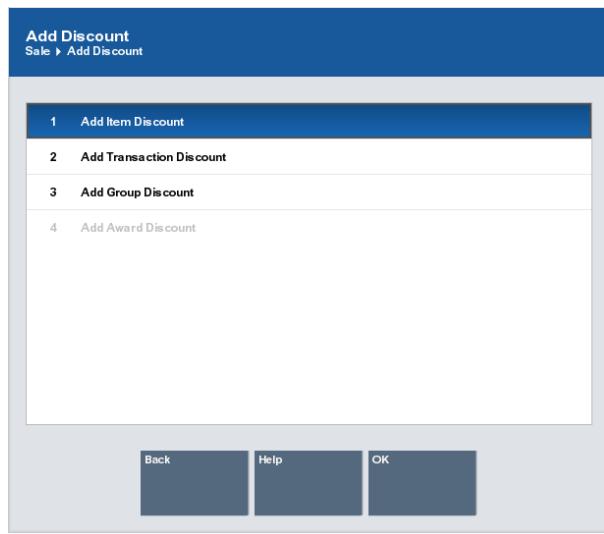
Deal Pricing Discount

Deal pricing discounts are automatically applied to items and transactions. No user interaction is required to apply a deal pricing discount to a transaction. Once the trigger it met, Xstore Point of Service applies the appropriate discount. There are many variations of deal discounts; for example, buy one get one free, or buy three items and get 10% off.

Add a Discount or Award to a Transaction

After adding items to a transaction, do the following to add a discount or award to a transaction:

1. Click **Add Discount**.

Figure 7–1 Discount Type Options

Xstore Point of Service prompts for the discount type.

- **Add Item Discount** - Discount applied to one item in the transaction.
 - **Add Transaction Discount** - Discount applied to the entire transaction.
 - **Add Group Discount** - Discount applied to a group of items.
 - **Add Award Discount** - Discount applied as a loyalty award.
2. Select the discount type:
 - Click the discount type.
 - Use the up and down arrows to highlight the correct discount type, then press the Spacebar.
 - Enter the number associated with the discount type.
 3. Click **OK**.
 4. Continue with the appropriate procedure:
 - **Item Discount** - Discount applied to one item in the transaction.
 - **Transaction Discount** - Discount applied to an entire transaction.
 - **Group Discount** - Discount applied to a group of items.
 - **Award Discount** - Discount applied through a loyalty award balance or loyalty award coupon.

Item Discount

After selecting **Add Item Discount** (see Step 2 in [Add a Discount or Award to a Transaction](#)), do the following to configure an item discount:

1. If necessary, select the item to which to apply the discount:

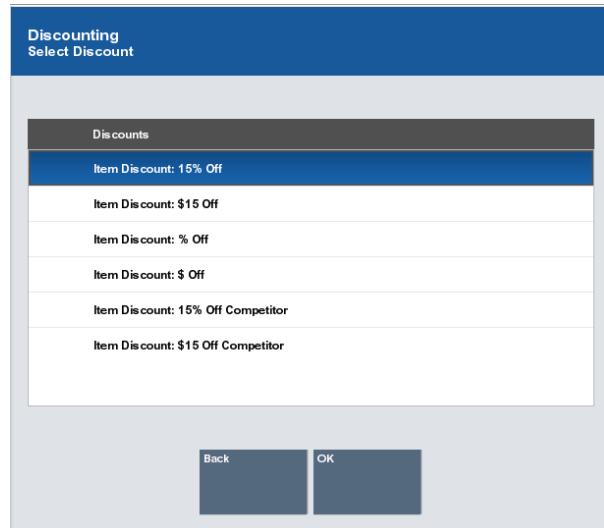
Note: If there is only one item in the transaction, go to Step 3.

- Click the item.

- Use the up and down arrows to highlight the correct item, then press the Spacebar.
- 2. Click OK.**

Xstore Point of Service prompts for the discount in the Discounting window.

Figure 7-2 Item Discount Options



- 3. Select the discount to apply to the item:**

Note: The discounts available in the Discounting window depend upon the configuration of your system.

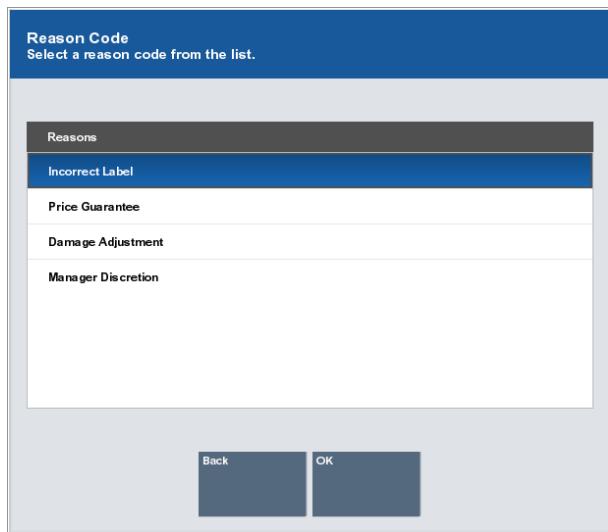
- Click the discount.
 - Use the up and down arrows to highlight the discount, then press the Spacebar.
- 4. Click OK.**
- 5.** If necessary, enter the reason for the discount. See [Select a Reason](#).
- 6.** If necessary, enter the discount information:
- [Percent Discount](#) - Enter the percentage of the discount.
 - [Amount Discount](#) - Enter the amount of the discount.

The discount is applied to the item and appears in the [View Port](#).

Select a Reason

To select a reason for a discount:

Figure 7–3 Reason Code List



1. Select the reason for the discount:
 - Click the reason.
 - Use the up and down arrows to highlight the reason, then press the Spacebar.
2. Click **OK**.

Percent Discount

To enter a percent discount:

1. Enter the percentage discount to apply to the item.
2. Press Enter.
3. If necessary, click **Yes** to confirm that the entered discount is correct.
The percentage discount is applied to the item.

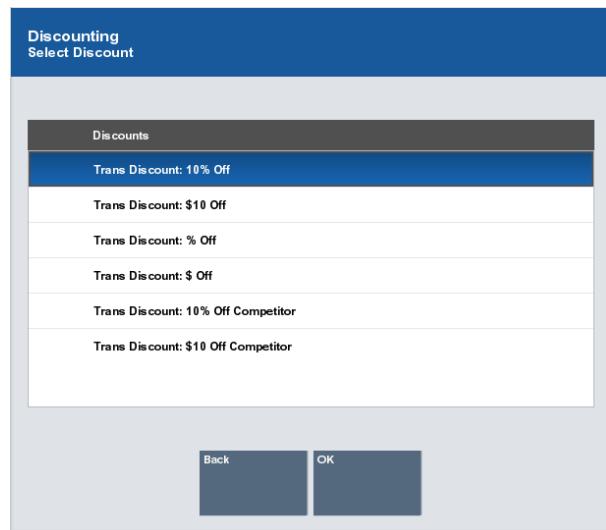
Amount Discount

To enter an amount discount:

1. Enter the amount of the discount to apply to the item.
2. Press Enter.
3. If necessary, click **Yes** to confirm that the entered discount is correct.
The amount of the discount is applied to the item.

Transaction Discount

After selecting **Add Transaction Discount** (see Step 2 in [Add a Discount or Award to a Transaction](#)), do the following to configure a transaction discount:

Figure 7–4 Transaction Discount Options

1. Select the discount to apply to the transaction:

Note: The discounts available in the Discounting window depend upon the configuration of your system.

- Click the discount.
 - Use the up and down arrows to highlight the discount, then press the Spacebar.
2. Click **OK**.
 3. If necessary, enter the reason for the discount. See [Select a Reason](#).
 4. If necessary, enter the discount information:
 - [Percent Discount](#) - Enter the percentage of the discount.
 - [Amount Discount](#) - Enter the amount of the discount.

The discount is applied to the transaction and appears in the [View Port](#).

Select a Reason

To select a reason for a discount ([Figure 7–3](#)):

1. Select the reason for the discount:
 - Click the reason.
 - Use the up and down arrows to highlight the reason, then press the Spacebar.
2. Click **OK**.

Percent Discount

To enter a percent discount:

1. Enter the percentage discount to apply to the transaction.
2. Press Enter.
3. If necessary, click **Yes** to confirm that the entered discount is correct.

The percentage discount is applied to the transaction.

Amount Discount

To enter an amount discount:

1. Enter the amount of the discount to apply to the transaction.
2. Press Enter.
3. If necessary, click **Yes** to confirm that the entered discount is correct.

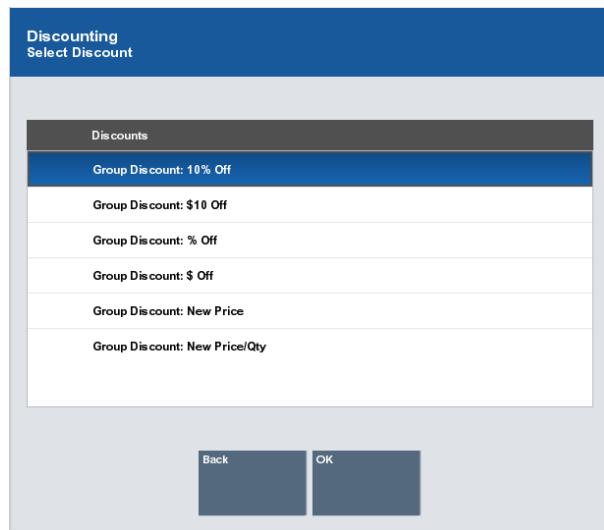
The amount of the discount is applied to the transaction.

Group Discount

After selecting **Add Group Discount** (see Step 2 in [Add a Discount or Award to a Transaction](#)), do the following to configure a group discount:

1. Select the discount to apply to the group of items:

Figure 7–5 Group Discount Options



Note: The discounts available in the Discounting window depend upon the configuration of your system.

- Click the discount.
- Use the up and down arrows to highlight the discount, then press the Spacebar.
2. Click **OK**.
3. Select the items to which to apply the discount:
 - Click the items.
 - Use the up and down arrows to highlight the each item, then press the Spacebar.
4. Click **OK**.
5. If necessary, enter the reason for the discount. See [Select a Reason](#).

6. If necessary, enter the discount information:

- **Percent Discount** - Enter the percentage of the discount.
- **Amount Discount** - Enter the amount of the discount.

The discount is applied to the items and appears in the [View Port](#).

Select a Reason

To select a reason for a discount ([Figure 7-3](#)):

1. Select the reason for the discount:
 - Click the reason.
 - Use the up and down arrows to highlight the reason, then press the Spacebar.
2. Click **OK**.

Percent Discount

To enter a percent discount:

1. Enter the percentage discount to apply to the item.
2. Press Enter.
3. If necessary, click **Yes** to confirm that the entered discount is correct.

The percentage discount is applied to the item.

Amount Discount

To enter an amount discount:

1. Enter the amount of the discount to apply to the item.
2. Press Enter.
3. If necessary, click **Yes** to confirm that the entered discount is correct.

The amount of the discount is applied to the item.

Award Discount

After selecting **Add Award Discount** (see Step 2 in [Add a Discount or Award to a Transaction](#)), the manner in which the award discount will be applied depends upon the configuration of your system:

- **Award Discount - Enter Amount** - Discount amount is applied through a loyalty award balance.
- **Award Discount - Select Coupon** - Discount amount is applied by selecting a loyalty award coupon.

Award Discount - Enter Amount

After selecting **Add Award Discount** (see Step 2 in [Add a Discount or Award to a Transaction](#)), do the following to configure an award discount:

1. Enter the award amount to be applied to the transaction.
2. Press Enter.
3. If necessary, click **Yes** to confirm that the entered discount is correct.

The discount is applied across the items and appears in the [View Port](#).

Award Discount - Select Coupon

After selecting **Add Award Discount** (see Step 2 in [Add a Discount or Award to a Transaction](#)), do the following to configure a group discount:

1. Select the coupons to apply to the transaction:
 - Click the coupons.
 - Use the up and down arrows to highlight each coupons, then press the Spacebar.
2. Click **OK**.

The discount is applied to the items and appears in the [View Port](#).

About the Award Coupon List The award coupon list may be configured two ways:

- Partial awards allowed:

The system automatically reduces the value of the selected coupon by the amount applied to the current transaction, up to the total amount due. For example, if \$14.98 is applied from a \$50.00 coupon, the coupon's remaining value is reduced to \$35.02 and it may be applied to a different transaction later.
- Partial awards not allowed:

The system automatically applies the entire value of the coupon, regardless of the amount due on the transaction. The coupon is removed from the list after it is applied to a transaction and may not be used again. For example, if the amount due is \$25.00 and a \$30.00 coupon is selected, the \$5.00 difference cannot be used in a future transaction.

If you select more than one coupon and the combined total exceeds the amount due on the sale, a message displays. Press Enter and the system returns to the list of coupons where you may select a different coupon.

8

Modify a Transaction

During a transaction you may need to make changes to a transaction or the items in it. This includes the following procedures:

- [Add Non-merchandise Items to a Sale](#) - Add non-merchandise items to a sale, such as gift cards, item alterations, or having an item gift wrapped.
- [Remove a Customer](#) - Remove the customer assigned to a transaction.
- [Modify a Line Item](#) - Make changes to a line item in a transaction.
- [Suspend a Transaction](#) - Suspend a transaction to be resumed later.
- [Resume a Transaction](#) - Resume a suspended transaction.
- [Cancel a Transaction](#) - Cancel a transaction.

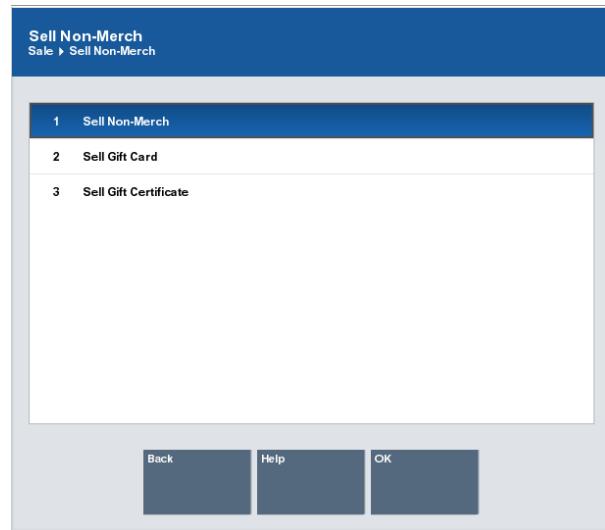
Add Non-merchandise Items to a Sale

To add non-merchandise items to a sale transaction (for example, a gift card, alteration, or gift wrapping service):

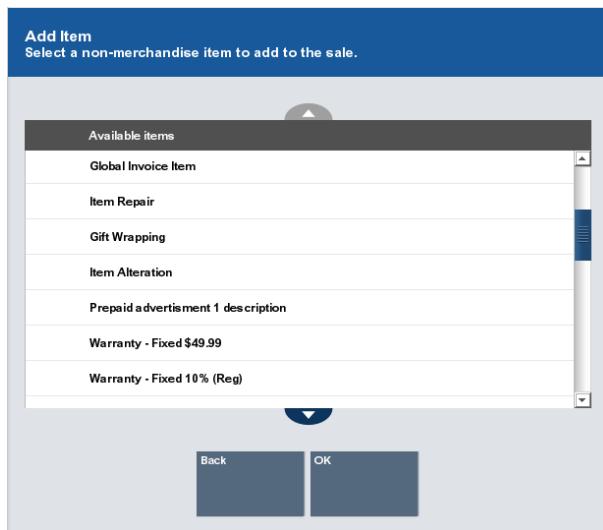
1. Click **Sell Non-Merch** in the Register Sale screen.

The Sell Non-Merch window opens.

Figure 8–1 List of Non-Merchandise Options



2. Select the type of non-merchandise item to sell:

Figure 8–2 List of Non-Merchandise Items

- Click the type of non-merchandise item.
- Use the up and down arrows to highlight the correct type of non-merchandise item, then press the Spacebar.
- Enter the number associated with the type of non-merchandise item.
3. Click **OK**.
 - If prompted to select an item, continue with Step 4.
 - If prompted for an item price, continue with Step 6.
 - If item is added to the [View Port](#), continue the transaction.
4. If necessary, select the item in the list:
 - Click the non-merchandise item.
 - Use the up and down arrows to highlight the correct non-merchandise item, then press the Spacebar.
 - Enter the number associated with the non-merchandise item.
5. Click **OK**.
 - If prompted for an item price, continue with Step 6.
 - If item is added to the [View Port](#), continue the transaction.
6. If necessary, enter the amount of the item.

Figure 8–3 Prompt For Price

7. Press Enter.

The item is added to the [View Port](#). Continue the transaction.

Remove a Customer

The procedure for removing a customer from a transaction depends upon whether the system is on a touchscreen system or a non-touchscreen system:

- [Touchscreen System](#)
- [Non-touchscreen System](#)

Touchscreen System

To remove a customer from a transaction:

1. Swipe from left to right in the Customer Loyalty banner.
An **Unassign** button appears.
2. Tap **Unassign** to remove the customer.

The customer is removed from the transaction.

Note: Tap anywhere other than the **Unassign** button to cancel the operation.

Non-touchscreen System

To remove a customer from a transaction:

1. Click **Customer Options** in the Register Sale screen.
2. Click **Remove Customer**.

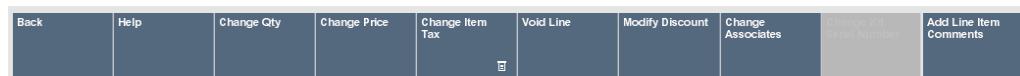
The customer is removed from the transaction.

Modify a Line Item

To modify a line item in a sale:

1. Click **Change Item** in the Register Sale screen.

Figure 8–4 Change Item Menu Options



2. Perform the appropriate procedure:
 - [Change Item Quantity](#) - Change the quantity of the item.
 - [Change Item Price](#) - Change the price of an item.
 - [Void an Item](#) - Remove an item from the transaction.
 - [Change the Commissioned Associate](#) - Change the commissioned associate for the transaction.
 - [Add a Line Item Comment](#) - Add a comment to a line item.
 - [Edit a Line Item Comment](#) - Edit the comment for a line item.
 - [Change the Tax for an Item](#) - Change the tax associated with an item.

Change Item Quantity

1. Click **Change Quantity**.
2. If necessary, select the item for which to change the quantity:

Note: If there is only one item in the transaction, Oracle Retail Xstore Point of Service will immediately prompt for the new quantity (go to Step 4).

- Click the item in the [View Port](#).
 - Use the up and down arrows to highlight the item in the [View Port](#).
3. Press Enter.

Xstore Point of Service prompts for the new quantity.

Figure 8–5 Enter Quantity Prompt



4. Enter the new quantity.
 5. Press Enter.
- The item quantity is changed. Continue the transaction.

Change Item Price

To change the price of an item:

1. Click **Change Price**.
2. If necessary, select the item for which to change the price:

Note: If there is only one item in the transaction, Oracle Retail Xstore Point of Service will immediately prompt for the new price (go to Step 4).

- Click the item in the [View Port](#).
 - Use the up and down arrows to highlight the item in the [View Port](#).
3. Press Enter.

Figure 8–6 Prompt For Price



Xstore Point of Service prompts for the new price.

4. Enter the new price.
5. Press Enter.

The item price is changed. Continue the transaction.

Void an Item

The method for voiding an item depends upon whether the system is a touchscreen system or a non-touchscreen system.

Touchscreen System

To void an item:

1. Swipe from left to right on the item to void.
A **Void** button opens.
2. Tap **Void** to remove the item.

Note: To cancel the void, either tap anywhere else on the screen, or wait a few seconds for the button to disappear.

3. If necessary, tap the reason for the void to select it.
4. Tap **OK**.

The item is voided from the transaction.

Non-touchscreen System

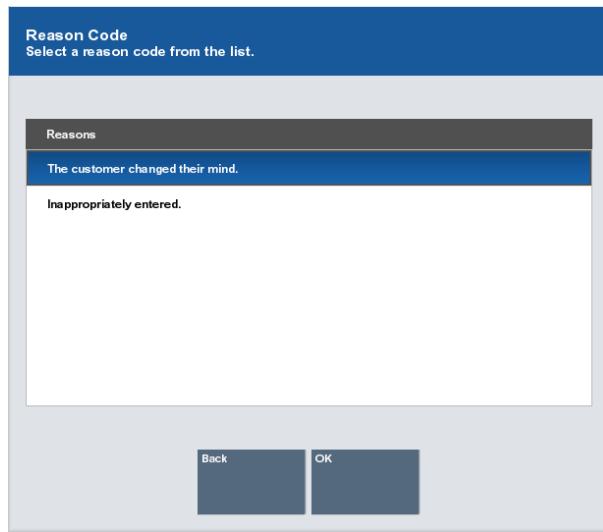
To void an item:

1. Click **Void Item**.
2. If necessary, select the item for which to change the quantity:

Note: If there is only one item in the transaction, Oracle Retail Xstore Point of Service will immediately void that item (go to Step 4 or continue the transaction).

- Click the item in the [View Port](#).
 - Use the up and down arrows to highlight the item in the [View Port](#).
3. Press Enter.

Figure 8–7 Reason Code List



4. If necessary, select the reason for the void:
 - Click the reason.
 - Use the up and down arrows to highlight the reason then press the Spacebar.
5. Click **OK**.

The item quantity is changed. Continue the transaction.

Change the Commissioned Associate

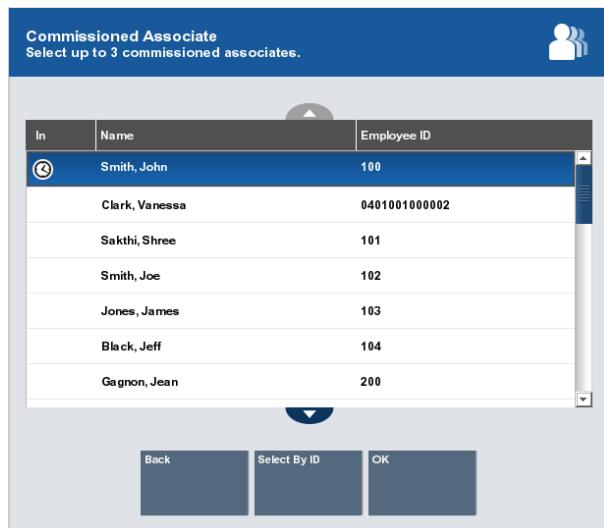
To change the commissioned associate for an item:

1. Click **Change Associates**.
2. If necessary, select the item for which to change the commissioned associate:

Note: If there is only one item in the transaction, Oracle Retail Xstore Point of Service will immediately select that item (go to Step 4).

- Click the item in the [View Port](#).
 - Use the up and down arrows to highlight the item in the [View Port](#).
3. Press Enter.

Xstore Point of Service opens a list of associates.

Figure 8-8 Commissioned Associate List

- 4.** Select the new commissioned associate from the list:

Note: Depending upon the configuration of your system, you may be able to assign more than one commissioned associate to an item.

- Click the associate. Continue with Step 5.
The commissioned associate for the item is updated.
 - Use the up and down arrows to highlight the associate then press the Spacebar. Continue with Step 5.
The commissioned associate for the item is updated.
 - Click **Select By Associate ID** and continue with Step 6.
- 5.** Click **OK**.
The commissioned associate for the item is updated. Continue the transaction.
- 6.** If you clicked **Select By Associate ID** in Step 4, enter the ID of the associate:
1. Enter the associate ID in the Commissioned Associate prompt.
 2. Press **Enter**.
- The commissioned associate for the item is updated. Continue the transaction.

Add a Line Item Comment

To add a line item comment.

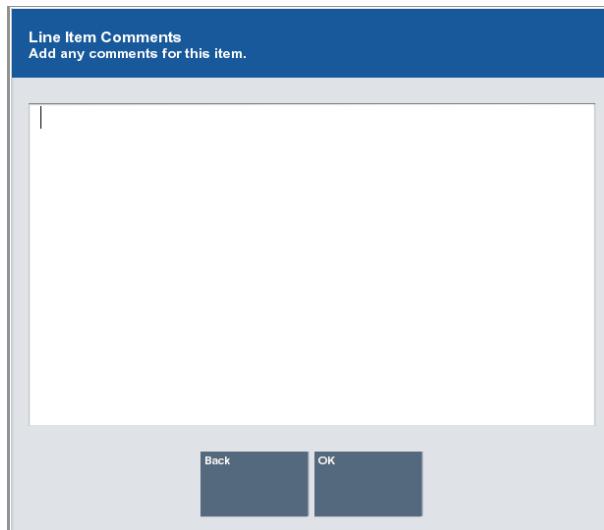
1. Click **Add/Edit Line Item Comments**.
2. If necessary, select the item for which to add the comment:

Note: If there is only one item in the transaction, Oracle Retail Xstore Point of Service will immediately select that item (go to Step 3).

- Click the item in the **View Port**.

- Use the up and down arrows to highlight the item in the [View Port](#).
Xstore Point of Service prompts for the comment.

Figure 8–9 Line Item Comments



3. Enter the comment.
4. Click **OK**.

The comment is added to the line item. Continue the transaction.

Edit a Line Item Comment

To edit a line item comment.

1. Click **Add/Edit Line Item Comments**.
2. Select the comment to edit:
 - Click the comment in the [View Port](#).
 - Use the up and down arrows to highlight the comment in the [View Port](#).
Xstore Point of Service opens a prompt with the existing comment.
3. Edit the text of the comment.
4. Click **OK**.

The comment is updated for the line item. Continue the transaction.

Change the Tax for an Item

To change the tax for an item:

Note: The item tax cannot be changed on an item in an Order Broker order.

1. Click **Change Item Tax**.

Figure 8–10 Change Item Tax Menu Buttons

2. Select the type of tax change, then follow the appropriate procedure:
 - [Change the Tax Location](#)
 - [Change the Tax Amount](#)
 - [Change the Tax Percentage](#)

Change the Tax Location

To change the tax location for an item:

1. Click **Change Item Tax Location**.
2. If necessary, select the item for which to change the tax location:

Note: If there is only one item in the transaction, Oracle Retail Xstore Point of Service will immediately select that item (go to Step 3).

- Click the item in the [View Port](#).
- Use the up and down arrows to highlight the item in the [View Port](#).
3. Press Enter.

Xstore Point of Service prompts for the postal code of the tax location.

Figure 8–11 Postal Code Prompt

4. Enter the postal code for the new tax location.
5. Press Enter.
6. If necessary, select the reason for the tax location change:
 - Click the reason.
 - Use the up and down arrows to highlight the reason then press the Spacebar.
7. Click **OK**.

The tax location is changed and the tax amount is changed to the tax for the new location. Continue the transaction.

Change the Tax Amount

To change the tax amount for an item:

1. Click **Change Item Tax \$**.
2. If necessary, select the item for which to change the tax amount:

Note: If there is only one item in the transaction, Oracle Retail Xstore Point of Service will immediately select that item (go to Step 3).

- Click the item in the [View Port](#).
 - Use the up and down arrows to highlight the item in the [View Port](#).
3. Press Enter.

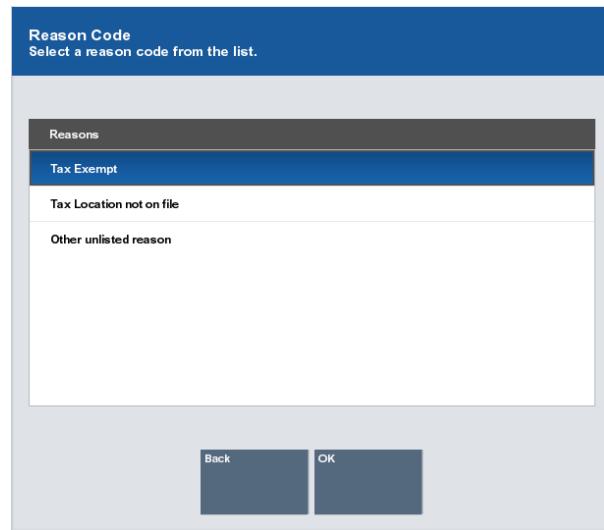
Xstore Point of Service prompts for the new tax amount.

Figure 8–12 Tax Amount Prompt



4. Enter the new amount of tax for the item.
5. Press Enter.

Figure 8–13 List of Tax Change Reasons



6. If necessary, select the reason for the tax amount change:
 - Click the reason.
 - Use the up and down arrows to highlight the reason then press the Spacebar.

7. Click **OK**.

The tax amount for the item is changed. Continue the transaction.

Change the Tax Percentage

To change the tax percentage for an item:

1. Click **Change Item Tax %**.
2. If necessary, select the item for which to change the tax percentage:

Note: If there is only one item in the transaction, Oracle Retail Xstore Point of Service will immediately select that item (go to Step 3).

- Click the item in the [View Port](#).
 - Use the up and down arrows to highlight the item in the [View Port](#).
3. Press Enter.

Xstore Point of Service prompts for the new tax percentage:

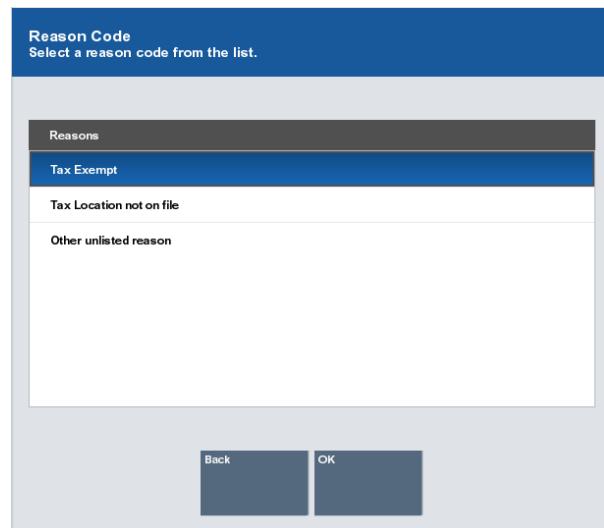
- If you are prompted to enter a new amount, continue with Step 4.
- If you are prompted to select a tax group, continue with Step 4.

Figure 8–14 Tax Percentage Prompt



4. Enter the new percentage of tax for the item.
5. Press Enter. Continue with Step 8.
6. Select the new tax group:
 - Click the tax group.
 - Use the up and down arrows to highlight the tax group.
7. Click OK.

Figure 8–15 List of Tax Change Reasons



8. If necessary, select the reason for the tax percentage change:
 - Click the reason.
 - Use the up and down arrows to highlight the reason then press the Spacebar.

9. Click OK.

The tax percentage for the item is changed. Continue the transaction.

Exempt an Item from Tax

To set an item as tax exempt:

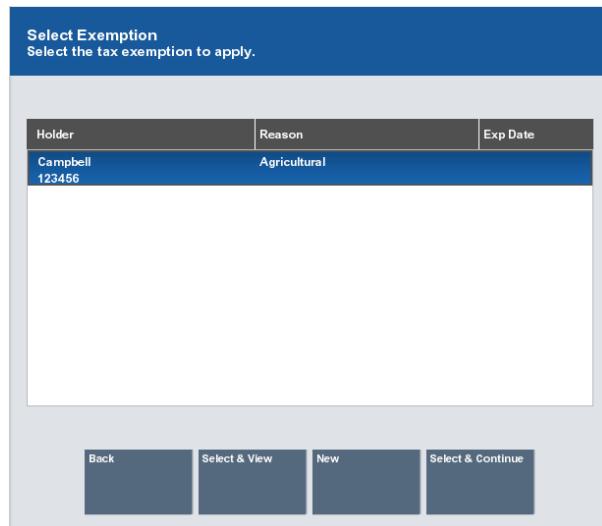
1. Click Exempt Item Tax.

2. If necessary, select the item to exempt from tax:

Note: If there is only one item in the transaction, Oracle Retail Xstore Point of Service will immediately select that item (go to Step 3).

- Click the item in the [View Port](#).
 - Use the up and down arrows to highlight the item in the [View Port](#).
- 3. If necessary, pick the tax to exempt from a list of taxes:**
- Click the tax.
 - Use the up and down arrows to highlight the tax.
- 4. If you selected a tax to exempt, click OK.**
- 5. Perform the appropriate next step:**
- If necessary, associate a customer with the transaction.
 - If the customer has a tax exemption associated with their account, continue with Step 6.
 - If the customer does not have a tax exemption associated with their account, continue with Step 8.
- 6. If necessary select the tax exemption certificate to apply to the transaction:**

Figure 8–16 List of Tax Exemptions On File for Customer

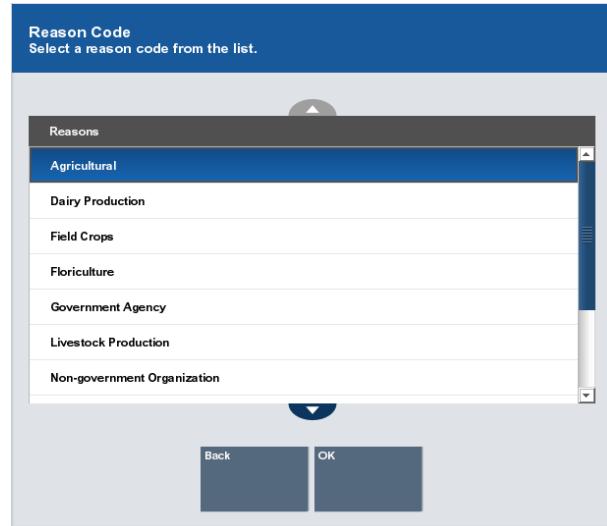


- Click the tax exemption certificate.
- Use the up and down arrows to highlight the tax exemption certificate.

7. Select the appropriate option:

- Click **Select & Continue** to apply the selected tax exemption certificate to the item and continue the transaction. An "E" appears next to the item in the [View Port](#).
- Click **Select & View** to view the selected tax exemption certificate and, if necessary, make changes (see Step 10).
- Click **New** to enter a new tax exemption certificate. Continue with Step 8.

Figure 8–17 Tax Exempt Reasons



8. If necessary, select the reason for the tax percentage change:

- Click the reason.
 - Use the up and down arrows to highlight the reason then press the Spacebar.
9. Click OK.

Figure 8–18 Customer Tax Exempt Form

10. Enter the tax exemption information:

Note: Depending on the configuration of your system, the fields in the tax exemption entry form may be different than those listed.

A red triangle appears in the upper-left corner of required fields.

- **Certificate #:** ID number for the tax exemption certificate.
- **Certificate Holder:** Entity that owns the tax exemption certificate.
- **State:** State or province where the certificate is valid.
- **Expiration Date:** Certificate expiration date.

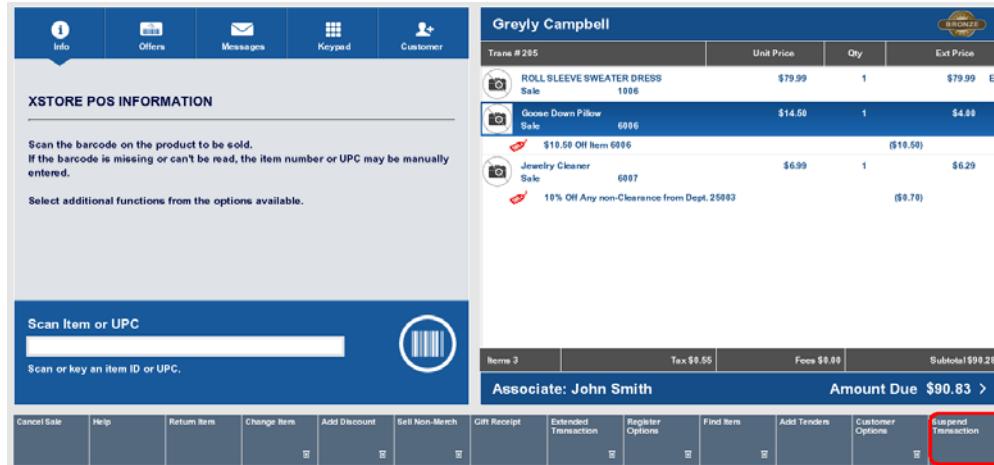
11. Click **Save Changes**.

The tax exemption is applied to the item. Continue the transaction. An “E” appears next to the item in the [View Port](#).

Suspend a Transaction

Click **Suspend Transaction** to suspend a transaction so that it can be resumed later.

Figure 8–19 Suspend Transaction Option



The system may print a receipt for the suspended transaction. It can be used by the customer to resume their transaction when they return.

Xstore Point of Service returns to the Register screen.

Resume a Transaction

1. Click **Resume Transaction**.

Xstore Point of Service opens a list of suspended transactions.

2. Select the transaction to resume:

- Click the transaction. Continue with Step 3.
- Use the up and down arrows to highlight the transaction. Continue with Step 3.

- Scan the suspended transaction receipt barcode. Continue with Step 4.
- 3. Click **OK**.
- 4. If the system is an airside location, scan the customer's boarding pass.
The transaction resumes. Continue the transaction.

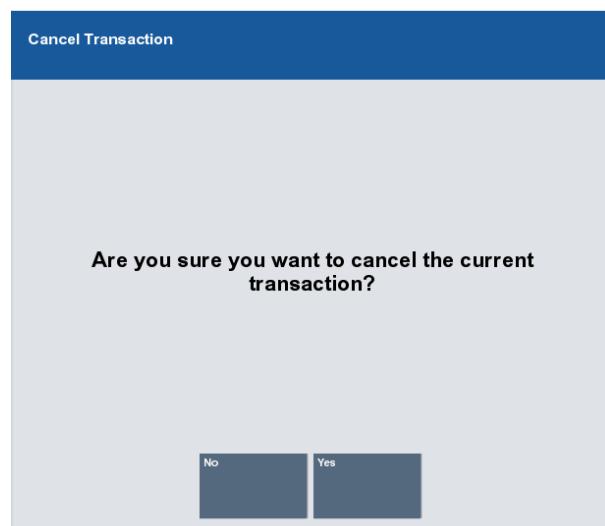
Cancel a Transaction

To cancel a transaction:

1. At any point in a transaction, press Esc until you return to the initial sale screen.
2. Cancel the sale:
 - Click **Cancel Sale**.
 - Press Esc.

If there are items in the sale, Xstore Point of Service prompts whether to cancel the sale.

Figure 8–20 Cancel Sale



3. Click **Yes**.
4. If necessary, select the reason for cancelling the sale:
 - Click the reason.
 - Use the up and down arrows to highlight the reason then press the Spacebar.
5. Click **OK**.

The transaction is cancelled.

Send Sale Transactions

A send sale item is an item that must be shipped to a customer-specified, off-site location after it is purchased.

Send sales are similar to special orders and orders because each of these transaction types may involve the direct shipment of a purchased item to a customer or third party. A send sale, however, implies that the item is in the store's saleable inventory when the purchase is made and is available at the time of purchase.

Note: A send sale must be paid for in full at the time of purchase. Special orders and orders may have more flexible payment options.

Your system may be configured for one-step or two-step send sale processing.

- In one-step processing, you enter the ship-to address and select a shipping method (if required) during the sale transaction. No further action is required in Xstore Point of Service after the transaction is completed.
- In two-step processing, you enter the ship-to address and select a shipping method (if required) during the sale transaction, just as performed in one-step processing. After the sale is completed, a shipping document is created automatically and must be processed as a separate step in the Back Office Shipping module. Refer to the *Oracle Retail Xstore Point of Service Shipping, Receiving, and Inventory Guide* for more information about two-step processing and completing the shipping document in the Back Office.

Create a Send Sale

To create a new send sale:

1. Click **Extended Transaction** in the Register Sale screen.

Figure 9–1 Extended Transaction Menu Buttons



2. Click **Send Sale**.
3. Click **New Send Sale**.
4. If a customer is not associated with the transaction, add a customer. See [Associate a Customer with the Transaction](#) in Chapter 5, Customer Maintenance.

5. If the customer has previous send sales, indicate whether to use a previous destination address:
 - Click **Skip** to enter a new destination. Continue with Step 7.
 - Select the destination in the list then click **OK**.
 - Click the destination.
 - Use the up and down arrows to highlight the correct destination, then press the Spacebar.
6. Enter the destination information for the new send sale by doing one of the following:
 - [Enter Address Information](#) - Enter the address information manually.
 - [Search for a Customer](#) - Search for a recipient that has a customer record.
7. Enter an into the transaction. See [Entering Items](#) in [Chapter 2, Basic Transaction Entry](#).

Note: The system validates every item to ensure that it meets the requirements for send sale items.

8. If necessary, enter an originating inventory location:
 - a. Select the originating inventory location.
 - b. Press **Process**.
9. If necessary, add a new send sale, or edit an existing send sale. See [Add or Edit a Send Sale](#).

Continue the transaction.

Enter Address Information

To enter address information into the destination information, do the following:

Note: In a new send sale, the fields may be initially populated with the address information for the customer associated with the transaction.

Figure 9–2 Shipping Destination Information Form - Auto-populated Customer Info

The form is titled "Shipping Destination" and has the instruction "Enter shipping destination information." It includes fields for "Phone #", "Ship Via" (with a dropdown arrow), "Ship To" (Greyly Campbell), "Address" (4422 Stony Parkway, Bldg F, Solon), "City" (44139), "State" (OH - Ohio), and "Country" (US - United States). At the bottom are buttons for "Back", "Help", "Ship To Customer Search", "Change Country", and "Accept".

1. Enter the address information:

Note: Required fields have a red triangle in the upper-left corner.

- **Phone #** - Phone number for the recipient.
- **Ship To** - Name of the recipient of the send sale:
 - **First** - First name.
 - **M.I.** - Middle initial.
 - **Last** - Last name.
- **Address** - Address for the recipient of the send sale:
 - First line of the street address.
 - Second line of the street address.
 - **Zip** - Postal or zip code.
 - **State** - State or province.
 - **City** - Recipient city.
 - **Apt** - Apartment.
- **Country** - Country for the recipient. See [Change Country](#) in [Chapter 1, Documentation and Screen Conventions](#).
- **Ship Via** - Shipper. *This field is only available if enhanced send sale processing is enabled.*

2. Click **Accept**.

The transaction continues.

Search for a Customer

To search for a customer to receive the send sale:

1. Click **Ship to Customer Search**.

Note: If [Address Lookup](#) is enabled, the **Ship To Customer Search** button will not be displayed.

2. Perform a customer search. See [Associate a Customer with the Transaction](#) in [Chapter 5, Customer Maintenance](#).

After selecting the customer, the transaction continues.

Add or Edit a Send Sale

To add a new send sale to a transaction or edit an existing send sale:

1. Click **Extended Transaction** in the Register Sale screen.

2. Click **Send Sale**.

3. Click **Edit Sale**.

Xstore Point of Service displays a list of existing send sales.

4. Do one of the following:
 - Click **Set Up New** to add a new send sale. Continue with Step 5 in [Create a Send Sale](#).
 - Select the send sale to edit:
 - Click the send sale.
 - Use the up and down arrows to highlight the correct send sale, then press the Spacebar.

5. Click **Select & Continue**.

Continue with Step 6 in [Create a Send Sale](#).

10

Layaway Transactions

A layaway item is a sale item that cannot be taken from a store when it is purchased. The customer often not pay the entire cost of the item at that time. Instead, the store reserves the item for the customer until the customer pays for the item in full.

Usually the customer is required to fully pay for the items in a layaway within a specified time period. Once an item in a layaway has been fully paid, the customer takes possession of it from the store.

A layaway account is a customer account that includes one or more layaway items. A layaway account for which the customer does not pay the requisite amount within a given time frame is considered delinquent; the items in the layaway are restocked as saleable inventory and any non-refundable deposit or setup fees are kept by the store. Any refundable deposits or setup fees are reserved for the customer.

Xstore Point of Service can be configured to allow Single or Multiple layaway accounts for a customer:

- In a Single layaway configuration, a customer may have only one active account, and all items purchased on a layaway basis are assigned to that account.
- In a Multiple layaway configuration, a customer may have more than one layaway active account.

Note: For more information about layaways and layaway processing options in Xstore Point of Service, see *Oracle Retail Xstore Point of Service Manager's Guide*.

Create a Layaway

To create a layaway:

1. Click **Extended Transactions** in the Register Sale screen.

Figure 10–1 Extended Transaction Menu Buttons



2. Click **Layaway**.

Figure 10–2 Layaway Search

The screenshot shows a search interface titled "Layaway Search" with the sub-instruction "Enter search criteria." Below the title are five input fields: "Account ID", "Last Name", "First Name", "Customer #", and "Phone #". At the bottom are four buttons: "Back", "Help", "Set Up New", and "Process".

3. Enter criteria to search for an existing layaway.

Xstore Point of Service will open a prompt listing open layaways for the customer, or an indication that there are no open layaways.

Figure 10–3 No Matching Layaways

The screenshot shows a search interface titled "Layaway". In the center, the message "There are no layaways matching the criteria entered." is displayed. At the bottom are two buttons: "Back" and "New".

4. Choose the correct option:

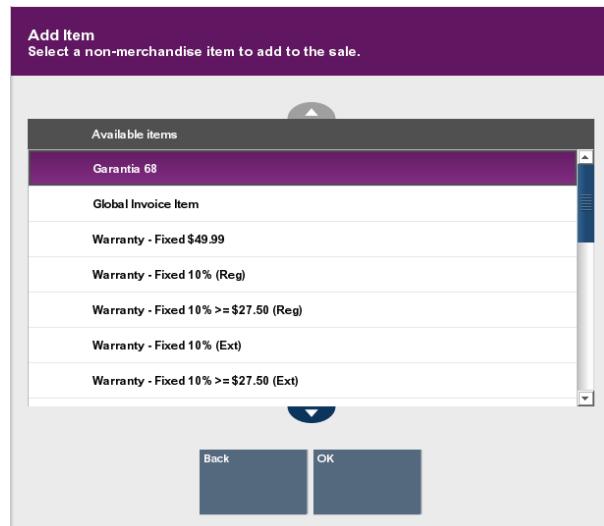
- Click **Set Up New** if the customer has open layaways.

Note: If the customer has an existing layaway account and Xstore Point of Service is configured for a Single layaway account, a new layaway cannot be created.

- Click **New** if there are no layaways associated with the customer, or no customer has been associated with the transaction.

- If no customer is associated with the transaction, perform a [Associate a Customer with a Transaction](#) and associate a customer with the transaction.
5. Add items to the transaction:

Figure 10–4 Sell Non-Merch Items



Note: If an item cannot be added to a layaway, the system prompts with a message or reason the item is ineligible.

- [Entering Items](#)
- [Add Wish List Items to a Transaction](#)
- [Add Digital Cart Items to a Transaction](#)

While Xstore Point of Service is in layaway mode, all items entered are entered as layaway items. The [View Port](#) only shows items and information for the current layaway transaction while in layaway mode.

Note: If adding an item would exceed the total amount or item quantity permitted in a layaway, Xstore Point of Service displays a warning message. Click **OK** to confirm the message, then either complete the layaway or remove items to add additional items.

6. After entering all the items, do one of the following:
- Click **Exit Layaway** to exit layaway mode and perform additional transaction processing.
 - Click **Complete Transaction** or **Add Tenders** to tender the transaction. See [Chapter 4, Processing Tenders](#).

Xstore Point of Service prompts for a deposit amount.

Figure 10–5 Deposit Amount Prompt

The screenshot shows a dark purple interface with a white input field containing the number "7.72". Above the input field is the word "Deposit". To the right of the input field is a white circle containing a black dollar sign (\$). Below the input field is the text "Enter the deposit amount.".

7. If necessary, change the layaway deposit amount.
8. Press Enter.
 - If the entered deposit amount is less than the minimum deposit amount, Xstore Point of Service opens a warning prompt. Click **OK** and return to Step 7 to enter a larger deposit.
 - If you changed the deposit amount was changed in Step 7, Xstore Point of Service prompts whether to continue with a deposit amount other than the default.
 - Click **Yes** to continue the transaction.
 - Click **No** to return to Step 7 and enter a new amount.
9. If Xstore Point of Service prompts for the number of days in the payment period:
 - a. Enter the number of days in the payment period.
 - b. Press Enter.

Note: Xstore Point of Service displays a confirmation prompt if the entered number exceeds to maximum payment period. Click **OK** and enter a new payment period.

Figure 10–6 Layaway Payment Periods

The screenshot shows a dark purple interface with a white input field containing the number "4". Above the input field is the text "Layaway Payment". To the right of the input field is a white circle containing a black icon with an upward arrow and a downward arrow. Below the input field is the text "Enter Number of Payment Periods" and "Maximum = 4".

10. If Xstore Point of Service prompts for the number of payment periods:
 - a. Enter the number of payment periods.
 - b. Press **Enter**.
11. Select an option to continue the transaction:
 - Click **Exit Layaway** to continue adding non-layaway items to the transaction.
 - Click **Complete Transaction** to proceed to tendering.

Open a Layaway

To open an existing layaway:

1. Click **Extended Transactions** in the Register Sale screen.
2. Click **Layaway**.

Xstore Point of Service will open a prompt listing open layaways for the customer, or an indication that there are no open layaways:

- Select the layaway:
 - Click the layaway.
 - Use the up and down arrows to highlight the correct layaway, then press the Spacebar.

Continue with Step 6.

- Scan the customer's layaway receipt. Continue with Step 7.
- Click **Layaway Search** to search for a layaway. Continue with Step 3.

3. Enter the search criteria:

- **Layaway ID** - ID of the layaway.
- **Last Name** - Last name of the customer associated with the layaway.
- **First Name** - First name of the customer associated with the layaway.
- **Customer ID** - ID of the customer associated with the layaway.
- **Phone #** - Phone number of the customer associated with the layaway.

4. Click **Process**.

The system displays a list of all layaways that match the entered criteria.

5. Select the layaway:

- Click the layaway.
- Use the up and down arrows to highlight the correct layaway, then press the Spacebar.

6. Click **Select & Continue**.

7. Perform the appropriate action:

- TBD actions needed

Layaway Payment

Customers may need to make regular payments to their layaway account between setting up and picking up the layaway. To add a layaway payment to a transaction:

1. [Open a Layaway](#)
2. Click **Make Payment**.
3. If necessary, change the amount of the payment.
4. Press Enter.
 - If the entered amount is less than the recommended amount, Xstore Point of Service prompts whether to continue the transaction.
 - Click **Yes** to continue the transaction.

- Click **No** to return to Step 3 and enter a new amount.
- If the entered amount is less than the minimum payment amount, Xstore Point of Service opens a prompt indicating the amount is too low. Click **OK** to return to Step 3.

The payment amount is added to the transaction. Continue the transaction.

Pick Up Layaway Items

To pick up items in a layaway:

1. [Open a Layaway](#)
2. Click **Pick Up Item**.

Xstore Point of Service displays a list of items in the transaction.

3. Select the items to be picked up:
 - Click the items.
 - Use the up and down arrows to highlight each item, then press the Spacebar.
 - Click **Pick Up All** to select all items.
 4. Click **Select & Continue**.
- Each selected item is listed as Picked-Up in the [View Port](#).
5. Select an option to continue the transaction:
 - Click **Exit Layaway** to continue adding non-layaway items to the transaction.
 - Click **Complete Transaction** to proceed to tendering.

Add Items to an Existing Layaway

To add items to a layaway that was created in a previous transaction:

1. [Open a Layaway](#)
2. Enter the items:
 - Scan each item.
 - Enter each item ID and press Enter.
3. Select an option to continue the transaction:
 - Click **Exit Layaway** to continue adding non-layaway items to the transaction.
 - Click **Complete Transaction** to proceed to tendering.

Edit Items in a Layaway

To change the items assigned to a layaway:

1. [Open a Layaway](#)
2. Click **Edit Account**.

The Edit Account Menu Options window opens.

3. Perform the appropriate action:
 - [Add Coupon](#) - Add a coupon to a layaway.

- [Add Discount](#) - Add a discount to a layaway.
 - [Change Item](#) - Make a change to a layaway item.
4. Repeat Steps 2 to 3 for each action to perform.
5. Select an option to continue the transaction:
- Click **Exit Layaway** to continue adding non-layaway items to the transaction.
 - Click **Complete Transaction** to proceed to tendering.

Add Coupon

To add a coupon to a layaway:

1. Click **Add Coupon** in the Edit Account Menu Options window.
2. Enter the coupon:
 - Scan the coupon.
 - Enter the coupon ID and press Enter.

The coupon is applied to the layaway.

Add Discount

To add a discount to a layaway:

1. Click **Add Discount** in the Edit Account Menu Options window.
2. Select the type of discount to add:
 - Click **Add Item Discount** to add an item discount.
 - Click **Add Group Discount** to add a group discount.
3. Perform the appropriate procedure in [Chapter 7, Discounts and Awards](#):
 - [Item Discount](#)
 - [Group Discount](#)

Change Item

To change an item in a layaway:

1. Click **Change Item** in the Edit Account Menu Options window.
2. Select the appropriate option in the **Menu Buttons**. See [Modify a Line Item](#) for information about the available options and procedures.

Cancel a Layaway

To cancel a layaway:

1. [Open a Layaway](#)
2. Click **Cancel Layaway**.

A confirmation prompt opens.

3. Indicate whether the customer is present:
 - Click **Yes** if the customer is present.

- Click **No** if the customer is not present.

If the customer is present, a second confirmation prompt opens.

Note: If the customer is not present, the layaway cannot be cancelled in register mode. See *Oracle Retail Xstore Point of Service Manager's Guide* for more information.

4. Indicate whether to cancel the layaway:

- Click **Yes** to cancel the layaway.

The layaway is canceled and the refund amount is applied to the transaction.

- Click **No** to return to the layaway without canceling it.

Add a Comment

To add a comment to a layaway:

1. [Open a Layaway](#)

2. Click **Edit Account**.

3. Click **Add Comment**.

A comment entry window opens.

4. Enter the text of the comment.

5. Click **OK**.

The comment is added to the layaway.

View Comments

To view the comments for a layaway:

1. [Open a Layaway](#)

2. Click **Edit Account**.

3. Click **More**.

4. Click **View Comments**.

The comments for the layaway are displayed in the [Message Window](#).

View Layaway Payment History

To view the payment history for a layaway account:

1. [Open a Layaway](#)

2. Click **Layaway Details**.

3. Click **View Payment History**.

Xstore Point of Service opens a window showing the payment history for the account:

- **Date** - Date of the payment.

- **Status** - Status of the account when the payment was made.

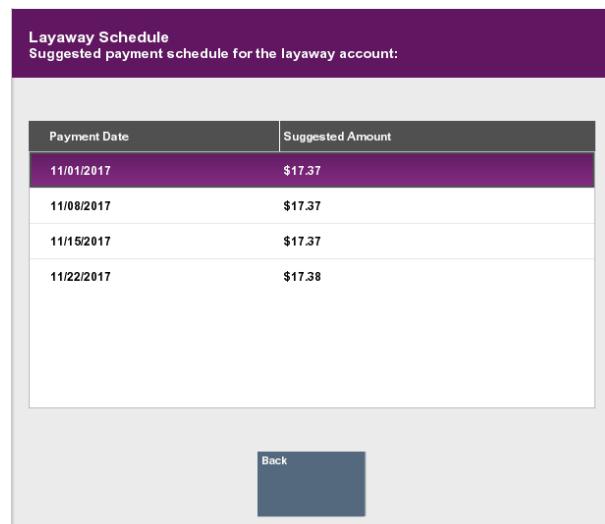
- **Type** - Type of payment.
 - **Item ID** - Item ID for the payment type.
 - **Amount** - Amount of the payment.
 - **Store** - ID of the store.
 - **Reg** - ID of the register.
 - **Tran Seq** - Sequence number of the transaction.
4. Click **Back** to return to the layaway.

View Layaway Payment Schedule

To view the payment schedule for a layaway account:

1. [Open a Layaway](#)
2. Click **Layaway Details**.
3. Click **View Payment Schedule**.

Figure 10–7 Layaway Payment Schedule



Payment Date	Suggested Amount
11/01/2017	\$17.37
11/08/2017	\$17.37
11/15/2017	\$17.37
11/22/2017	\$17.38

Xstore Point of Service opens a window showing the payment schedule for the account:

- **Payment Date** - Due date for the payment.
 - **Suggested Amount** - Suggest amount for the payment.
4. Click **Back** to return to the layaway.

View Layaway Activity History

To view the activity history for a layaway account:

1. [Open a Layaway](#)
2. Click **Layaway Details**.
3. Click **View Activity History**.

Xstore Point of Service opens a window showing the history of all actions performed on the account:

- **Date** - Date of the payment.
 - **Status** - Status of the account when the action was performed.
 - **Type** - Type of activity.
 - **Item ID** - Item ID for the action, or the ID of the item used in the action.
 - **Amount** - Amount of the activity.
 - **Store** - ID of the store.
 - **Reg** - ID of the register.
 - **Tran ID** - ID of the transaction.
4. Click **Back** to return to the layaway.

Automatic Prompts for Accounts Requiring Attention

When you associate a customer with a sale transaction, the system may determine that the customer has a layaway account that requires attention. In this case, the system may display a prompt indicating that action is required on the layaway account. These prompts can include

- A layaway payment is due. If this is the case, indicate whether the layaway payment should be added to the current transaction.
- A layaway payment is overdue. If this is the case, indicate whether the layaway payment should be added to the current transaction.

Note: This may include an overdue payment fee.

- Layaway items are available for pickup. Indicate whether the items should be picked up in the current transaction.

11

Special Orders

A Special Order transaction is typically performed when a customer wants to purchase an item that is not currently available in the store. The item may be out of stock or unavailable for any reason. A special order item may be any saleable item from the store's inventory. Non-inventory items may also be special-ordered if your store policy permits it.

When an item is out of stock, the customer cannot take possession of the item immediately, so the store orders it from a vendor, warehouse, or another store. When the special order item arrives in the store, it is shipped to the customer or the customer is notified to pick it up at the store.

The Special Order function includes the order-entry process for a special order item, entering the related customer information, and processing any special fees that may be associated with the special order.

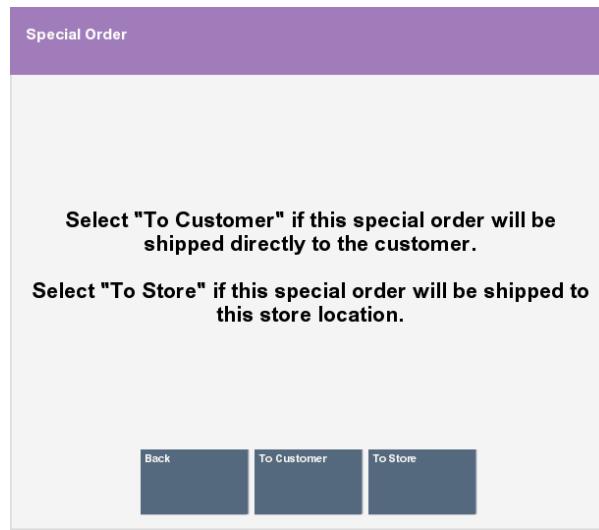
Create a Special Order

To create a new special order:

1. Click **Extended Transactions** in the Register Sale screen.
2. Click **Special Order**.

Xstore Point of Service will open a prompt listing open special orders for the customer, or an indication that there are no open special orders.

3. Perform the appropriate action:
 - Click **New** if no customer is associated with the transaction. Continue with Step 4.
 - Click **Set Up New** if a customer is associated with the transaction. Continue with Step 5.
4. Associate a customer with the transaction. See [Associate a Customer with a Transaction](#).

Figure 11–1 Special Order Shipping/Pick Up Options

5. Select the destination for the special order:
 - **To Customer** - Ship the order directly to the customer. Continue with Step 6
 - **To Store** - Ship the order to the local store where the customer will pick it up. Continue with Step 8.
6. If necessary, enter or update the shipping information for the customer:

Note: If your system is configured to provide [Address Lookup](#) functionality, an **Address Lookup** button will be available to allow you to quickly look up customer addresses using minimal information.

- **Send To** - Name of the customer.
 - **First** - First name.
 - **Middle** - Middle initial.
 - **Last** - Last name.
- **Address** - Shipping address.

Note: The fields in this section will depend upon configuration and nationality.

- First line of the shipping address.
- Second line of the shipping address.
- **Zip** - Zip or postal code.
- **State** - State or province.
- **City** - City name.
- **Apt** - Apartment.

- **Country** - Country name. Click the **Change Country** button to change this value. See [Change Country](#).
 - **Ship Via** - Name of the shipping company.
7. Click **Process**.
8. Enter the items for the special order. See [Entering Items](#).

Figure 11–2 Special Order Screen

The screenshot shows the Special Order screen with the following details:

Customer Information:

- Account ID: S040100100004
- Special Order Status: New
- Setup Date: 10/25/17
- Customer #: C099802
- Customer Name: Greely Campbell
- Address: 4422 Stony Parkway Bldg F, Solon, OH 44139
- Phone: 123-456-7890
- Sale Amount: \$100.72
- Balance Due: \$0.00
- Open Items: 2

Items:

Item	Unit Price	Qty	Ext Price
DRAWSTRING PEASANT DRESS	\$89.50	1	\$89.50
Goose Down Pillow	\$14.00	1	\$14.00
Total:	\$10.50		(\$10.50)

Transaction Summary:

Items: 9	Tax: \$7.22	Fees: \$0.00	Subtotal: \$101.22
Associate: John Smith		Amount Due: \$108.44 >	

Buttons:

- Help
- Exit Special Order
- Sell Non-Merch
- Edit Account
- View History
- Item Lookup
- Add Tenders
- Warranty
- View Customer

9. If necessary, enter the expected arrival date for the order, then press Enter.

Figure 11–3 Expected Receipt Date Prompt

The screenshot shows the Expected Receipt Date prompt with the following details:

Text Field: 10/25/2017

Instructions: Enter item expected date.

10. Click the appropriate option:
- Click **Exit Special Order** to exit special order mode and perform additional transaction processing.
 - Click **Complete Transaction** to proceed to tendering after completing the special order.
11. If necessary, enter the amount of the special order deposit, then press Enter.

Figure 11–4 Special Order Deposit Prompt

The screenshot shows the Special Order Deposit prompt with the following details:

Text Field: 22.41

Instructions: Enter the deposit amount.

Note: This option is only available if you clicked **To Store** in Step 5. Items that are shipped to the customer must be paid in full in the same transaction in which the order is created.

- If you clicked **To Store** in Step 5, special order creation is complete. Continue the transaction.
 - If you clicked **To Customer** in Step 5, continue with Step 12
12. If necessary, click **OK** to confirm that a shipping fee has been added to the special order.
- Continue the transaction.

Open an Existing Special Order

To open an existing special order:

1. Click **Extended Transactions** in the Register Sale screen.

2. Click **Special Order**.

Xstore Point of Service will open a prompt listing open special orders for the customer, or an indication that there are no open special orders.

- To select the special order from the list, continue with Step 6.
- To search for the special order, continue with Step 3.

3. If necessary, click **Special Order Search**.

Figure 11–5 Special Order Search

The screenshot shows a software interface titled "Special Order Search" with the sub-instruction "Enter search criteria." Below the title, there are five input fields for searching: "Account ID", "Last Name", "First Name", "Customer #", and "Phone #". At the bottom of the screen, there are four buttons arranged horizontally: "Back", "Help", "Set Up New", and "Process".

4. Enter the search information for the special order:

Note: You can also scan the receipt for the special order to open it.

- **Account ID** - ID of the special order.
- **Last Name** - Last name of the customer associated with the special order.
- **First Name** - First name of the customer associated with the special order.
- **Customer #** - ID of the customer associated with the special order.
- **Phone #** - Phone number of the customer associated with the special order.

5. Click Process.

A list of special orders matching the entered criteria opens.

Figure 11–6 Special Order Search List

Special Order Search Select one of the following special order accounts.		
Name Account ID	Setup Date Status	Balance
Campbell, Greely S0401003000003	10/25/2017 Open	\$77.75
Back	Set Up New	Select & Continue

6. If necessary, select the special order in the list:

- Click the special order.
- Use the up and down arrows to highlight the correct special order, then press the Spacebar.

7. Click Select & Continue.

The special order opens.

Figure 11–7 Special Order Account Screen

Info	Offers	Messages	Keypad	Customer
Account ID S040100300003				
Special Order Status Open				
Setup Date 10/25/17				
Customer # C99999102				
Customer Address	Greely Campbell			
Phone 123-456-7890				
Sale Amount \$86.39				
Balance Due \$77.75				
Open Items 1				
Special Order				
Select an option from the menu.				
Items 0	Tax \$0.00	Fees \$0.00	Subtotal \$0.00	
Associate:				
Amount Due \$0.00 >				
Cancel	Help	Exit Special Order	Cancel Special Order	View History
				View Customer

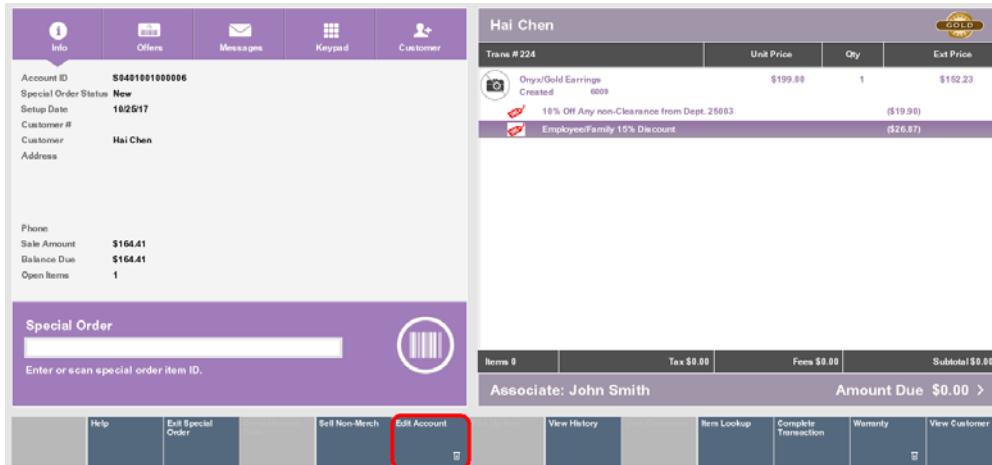
Modify Special Order Items

Changes can be made to items in a special order.

To make changes to special order items:

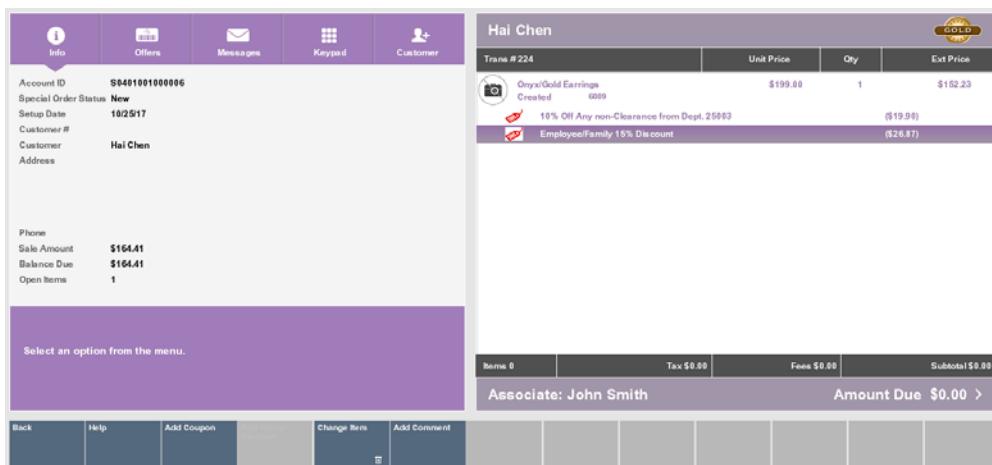
- If necessary, [Create a Special Order](#).

Figure 11–8 Special Order Edit Account Option



- Click **Edit Account**.

Figure 11–9 Special Order Edit Account Options



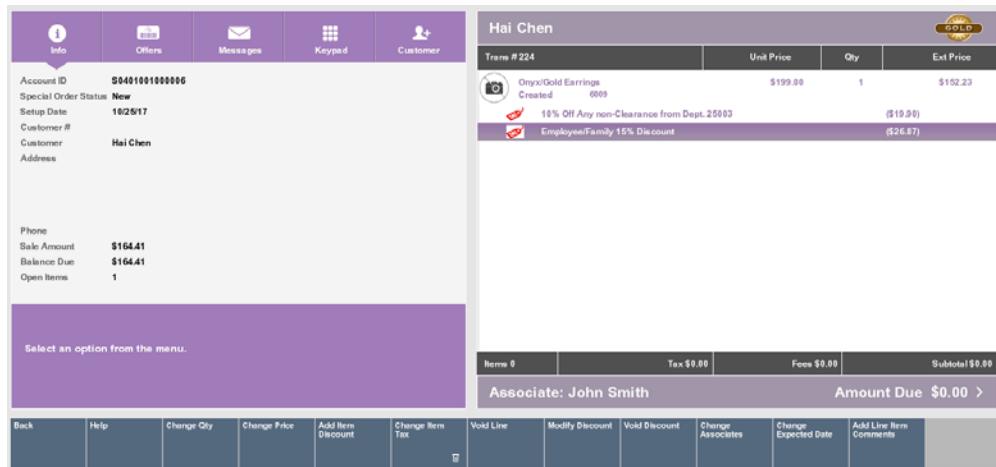
- Perform the appropriate action:

- [Change the Item Expected Date](#)
- Make changes to the line items. See [Chapter 4, Processing Tenders](#) for more information about changing items in a transaction.

Change the Item Expected Date

To change the expected date for an item:

- Click **Change Item**.

Figure 11–10 Special Order Change Item Options

2. Click **Change Expected Date**.
3. Select the item in the **View Port**:
 - Click an item.
 - Use the up and down arrows to select an item, then press the Spacebar to highlight it.
4. Enter the expected arrival date for the item.

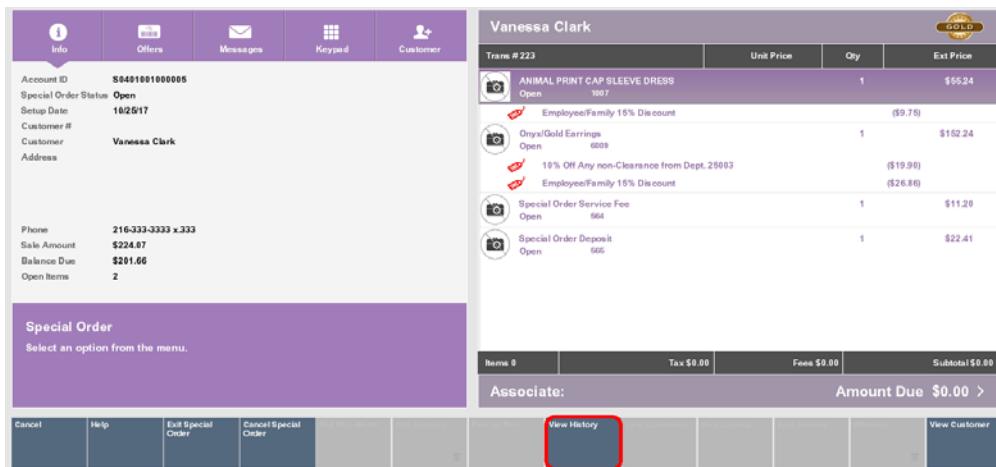
Figure 11–11 Special Order Item Expected Date

5. Press Enter.
- The expected arrival date for the item is changed.

View Special Order History

To view the customer's special order history:

1. [Create a Special Order](#) or [Open an Existing Special Order](#).
2. Click **View History** in the special order screen.

Figure 11–12 Special Order View History Option

Xstore Point of Service opens a window displaying the previous special order activities associated with the customer.

Figure 11–13 Special Order View History

Special Order History S040100100005 History for the special order account.				
Date	Expected	Type	Status	Amount
10/25/2017	10/25/2017	ITEM	OPEN	\$56.24
10/25/2017		ITEM	OPEN	\$152.24
10/25/2017		SETUP_FEE	OPEN	\$11.20
10/25/2017		DEPOSIT	OPEN	\$22.41

Back OK

The following information is shown for each special order:

- **Date** - Date the special order was created.
 - **Expected** - Expected delivery date for the special order.
 - **Type** - Type of activity.
 - **Status** - Status of the special order.
 - **Amount** - Amount associated with the activity.
3. Click **OK** to close the window and return to the special order.

Pick Up a Special Order

When a customer arrives at a store to pick up special order items, do the following:

1. [Open an Existing Special Order.](#)
2. Click **Pick Up Item**.
3. Select the items to pick up:
 - Click the item.
 - Use the up and down arrows to highlight the correct items, then press the Spacebar.
 - Click **Pick Up All** to select all items.
4. Click **Select & Continue**.
5. Click the appropriate option:
 - Click **Exit Special Order** to exit special order mode and perform additional transaction processing.
 - Click **Complete Transaction** to proceed to tendering after completing the special order.

Cancel a Special Order

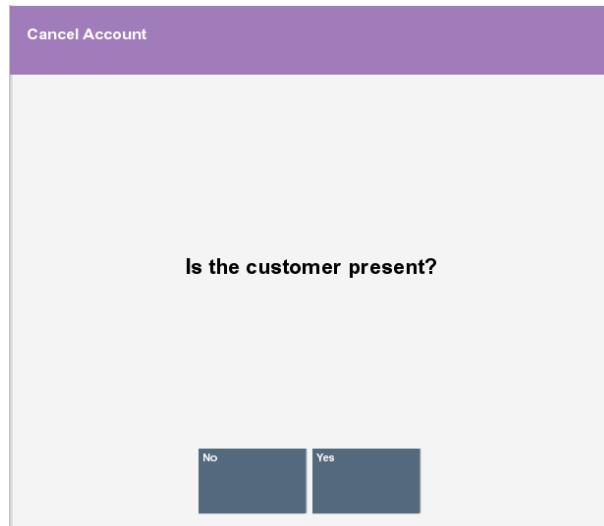
Special orders to be sent to a store can be canceled at a store. To cancel a special order:

Note: To cancel a gift registry order, assign the gift registry prior to canceling the order (see [Sell Gift Registry Items](#)).

1. [Open an Existing Special Order.](#)
2. Click **Cancel Special Order**.

A confirmation prompt opens.

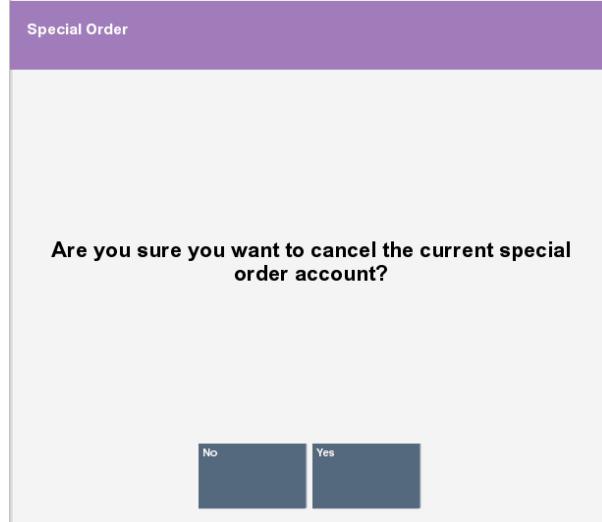
Figure 11–14 Customer Present Prompt



3. Indicate whether the customer is present:
 - Click **Yes** if the customer is present.
 - Click **No** if the customer is not present.

If the customer is present, a second confirmation prompt opens.

Figure 11–15 Confirm Cancellation Prompt



Note: If the customer is not present, the special order cannot be cancelled in register mode. See *Oracle Retail Xstore Point of Service Manager's Guide* for more information.

4. Indicate whether to cancel the special order:

- Click **Yes** to cancel the special order.
The special order is canceled and the refund amount is applied to the transaction.
- Click **No** to return to the special order without canceling it.

12

Work Orders

Work orders are labor services requested by a customer and performed by the retailer or an outside contractor. They may be further sub-classified as repairs or alterations.

The system provides work order tracking functionality that allows a retailer to take in merchandise from the customer and associate it with a POS tracking record. The record identifies the product, its value, condition, customer information, and the work to be done. The kinds of work that are performed on a product are called work order tasks.

- Repair service is typically found in retail environments that sell and service watches, athletic equipment, and footwear. Repair services usually focus on the repairing, setting up, or fitting of products for the retail customer. An example of a repair is fixing a flat tire at a bicycle shop. A setup example is a Hot-Tub purchase in which installers are required to connect the filter and heating systems.
Repairs may vary depending on the service being performed. For instance, a sporting goods outlet may track the service associated with the sizing and drilling of a bowling ball as a repair service. The similarities of this process and their actual repair activities allow retailers to utilize the same POS function to perform multiple activities.
- Alteration services are primarily found in clothing retail locations. Retailers provide an important service by altering the garments that they sell to their customers. This service may be a billable activity to the customer or it may be without cost. Some retailers extend this offer to non-customers or even to customers who have a product for alteration that was not purchased through a particular outlet; this is generally performed as a value-added service to loyal customers.
- Tasks are the detail operations that are performed on a Work Order item and can be selected from a list. The system also maintains a fixed rate of cost for the task, a description, and a free-form comment field that may be used to describe the task to be performed. For example, a comment may contain the specific text to engrave or embroider on an item.

Create a Work Order

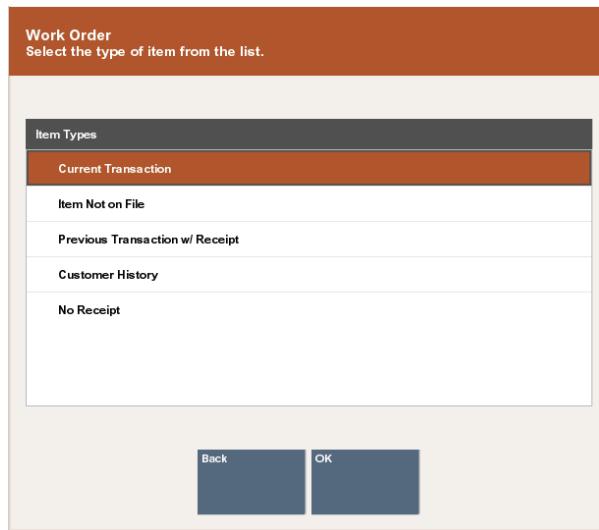
A work order must be associated with a regular sale transaction and a customer name. To create a work order:

1. Click **Extended Transaction** in the Register Sale screen.
2. Click **Work Order**.

A window will open prompting for more information. The type of window will depend upon whether there is a customer currently associated with the transaction, and whether the customer currently has any work orders open.

3. Click **Set Up New**.
4. If necessary, associate a customer with the transaction. See [Associate a Customer with a Transaction](#).

Figure 12–1 Work Order Item Type



5. Click the method to use to find the item on which the work order will be performed, then click **OK**:
 - **Current Transaction** - The item is in the current sale transaction. This option is only available if there is at least one item in the current sale transaction.
Xstore Point of Service displays a lists of items in the current transaction that are eligible for a work order. Continue with [Current Transaction](#).
 - **Item Not on File** - The item requiring work is not in the system.
Xstore Point of Service prompts for a description of the item. Continue with [Item Not on File](#).
 - **Previous Transaction w/ Receipt** - The item is identified on the receipt from a previous transaction.
Xstore Point of Service prompts you to enter information from the original transaction receipt. Continue with [Previous Transaction with Receipt](#).
 - **Customer History** - Find the item by searching the customer's previous purchase transaction history.
Xstore Point of Service displays a list of items previously purchased by the customer that are eligible for a work order. Continue with [Customer History](#).
 - **No Receipt** - The item has no receipt available or is not referenced on a receipt.
Xstore Point of Service prompts for an item ID. Continue with [No Receipt](#).

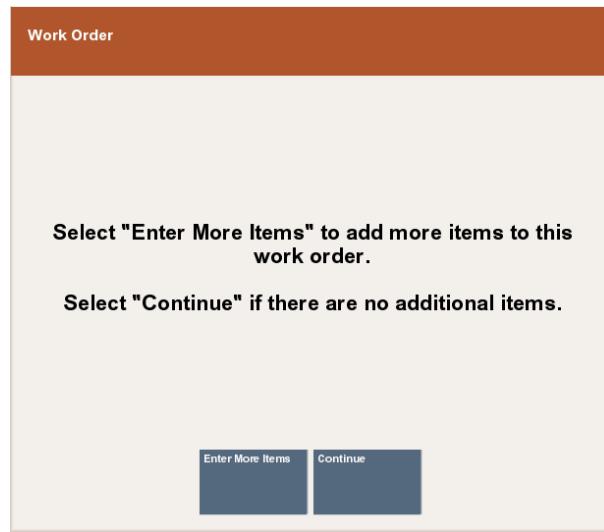
Current Transaction

After selecting **Current Transaction** in Step 5, do the following:

1. Select the items in the [Message Window](#).
 - Click the items.
 - Use the up and down arrows to highlight the correct items and press the Spacebar.
2. Click **OK**.

Xstore Point of Service prompts whether there are additional work order items.

Figure 12–2 Work Order Prompt for Additional Work Order Items



3. Select whether to add additional work order items:
 - Click **Enter More Items** to add more work order items. Repeat Steps 1 to 3.
 - Click **Continue** to continue with [Work Order Categories](#).

Item Not on File

After selecting **Item Not on File** in Step 5, do the following:

Figure 12–3 Work Order Item Description Prompt



1. Enter a description of the item and press Enter.

Xstore Point of Service prompts for the value of the item.

Figure 12–4 Work Order Item Value Prompt

2. Enter the value of the item and press Enter.

Xstore Point of Service prompts whether there are additional work order items. See [Figure 12–2](#).

3. Select whether to add additional work order items:

- Click **Enter More Items** to add more work order items. Repeat Steps 1 to 3.
- Click **Continue** to continue with [Work Order Categories](#).

Previous Transaction with Receipt

After selecting **Previous Transaction w/ Receipt** in Step 5, do the following:

Figure 12–5 Work Order Original Transaction Search Form

1. Enter information about the original transaction:

- **Gift Receipt** - Indicates whether the receipt is a gift receipt.
- **Trans Barcode** - Barcode for the transaction.
- **Orig Ticket ID** - ID of the original ticket.
- **Orig Trans Date** - Date of the transaction.
- **Orig Store ID** - ID of the store where the transaction was performed.
- **Orig Register ID** - ID of the register that performed the original transaction.
- **Credit Card #** - Number of the credit card used in the original transaction.
- **Serial Number** - Serial number of the item.

2. Click **Process**.

Xstore Point of Service displays a list of items from the original transaction that are eligible for a work order.

3. Select the items to add to the work order.
 - Click the items.
 - Use the up and down arrows to highlight the correct items and press the Spacebar.
 4. Click **OK**.
- Xstore Point of Service prompts whether there are additional work order items. See [Figure 12–2](#).
5. Select whether to add additional work order items:
 - Click **Enter More Items** to add more work order items. Repeat Steps 3 to 5.
 - Click **Continue** to continue with [Work Order Categories](#).

Customer History

After selecting **Customer History** in Step 5, do the following:

Figure 12–6 Work Order Customer History-Previous Items Purchased

Date	Qty	Description	Amount
10/25/17	1	COTTON JERSEY TIERED DRESS	\$106.20
10/25/17	1	TIE WAIST SHIRT DRESS	\$69.50
10/25/17	1	BLK WHITE CAP SLEEVE DRESS	\$69.50
10/25/17	1	BLK WHITE CAP SLEEVE DRESS	\$69.50
10/25/17	1	PEASANT TOP JERSEY DRESS	\$79.99
10/25/17	1	ROLL SLEEVE SWEATER DRESS	\$79.99
10/25/17	1	ROLL SLEEVE SWEATER DRESS	\$79.99

1. Select the items to add to the work order.
 - Click the items.
 - Use the up and down arrows to highlight the correct items and press the Spacebar.
 2. Click **OK**.
- Xstore Point of Service prompts whether there are additional work order items. See [Figure 12–2](#).
3. Select whether to add additional work order items:
 - Click **Enter More Items** to add more work order items. Repeat Steps 1 to 3.
 - Click **Continue** to continue with [Work Order Categories](#).

No Receipt

After selecting **No Receipt** in Step 5, do the following:

Figure 12–7 Work Order Item ID Prompt



1. Enter the item:

- Scan the item.
- Enter the ID of the item and press Enter.

Note: If you do not know the item ID but your system has a Work Order SKU, you can enter that instead of the actual item ID. You can also use Item Not On File functionality to capture the item information

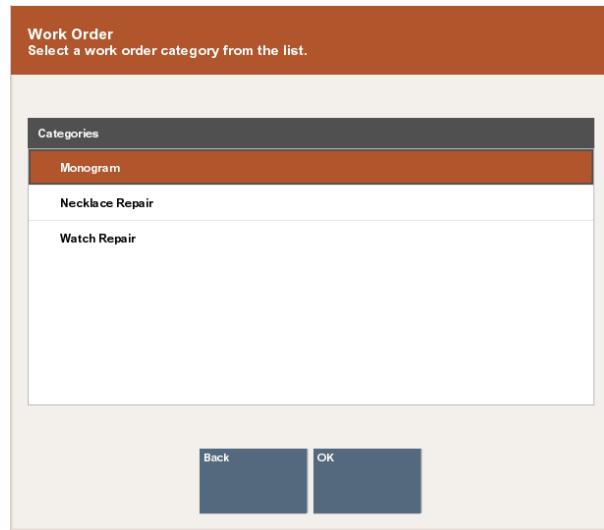
2. If necessary, enter the value of the item and press Enter.
3. If necessary, enter a description of the item.
4. Select whether to add additional work order items, see [Figure 12–2](#):
 - Click **Enter More Items** to add more work order items. Repeat Steps 1 to 4.
 - Click **Continue** to continue with [Work Order Categories](#).

Work Order Categories

Once you have identified the item(s) for the work order, you are prompted to select a work order category. Categories may include repairs, alterations, or any other categories that are determined by your store operations.

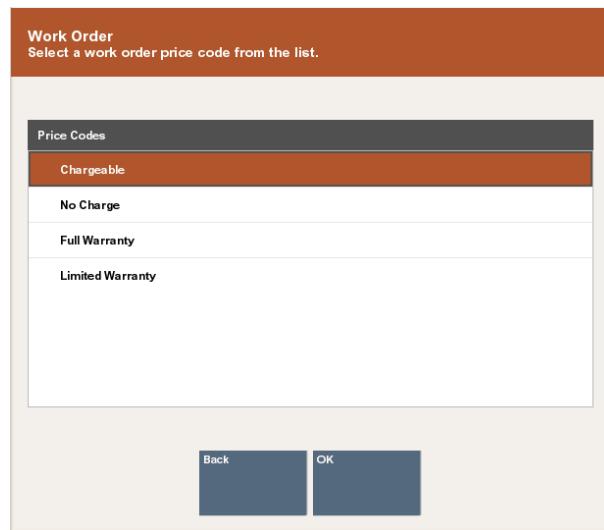
For example, repairs may include work order categories such as jewelry and watch repairs. Work order alterations may include categories such as men's clothing and children's clothing.

1. Select the work order category.

Figure 12–8 Work Order Categories

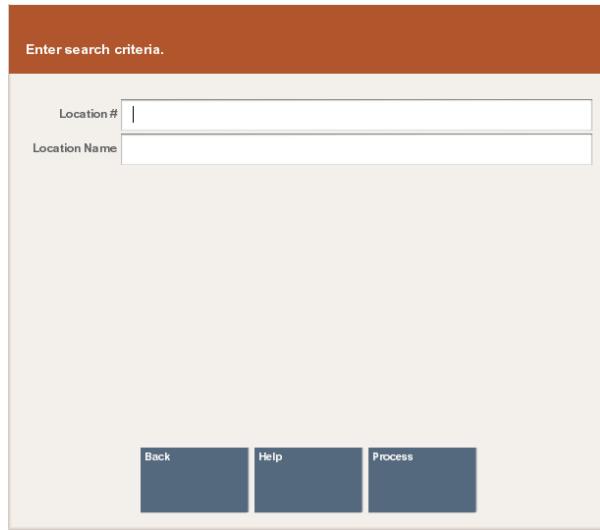
Note: The work order categories available depend upon the configuration of your system.

2. If necessary, select or enter additional information about the work order in the prompts. For example, you may need to enter warranty information or select a work order price code.

Figure 12–9 Work Order Warranty Plan**Figure 12–10 Work Order Price Code List**

3. If necessary, enter the information about where the work will be performed:

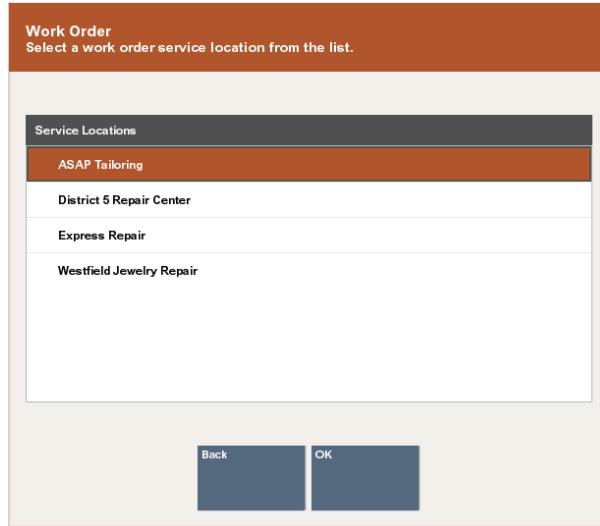
Figure 12–11 Work Order Location Search Form



The figure shows a screenshot of a search form titled "Enter search criteria." It contains two input fields: "Location #" and "Location Name". At the bottom are three buttons: "Back", "Help", and "Process".

- Enter the location information, then click **Process**:
 - **Location #** - ID for the location.
 - **Location Name** - Name of the location.
- Continue with Step 5.
- Leave the fields blank and click **Process** to view a list of available service locations.
 - Continue with Step 4.

Figure 12–12 Work Order Vendor List



The figure shows a list of service locations. The top header reads "Work Order" and "Select a work order service location from the list." The list itself is titled "Service Locations" and includes the following items:

- ASAP Tailoring
- District 5 Repair Center
- Express Repair
- Westfield Jewelry Repair

At the bottom are two buttons: "Back" and "OK".

4. If necessary, select the location where the work will be performed, then click **OK**:
 - Click the location.

- Use the up and down arrows to highlight the correct location and press the Spacebar.

Figure 12-13 Work Order Tasks List

Task	Price Type	Charge
3 Initial	ACTUAL	\$5.00
2 Initial	ACTUAL	\$7.00

5. Select the tasks to be performed on the item:
 - Click the task.
 - Use the up and down arrows to highlight the correct task and press the Spacebar.

Note: A task may not have a cost associated with it. If it does not have a cost, it may be an estimate. Estimates must be converted to actual amounts before the customer can pick up the item. Price categories such as No Charge and Warranty have zero amounts in the Charge column on the Task List form.

6. Click OK.

The work order appears in the [View Port](#).

Figure 12–14 Work Order Summary Information

The screenshot shows a software interface for managing work orders. At the top, there are five navigation icons: Info (highlighted in red), Offers, Messages, Keypad, and Customer. Below these are several input fields for customer and transaction details:

- Ticket ID: W9401091000010
- Work Order Status: NEW
- Setup Date: 10/26/17
- Priority:
- Expected Finish Date: 11/4/17
- Customer #: C9999882
- Customer Name: Grely Campbell
- Phone: 123-456-7890 123-123-1231 x.2312
- Number of Items: 1
- Total Item Value: \$799.00
- Balance Due: \$0.00

In the center, a section titled "Greyly Campbell" displays transaction details:

Trans # 238	Unit Price	Qty	Ext Price
3 Initial CREATED	\$5.00	1	ACTUAL

On the right, a summary table shows:

Items 0	Tax \$0.00	Fees \$0.00	Subtotal \$0.00
Associate: John Smith			Amount Due \$0.00 >

At the bottom, a menu bar contains the following items:

- Back
- Help
- Exit Work Order** (highlighted in red)
- Task Maint
- Item Maint
- Parts Maint
- Edit Line Item
- Work Order Maint
- History/Comments
- View Customer
- Complete Transaction** (highlighted in red)

7. Click the appropriate option:

- Click **Exit Work Order** to exit work order mode and perform additional transaction processing.
- Click **Complete Transaction** to proceed to tendering.

Open a Work Order

To open a work order:

- Click **Extended Transaction** in the Register Sale screen.
- Click **Work Order**.

Figure 12–15 Work Order Search Form

The screenshot shows a search form titled "Work Order Search" with the sub-instruction "Enter search criteria." It includes the following search fields:

- Account ID:
- Last Name:
- First Name:
- Customer #:
- Phone #: ..

At the bottom, there are four buttons:

- Back
- Help
- Process
- Set Up New

- If no customer is associated with the transaction, Xstore Point of Service prompts for the work order information. Continue with [No Customer Associated with the Transaction](#).

- If a customer is associated with the transaction, continue with [Customer Associated with the Transaction](#).

No Customer Associated with the Transaction

To open a work order when there is no customer currently assigned to a transaction:

1. Enter the work order information:
 - Scan the work order receipt.
The work order opens. Continue the transaction.
 - Enter the search criteria for the work order:
 - **Account ID** - ID of the work order.
 - **Last Name** - Last name of the customer associated with the work order.
 - **First Name** - First name of the customer associated with the work order.
 - **Customer #** - ID of the customer associated with the work order.
 - **Phone #** - Phone number of the customer associated with the work order.
2. Click **Process**.
Xstore Point of Service displays a list of work orders matching the entered criteria.
3. Select the work order:
 - Click the work order.
 - Use the up and down arrows to highlight the correct work order and press the Spacebar.
4. Click **Select & Continue**.
5. If necessary, associate a customer with the transaction. See [Associate a Customer with the Transaction](#).

Continue the transaction.

Customer Associated with the Transaction

To open a work order when a customer is assigned to a transaction:

- If Xstore Point of Service indicates that there is no work order associated with the customer, go to Step 1.
 - If one or more work orders is associated with the customer, Xstore Point of Service displays a list of those work orders. Go to Step 3.
1. Click Search.
Xstore Point of Service opens a work order search form. See [Figure 12-15](#).
 2. Enter the work order information:
 - Scan the work order receipt.
The work order opens. Continue the transaction.
 - Enter the search criteria for the work order:
 - **Account ID** - ID of the work order.
 - **Last Name** - Last name of the customer associated with the work order.

- **First Name** - First name of the customer associated with the work order.
- **Customer ID** - ID of the customer associated with the work order.
- **Phone #** - Phone number of the customer associated with the work order.

Xstore Point of Service displays a list of work orders matching the entered criteria.

3. Select the work order:
 - Click the work order.
 - Use the up and down arrows to highlight the correct work order and press the Spacebar.
4. Click **Select & Continue**.

The work order opens. Continue the transaction.

Modify a Work Order

To modify a work order:

1. If necessary, [Open a Work Order](#).

Figure 12–16 Work Order Modify Options



2. Click the appropriate option:
 - Click **Item Maint** to enter [Item Maintenance](#).
 - Click **Task Maint** to enter [Task Maintenance](#).
 - Click **Parts Maint** to enter [Parts Maintenance](#).
 - Click **Work Order Maint** to enter [Work Order Maintenance](#).
 - You can also [Edit a Line Item](#) in a work order.

The [Menu Buttons](#) provide task maintenance options.

Item Maintenance

The item maintenance functions allow you to change the work order item information by adding new items, deleting items from the work order, or editing an item's value and description. The items may come from several different sources including the current transaction, a previous transaction (with or without a receipt), customer history, or it may be an item not found in the database.

Figure 12–17 Work Order Item Maintenance Options



The following actions can be performed on work order items:

- [Add an Item](#)
- [Delete an Item](#)

- [Edit an Item Value](#)
- [Edit an Item Description](#)

Add an Item

To add an item to a work order:

1. Click **Add Item**. See [Figure 12-17](#).
2. Select the method used to find the item on which the work order will be performed. See [Figure 12-1](#).
 - **Current Transaction** - The item is in the current sale transaction. This option is only available if there is at least one item in the current sale transaction.
Xstore Point of Service displays a lists of items in the current transaction that are eligible for a work order. Continue with [Current Transaction](#).
 - **Item Not on File** - The item requiring work is not in the system.
Xstore Point of Service prompts for a description of the item. Continue with [Item Not on File](#).
 - **Previous Transaction w/ Receipt** - The item is identified on the receipt from a previous transaction.
Xstore Point of Service prompts you to enter information from the original transaction receipt. Continue with [Previous Transaction with Receipt](#).
 - **Customer History** - Find the item by searching the customer's previous purchase transaction history.
Xstore Point of Service displays a list of items previously purchased by the customer that are eligible for a work order. Continue with [Customer History](#).
 - **No Receipt** - The item has no receipt available or is not referenced on a receipt.
Xstore Point of Service prompts for an item ID. Continue with [No Receipt](#).

After performing the appropriate procedure, continue the transaction.

Delete an Item

To delete an item from a work order:

1. Click **Delete Item**.

Note: This option is only available when there are two or more items on the work order.

Xstore Point of Service displays a list of items in the transaction.

2. Select the item to delete:
 - Click the item.
 - Use the up and down arrows to highlight the correct item and press the Spacebar.
3. Click **OK**.

The item is removed from the work order.

Edit an Item Value

To change the value of an item:

1. Click **Edit Item Value**. See [Figure 12–17](#).

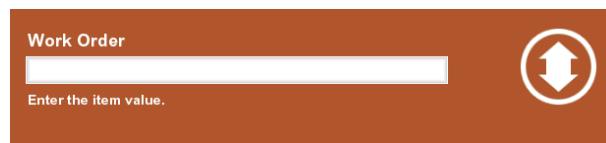
Xstore Point of Service displays a list of items in the transaction.

2. Select the item:
 - Click the item.
 - Use the up and down arrows to highlight the correct item and press the Spacebar.

3. Click **OK**.

Xstore Point of Service prompts for the new price.

Figure 12–18 Work Order Item Value



4. Enter the new price.

5. Press Enter.

The price of the item is changed.

Edit an Item Description

To change the description of an item:

1. Click **Edit Item Description**. See [Figure 12–17](#).

Xstore Point of Service displays a list of items in the transaction.

2. Select the item:
 - Click the item.
 - Use the up and down arrows to highlight the correct item and press the Spacebar.

3. Click **OK**.

Xstore Point of Service prompts for the new description.

Figure 12–19 Work Order Item Description



4. Enter the new description.

5. Click **OK**.

The description of the item is changed.

Edit a Line Item

Edit Line Item functions allow you to change the quantity, price, and tax on a line item in the work order.

A work order may contain one or more line items, and they can be edited during or after its creation. If the work order is still being created, select the Edit Line Item option while in the Work Orders mode.

Figure 12–20 Work Order Edit Line Item Options



The options for editing a line item are the same as those for other transactions. See [Modify a Line Item](#) in Chapter 8, [Modify a Transaction](#) for more information.

Task Maintenance

Task maintenance functions allow you to modify the work order tasks by adding new tasks, deleting work order tasks, and adding additional information pertaining to a specific task.

Figure 12–21 Work Order Task Maintenance Options



The following actions can be performed on tasks in a work order:

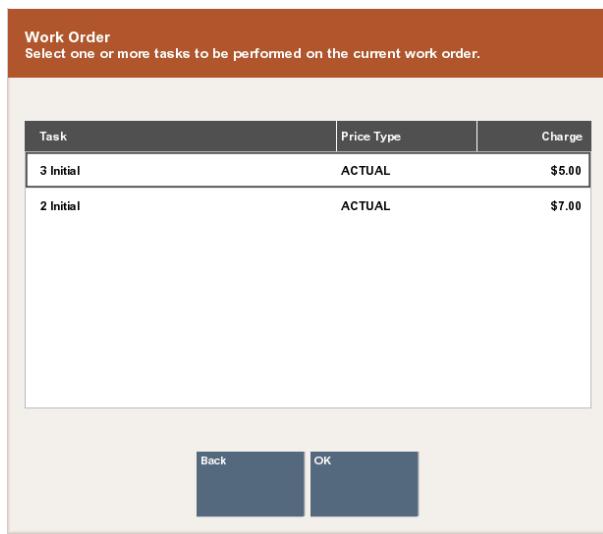
- [Add a Task](#)
- [Delete a Task](#)
- [Add an Instruction](#)
- [Convert an Estimate](#)
- [Discount a Task](#)

Add a Task

To add a task:

1. Click **Add Task**.

Xstore Point of Service displays a list of tasks that are available for the work order service location.

Figure 12–22 Work Order Task List

2. Select the task to add:

- Click the task.
- Use the up and down arrows to highlight the correct task and press the Spacebar.

3. Click **OK**.

The task is added to the transaction.

Delete a Task

To add a task:

1. Click **Delete Task**.

Xstore Point of Service displays a list of tasks that are currently on the work order.

2. Select the task to delete:

- Click the task.
- Use the up and down arrows to highlight the correct task and press the Spacebar.

3. Click **OK**.

The task is deleted from the transaction.

Add an Instruction

Instructions can be added to a work order to provide additional information about the work. To add an instruction:

1. Click **Add Instruction**.

Xstore Point of Service displays a list of tasks that are currently on the work order.

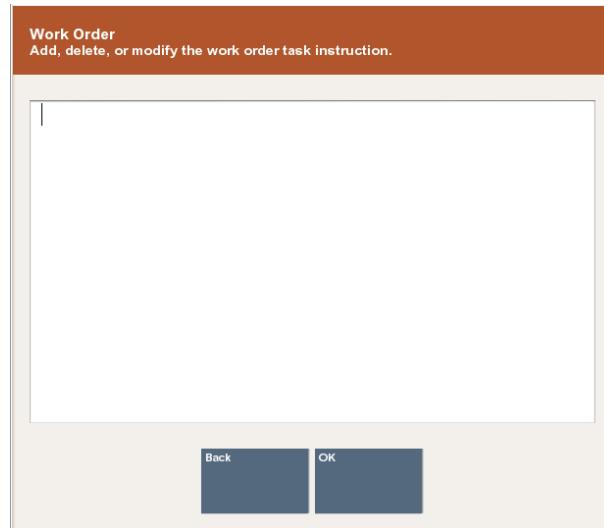
2. Select the task for which to add an instruction:

- Click the task.
- Use the up and down arrows to highlight the correct task and press the Spacebar.

3. Click **OK**.

Xstore Point of Service displays a text entry prompt.

Figure 12-23 Work Order Task Instruction Prompt



4. Press Enter when you are done entering the instruction.

The instruction is added to the task.

Convert an Estimate

Converting a estimate changes an estimated cost amount to an actual cost amount. An estimated cost is a best guess for the final cost of performing the task, and it is assigned when the work order is created. After the task is completed, the actual cost is known, and the estimate can be converted so that the final price can be calculated. To convert an estimate:

1. Click Convert Estimate.

Xstore Point of Service displays a list of the tasks in the work order that have estimated costs.

Figure 12–24 Work Order Estimate Task List

Work Order
Select an estimated task to convert.

Task Status	Charge Price Type	Qty
Replace Battery OPEN	\$595 ESTIMATE	1

Back **OK**

2. Select the task for which to convert an estimate:
 - Click the task.
 - Use the up and down arrows to highlight the correct task and press the Spacebar.
3. Click **OK**.

Xstore Point of Service displays a list of the tasks with actual costs that are applicable to the work order category (for example, a repair or alteration).

Figure 12–25 Work Order Actual Price Type

Work Order
Select one or more tasks to be performed on the current work order.

Task	Price Type	Charge
Replace Bezel	ACTUAL	\$6.00

Back **OK**

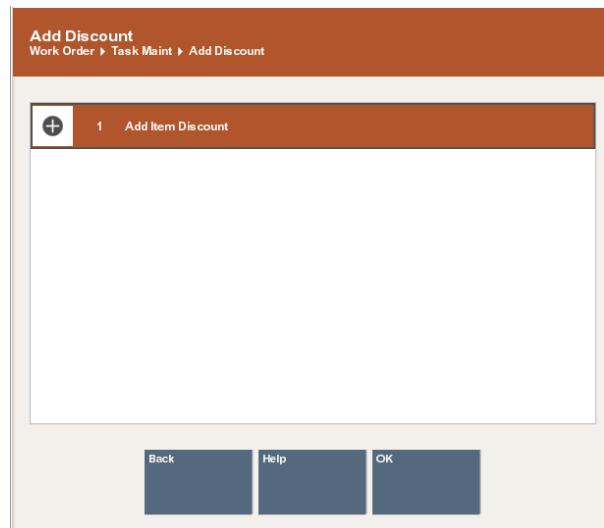
4. Select the appropriate task type to use to set the amount:
 - Click the task type.
 - Use the up and down arrows to highlight the correct task type and press the Spacebar.
5. Click **OK**.

The selected work order cost is applied to the task that previously had an estimated cost.

Discount a Task

The procedure for applying a discount to a task is the same as the procedure for applying a discount to any other item. See [Item Discount](#) for more information.

Figure 12–26 Work Order Task Discount Option



Parts Maintenance

The Parts Maintenance functions allow you to add or delete supplementary parts from a work order. A part may be anything that is required to complete a task. One or more parts may be associated with a work order, and they can be added or deleted during or after its creation.

Figure 12–27 Work Order Parts Maintenance Options



The following actions can be performed on parts in a work order:

- [Add a Part](#)
- [Delete a Part](#)

Add a Part

To add a part to a work order:

1. Click [Add Parts](#).
- Xstore Point of Service prompts for a part ID.
2. Enter the part number. See [Entering Items](#).
 3. The part is added to the work order.

Delete a Part

To delete a part from a work order:

1. Click Delete Part.

Xstore Point of Service displays a list of parts in the work order.

2. Select the part to delete:

- Click the part.
- Use the up and down arrows to highlight the correct part and press the Spacebar.

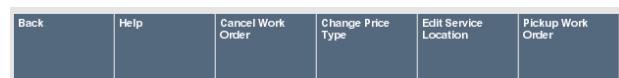
3. Click OK.

The part is removed from the work order.

Work Order Maintenance

Work Order maintenance functions allow you to add, change, and maintain work orders.

Figure 12–28 Work Order Maintenance Options



The following maintenance actions can be performed on a work order:

- [Cancel the Work Order](#)
- [Change the Price Type](#)
- [Edit an Approved Amount](#)
- [Edit the Priority](#)
- [Edit the Notice Date](#)
- [Edit the Finish Date](#)
- [Edit the Service Location](#)
- [Edit the Contact Method](#)
- [Edit the Account Status](#)

Cancel the Work Order

To cancel the current work order:

1. Click Cancel Work Order.

Xstore Point of Service prompts whether to cancel the work order.

2. Click Yes.

The work order is removed from the transaction and the refund amount applied to the transaction balance.

Change the Price Type

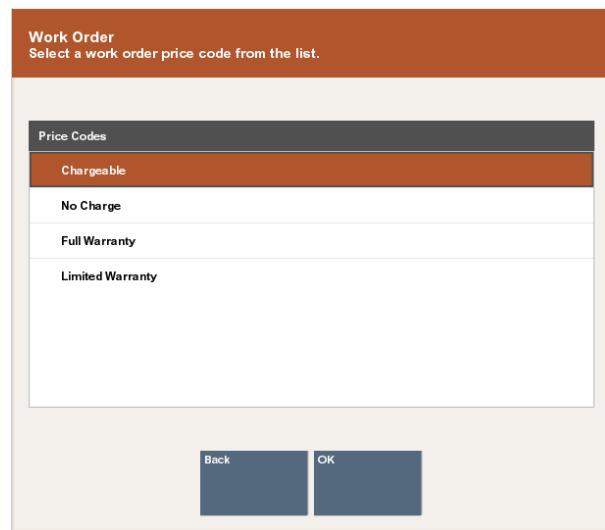
Changing a price type can change the price from Actual to Estimated, Estimated to Actual, or to change from Chargeable to Warranty. You may also select No Charge. For example, a customer may not have the warranty information in-hand when the work order is set up. If the customer returns at a later date with proof of a valid warranty, you can use this option to change the work order price from Chargeable to Full Warranty or Limited Warranty.

To change the price type for the work order:

1. Click Change Price Type.

Xstore Point of Service prompts for the new price code.

Figure 12-29 Work Order Price Code List



2. Select the price type:

- Click the price type.
- Use the up and down arrows to highlight the correct price type and press the Spacebar.

3. Click OK.

The price type is applied to the work order and the price is changed for the new price type.

Edit an Approved Amount

The approved amount is the amount that has been pre-approved by a customer for the repair.

To change the approved amount:

1. Click Edit Approved Amount.

Xstore Point of Service prompts for the new amount, with the current approved amount entered as the default.

2. Enter the new approval amount and press Enter.

Note: The new amount entered here must be greater than the amount for any tasks on the work order.

The new pre-approved amount for the work is entered for the work order.

Edit the Priority

To change the priority of a work order:

1. Click **Edit Priority**.

Xstore Point of Service displays a list of priority levels for a work order.

2. Select the new priority:

- Click the priority.
- Use the up and down arrows to highlight the correct priority and press the Spacebar.

3. Click **OK**.

The priority for the work order is updated.

Edit the Notice Date

The Notice Date is the date that a notice was sent to the customer.

To change the date that a notice was sent to the customer:

1. Click **Edit Notice Date**.

Xstore Point of Service prompts for the last customer notice date.

2. Enter the date the customer was most recently notified about this work order and press Enter.

The notice date is updated for the work order.

Edit the Finish Date

The Finish Date is the date the finished item has been promised to the customer.

To change the promised date for the finished work order to be ready for the customer:

1. Click **Edit Finish Date**.

Xstore Point of Service prompts for the new date the work order repair/alteration will be completed

2. Enter the date this work order will be finished and press Enter.

Note: This date must be in the future.

The finish date for the work order is updated.

Edit the Service Location

To change the location where the work will be performed:

1. Click **Edit Service Location**.

Xstore Point of Service prompts for the location information.

2. Enter the information about where the work will be performed:
 - Enter the location information, then click **Process**:
 - **Location #** - ID for the location.
 - **Location Name** - Name of the location.The service location is updated to the entered location. Continue the transaction.
 - Leave the fields blank and click **Process** to view a list of available service locations.
Continue with Step 3.
3. If necessary, select the location where the work will be performed:
 - Click the location.
 - Use the up and down arrows to highlight the correct location and press the Spacebar.
4. Click **OK**.

The service location is updated to the entered location.

Edit the Contact Method

To modify the method of communication used to contact a customer:

1. Click **Edit Contact Method**.
Xstore Point of Service displays a list of contact methods for the customer.
2. Select the new contact method:
 - Click the contact method.
 - Use the up and down arrows to highlight the correct contact method and press the Spacebar.
3. Click **OK**.

The contact method for the work order is updated.

Edit the Account Status

To change the status of a work order account:

1. Click **Edit Account Status**.
Xstore Point of Service displays a list of work order status options for the account.
2. Select the new account status:
 - Click the account status.
 - Use the up and down arrows to highlight the correct account status and press the Spacebar.
3. Click **OK**.

The account status for the work order is updated.

Work Order History and Comments

Work Order History and Comments functions allow you to view the history of the work order and add comments to it.

To view the history of a work order and add comments to it:

1. If necessary, [Open a Work Order](#).
2. Click **History/Comments**.

Figure 12–30 Work Order History/Comments Options



3. Perform the appropriate procedure:
 - [View History](#)
 - [View Comments](#)
 - [Add Comment](#)

View History

To view the history of the activities performed on a work order:

1. Click **View History**.

Xstore Point of Service displays a list of actions performed on the work order.

Note: If necessary, use the up and down arrow keys to scroll through the activities.

2. Click **OK** to close the list of activities.

View Comments

To view the comments entered for a work order:

1. Click **View Comments**.

Xstore Point of Service displays a list of comments entered for the work order.

Note: If necessary, use the up and down arrow keys to scroll through the comments.

2. Click **OK** to close the list of comments.

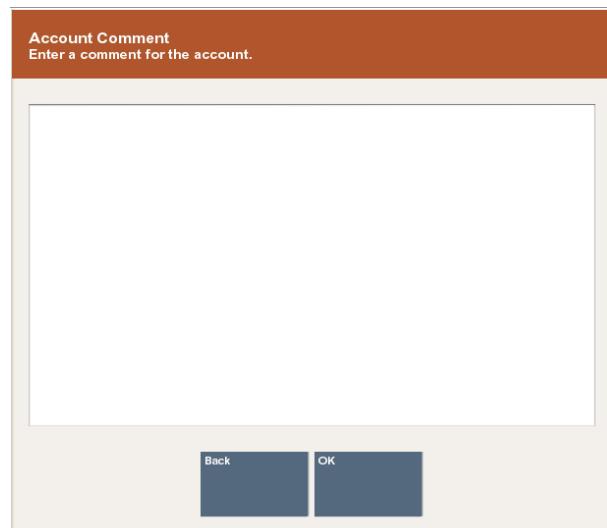
Add Comment

To add a comment to a work order:

1. Click **Add Comment**.

Xstore Point of Service prompts for the comment.

Figure 12–31 Work Order Account Comment Prompt



2. Enter the comment.
3. Click **OK** when finished.

The comment is added to the work order.

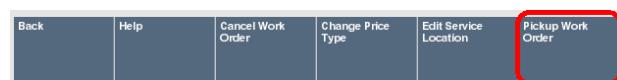
Pick Up a Completed Work Order

When a customer is associated with a sale transaction, the system may automatically notify you when the customer has a work order that requires attention. Click **OK** to acknowledge the message and close the window.

To pick up a work order:

1. If necessary, [Open a Work Order](#).
2. Click **Work Order Maintenance**.

Figure 12–32 Work Order Pickup Work Order Option



3. Click **Pickup Work Order**.

The completed work order is added to the sale screen and any amount due is applied to the transaction. Continue the transaction.

13

Warranties

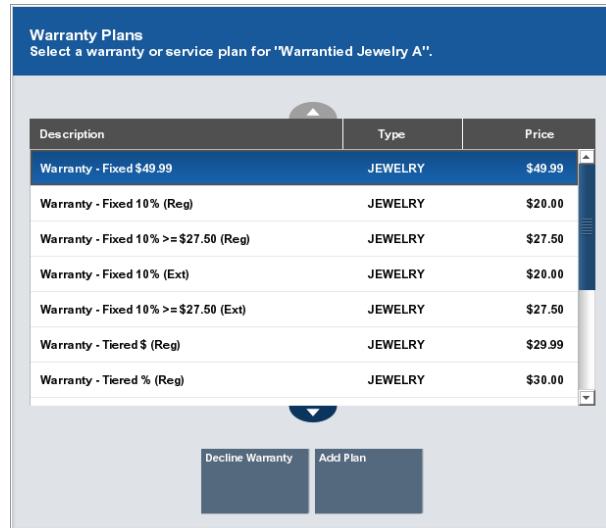
A warranty (also known as a service plan) is a promise made by a manufacturer or seller to support a product after its purchase. Typically, this involves the purchase of a contract that covers the costs of parts and service on an item beyond the manufacturer's original warranty period.

Additional benefits may be offered during the manufacturer's warranty and throughout the entire coverage period. A warranty may be offered to a customer during a sales transaction. It may also be used to bring the customer back to the store when the plan includes an option for periodic merchandise inspections.

Sell a Warranty

When you sell an item that is eligible for a warranty or service plan, the system automatically displays a list, in the [Message Window](#), of plans that are available for the specific item.

Figure 13–1 Warranty Plans



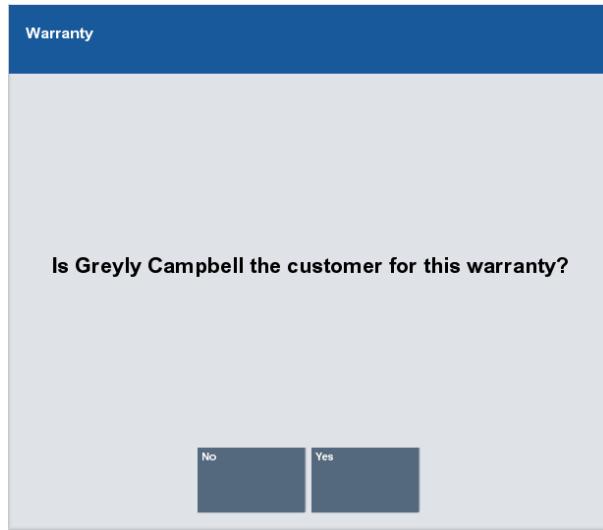
Note: Items that are eligible for warranty plans but have not been associated with any plan show a No Warranty Purchase icon next to them in the [View Port](#).

When are prompted to select a warranty:

1. Select whether to add a warranty:
 - Select **Decline Warranty** to continue the transaction without adding a warranty.
 - Select the warranty to add:
 - Click the warranty.
 - Use the up and down arrows to highlight the warranty.
 2. Click **Add Plan**.
- The warranty is added to the transaction and Xstore Point of Service prompts for the customer to assign to the warranty.
- If a customer is associated with the transaction, Xstore Point of Service prompts whether to assign the current customer to the warranty. Continue with Step 3.
 - If no customer is associated with the transaction, Xstore Point of Service prompts for customer information for the warranty. Continue with Step 4.

Note: Because a warranty must have an owner, you must associate a customer name with the warranty plan. The plan owner may be a different person than the customer who purchases the item and the warranty. For example, the customer may purchase an item as a gift and also wants to assign the warranty to the person receiving the gift.

Figure 13–2 Warranty Current Customer Prompt



3. Indicate whether to assign the warranty to the current customer:
 - Click **Yes** to assign the warranty to the current customer.
Continue the transaction.
 - Click **No** to assign the warranty to a different customer.
Xstore Point of Service prompts for the warranty owner.
4. Enter the warranty owner information.
5. Click **Yes**.

The person's name is added to the warranty.

Figure 13–3 Sale Customer Different than the Warranty Plan Owner

Greyly Campbell				
Trans #239		Unit Price	Qty	Ext Price
 Warranted Jewelry A Sale 9100		\$200.00	1	\$180.00
	10% Off Any non-Clearance from Dept. 25003			(\$20.00)
 Warranty - Fixed 10% (Reg) Warranty 9000020		\$20.00	1	\$20.00
			Vanessa Clark	

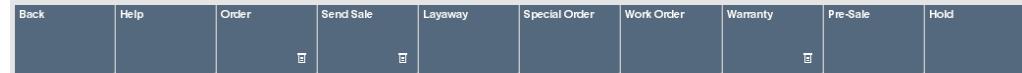
Add a Warranty After a Purchase

A customer may decide to purchase a warranty after purchasing an item. For example, the item may have been purchased as a gift and the recipient would like to purchase a warranty for the item. Perhaps the customer has reconsidered the warranty option and returns to the store later to purchase the warranty. You can also add a warranty plan in the current transaction if the customer declines the warranty at first and reconsiders the decision before the transaction is tendered.

To add a warranty after a purchase:

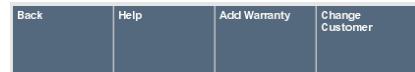
1. Click **Extended Transaction** in the Register Sale screen.

Figure 13–4 Extended Transaction Menu Buttons

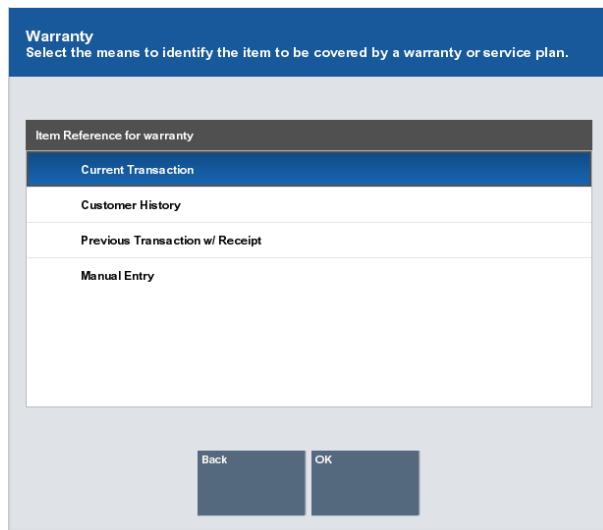


2. Click **Warranty**.

Figure 13–5 Warranty Menu



3. Click **Add Warranty**.

Figure 13–6 Add Item Warranty Options

4. Click the method to use to find the item on which the warranty will be applied, then click **OK**:
 - **Current Transaction** - The item is in the current sale transaction. This option is only available if there is at least one item in the current sale transaction.
Xstore Point of Service displays a lists of items in the current transaction that are eligible for a warranty. Continue with [Current Transaction](#).
 - **Previous Transaction w/ Receipt** - The item is identified on the receipt from a previous transaction.
Xstore Point of Service prompts you to enter information from the original transaction receipt. Continue with [Previous Transaction with Receipt](#).
 - **Customer History** - Find the item by searching the customer's previous purchase transaction history.
Xstore Point of Service displays a list of items previously purchased by the customer that are eligible for a warranty. Continue with [Customer History](#).
 - **Manual Entry** - The item has no receipt available and it is not in the customer's purchase history.
Xstore Point of Service prompts for an item ID. Continue with [Manual Entry](#).

Current Transaction

After selecting **Current Transaction** in Step 4, do the following:

1. Select the items in the [Message Window](#).
 - Click the item.
 - Use the up and down arrows to highlight the correct item and press the Spacebar.
2. Click **OK**.
Xstore Point of Service displays a list of warranties that can be added to the item. [Figure 13–1](#).
3. Select the warranty:

- Click the warranty.
 - Use the up and down arrows to highlight the correct warranty and press the Spacebar.
- 4. Click OK.**

The warranty is added to the transaction and Xstore Point of Service prompts for the customer to assign to the warranty.

- If a customer is associated with the transaction, Xstore Point of Service prompts whether to assign the current customer to the warranty. Continue with Step 5.
 - If no customer is associated with the transaction, Xstore Point of Service prompts for customer information for the warranty. Continue with Step 6.
- 5. Indicate whether to assign the warranty to the current customer:**
- Click **Yes** to assign the warranty to the current customer.
Continue the transaction.
 - Click **No** to assign the warranty to a different customer.
Xstore Point of Service prompts for the warranty owner.
- 6. Enter the warranty owner information.**
- 7. Click Yes.**

The person's name is added to the warranty. Continue the transaction.

Previous Transaction with Receipt

After selecting **Previous Transaction w/ Receipt** in Step 4, do the following:

- 1. Enter information about the original transaction:**
 - **Gift Receipt** - Indicates whether the receipt is a gift receipt.
 - **Trans Barcode** - Barcode for the transaction.
 - **Orig Ticket ID** - ID of the original ticket.
 - **Orig Trans Date** - Date of the transaction.
 - **Orig Store ID** - ID of the store where the transaction was performed.
 - **Orig Register ID** - ID of the register that performed the original transaction.
 - **Credit Card #** - Number of the credit card used in the original transaction.
 - **Serial Number** - Serial number of the item.
 - 2. Click Process.**
- Xstore Point of Service displays a list of items from the original transaction that are eligible for a warranty.
- 3. Select the item for which to add a warranty:**
 - Click the item.
 - Use the up and down arrows to highlight the correct item and press the Spacebar.
 - 4. Click OK.**

The warranty is added to the transaction and Xstore Point of Service prompts for the customer to assign to the warranty.

- If a customer is associated with the transaction, Xstore Point of Service prompts whether to assign the current customer to the warranty. Continue with Step 5.
 - If no customer is associated with the transaction, Xstore Point of Service prompts for customer information for the warranty. Continue with Step 6.
5. Indicate whether to assign the warranty to the current customer:
- Click **Yes** to assign the warranty to the current customer.
Continue the transaction.
 - Click **No** to assign the warranty to a different customer.
Xstore Point of Service prompts for the warranty owner.
6. Enter the warranty owner information.
7. Click **Yes**.

The person's name is added to the warranty. Continue the transaction.

Customer History

After selecting **Customer History** in Step 4, do the following:

1. Select the items for which to add a warranty:
 - Click the item.
 - Use the up and down arrows to highlight the correct item and press the Spacebar.
 2. Click **OK**.
- The warranty is added to the transaction and Xstore Point of Service prompts for the customer to assign to the warranty.
- If a customer is associated with the transaction, Xstore Point of Service prompts whether to assign the current customer to the warranty. Continue with Step 3.
 - If no customer is associated with the transaction, Xstore Point of Service prompts for customer information for the warranty. Continue with Step 4.
3. Indicate whether to assign the warranty to the current customer:
 - Click **Yes** to assign the warranty to the current customer.
Continue the transaction.
 - Click **No** to assign the warranty to a different customer.
Xstore Point of Service prompts for the warranty owner.
 4. Enter the warranty owner information.
 5. Click **Yes**.
- The person's name is added to the warranty. Continue the transaction.

Manual Entry

After selecting **Manual Entry** in Step 4, do the following:

1. Enter the item:
 - Scan the item.
 - Enter the ID of the item and press Enter.
2. If necessary, enter the price of the item and press Enter.

The warranty is added to the transaction and Xstore Point of Service prompts for the customer to assign to the warranty.

 - If a customer is associated with the transaction, Xstore Point of Service prompts whether to assign the current customer to the warranty. Continue with Step 3.
 - If no customer is associated with the transaction, Xstore Point of Service prompts for customer information for the warranty. Continue with Step 4.
3. Indicate whether to assign the warranty to the current customer:
 - Click **Yes** to assign the warranty to the current customer.

Continue the transaction.
 - Click **No** to assign the warranty to a different customer.

Xstore Point of Service prompts for the warranty owner.
4. Enter the warranty owner information.
5. Click **Yes**.

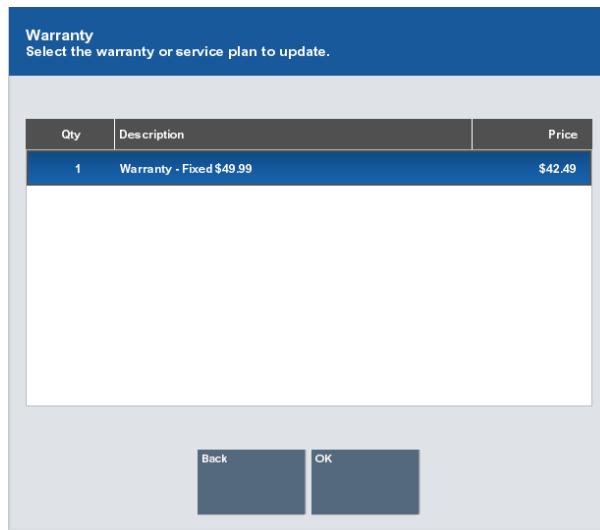
The person's name is added to the warranty. Continue the transaction.

Change the Warranty Customer

To change the customer assigned to a warranty:

1. Click **Extended Transaction** in the Register Sale screen.
2. Click **Warranty**.
3. Click **Change Customer**. [Figure 13-5](#).

Xstore Point of Service displays a list of warranties in the current transaction.

Figure 13–7 List Of Warranties on the Current Transaction

4. Select the warranty:
 - Click the warranty.
 - Use the up and down arrows to highlight the correct warranty and press the Spacebar.
 5. Click **OK**.
- Xstore Point of Service prompts for customer information.
6. Enter the new warranty owner information.
 7. Click **Yes**.
- The customer assigned to the warranty is changed. Continue the transaction.

Figure 13–8 Sale Customer Different than the Warranty Plan Owner

The screenshot shows a transaction screen with a header 'Hai Chen' and a gold 'GOLD' logo. The transaction details include:

Trans # 240	Unit Price	Qty	Ext Price
Warrantied Jewelry A Sale 9100	\$200.00	1	\$0.00
Buy 1 In Dept. 25003 Get 1 In Dept. 25003 Free			(\$200.00)
Warrantied Jewelry A Sale 9100	\$200.00	1	\$170.00
Employee/Family 15% Discount			(\$30.00)
Warranty - Fixed \$49.99 Warranty 9000010	\$49.99	1	\$42.49
Employee/Family 15% Discount			(\$7.50)

A red box highlights the customer name 'Midori Tanaka' in the warranty row.

Order Transactions Through Order Broker Cloud Service

Oracle Retail Order Broker Cloud Service is an optional module that can be interfaced with Xstore Point of Service to provide information about inventory availability across all sales channels.

Using this order functionality, you can sell an item that is not in stock at your store and the Order Broker Cloud Service module automatically selects the best location to fulfill the customer's order across the enterprise.

There are multiple purchasing options available, such as same-store pickup, different store pickup, and delivery to a customer-specified address. You can track and maintain the orders using the Back Office Customer Maintenance function. See the *Oracle Retail Xstore Point of Service Manager's Guide* for more information about Back Office processing.

This chapter describes the following topics:

- [Fulfillment Options](#)
- [Item Status](#)
- [Order Status](#)
- [Message Alerts](#)
- [Creating an Order](#)
- [Opening an Order Broker Order](#)
- [Changing Order Items](#)
- [Canceling Order Items or an Entire Order](#)
- [Pick Up an Order](#)

Fulfillment Options

Xstore Point of Service provides different options for fulfilling an order:

- [Pickup This Store](#)
- [Pickup Other Store](#)
- [Customer Delivery](#)

Pickup This Store

If an item is not available in your store, use this option to have the item shipped to your store for pickup at a later time. In this scenario, order creation and order fulfillment are both handled by the same Xstore Point of Service store location. Inventory is sourced out of another location and shipped to the Xstore Point of Service location. In Xstore Point of Service, this order type is defined as **Transfer Pickup**.

Pickup Other Store

The process for picking up items at another store depends upon whether legacy order types are enabled or disabled.

Legacy Order Types Disabled

If the inventory exists in the store where the customer wants to pick up, then that store is used and the order type is defined as a pickup. However, if the inventory does not exist in the store where the customer wants to pick it up, then Order Broker will find another location from which to fulfill the order. The order will be shipped from that location to the pickup. In this case, Xstore Point of Service considers it a Transfer Pickup.

Legacy Order Types Enabled

If an item is not available in your store, use this option to find another store location where the item is currently available. The customer can pick up the item from that store once it is in a status of Ready for Pick Up. In this scenario, both order creation and order fulfillment is being done by the Xstore Point of Service system. Inventory comes out of the fulfilling store if that store has inventory available; if the store does not have inventory available, Order Broker finds the required inventory. In Xstore Point of Service, this order type is defined as Pickup.

Customer Delivery

If an item is not available in your store, use this option to have the item shipped directly to the customer's home (or another specified address). Order creation is done by the Xstore Point of Service system. In this scenario, order fulfillment may be done by another store or a distribution center. Inventory comes out of the fulfilling location. In Xstore Point of Service, this order type is defined as **Delivery**.

Item Status

Order items can have the following statuses:

- **New:** Indicates the item has been added to the order.
- **Polled:** Indicates the source/fulfilling location got the item request.
- **Accepted:** Indicates the source location has confirmed it can satisfy the order request.
- **Reserved:** Indicates the item has been put aside for the customer at the source/fulfilling location.
- **In Transit:** Indicates the item has been shipped.
- **In Transit Polled:** Indicates the store in which the customer is to pick up the product has acknowledged that the items are in transit and is expecting the order.
- **Received:** Indicates the item has been received in the store.

- **Fulfilled:** Indicates the item has been picked up/delivered.
- **Cancelled:** Indicates the item has been canceled.
- **Rejected:** Indicates the source location has rejected the order and the item is sourced from another location. The status of the order becomes unfulfillable.
- **Unfulfillable:** Indicates the item has been rejected and an alternative location could not be determined.

Order Status

Orders can have the following statuses:

- **Open:** At least one item in the order has a status of: New, Polled, Accepted, or In Transit.
- **Ready for Pick Up:** All items are in reserved or received status (can also include canceled item).
- **Ready to Ship:** This is applicable only for customer delivery, transfer pickup, or delayed pickup (pickup from this store). All items must be reserved, or some items are reserved and some canceled.
- **Complete:** The order has been completed and the customer is in possession of their items.
- **Canceled:** All items are canceled.
- **Unfulfillable:** All items are unfulfillable or a mix of unfulfillable and canceled. Unfulfillable items are those that have been rejected by the store assigned as the source for the item and Order Broker cannot find another source store.

Message Alerts

When new orders require your attention, a notification will appear on the [Message Bar](#). Click the message bar to view information about the new orders.

Order Statistics

After clicking the message bar, Xstore Point of Service opens a window displaying the following information about the orders:

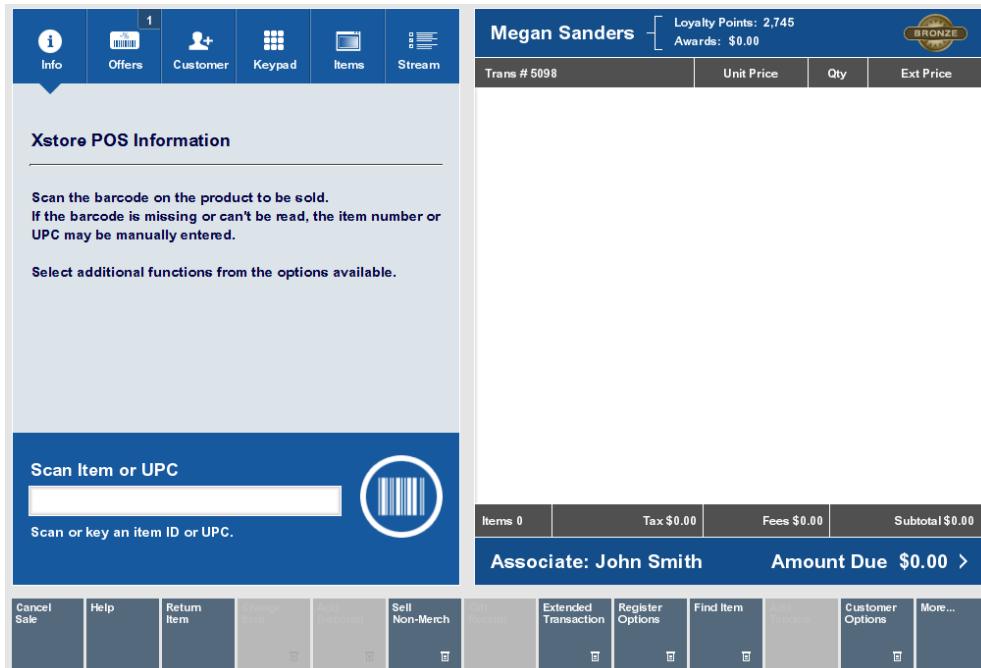
- **Total New Orders:** The total number of new orders. These include all orders with a status of ACCEPTED, POLLED, or RESERVED.
- **Ship Orders:** The number of new orders waiting to be shipped from this store.
- **Customer Pick Up Orders:** The number of new customer pickup orders to be picked up in this store.
- **Items Awaiting Pick:** The total number of items that must be set aside for the new orders.
- **Average Order Age:** The average age of the orders awaiting fulfillment. The age can be in either minutes or days and hours.
- **Oldest Order Age:** The age of the oldest order awaiting fulfillment. The age can be in either minutes or days and hours.
- **Unfulfillable Orders:** The total number of orders that cannot be fulfilled. When an order is rejected and cannot be filled at another location, the status becomes unfulfillable.

See the *Oracle Retail Xstore Point of Service Manager's Guide* for more information about processing orders in the back office.

Creating an Order

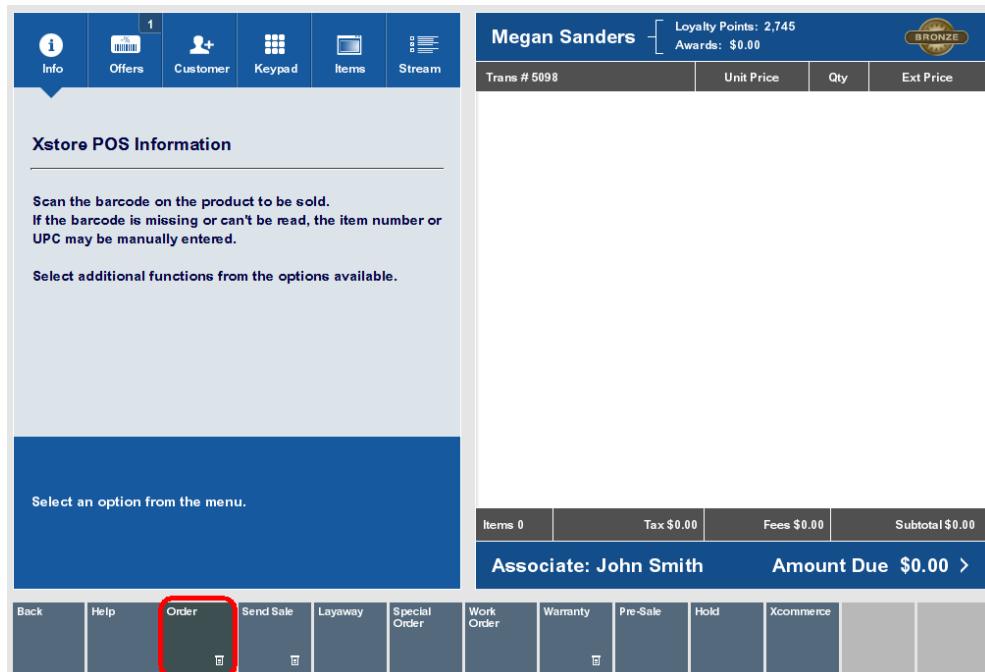
A customer name and address is required to create an Order Broker order. You must assign a customer to the transaction prior to order creation if you did not do so at the beginning of the transaction. Refer to [Associate a Customer with a Transaction](#) for more information about setting up a customer.

Figure 14–1 Customer Assigned to Transaction



To create an Order Broker order:

1. Click **Extended Transaction** in the Register Sale screen.

Figure 14–2 Extended Transaction Menu**2. Click Order.**

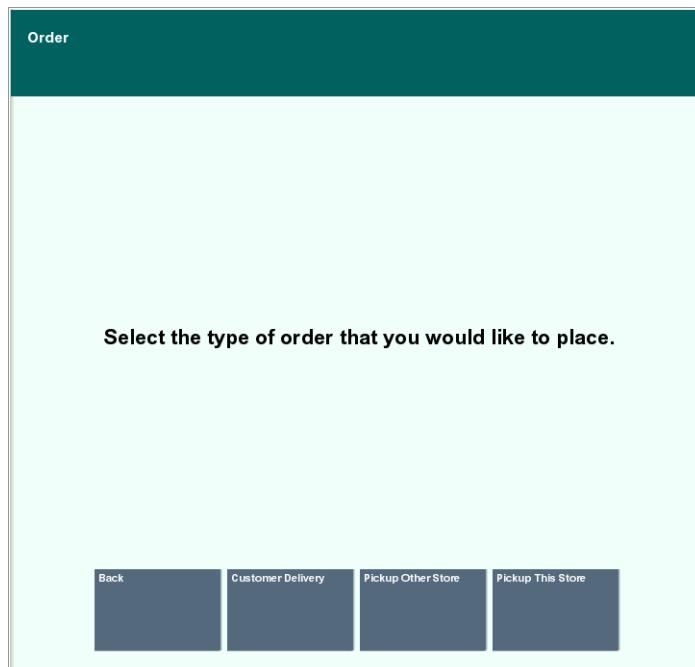
- If a customer is associated with the transaction:
 - If the customer has one or more open orders, Xstore Point of Service displays a list of the open orders.
 - If the customer has no open orders, Xstore Point of Service prompts for order search criteria.
- If no customer is associated with the transaction, Xstore Point of Service prompts for order search criteria.

3. Click New.

- If no customer is associated with the transaction, continue with Step 4.
- If a customer is associated with the transaction, Xstore Point of Service displays an order search window. Continue with Step 5.

4. Associate a customer with the transaction. See [Associate a Customer with a Transaction](#).

Figure 14–3 Order Type Menu Options



5. Select the type or order:

- **Customer Delivery:** If an item is not available in your store, use this option to have the item shipped directly to the customer's home (or specified address). This order type is defined as Delivery type in Xstore Point of Service. Continue with [Customer Delivery](#).
- **Pickup Other Store:** If an item is not available in the store where the customer wishes to pick it up, the item will be sent to the pickup store from another location. The pickup store will then hold the item until the customer picks it up. This order type is defined as a Pickup if the item is in stock at the pickup store, and a Transfer Pickup if the item is sent to the pickup store from another store. Continue with [Pickup Other Store](#).
- **Pickup This Store:** If an item is not available in your store, use this option to have the item shipped to your store for pickup at a later time. This order type is defined as Transfer Pickup type in Xstore Point of Service. Continue with [Pickup This Store](#).

Customer Delivery

To create an order for customer delivery:

1. Click **Customer Delivery**.
2. Enter the delivery information:

Figure 14–4 Order Delivery Details

The screenshot shows a web-based form for entering delivery information. The title bar says "Order" and "Enter delivery information for this order.". The form fields include:

- Phone #: 820-101-8010 x.
- Email: (empty)
- Name: Prefix: Suzy, First: Brown, M.I.: (empty), Last: (empty)
- Company: Githerb
- Address: 56 New Town West
- City: Burgon
- Postal Code: 68281
- State: NY - New York
- Country: US - United States

At the bottom are four buttons: Back, Help, Change Country, and Process.

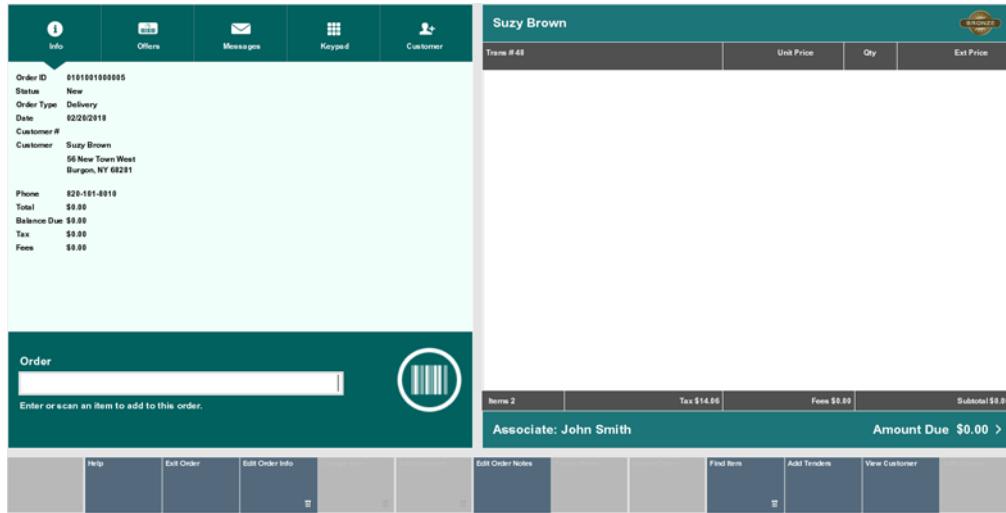
Note: If your system is configured to provide [Address Lookup](#) functionality, an **Address Lookup** button will be available to allow you to quickly look up customer addresses using minimal information.

- **Phone:** Phone number.
- **Email:** E-mail address.
- **Prefix:** Name prefix.
- **First:** First name.
- **M.I.:** Middle initial.
- **Last:** Last name.
- **Company:** Company name.
- **Address:** First and second line of the street address.
- **Apartment:** Apartment number.
- **State/Zip:** Zip Code and state or province.
- **City/Country:** City and country.

3. Click **Process**.

Item entry opens.

Figure 14–5 Order Screen - For Customer Delivery



4. Enter an item for the order. See [Entering Items](#).

After entering each item, Xstore Point of Service prompts for a delivery method for the item.

5. Select the shipping method:

- Click the shipping method.
- Use the up and down arrows to highlight the shipping method and press the Spacebar.

6. Click **OK**.

7. Repeat Steps 4 to 6 for each item to add to the transaction.

8. When you are finished adding order items:

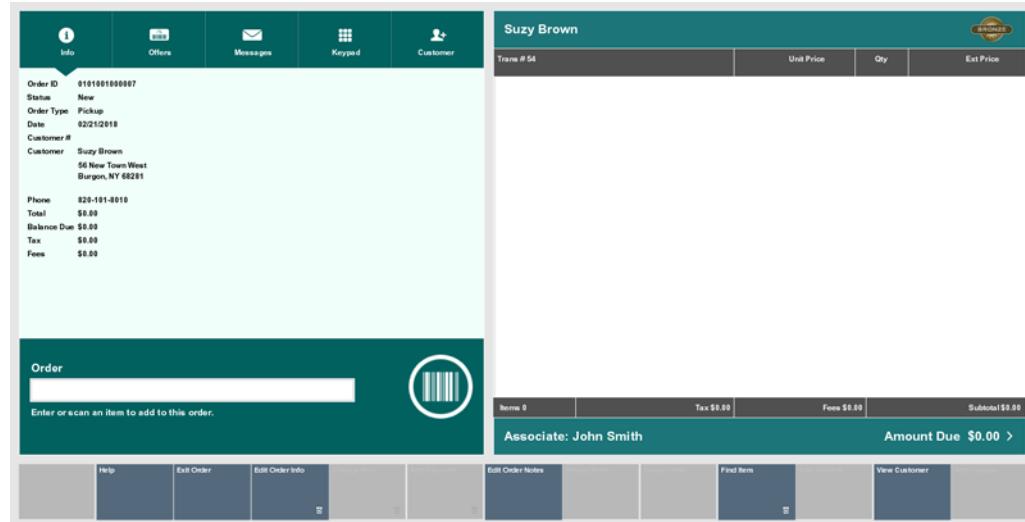
- Click **Add Tenders** to tender and complete the transaction.
- Click **Exit Order** to exit the order and continue the transaction.

Pickup Other Store

To create an order for pickup at another store:

- Click Pickup Other Store.

Figure 14–6 Order Screen - For Pickup Other Store



- Enter an item for the order. See [Entering Items](#).

After entering each item, Xstore Point of Service prompts for the pickup location for the item.

- Enter the search criteria for the pickup location:

- **City:** City.
- **State:** State.
- **Postal Code:** Postal or zip code.
- **Country:** Country.
- **Miles:** Radius around the city in which to search for a store.

- Click **Process**.

Xstore Point of Service displays a list of stores matching the search criteria.

- Select the pickup store:

- Click the store.
- Use the up and down arrows to highlight the store and press the Spacebar.

- Click **OK**.

The item is added to the transaction.

- Repeat Steps 2 to 6 for each item to add to the order.

- When you are finished adding order items:

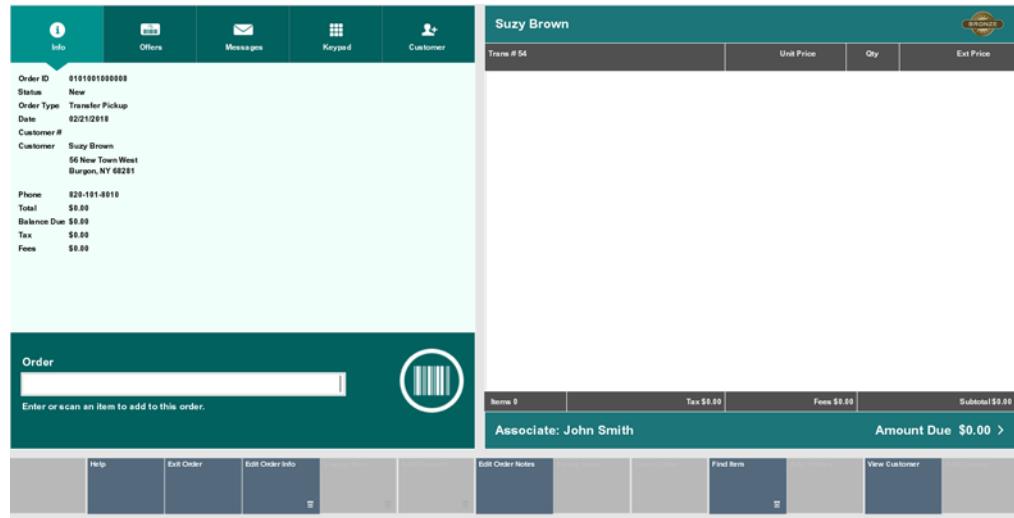
- Click **Add Tenders** to tender and complete the transaction.
- Click **Exit Order** to exit the order and continue the transaction.

Pickup This Store

To create an order for pickup at the current store:

1. Click **Pickup This Store**.

Figure 14–7 Order Screen - For Pickup This Store



2. Enter the items for the order. See [Entering Items](#).
3. When you are finished adding order items:
 - Click **Add Tenders** to tender and complete the transaction.
 - Click **Exit Order** to exit the order and continue the transaction.

Opening an Order Broker Order

To search for an Order Broker order:

1. Click **Extended Transaction** in the Register Sale screen. See [Figure 14–2](#).
2. Click **Order**.
 - If a customer is associated with the transaction:
 - If the customer has one or more open orders, Xstore Point of Service displays a list of the open orders. Continue with Step 6.
 - If the customer has no open orders, Xstore Point of Service prompts for order search criteria. Continue with Step 3.
 - If no customer is associated with the transaction, Xstore Point of Service prompts for order search criteria. Continue with Step 4.
3. Click **Order Search**.
Xstore Point of Service displays a search window.
4. Enter the search criteria.
5. Click **Process**.
 - If only one order matches the search criteria, Xstore Point of Service opens the order. The order is opened and the transaction continues.
 - If more than one order matches the search criteria, Xstore Point of Service displays a list of orders. Continue with Step 6.
6. Select the order:
 - Click the item.
 - Use the up and down arrows to highlight the correct item and press the Spacebar.
7. Click **OK**.

Xstore Point of Service opens the order. Continue the transaction.

Changing Order Items

Order items can only be changed in Order mode. See [Chapter 8, Modify a Transaction](#) for more information about changing line items in a transaction.

To make changes to Order Broker order items, perform the appropriate action:

- [Edit Delivery Information](#). Note that this can only be done for Order Broker orders before tendering. If a delivery address needs to be changed after the order is sent to Order Broker, the order must be canceled and a new order created with the correct address.
- Make changes to the line items. See [Chapter 8, Modify a Transaction](#) for more information about changing items in a transaction.

Edit Delivery Information

To change the delivery information for an order:

Note: Note that this can only be done for Order Broker orders before tendering. If a delivery address needs to be changed after the order is sent to Order Broker, the order must be canceled and a new order created with the correct address.

1. [Opening an Order Broker Order](#).
2. Click **Edit Delivery Info**.
3. Change the delivery information as necessary:
 - For a [Customer Delivery](#) order, enter the customer address. See Step 2 in [Customer Delivery](#) for more information.
 - For a [Pickup Other Store](#) order, search for the pickup store. See Steps 3 to 6 in [Pickup Other Store](#) for more information.

Canceling Order Items or an Entire Order

The customer must return to the store where an order was created to cancel that order. If an item has been reserved, a message prompt will display indicating that you must un-reserve the item in the Back Office before canceling the order.

To cancel an order:

1. [Opening an Order Broker Order](#).
2. Click **Cancel Order**.
Xstore Point of Service displays a list of items in the order.
3. Select the items to cancel:
 - Click the items.
 - Use the up and down arrows to highlight the correct items and press the Spacebar.
 - Click **Select All** to cancel the entire order.
4. Click **Select & Continue**.
A confirmation prompt opens.
5. Click **Yes**.
Xstore Point of Service prompts for a reason.
6. Select the reason:
 - Click the reason.
 - Use the up and down arrows to highlight the correct reason and press the Spacebar.
7. Click **OK**.
The items are removed and any return amount is applied to the transaction.
8. Continue the transaction:
 - Click **Add Tenders** to tender and complete the transaction.

- Click **Exit Order** to exit the order and continue the transaction.

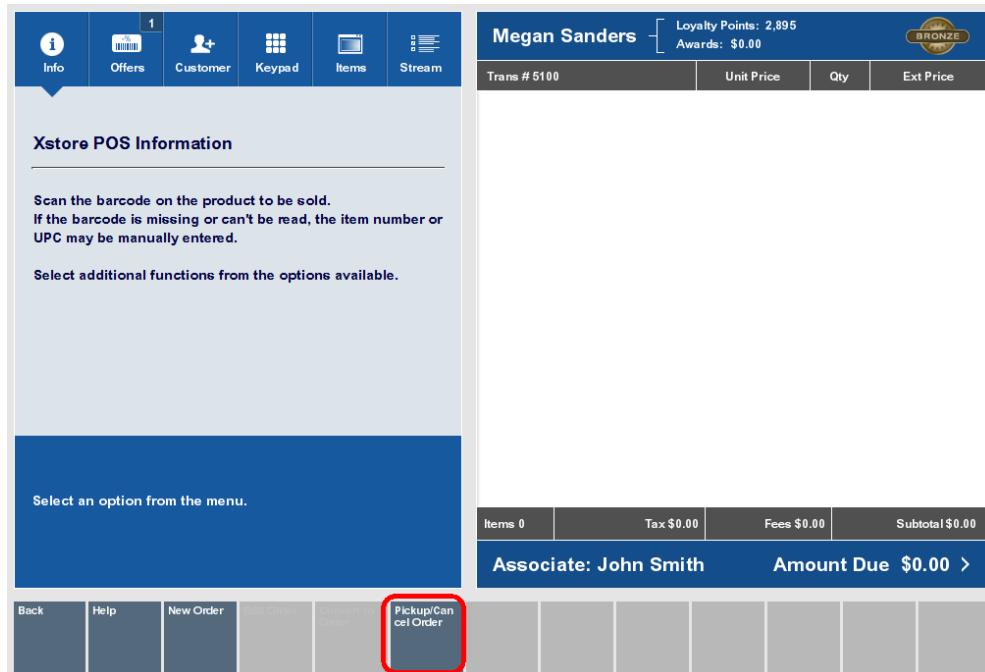
Pick Up an Order

To perform a pickup of an order:

Note: If you enter the customer's information at the beginning of a sale and the customer's order item has been received at the store, a message may display indicating the order has been received and is ready for pickup. Press **Enter** to acknowledge the message and continue with Step 1 below.

- Open an Order Broker Order, see [Opening an Order Broker Order](#).

Figure 14–8 Order Screen



- Select **Pickup /Cancel Order**.

Xstore Point of Service displays a list of orders for that customer.

Figure 14–9 List of Orders

Order Search		
Select an order.		
Order ID Customer	Order Type Phone	Status Date
0007001000116 Megan Sanders	Pickup 632-552-1111	Ready for Pickup 08/21/2018
0007042000006 Megan Sanders	Pickup 632-552-1111	Unfulfillable 08/21/2018
0570054000006 Megan Sanders	Pickup 632-552-1111	Ready for Pickup 09/13/2018
3737042000063 Megan Sanders	Pickup 632-552-1111	Ready for Pickup 09/19/2018
0570001000217 Megan Sanders	Pickup 632-552-1111	Open 09/24/2018

Back OK

3. Select an order from the list.

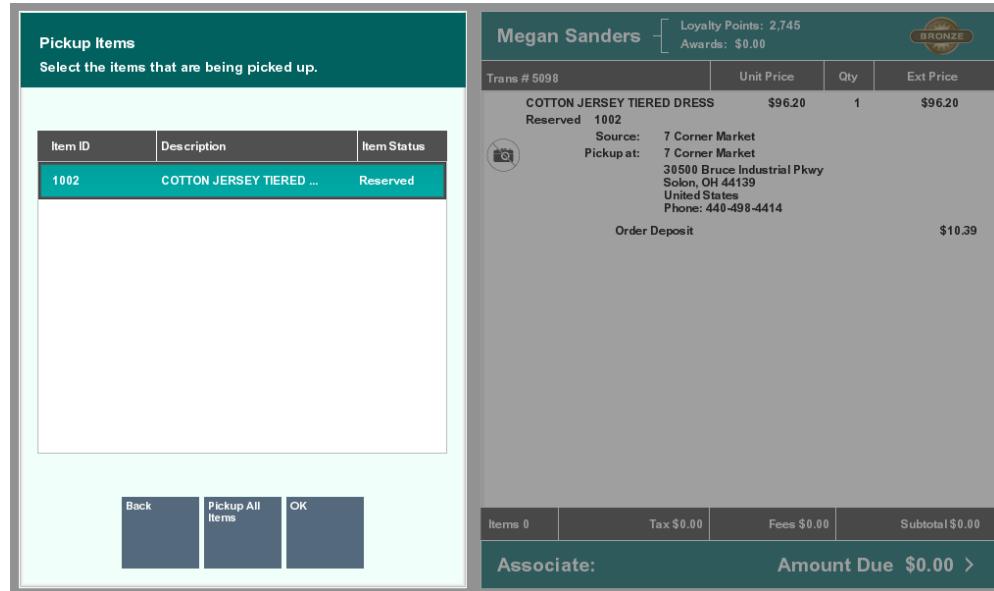
Figure 14–10 Order Ready for Pickup

Info	Offers	Customer	Keypad	Items	Stream
Order ID: 0570054000006 Status: Ready for Pickup Order Type: Pickup Date: 09/13/2018 Customer #: 317784 Customer: Megan Sanders 807 OAKPARK CLEVELAND, OH 44125 United States Phone: 632-552-1111 Total: \$103.90 Balance Due: \$93.51 Tax: \$7.70 Fees: \$0.00	1	Megan Sanders	Loyalty Points: 2,745 Awards: \$0.00	BRONZE	
				Trans # 5098	Unit Price Qty Ext Price
				COTTON JERSEY TIERED DRESS	\$96.20 1 \$96.20
				Reserved: 1002	
				Source: 7 Corner Market	
				Pickup at: 30500 Bruce Industrial Pkwy	
				Solon, OH 44139	
				United States	
				Phone: 440-498-4414	
				Order Deposit	\$10.39
				Items 0	Tax \$0.00 Fees \$0.00 Subtotal \$0.00
				Associate:	Amount Due \$0.00 >
Cancel Sale	Help	Exit Order	Edit Order Info	Change Item	Add Item
			Edit Order Notes	Find Item	Add Inventory
			Pickup Items	View Customer	Add Coupon

4. Select Pickup Items.

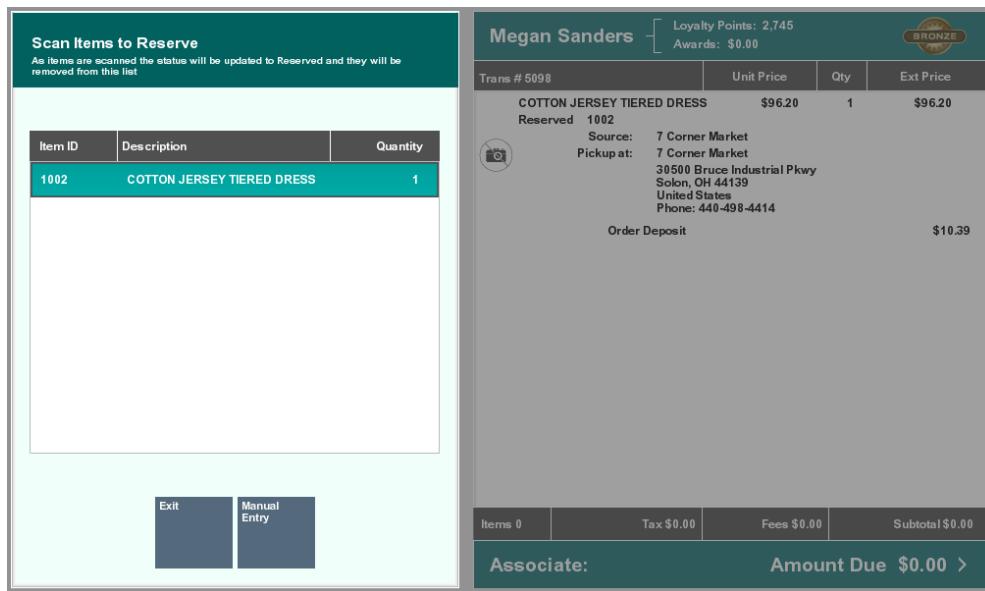
Xstore Point of Service displays a list of items in the order that are ready to be picked up.

Figure 14–11 Pickup Items



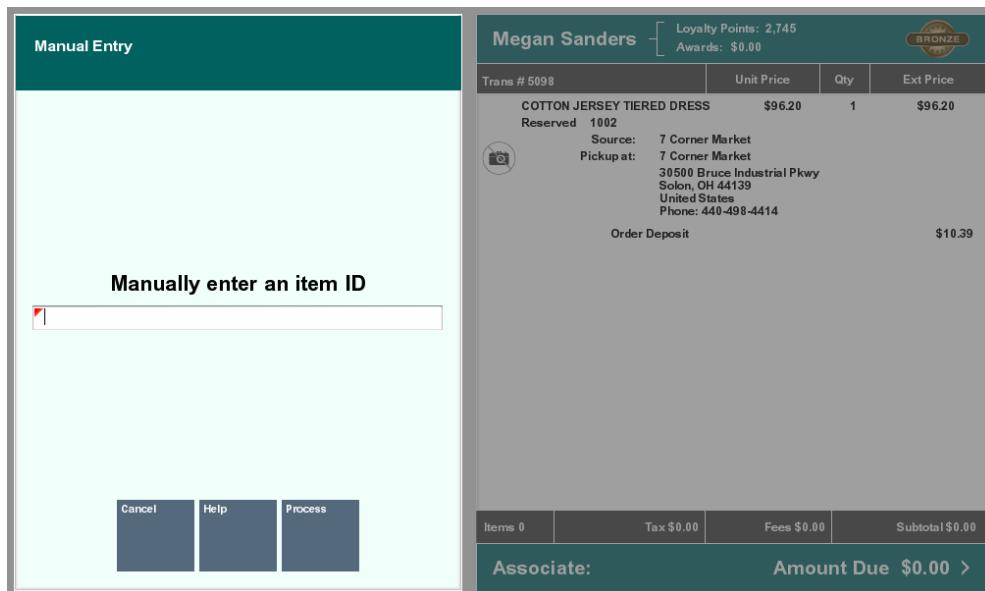
5. Select the items to pick up:
 - Click the items.
 - Use the up and down arrows to highlight the correct items and press the Spacebar.
 - Click **Pickup All Items** to pick up the entire order.
6. If your system has the **Scan Items Prior to Adding to Transaction** setting configured, the items display in a list to scan from, to confirm they are the correct items.

If your system does not have the **Scan Items Prior to Adding to Transaction** setting configured, no scanning is required. Continue at step 9

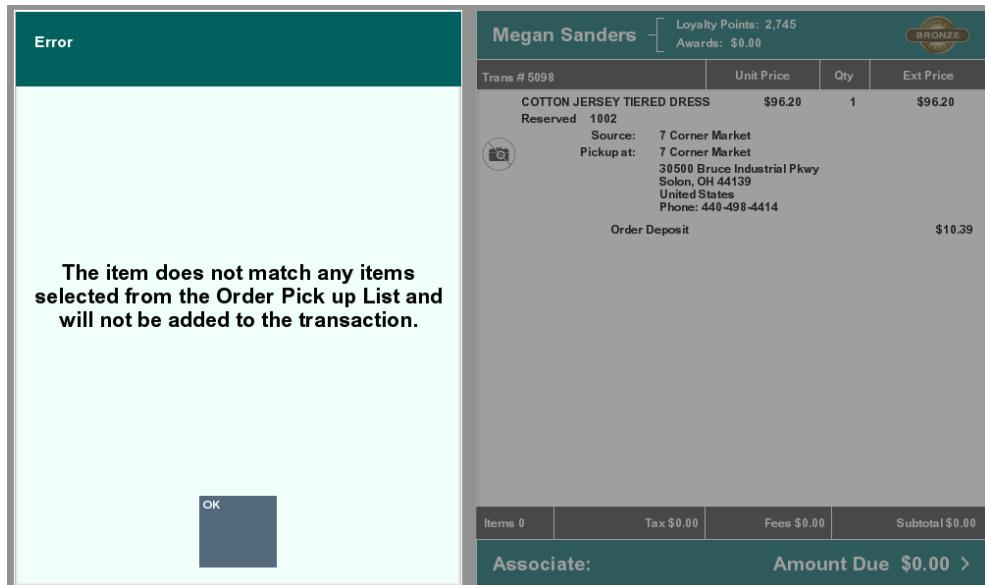
Figure 14–12 Scan Items to Reserve

- Scan the items from the list. The items will be marked Reserved and removed from the list.

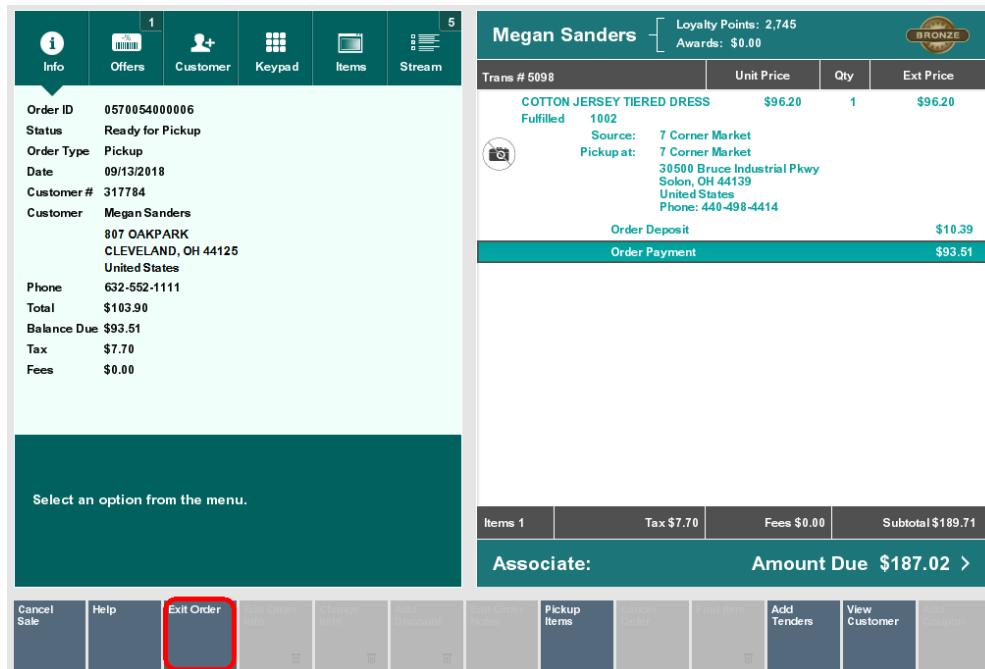
If the item does not scan, select **Manual Entry** and enter the ID of the item.

Figure 14–13 Manual Entry

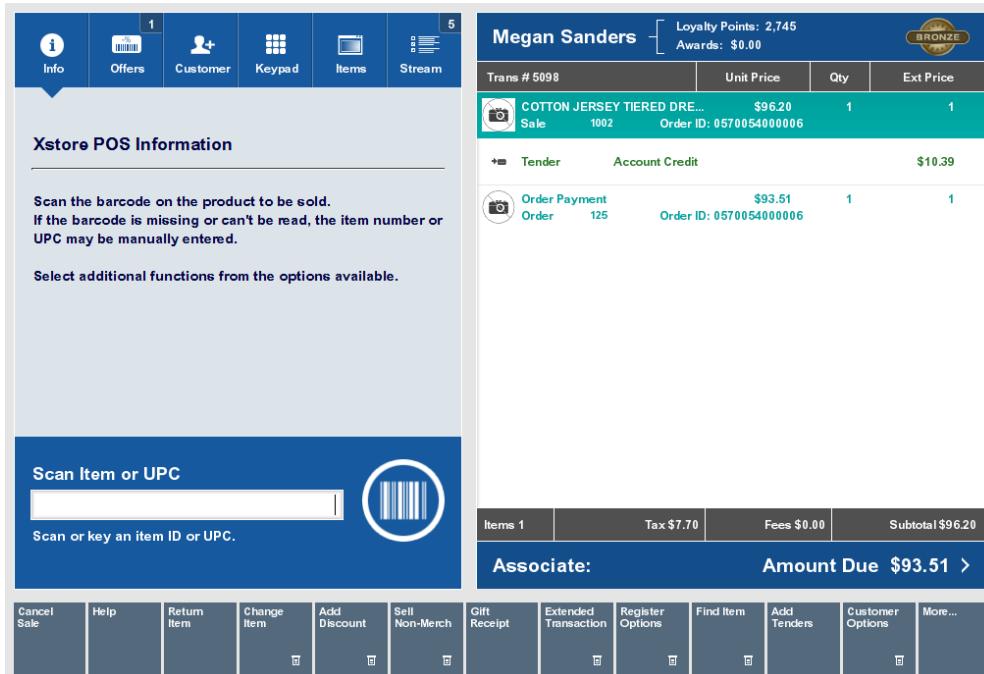
If an item is scanned or entered that does not match any items selected from the order pickup list, a warning message is shown and the item is not added to the transaction. Select **OK** to continue.

Figure 14–14 Reserved Wrong Item Scanned

- After an item has been scanned or manually entered, it is added to the transaction.

Figure 14–15 Scanned Item Added to Transaction

- When all items have been added, select **Exit Order**.

Figure 14–16 Order Ordered**10.** Continue the transaction:

- Click **Add Tenders** to tender and complete the transaction.
- Click **Exit Order** to exit the order and continue the transaction.

15

Pre-Sale Transactions

A Pre-Sale Transaction is typically performed when a customer wants to purchase an item that is not currently available for sale in the store. Pre-sale transactions have the following requirements:

- The transaction must be associated with a customer.
- The transaction must be paid in full at setup.
- Only items on file can be added to the transaction.
- All Pre-Sale items must be picked up at the same time, partial pickups are not allowed.
- Pre-Sale accounts cannot be canceled if the customer is not present.

Create a Pre-Sale

To create a pre-sale:

1. Click Extended Transaction.

Figure 15–1 Extended Transaction Menu Buttons



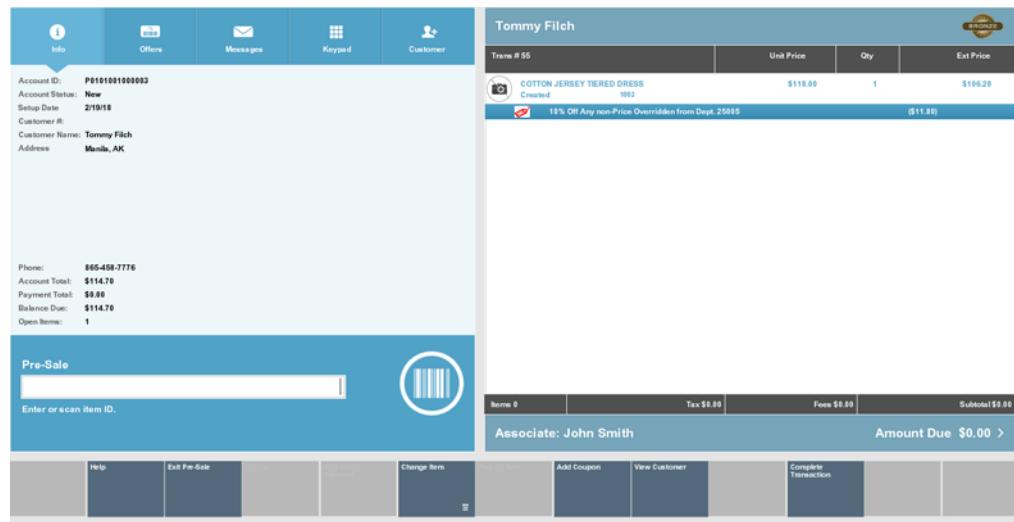
2. Click Pre-Sale.

The window that opens will depend upon whether a customer is associated with the transaction and, if so, whether that customer has any existing pre-sales accounts.

3. Click Set Up New.

- If no customer is associated with the transaction, continue with Step 4.
- If a customer is associated with the transaction, continue with Step 5.

4. If necessary, associate a customer with the transaction. See [Associate a Customer with a Transaction](#).
5. Add items to the transaction. See [Entering Items](#).

Figure 15–2 Pre-Sale Screen

6. When you are done creating the pre-sale:
 - Click **Exit Pre-Sale** to perform other actions in the transaction.
 - Click **Complete Transaction** to tender the transaction. See [Tendering a Transaction](#) for more information.

Xstore Point of Service prompts for the deposit amount.

7. Press Enter to confirm the deposit amount.

Note: Pre-sale items must be paid in full at setup. You cannot change the deposit amount.

Continue the transaction.

Open a Pre-Sale

To search for and open an existing pre-sale:

1. Click **Extended Transaction**.
2. Click **Pre-Sale**.
 - If a customer is not associated with the transaction, continue with Step 4.
 - If a customer is associated with the transaction, but does not have any open pre-sales, continue with Step 3.
 - If a customer is associated with the transaction and has open pre-sales, continue with Step 6.
3. Click **Search**.
4. Enter the search criteria:
 - **Account ID** - The pre-sale account identifier.
 - **Last Name** - The pre-sale account owner's last name.
 - **First Name** - The pre-sale account owner's first name.

- **Customer ID** - The pre-sale account owner's customer Id.
 - **Phone #** - The pre-sale account owner's phone number.\
5. Click **Process**.
- If Xstore Point of Service displays a list of pre-sales that match the entered criteria, continue with Step 6.
 - If Xstore Point of Service does not find any pre-sales that match the entered criteria, go to Step 3 to perform another search.
6. Select the pre-sale:
- Click the pre-sale.
 - Use the up and down arrows to highlight the correct pre-sale, then press the Spacebar.
7. Click **OK**.
- The pre-sale opens. Continue with the appropriate procedure:
- [Pick Up Pre-sale Items](#)
 - [Cancel a Pre-sale](#)

Pick Up Pre-sale Items

To pick up items in a pre-sale:

1. [Open a Pre-Sale](#).
2. Click **Pick Up Item**.

Note: Partial pickups are not permitted for pre-sales.

3. If necessary, click **Yes** to confirm that all items should be picked up.
All items in the pre-sale are listed as Picked Up.
4. Continue the transaction:
 - Click **Exit Pre-Sale** to perform other actions in the transaction.
 - Click **Complete Transaction** to tender the transaction. See [Tendering a Transaction](#) for more information.

Cancel a Pre-sale

To cancel a pre-sale:

1. [Open a Pre-Sale](#).
2. Click **Cancel Pre-Sale**.
3. If necessary, click **Yes** to confirm that the pre-sale should be cancelled.
4. Indicate whether the customer is present:
 - Click **Yes** if the customer is present.
A refund for the pre-sale is applied to the transaction. Xstore Point of Service returns to the sale screen.

- Click **No** if the customer is not present. Xstore Point of Service returns to the pre-sale screen and the pre-sale is not cancelled.

16

Hold Transactions

A Hold transaction is typically performed when a customer plans to purchase an item, but would like the store to hold the item for a short period of time so they can return to the store later to complete the purchase and pick up the item. You must associate a customer with the transaction.

Create a Hold Transaction

To create a hold account:

1. Click **Extended Transaction**.

Figure 16–1 Extended Transaction Menu Buttons



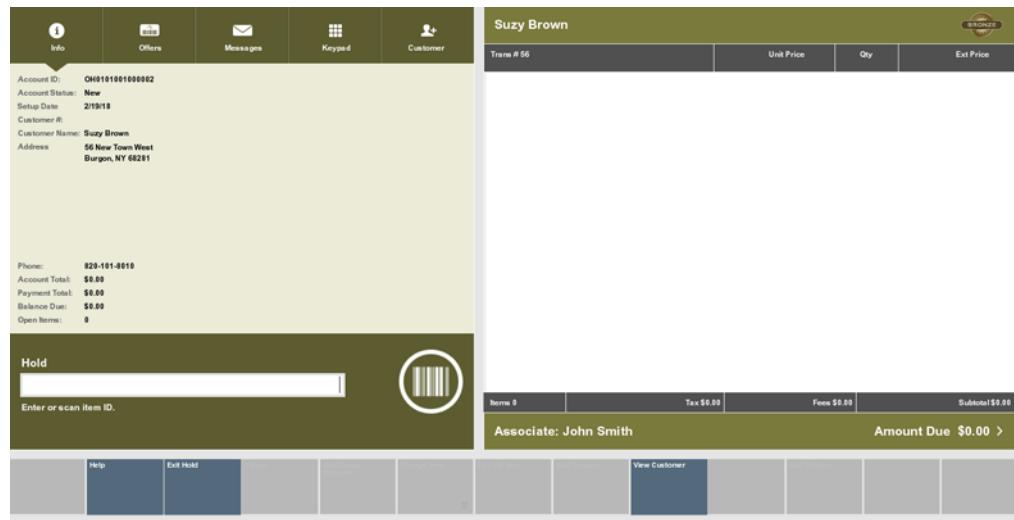
2. Click **Hold**.

The window that opens will depend upon whether a customer is associated with the transaction and, if so, whether that customer has any existing hold accounts.

3. Click **Set Up New**.

- If no customer is associated with the transaction, continue with Step 4.
- If a customer is associated with the transaction, continue with Step 5.

4. If necessary, associate a customer with the transaction. See [Associate a Customer with a Transaction](#).

Figure 16–2 Hold Screen

5. Add items to the transaction. See [Entering Items](#).
6. When you are done creating the hold:
 - Click **Exit Hold** to perform other actions in the transaction.
 - Click **Complete Transaction** to tender the transaction. See [Tendering a Transaction](#) for more information.

Continue the transaction.

Open a Hold

To search for and open an existing hold:

1. Click **Extended Transaction**.
2. Click **Hold**.
 - If a customer is not associated with the transaction, continue with Step 4.
 - If a customer is associated with the transaction, but does not have any open holds, continue with Step 3.
 - If a customer is associated with the transaction and has open holds, continue with Step 6.
3. Click **Search**.
4. Enter the search criteria:
 - **Account ID** - The hold account identifier.
 - **Last Name** - The hold account owner's last name.
 - **First Name** - The hold account owner's first name.
 - **Customer ID** - The hold account owner's customer Id.
 - **Phone #** - The hold account owner's phone number.\
5. Click **Process**.
 - If Xstore Point of Service displays a list of holds that match the entered criteria, continue with Step 6.

- If Xstore Point of Service does not find any holds that match the entered criteria, go to Step 3 to perform another search.
6. Select the hold:
- Click the hold.
 - Use the up and down arrows to highlight the correct hold, then press the Spacebar.
7. Click **OK**.

The hold opens. Continue with the appropriate procedure:

- [Pick Up Hold Items](#)
- [Cancel a Hold](#)

Pick Up Hold Items

To pick up items in a pre-sale:

1. [Open a Hold](#).
2. Click **Pick Up Item**.

Note: Partial pickups are not permitted for holds.

3. If necessary, click **Yes** to confirm that all items should be picked up.

All items in the hold are listed as Picked Up. The amount due for the hold items is applied to the transaction.

4. Continue the transaction:
 - Click **Exit Hold** to perform other actions in the transaction.
 - Click **Add Tenders** to tender the transaction. See [Tendering a Transaction](#) for more information.

Cancel a Hold

To cancel a hold:

1. [Open a Hold](#).
2. Click **Cancel Hold**.
3. If necessary, click **Yes** to confirm that the hold should be cancelled.

The hold is cancelled.

Xstore Xcommerce provides the ability to pull items from a guided selling website and sell in the store or create an Omni-Channel order. You must associate a customer with the transaction.

Create an Xcommerce Transaction

To create an Xcommerce transaction:

1. Click **Extended Transaction**.
2. Click **Xcommerce**.

The browser launches in Xstore.

3. Click **Xcommerce**.

The browser launches in Xstore.

4. Add items to the shopping cart in the Xcommerce site.
5. When all items have been added select **Retrieve Items**. Xstore displays the items as a list with the options to Mark for Sale, or Mark for Order.
6. Mark each of the items or remove items. When done select **Complete**.

The transaction proceeds with the standard order flow (See [Creating an Order](#) or sale transaction process).

7. If necessary, associate a customer with the transaction. See [Associate a Customer with a Transaction](#).
8. Add additional items to the transaction. See [Entering Items](#).
9. Click **Complete Transaction** to tender the transaction. See [Tendering a Transaction](#) for more information.

Continue the transaction.

Remove Item

To delete one or more items from the Xcommerce list:

1. Select **Remove Item** to delete from the list.
2. Select **Yes** to confirm the removal of items.

No Items

If the customer cannot find any items they would like to purchase from the guided selling shopping site:

1. Select **Return to POS** to return to Xstore.
2. Click OK at the prompt stating no items were returned.

Gift Registry

The Gift Registry feature is a tool to assist the customer in purchasing gifts for someone registered. Items in a sale transaction can be associated to a registry, additionally, gift registries can be set up and maintained in the system from the Back Office. Gift Registry is available if you are using Oracle Retail Customer Engagement Cloud Services. The following can be done in the Register mode of Oracle Retail Xstore Point of Service:

- [Sell Gift Registry Items](#)
- [Return a Gift Registry Item](#)
- [Gift Registry Item in an Order Broker Order](#)

Sell Gift Registry Items

To sell an item off of a gift registry, you must first assign the gift registry to the sale or order. Gift registry sales can be added to special orders and Oracle Retail Order Broker Cloud Service orders (see [Chapter 14, Order Transactions Through Order Broker Cloud Service](#)).

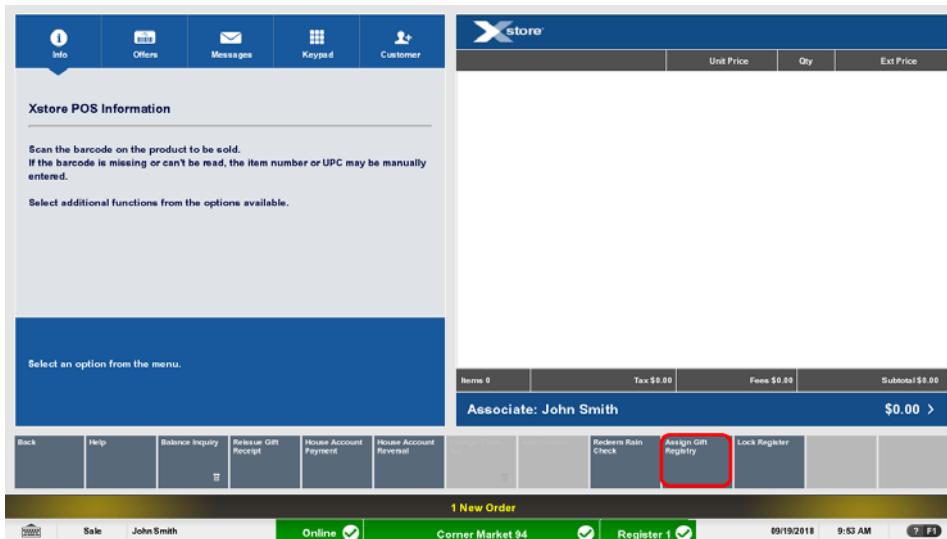
Assign the Gift Registry

If your system is offline, you cannot access the gift registry from Customer Engagement. However, if you've already accessed the gift registry and are making modifications, the registry updates once your system is back on line.

To assign a gift registry:

Note: If the printed gift registry is available, scan the bar code to assign the gift registry to the sale.

1. Click **Register Options** in the Register Sale screen.
2. Click **Assign Gift Registry**.

Figure 18–1 Register Options Menu - Assign Gift Registry

Xstore Point of Service prompts for gift registry search criteria.

3. Enter the search criteria:

Figure 18–2 Gift Registry Search

The screenshot shows the 'Gift Registry Search' interface. At the top, it says 'Enter search criteria.' Below is a form with the following fields: 'Registry #' (text input), 'Registry Name' (text input), 'Owner Last Name' (text input), 'Owner First Name' (text input), and 'Event Type' (dropdown menu). At the bottom are three buttons: 'Back', 'Help', and 'Process'.

- **Register #** - ID number for the register.
- **Registry Name** - Name of the registry.
- **Owner Last Name** - Last name of the registry owner.
- **Owner First Name** - First name of the registry owner.
- **Event Type** - Type of event.

4. Click **Process**.

Xstore Point of Service displays a list of gift registries matching the search criteria.

Figure 18–3 Gift Registry Search Results

Gift Registry Search		
Select a gift registry.		
Name & Event	Event Date	Registry #
Lanister, Aria 45	02/22/2017	53
Lanister, Aria 353	02/26/2017	55
Lanister, Aria Baby Shower	02/20/2017	56
Solon, Melanie Mel's Birthday	10/20/2017	111

Back **Select & Continue**

5. Select the proper gift registry:
 - Click the registry.
 - Use the up and down arrows to highlight the correct registry and press the Spacebar.
 6. Click **Select & Continue**.
- Xstore Point of Service returns to the sale screen.
7. Continue the transaction.

Figure 18–4 Sale with Gift Registry Item

The screenshot shows the Xstore POS interface during a sale. On the right, a detailed view of a gift registry item is displayed:

Melanie Solon		Loyalty Points: 4,991.27	Awards: \$22.00	
923	COTTON JERSEY TIERED DRESS 1892	Unit Price \$118.00	Oty 1	Ext Price \$118.00
		Gift Registry: 45		
		15% Off Any non-Price Overridden from Dept. 25985		
		\$11.80	(\$11.80)	

On the left, the main POS screen shows the following details:

- Xstore POS Information**
- Scan the barcode on the product to be sold.
- Scan or key an item ID or UPC.
- Associate: John Smith
- Amount Due: \$103.90
- Buttons at the bottom include: Cancel Sale, Help, Return Item, Change Item, Add Discount, Sell Non-Merch, Gift Receipt, Enter Credit Transaction, Register Options, Find Item, Add Tenders, Customer Options, and Suspend Transaction.

Any registry items entered into the transaction will have the gift registry number and a gift receipt icon with it in the [View Port](#).

Figure 18–5 Gift Receipt



Return a Gift Registry Item

If an item is purchased in a regular sale transaction, assigned to a gift registry, and then a verified return is done on that transaction later, Xstore Point of Service automatically updates the purchase quantity on the registry as a result of the return.

Gift Registry Item in an Order Broker Order

For Order Broker orders you must manually assign the gift registry prior to entering the return or cancelling the order.

Task Management

Task Management is a feature that encompasses tasks assigned to associates in a store for completion as well as tasks that are customer-focused such as appointments. Tasks have workflows associated with them so at any time a manager can easily see the current status of the task.

For Oracle Retail Customer Engagement Cloud Services users, this section also includes instructions on how to use the Black Book feature to focus on your primary customers.

My Tasks Screen

The My Tasks screen displays all tasks visible to you. The menu options available are based on the task status and the associated workflow.

The [Task Filters](#) along the top of the screen allow you to limit the tasks displayed in the My Tasks screen.

The following information is displayed for each task:

- **P** (Priority) - Task priority. This can be High, Medium, or Low.
- **Date** - Start date for the task.
- **Start Time** - Start time for the task.
- **Duration** - Length of time for the task.
- **Activity** - Type of task.
- **Description** - Description of the task.
- **Customer** - The customer associated with the task.

Note: If a customer is associated with the task, the task can also be viewed from the Task tab in Customer Maintenance.

- **Status** - Status of the task. This can be Open, In Progress, Cancelled, or Closed.
- **Associate** - Employee or employee group assigned to the task.

Task Filters

Use the filter bar to view specific information. Search by Associate, Activity, Start Date, End Date, or Status. Your security privileges determine which Associates you can view.

You can filter tasks on the following criteria:

- [Assigned Associate](#)
- [Activity](#)
- [Status](#)
- [Start Date](#)
- [End Date](#)

Assigned Associate

To filter tasks by assigned associate:

1. Click the **Associate** name.

Xstore Point of Service displays a list of employee and employee groups.

2. Click the correct employee or employee group.
3. Click **OK**.

The task list will only display tasks associated with the selected employee or employee group.

Activity

To filter tasks by activity type:

1. Click **Activity**.

Xstore Point of Service displays a list of activity types.

2. Click the correct activity type.
3. Click **OK**.

The task list will only display tasks of the selected activity type.

Status

To filter tasks by task status:

1. Click **Status**.

Xstore Point of Service displays a list of task status.

2. Click the correct task status.
3. Click **OK**.

The task list will only display tasks of the selected task status.

Start Date

To filter tasks by start date:

1. Click the **Start Date** field.
2. Enter the new start date.
3. Press Enter.

The task list will only display tasks with a start date on or after the entered date.

End Date

To filter tasks by end date:

1. Click the **End Date** field.
2. Enter the new end date.
3. Press Enter.

The task list will only display tasks with a start date on or before the entered date.

Sort Tasks

Click a column name in the task list to sort the list by that column. Click the column again to alternate between sorting ascending or descending.

Task Notes

The most recent note associated with the task displays beneath the task row.

To view all the notes for a task:

1. Select the task:
 - Click the task.
 - Use the up and down arrows to highlight the task, then press the Spacebar.
2. Click **View Notes**.

A window opens displaying all the notes for the task. Click **Back** to close the window.

Open Customer Record

To open a customer record in [Customer Maintenance](#) from a task:

1. Select a task associated with a customer:
 - Click the task.
 - Use the up and down arrows to highlight the task, then press the Spacebar.
2. Click **View Customer**.

The customer record opens in [Customer Maintenance](#).

View Your Tasks

Your tasks can be viewed through the register or through the Back Office:

- [View Your Tasks from the Register](#)
- [View Your Tasks from the Back Office](#)

View Your Tasks from the Register

To view your tasks from the Register Sale screen:

1. Click **My Tasks**.
Xstore Point of Service prompts for your user ID.
2. Enter your user ID and press Enter.

Xstore Point of Service prompts for your password.

3. Enter your password and press Enter.

Xstore Point of Service opens the [My Tasks Screen](#).

View Your Tasks from the Back Office

To view your tasks from the Back Office:

1. Click **Associate Tasks**.
2. Click **My Tasks**.

Xstore Point of Service opens the [My Tasks Screen](#).

Create a Task

To create a task:

1. Click **Add Task** in the Task List or the [Awards](#) tab in [Customer Maintenance](#).
2. Enter the task information:

- **Type** - Type of task.
- **Description** - Description of the task.
- **Priority** - Priority of the task.
- **Start Date** - Date on which the task will begin.
- **End Date** - Date by which the task must be finished.
- **Start Time** - Time at which the task will begin.
- **End Time** - Time at which the task must be finished.
- **Visibility** - The group that can view the task (Store, Employee Group, or Employee).

Note: Employee Group visibility is not an option if you are using Customer Engagement to manage your tasks.

- **Assigned To** - The employee group or employee to assign to the task. This field is not editable for tasks with Store visibility.

Note: If Xstore Point of Service indicates the employee is not a valid Customer Engagement user, the employee does not exist in Customer Engagement.

3. If necessary, assign a customer to the task by performing the following:

Click **Assign Customer**. Xstore Point of Service opens a window prompting for customer search criteria.

[Associate a Customer with the Transaction](#). The customer is assigned to the task.

4. Click **Save**.

This task is created and added to the Task List.

Add a Note

To add a note to a task:

1. Select the task in the Task List or the [Awards](#) tab in [Customer Maintenance](#).
 - Click the task.
 - Use the up and down arrows to highlight the task, then press the Spacebar.
2. Click **Add Note**.

A note entry window opens.

3. Enter the note text.
4. Click **OK**.

The note is added to the task

Edit a Task

To edit a task:

1. Select the task in the Task List or the [Awards](#) tab in [Customer Maintenance](#).
 - Click the task.
 - Use the up and down arrows to highlight the task, then press the Spacebar.
 2. Click **Edit Task**.
- A task details window opens.
3. Make the necessary changes to the task:
 - **Description** - Description of the task.
 - **Priority** - Priority of the task.
 - **Start Date** - Date on which the task will begin.
 - **End Date** - Date by which the task must be finished.
 - **Start Time** - Time at which the task will begin.
 - **End Time** - Time at which the task must be finished.
 4. If necessary, assign a customer to the task:
 - Click **Assign Customer**.
Xstore Point of Service opens a window prompting for customer search criteria.
 - [Associate a Customer with the Transaction](#).
The customer is assigned to the task.
 5. Click **Save**.
- The note is added to the task.

Update Task Status

To update the status of a task:

1. Select the task in the task list:

- Click the task.
 - Use the up and down arrows to highlight the task, then press the Spacebar.
2. Click the new status. Menu options include:

Note: All status menu options may not be visible depending on the current status of the task. Xstore Point of Service displays the next status options in the workflow.

- **Begin Task** - Sets the status to In progress.
- **Reopen Task** - Sets the status to Open.
- **Complete Task** - Sets the status to Closed. The task cannot be re-opened or edited after it is completed.
A verification prompt opens.
- **Cancel Task** - Sets the status to Cancelled. The task cannot be re-opened or edited after it is cancelled.
A verification prompt opens.

3. If necessary, click **Yes** to confirm the status change.

View Black Book

The Black Book feature to view your primary customers' contact information. The Black Book feature is only available through Oracle Retail Customer Engagement Cloud Services. Your security privileges determine the associates and customers you can access.

To view your black book:

1. Go to the Back Office.
2. Click **Associate Tasks**.
3. Click **Black Book**.
If the Associate Filter screen opens, continue with Step 4.
4. Click the correct employee.
The employee's black book opens.

Black Book Screen

The Black Book screen displays the following information for each customer in the employee's black book:

- **Customer Name** - Full name of the customer.
- **Email** - Customer e-mail.
- **Phone** - Customer phone number.

View a Customer Record

To open a customer record in [Customer Maintenance](#) from the [Black Book Screen](#):

1. Select a customer in the list:

- Click the customer.
 - Use the up and down arrows to highlight the customer, then press the Spacebar.
- 2. Click [View Customer](#).**
- The customer record opens in [Customer Maintenance](#).
- 3. Click [Back](#) to return to the [Black Book Screen](#).**

20

Airside Store Transactions

Airside duty-free shopping functionality provides a mechanism by which shoppers are charged the correct pricing for items purchased in an airside retail store based on the destination of the flight they are taking. In Xstore Point of Service, the boarding pass information is scanned, or entered manually, to determine if duty and/or tax apply to the transaction based on the flight destination.

Depending on your store configuration, one or more of the following actions may be required when beginning a sale transaction:

- [Associate Flight Information](#)
- [Flight Recap Information](#)
- [Multiple Flights Boarding Passes](#)
- [Make an Airside Sale on Arrivals](#)
- [Make an Airside Sale to Staff](#)
- [Airside Returns](#)

Associate Flight Information

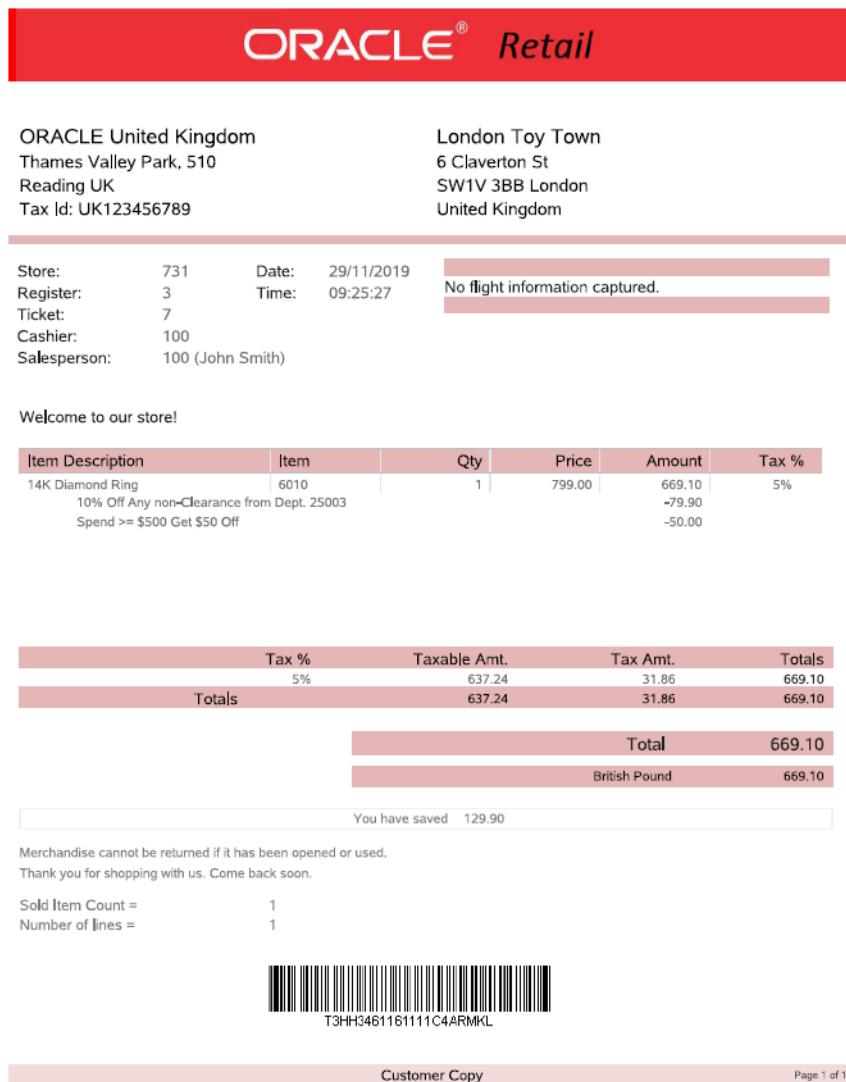
Airside stores scan or manually enter boarding pass information into Xstore Point of Service to determine the tax of the transaction based on flight destination.

Figure 20–1 Flight Information Screen

The screenshot shows a mobile application interface titled "Flight Information". At the top, there is a barcode scanner icon and the text "Scan or key flight number.". Below this, there are several input fields and buttons. The input fields include "Flight #", "No Seat" (with a checked checkbox), "Seat Number", "Origin Airport" (set to "LHR"), "Destination Airport", and "Scheduled" (set to "12/09/2019"). At the bottom, there are four buttons: "Back", "Process", "Skip", and "More".

If the customer does not have or show a boarding pass, and if Xstore is configured to allow bypass of flight details in the arrivals area, select **Skip**. If the flight information is not captured, the transaction is not tax-free and the appropriate taxes are applied. The receipt indicates that no flight information was captured.

Figure 20–2 No Flight Information Captured Receipt



If the customer shows a boarding pass:

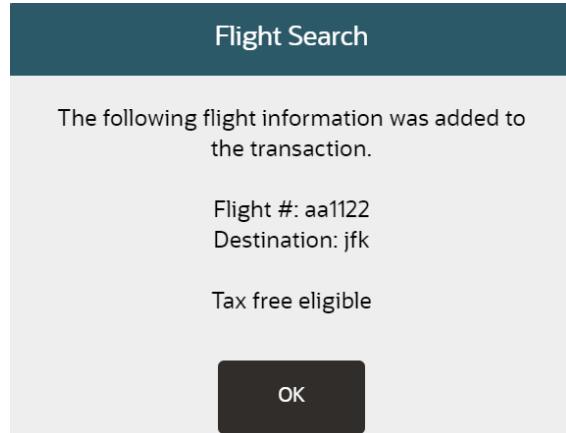
1. Scan the boarding pass barcode or enter the flight information and click **Process**.
 - **Flight #:** Flight number.

Note: The Flight Number can include spaces but not special characters.

- **Seat Number:** Seat number for the customer.
- **Destination Airport:** Airport to which the customer is flying.
- **Scheduled:** Date of the flight.

If the information is valid, a confirmation prompt indicates that the flight information was added to the transaction.

Figure 20–3 Flight Information Added Prompt



2. Click **OK** to confirm that the flight information was added to the transaction and return to the transaction.
3. If the destination flight is not eligible for tax free, the system asks for a second flight (if configured):

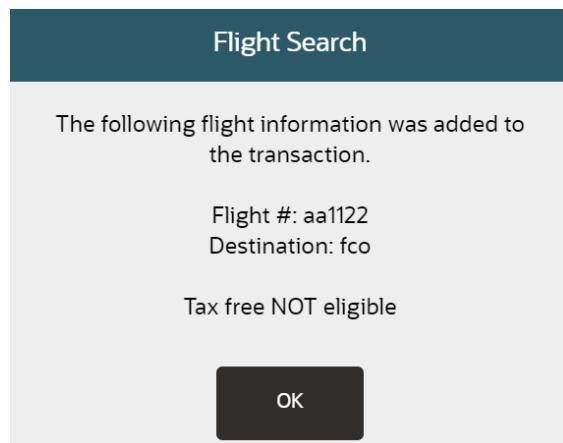
Figure 20–4 Second Flight Information Prompt

- If the customer does not have a second boarding pass, click **Complete**.
- If the customer does have a second boarding pass, scan the boarding pass barcode or enter the flight information and click **Process**.
 - **Flight #:** Flight number.

Note: The Flight Number can include spaces but not special characters.

- **Seat Number:** Seat number for the customer.

- **Origin Airport:** It is the airport the next flight will depart from; it cannot be the current store's one.
 - **Destination Airport:** Airport to which the customer is flying.
 - **Scheduled:** Date of the flight.
4. A confirmation prompt opens:
- If the flight is found and eligible for tax-free shopping, click **OK** to finish associating flight information and continue the transaction.
 - If the flight is not eligible for tax-free shopping, a notification opens. Click **Complete** to continue the transaction.

Figure 20–5 Boarding Pass Not Eligible for Tax Free

Flight Recap Information

If configured, the flight information is shown in a specific tab panel.

Figure 20–6 Airside Tab

Airside					1
Flight Number	Origin Airport	Destination Airport	Price Calculation Mode		
aa1122	LHR	jfk	Tax Free		

Multiple Flights Boarding Passes

Xstore is able to support boarding passes with more than one flight. With a single scan the system is able to import all the flights present on the boarding pass. The analysis process stops when the first eligible flight is found in the chain of the flights. Here is an example of multiple flights boarding pass.

Figure 20–7 Multiple Flights Boarding Pass

Make an Airside Sale on Arrivals

In some airports, arriving passengers are allowed to purchase goods at airside stores. In this case, the passengers must pay taxes.

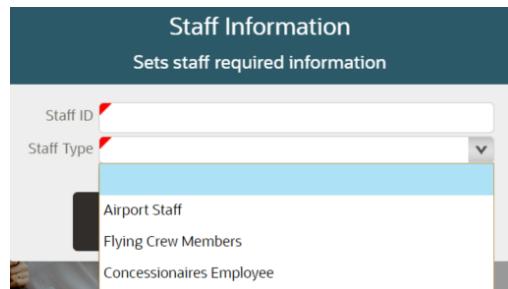
Click **Arrivals** to perform a sale to an arriving passenger.

Figure 20–8 Airside Sale to Arriving Passenger

Make an Airside Sale to Staff

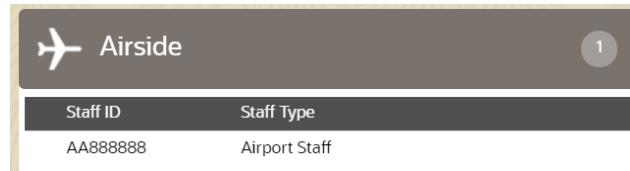
In some airports, it is permitted to sell goods to staff (for example, crew members or employees). In this case, the customers are not eligible for tax free shopping. To sell to staff:

1. Click **Staff**.
2. Enter information about the staff member:
 - **Staff Id:** Enter the ID for the staff member.
 - **Staff Type:** Select the type of staff member.

Figure 20–9 Staff Information

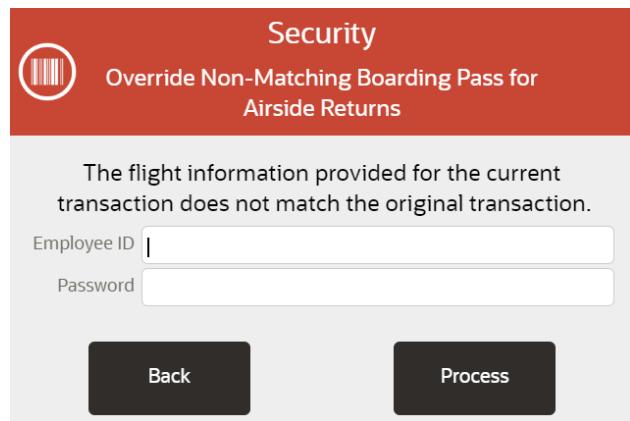
3. Click Process.

A notification is displayed that indicates the sale is for a staff member. The transaction continues.

Figure 20–10 Sale to Staff Member

Airside Returns

Some airport authorities allow the possibility to manage airside returns or exchange transactions but only when providing the original boarding pass, and only if the flight has not yet taken off. So, if the appropriate configuration parameter is activated, if you try to return an item sold in a transaction associated to a boarding pass different than the current one, you get an error message and you are not allowed to proceed.

Figure 20–11 Non-Matching Boarding Pass

If configured, there is the possibility, for the store manager, to override this control. If a manager override is performed for non-matching flights, the transaction captures the customer's new flight information, and prints it on the return receipt.

21

Miscellaneous Transactions

Miscellaneous transactions are those activities that may not be directly related to a specific sale transaction, but offer important and useful functions. Like sale transactions, these activities are also logged by the system for accountability and reporting purposes.

This chapter describes the following miscellaneous transaction processes:

- [Clock In and Clock Out](#) - Clocking in, clocking out, and changing work codes.
- [Balance Inquiry](#) - Check the balance of a gift card, gift certificate, or gift receipt.
- [Change Your Password](#) - Change the password you use to log in.
- [Post Void](#) - Cancel a previous transaction.
- [No Sale](#) - Open a cash drawer.
- [Lock or Unlock a Register](#) - Lock or unlock a register.
- [Price Inquiry](#) - Look up the price of an item.

Clock In and Clock Out

Depending upon your store policy, you may be required to clock in before logging in. You may also be required to clock in and out for meal breaks. If meal break clock-out and clock-in is enforced, you cannot clock back in after a meal break until a specified period of time has elapsed.

In order for your timecard to accurately reflect the number of hours worked, you must clock in and out by performing the following procedures:

- [Clock In](#) - Clocking in at the start of a shift.
- [Clock Out](#) - Clocking out at the end of a shift.
- [Change Work Code](#) - Changing the work code onto which you are logging time.
- [Clocking In and Clocking Out for Meal Breaks](#) - Clocking out to start a meal break.

Clock In

Figure 21–1 Register Screen Login



To clock in:

1. Click **Clock In/Clock Out** at the Register Login screen.

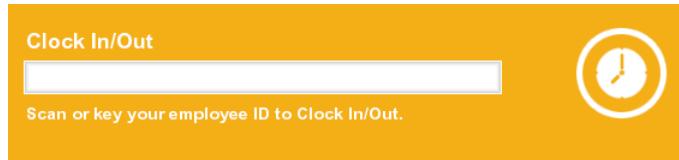
Xstore Point of Service knows whether you are currently clocked in or clocked out and will perform the appropriate action automatically.

Note: Touch-screen users swipe the clock area to clock in or clock out.



Xstore Point of Service prompts for your user ID.

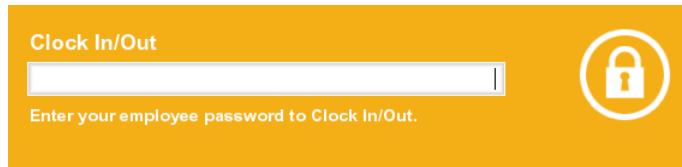
Figure 21–2 Clock In Employee ID Prompt



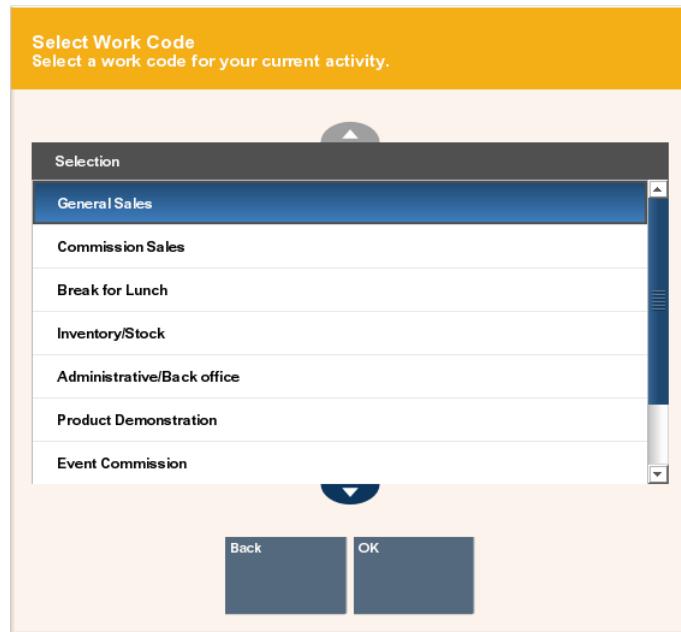
2. Scan or enter your employee ID at the Clock In/Out prompt and press Enter.

Xstore Point of Service prompts for your password.

Figure 21–3 Clock In Employee Password Prompt



3. Enter your password and press Enter.

Figure 21–4 Work Code List

4. If necessary, select a work code for your current activity:
 - Click the work code.
 - Use the up and down arrow keys to highlight the appropriate work code, then press the Spacebar.
5. Click **OK** if necessary.

You are now clocked in.

Clock Out

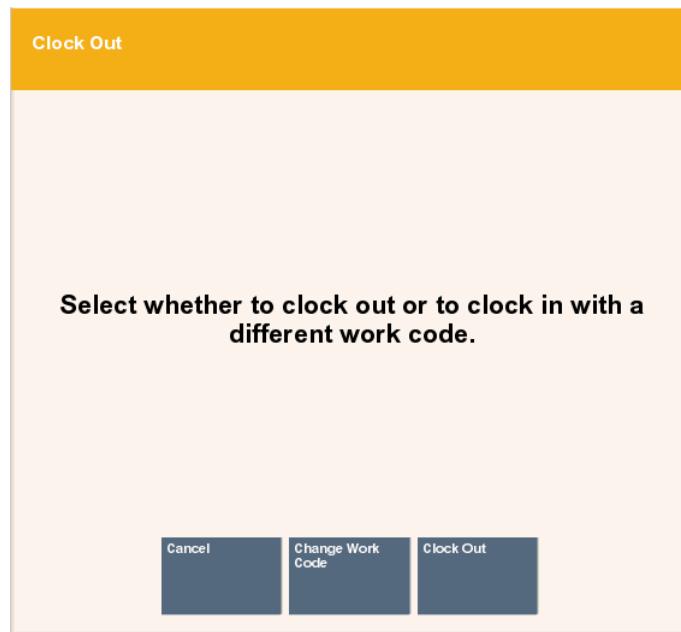
To clock out:

1. Click **Clock In/Clock Out** at the Register Login screen. See [Figure 21–1](#)
Xstore Point of Service knows whether you are currently clocked in or clocked out and will perform the appropriate action automatically.

Note: Touch-screen users swipe the clock area to clock in or clock out.

- Xstore Point of Service prompts for your user ID. See [Figure 21–2](#).
2. Scan or enter your employee ID at the Clock In/Out prompt and press Enter.
Xstore Point of Service prompts for your password. See [Figure 21–3](#).
 3. Enter your password and press Enter.

Figure 21–5 Clock Out Prompt



4. Click **Clock Out** if you are prompted whether to clock out or clock in under a different work code.

You are clocked out. Xstore Point of Service may print a receipt with your clock-out information.

Change Work Code

To change the work code you are using for your clock in:

1. Click **Clock In/Clock Out** at the Register Login screen. See [Figure 21–1](#).

Xstore Point of Service knows whether you are currently clocked in or clocked out and will perform the appropriate action automatically.

Note: Touch-screen users swipe the clock area to clock in or clock out.

Xstore Point of Service prompts for your user ID. See [Figure 21–2](#).

2. Scan or enter your employee ID at the Clock In/Out prompt and press Enter.

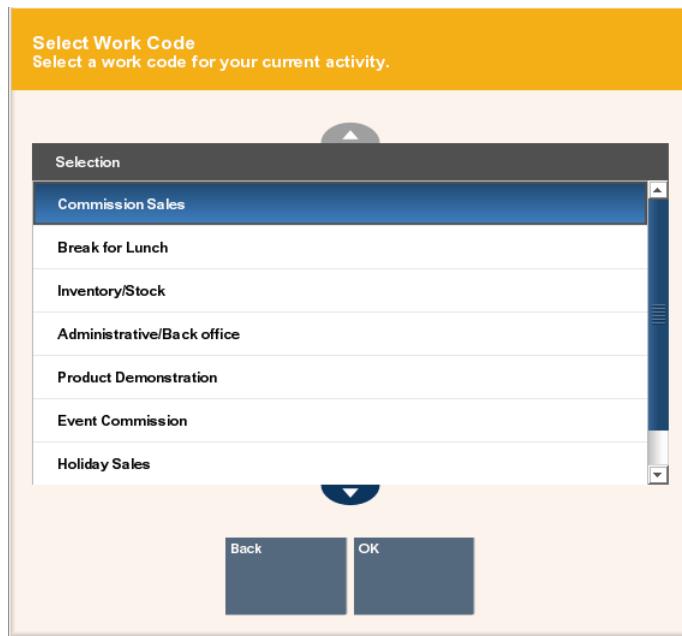
Xstore Point of Service prompts for your password. See [Figure 21–3](#).

3. Enter your password and press Enter.

You are prompted whether to clock out or clock in under a different work code. See [Figure 21–5](#).

4. Click **Change Work Code**.

You are prompted for a new work code.

Figure 21–6 Change Work Code List

5. Select a work code for your current activity:
 - Click the work code.
 - Use the up and down arrow keys to highlight the appropriate work code, then press the Spacebar.
6. Click **OK** if necessary.

You are now clocked in under a new work code.

Clocking In and Clocking Out for Meal Breaks

If your store policy enforces meal break clock-out and clock-in, you cannot clock back in after a meal break until a specified period of time has elapsed.

If a minimum clocked-in time interval is used.

If your store policy requires a minimum clocked-in time interval for a Meal Break work code (for example, 30 minutes), you cannot clock out early from your meal break. An override is allowed with a Manager's permission.

To clock out for a meal break:

1. Click **Clock In/Clock Out** at the Register Login screen. See [Figure 21–1](#).

Note: Touch-screen users swipe the clock area to clock in or clock out.

Xstore Point of Service prompts for your user ID. See [Figure 21–2](#).

2. Scan or enter your employee ID at the Clock In/Out prompt and press Enter.

Xstore Point of Service prompts for your password. See [Figure 21–3](#).

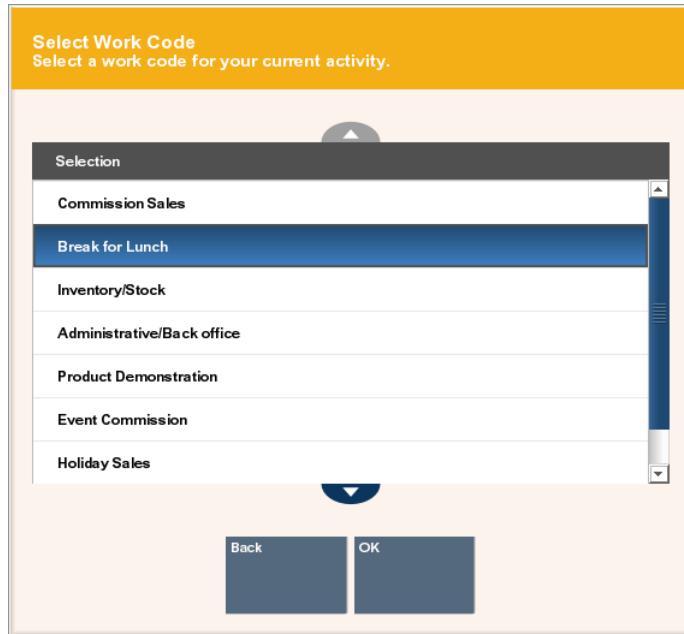
3. Enter your password and press Enter.

You are prompted whether to clock out or clock in under a different work code. See [Figure 21–5](#).

4. Click Change Work Code.

You are prompted for a new work code.

Figure 21–7 Work Code List



5. Select the meal break option (for example, Break For Lunch or Meal Break):

- Click the meal break option.
- Use the up and down arrow keys to highlight the meal break option, then press the Spacebar.

6. Click OK if necessary.

You are now clocked out for a meal.

If your store policy is set up for a minimum clocked-out time interval for a break (for example, 30 minutes), you cannot clock back in early.

This means that once you have clocked out during your shift, you cannot clock back in again for at least 30 minutes.

An override is allowed with a manager's permission.

Balance Inquiry

Gift cards and store credit vouchers may be used as a tender until the total value of the account has been used. Since the amount left on a card or voucher cannot be visibly seen, this function electronically checks the account record and tells you the remaining value on the account. You can also use Balance Inquiry to look up an encoded item's price on a gift receipt.

Use the balance inquiry process to check the amount remaining on a customer's store credit voucher, gift card or gift certificate, and an item's price from a gift receipt.

Note: Depending upon the configuration of your system, this option may be available from several different locations. Before logging in, Balance Inquiry is available from the Register Login screen and from the Till Options menu. After logging in, Balance Inquiry is available from both the Register Options menu and the Back Office Main Menu. The procedure that follows describes how to access Balance Inquiry from the Register Login screen

1. Click Balance Inquiry at the Register Login screen.

Figure 21–8 Balance Inquiry Menu Options



2. Click the type of balance inquiry:
 - **Gift Card Balance** - Remaining balance on a gift card.
 - **Gift Cert. Balance** - Remaining balance on a gift certificate.
 - **Store Credit Balance** - Remaining store credit balance.
 - **Loyalty Balance** - Loyalty point balance.
 - **Gift Receipt Inquiry** - Redemption amount of a gift certificate.

Xstore Point of Service prompts for the ID number.

Figure 21–9 Store Credit Number Prompt



3. Enter the ID number (for example, the gift card number or gift receipt barcode number) and press Enter.

Xstore Point of Service opens a window displaying the requested information.

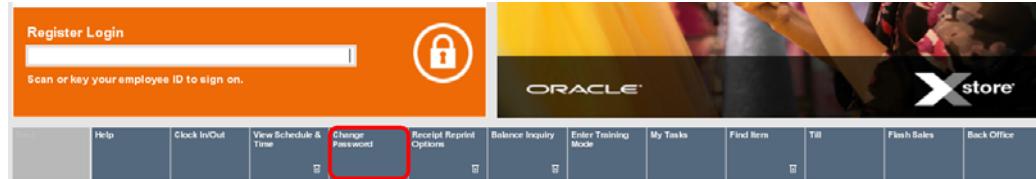
4. When you are finished:

- Click **OK** to close the window.
- Indicate whether to print a receipt:
 - Click **Yes** to print a receipt and close the window.
 - Click **No** to close the window.

Change Your Password

The Change Password option is only available from the Register Login screen or the Back Office Login screen before you log in.

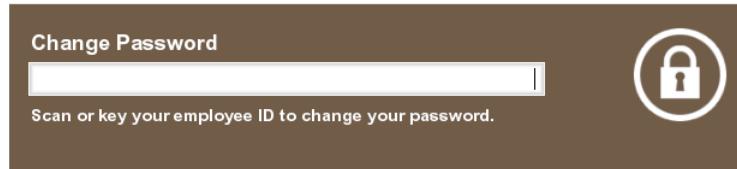
Figure 21–10 Change Password Login Screen



To change your password:

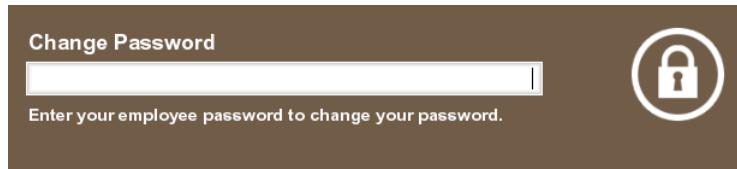
1. Click **Change Password** in the Register Login screen or Back Office Login screen. Xstore Point of Service prompts for your user ID.

Figure 21–11 Employee ID Prompt

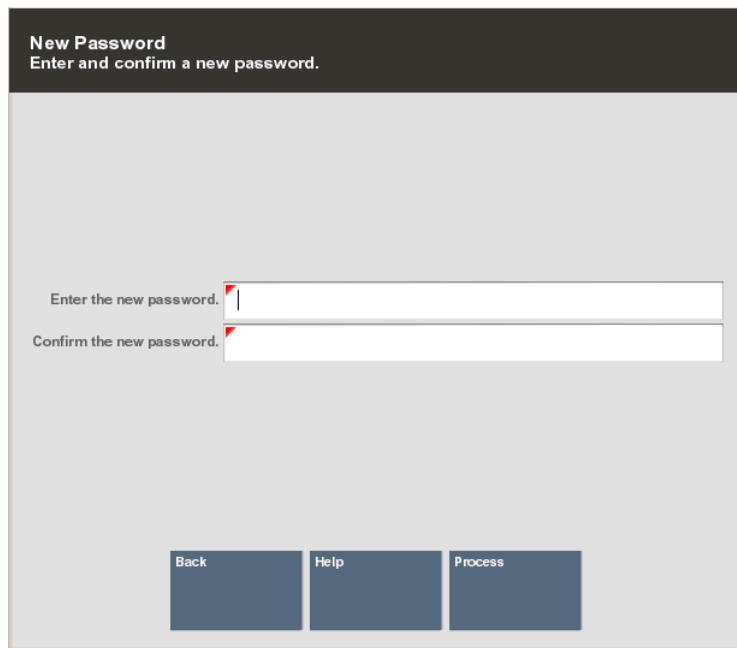


2. Do one of the following, depending upon the configuration of your system:
 - Enter your user ID and press Enter.
Xstore Point of Service prompts for your password. Continue with Step 3.
 - Scan your finger on the fingerprint reader.
Xstore Point of Service prompts for your new password. Continue with Step 4.

Figure 21–12 Enter Current Password Prompt



3. Enter your current password and press Enter.

Figure 21–13 New Password Prompt

4. Enter your new password in the **Enter the new password** and **Confirm the new password** fields.
5. Click **Process**.

The new password is saved.

Note: Xstore Point of Service may enforce certain rules regarding passwords, such as the minimum number of characters required or whether you can reuse an old password.

If your new password is not valid, press Enter to acknowledge the Validation prompt and try again.

Change your Password with Challenge Questions

If Xstore Point of Service is configured to use password challenge questions, you can re-set your password without knowing your current password by answering a set of questions whose answers should only be known to you.

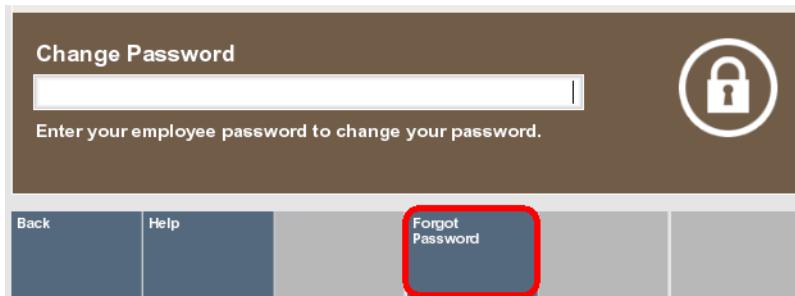
To change your password using challenge questions:

1. Click **Change Password** in the Register Login screen or Back Office Login screen. See [Figure 21–10](#).

Xstore Point of Service prompts for your user ID. See [Figure 21–11](#).

2. Enter your user ID and press Enter.

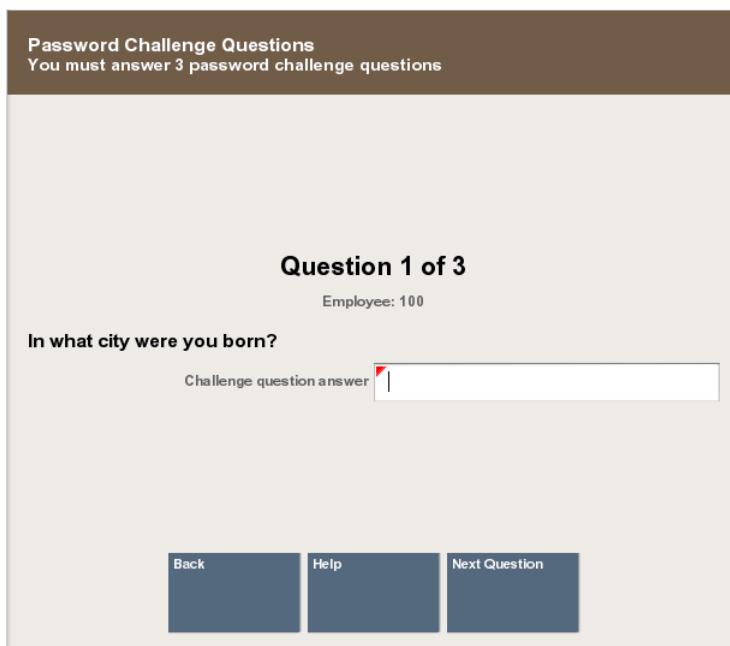
Xstore Point of Service prompts for your password.

Figure 21–14 *Forgot Password Menu Option***3.** Click **Forgot Password**.

Xstore Point of Service prompts for your last name.

Figure 21–15 *Change Password Verification***4.** Enter your last name and press Enter.

Xstore Point of Service asks the challenge questions.

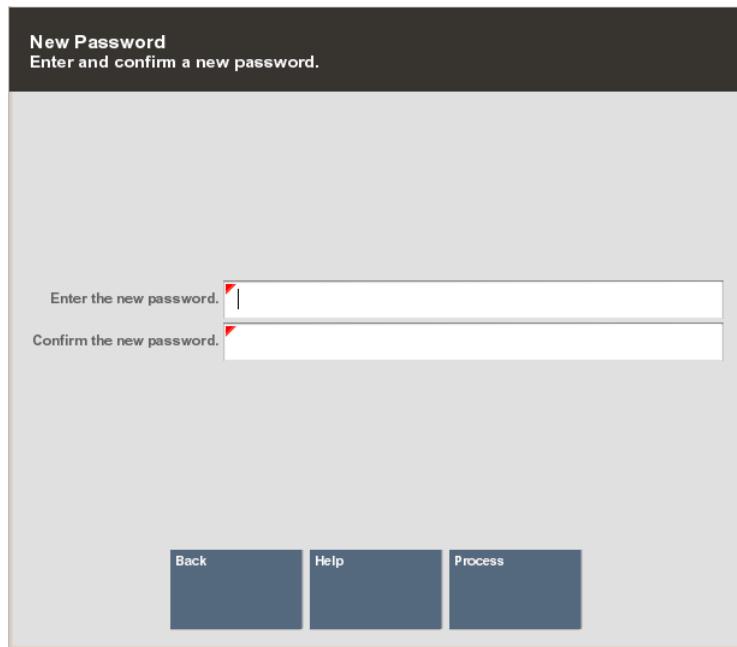
Figure 21–16 *Example Challenge Question***5.** Answer each challenge question:

1. Enter the answer.
2. Click **Next Question** or **Process**.

3. Repeat Steps 1 to 2 for each question.

After you have entered the correct answer for each question, Xstore Point of Service prompts for your new password.

Figure 21-17 New Password Prompt



6. Enter your new password in the **Enter the new password** and **Confirm the new password** fields.
7. Click **Process**.

The new password is saved.

Note: Xstore Point of Service may enforce certain rules regarding passwords, such as the minimum number of characters required or whether you can reuse an old password.

If your new password is not valid, press Enter to acknowledge the Validation prompt and try again.

Post Void

Performing a Post Void transaction changes the status of a sale transaction to Void. All records in the system are reset as if they had never occurred during the original transaction. For example, a post void adjusts the tender totals for the till involved in the transaction.

A transaction may be post voided only on the day it is created. Post Voids may be performed on a different register from the one where the original transaction was executed.

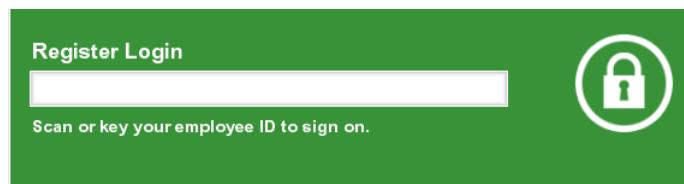
Certain kinds of sale transactions may involve extended transactions that occur outside the system. For example, special orders, work orders and layaways are extended transactions. Although the system checks for such conditions when a post void is executed, some aspects of the transaction may need to be reversed by an additional transaction such as a return. If the system detects an extended transaction, you are prompted about whether or not you want to continue the post void process.

A Post Void transaction may be performed from the Register or from the Back Office, depending upon your system's configuration and store policy. In the Back Office it is available on the Main Menu and also from the Electronic Journal.

To perform a Post Void from the register:

1. Select Till in the Register Login screen.

Figure 21–18 Register Login Employee ID Prompt

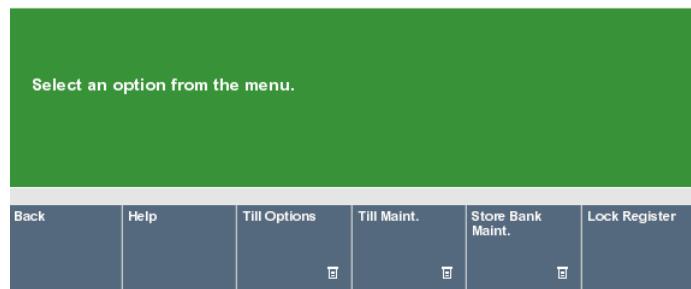


2. Do one of the following, depending upon the configuration of your system:
 - Enter your user ID and press Enter.
Xstore Point of Service prompts for your password. Continue with Step 3.
 - Scan your finger on the fingerprint reader.
The Manage Tills menu opens. Continue with Step 4.
3. Enter your password and press Enter.

Figure 21–19 Register Login Password Prompt



The Till menu opens.

Figure 21–20 Till Menu

4. Select Till Options.

Figure 21–21 Till Options Menu

5. Select Post Void.

Xstore Point of Service prompts for the transaction information.

Figure 21–22 Prompt for Transaction Barcode

The image shows a software interface titled "Post Void". The title bar includes the instruction "Scan a document barcode or enter search criteria.". Below this is a form area with several input fields and labels. The labels are: "Trans Barcode", "Or", "Orig Ticket ID", "Orig Trans Date", "Orig Store ID", "Orig Register ID", and "Orig Trans Amount". Each label is followed by a red-bordered input field. At the bottom of the form are three buttons: "Back", "Help", and "Process".

6. Enter the transaction information:

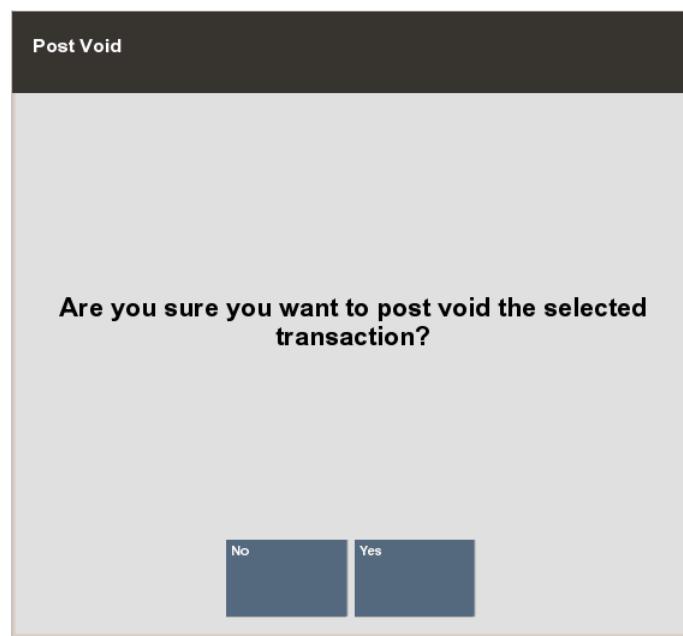
- Scan the transaction barcode. Continue with Step 7.

- Enter the transaction information:
 - **Trans Barcode** - Transaction barcode number.
-
- Note:** If the transaction barcode is entered, the other field values will be ignored.
-
- **Orig Ticket ID** - Ticket ID of the transaction to post void.
 - **Orig Trans Date** - Date of the transaction to post void.
 - **Orig Store ID** - ID of the store where the transaction was performed.
 - **Orig Register ID** - ID of the register where the transaction was performed.
 - **Orig Trans Amount** - Amount of the transaction to post void.

7. Select Process.

If the transaction is found, Xstore Point of Service prompts for confirmation to post void the transaction.

Figure 21-23 Prompt to Confirm Post Void

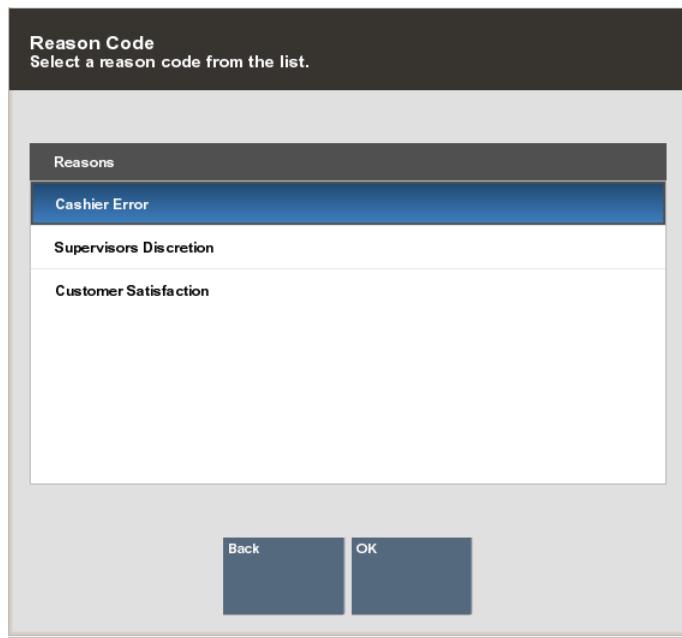


8. Indicate whether to post void the transaction:

- Click **Yes** to post void the transaction.
- Click **No** to cancel the post void.

Xstore Point of Service may prompt for a reason for the post void.

Figure 21–24 List of Post Void Reasons



9. Select the reason:

- Click the reason.
- Use the up and down arrow to highlight the reason, then press the Spacebar.

10. Select OK.

The following prompts depend upon the configuration of your system.

11. If necessary, scan the cash drawer with which to perform the post void.

12. If necessary, enter additional information about the reason for the post void:

1. Enter the additional information.
2. Select OK.

Xstore Point of Service voids the transaction, performs any necessary refunds, prints void receipts for your records, and returns to the previous screen.

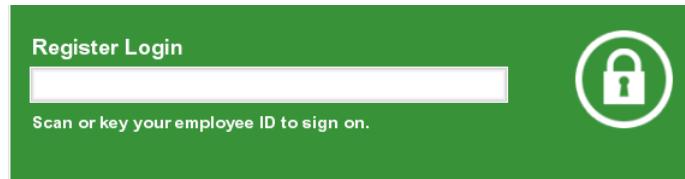
No Sale

Use the No Sale option to open the cash drawer for a reason other than a normal sale transaction.

To perform a No Sale:

1. Select **Till** in the Register Login screen.

Figure 21–25 Register Login Employee ID Prompt



2. Do one of the following, depending upon the configuration of your system:
 - Enter your user ID and press Enter.
Xstore Point of Service prompts for your password. Continue with Step 3.
 - Scan your finger on the fingerprint reader.
The Manage Tills menu opens. Continue with Step 4.
3. Enter your password and press Enter.

Figure 21–26 Register Login Password Prompt



The Till menu opens.

Figure 21–27 Till Menu



4. Select **Till Options**.

Figure 21–28 Till Options Menu



5. Select No Sale.

Xstore Point of Service prompts for the reason for the no sale.

6. Select the reason:

- Click the reason.
- Use the up and down arrow to highlight the reason, then press the Spacebar.

7. Select OK.

The following prompts depend upon the configuration of your system.

8. If necessary, scan the cash drawer with which to perform the no sale.

9. If necessary, enter additional information about the reason for the no sale:

1. Enter the additional information.
2. Click OK.

The cash drawer opens.

Lock or Unlock a Register

Your system may be configured to automatically log out an associate after a specified period of time if there is no system activity. However, you may need to temporarily leave a register before that occurs. In that case, you can lock the register to prevent another person from using the system while you are away.

Lock a Register

Registers can be locked from the Register Login screen or the Register Sale screen:

- [Register Login Screen](#)
- [Register Sale Screen](#)

Register Login Screen

To lock a register:

1. Click **Manage Tills** in the Register Login screen.
2. Do one of the following, depending upon the configuration of your system:
 - Enter your user ID and press Enter.
Xstore Point of Service prompts for your password. Continue with Step 3.
 - Scan your finger on the fingerprint reader.
The Manage Tills menu opens. Continue with Step 4.
3. Enter your password and press Enter.
The Manage Tills menu opens.
4. Click **Register Options**.
5. Click **Lock Register**.

The system displays a message indicating that the system is now locked.

Register Sale Screen

To lock a register:

1. Click **Register Options**.
2. Click **Lock Register**.

The system displays a message indicating that the system is now locked.

Unlock a Register

To unlock a register:

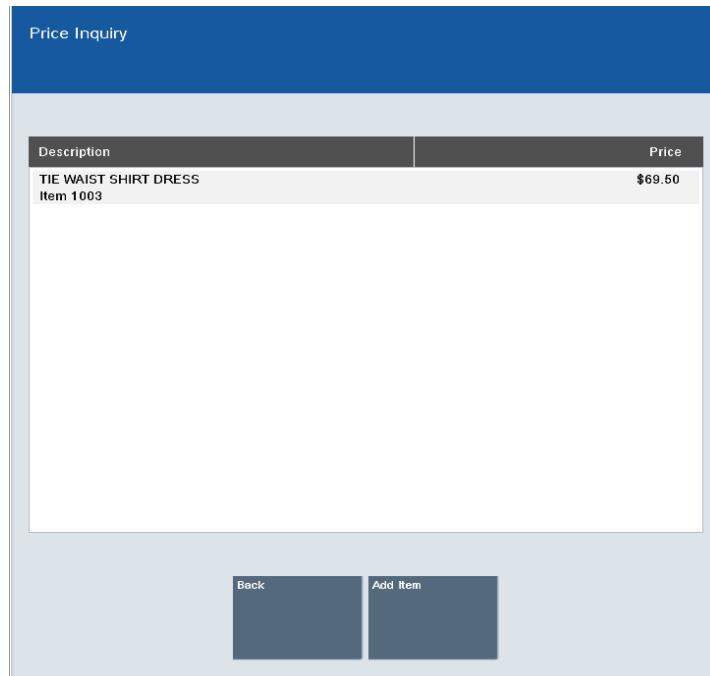
1. Do one of the following, depending upon the configuration of your system:
 - Enter your user ID in the Register Login field and press Enter.
Xstore Point of Service prompts for your password. Continue with Step 3.
 - Scan your finger on the fingerprint reader.
The register is unlocked.
2. Enter your password and press Enter.
The register is unlocked.

Price Inquiry

If you want to look up the price of an item, use the function Price Inquiry. You can look up the price for an item when you are logged out as well as when you are logged on to the application. To look up the price of an item, follow the steps below.

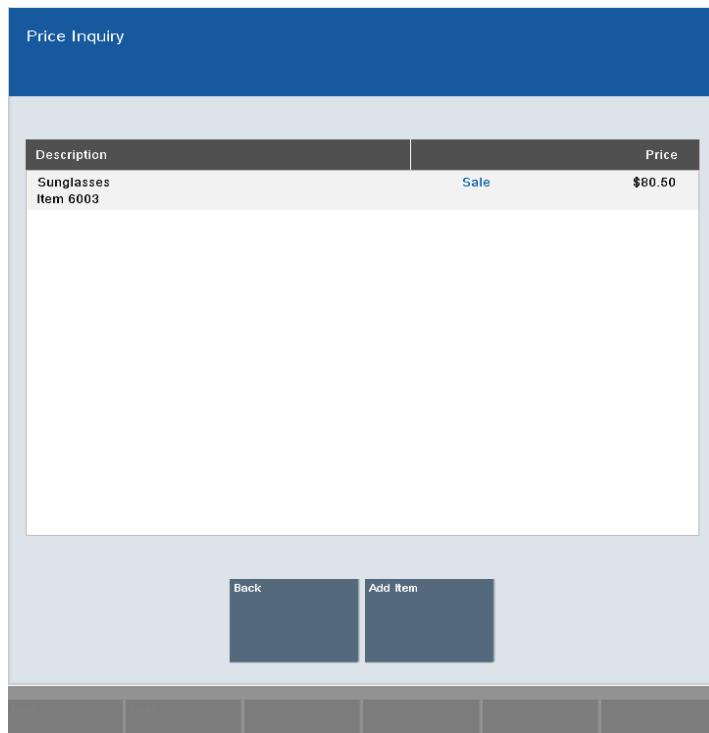
1. Press **Find Item**.
2. Press **Price Inquiry**.
3. You are prompted for the item. Scan, or enter the item and press **Enter**.
4. The item description, item ID and the corresponding price are displayed.

Figure 21–29 Price Inquiry - Logged In



Note: If the displayed price is a deal price, the system marks the price with the text Sale.

Figure 21–30 Price Inquiry - Deal Price



- If you are logged out of the application, press **Back** to close the screen.
- If you are logged on to the application, choose one of the following options.
 - Press **Back** to return to the Sales screen.
 - Press **Add to Item** to add the item to the current sales transaction. The item is shown on the view port.

22

House Account Payments

This function allows you to accept a customer payment that is applied toward the balance owed by a customer. The tender types that are acceptable for payment are defined in your system's configuration. House Account payments may be included as part of a regular register sale or as the sole item (payment) in a sale.

This chapter covers the following topics:

- [Making a House Account Payment](#)
- [Reversing a House Account Payment](#)

Making a House Account Payment

To perform a payment to a house account:

1. Associate a Customer with the Transaction.
2. Click Register Options in the Register Sale screen.
3. Click House Account Payment.

Xstore Point of Service prompts for authorized buyer making the payment to the account.

Figure 22–1 House Account Authorized Buyer List

Primary	Name & Buyer ID	Start End Date
<input checked="" type="checkbox"/>	Campbell, Grely HAU040100100002	10/25/2017
	Buyer, Benny HAU040100100003	10/25/2017

4. Select the authorized buyer:
 - Click the buyer.
 - Use the up and down arrow to highlight the buyer, then press the Spacebar.
5. Select OK.

Xstore Point of Service prompts for the payment amount.

Figure 22–2 House Account Payment Amount Prompt

6. Enter the payment amount and press Enter.

The following prompts will depend up on the configuration of your system.

Figure 22–3 House Account Payment Statement Date Prompt



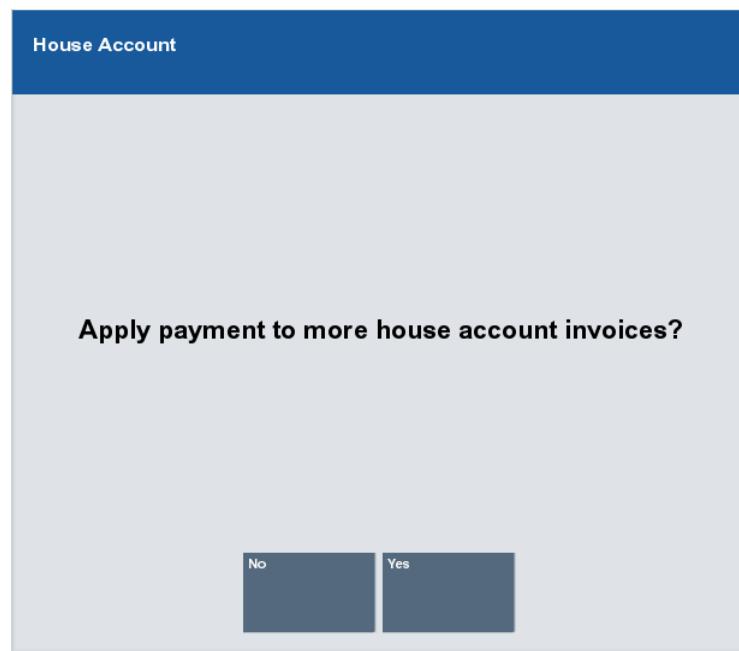
7. If prompted, enter the date of the payment statement on which the payment should appear, then press Enter.

Figure 22–4 House Account Invoice Number Prompt



8. If prompted, enter the Invoice Number against which the payment is applied, then press Enter.

Figure 22–5 House Account More Payments Prompt



9. If necessary, indicate whether to make more payments to house accounts.
 - Click **Yes** to make more payments. Continue with Step 4.
 - Click **No** to return to the Register Options menu.
10. When completing the transaction, apply the permitted tenders to the transaction.

Note: The tenders that can be applied to a house account are limited. For example, a house account cannot be used to make a house account payment.

Reversing a House Account Payment

To reverse a payment on a house account:

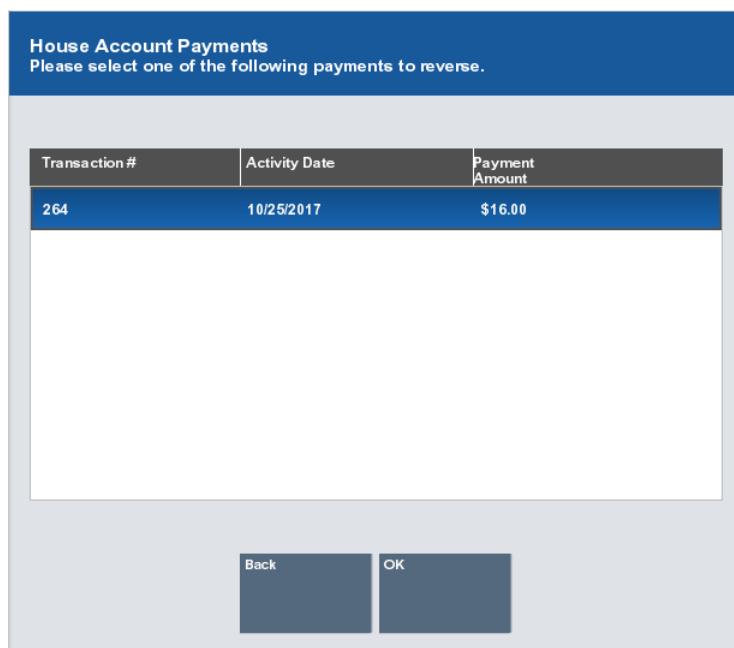
1. [Associate a Customer with the Transaction.](#)
2. Click **Register Options** in the Register Sale screen.
3. Click **House Account Reversal**.

If the customer has more than one house account, Xstore Point of Service prompts for the account. Continue with Step 4. Otherwise, continue with Step 10.

4. Select the account:
 - Click the account.
 - Use the up and down arrow to highlight the account, then press the Spacebar.
5. Click **OK**.

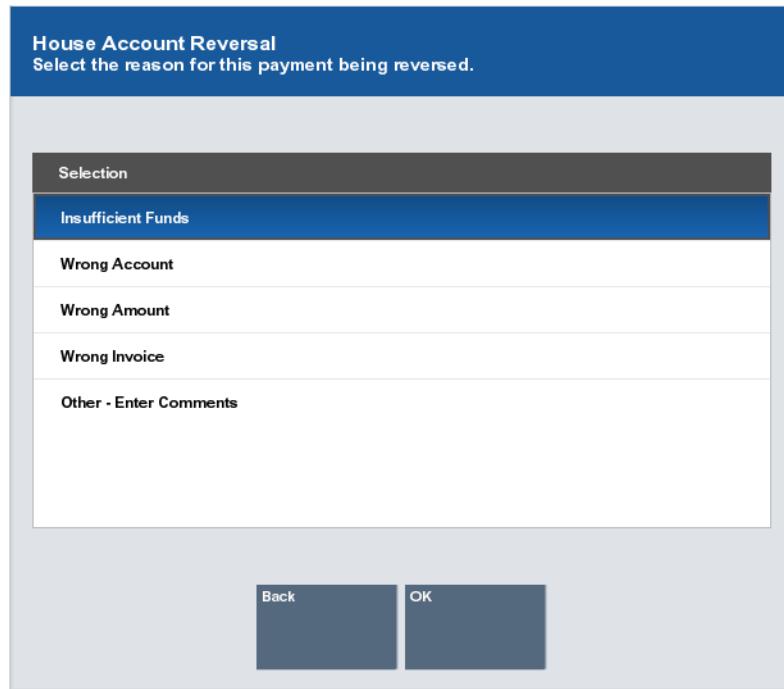
Xstore Point of Service prompts for the payment to reverse.

Figure 22–6 House Account Payments List

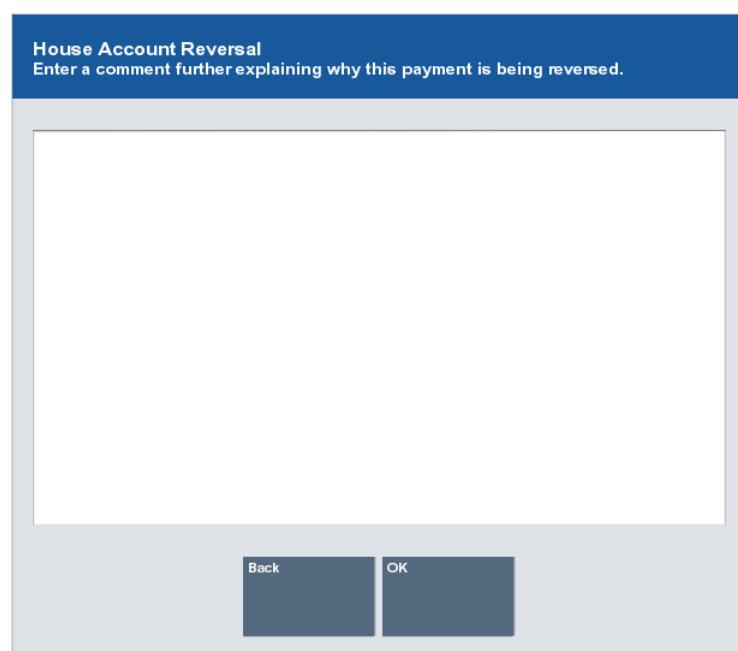


6. Select the payment:
 - Click the payment.
 - Use the up and down arrow to highlight the payment, then press the Spacebar.
7. Click **OK**.

Xstore Point of Service prompts for the reason for the reversal.

Figure 22–7 House Account Reversal Reason Code List

8. Select the reason:
 - Click the reason.
 - Use the up and down arrow to highlight the reason, then press the Spacebar.
 9. Select **OK**.
- Xstore Point of Service prompts for additional information about the reason for the reversal.

Figure 22–8 House Account Reversal Comment Prompt

- 10.** Enter additional information about the reason for the reversal.
- 11.** Select **OK**.

The payment reversal is applied to the transaction and appears in the [View Port](#).

23

Tax Free Invoices

Some countries offer “Tax Free Shopping” to shoppers from other countries, and allow for the reclaiming of value added tax (VAT) on their purchases. The final cost for the traveler is the value of the merchandise minus the taxes and the fee of the provider.

Xstore Point of Service has been integrated with the two largest providers:

- Global Blue
 - Using their IC2 services and IC2 web forms embedded within Xstore
- Planet Payment (previously known as Premier Tax Free (PTF) or Fintrax(FX))
 - Using Xstore forms

Countries

Xstore is certified for the use of the Tax Free for the following countries:

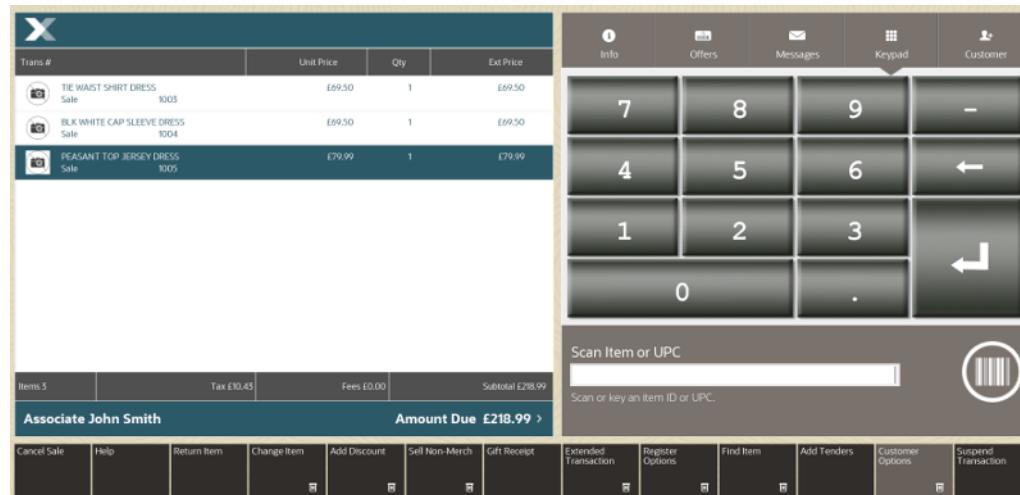
- Austria
- Belgium
- France
- Germany
- Italy
- Japan
- Netherlands
- Poland
- Portugal
- Spain
- Sweden
- Switzerland
- United Kingdom

Other countries could be configured, but are not officially supported.

Issue the Tax Free Invoice During a Sale

If Xstore Point of Service has been configured to integrate with one of these Tax Free providers, then eligible shoppers can request a Tax Free Invoice (TFI) during the sale, which they can later use to reclaim the VAT they have paid on their purchases.

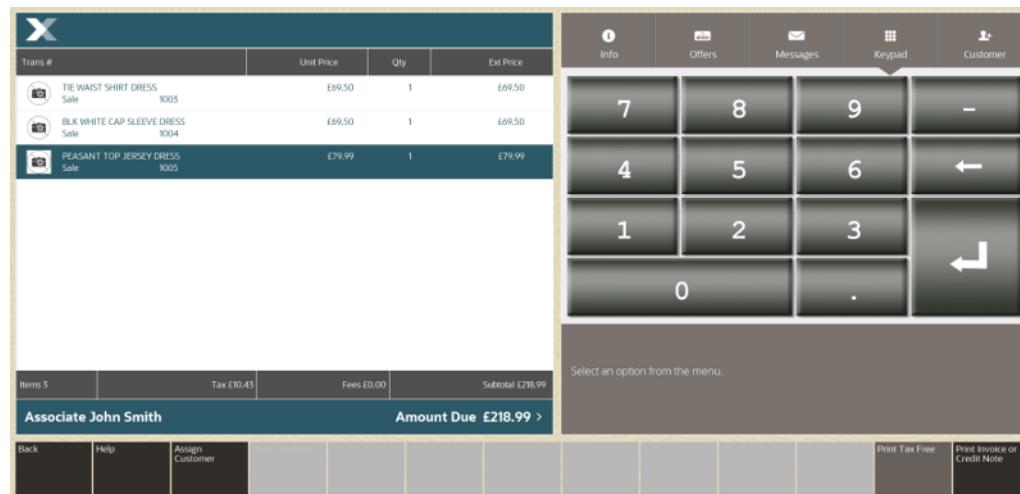
Figure 23–1 Tax Free Sale



To issue a Tax Free Invoice during a sale:

1. Click **Customer Options**.

Figure 23–2 Customer Options Menu - Print Tax Free



2. Click **Print Tax Free**.

In the default processing, the Tax Free Invoice form opens, and after this Xstore prompts for tendering.

Note: A configuration setting is available for use with Global Blue, and when using certain payment providers, that prompts for tendering first, and if a credit /debit card is tendered and is potentially eligible for Tax Free, then the Tax Free Invoice form can be opened, and can allow "immediate refund" method to be selected (if configured) and the refund applied immediately to the sale. The reduced transaction amount is then displayed on the payment terminal and thus the customer will pay the original transaction total, less the refund amount, on the card payment.

Note: The connection from Xstore to the Tax Free Provider must be available, in order for a Tax Free Invoice to be issued.

The Tax Free Invoice form that opens depend on the Tax Free Provider. Select the provider to continue the steps:

- [Planet](#)
- [Global Blue](#)

Planet

With Planet, the following Xstore forms are displayed:

Figure 23–3 Tax Free Invoice Form - Planet

1. Do one of the following:

- [Get Traveler Information.](#)
- Enter or edit the **Customer Information**:

Note: If a customer is associated with the transaction, the customer information will be populated with the information from the customer record.

- **First Name:** First name.
- **Last Name:** Last name.
- **Address:** Street address.
- **City:** City of the address.
- **State:** State or province of the address.
- **Postal Code:** Postal or zip code for the address.
- **Country of Residence:** Country of the address.

2. Enter the **Tax Free Information** for the customer:

- **Document Type:** Specify the document type provided by the traveler (for example, Passport, Driving License, Identify Card, and so on.)
- **Document #:** The id of the selected document type.
- **Document Country:** Country for the customer's document.

Note: Only countries locally eligible for VAT refund are available in this menu.

- **Document Expiration Date:** The date in which the document will expire.
- **Nationality:** Customer's national country.
- **Tax Number:** The tax identification number associated to the traveler.
- **Mobile Number:** The mobile phone number of the traveler.
- **Birth Date:** Customer's birthdate.
- **Final Destination:** Final travel destination for the customer.
- **Email:** Customer email address.
- **Arrival Date:** Date the customer arrived in the country.
- **Departure Date:** Date the customer will leave the country.

Note: The fields are all visible, but, depending on the specific country, they are enabled or not, and mandatory or optional.

3. Click **Select Tax Free Reimbursement** when all the mandatory information has been entered.

The form to select the options for the credit card to be used for the refund is shown; use the **Skip card data selection** button to use a refund method different than a credit card.

Figure 23–4 Tax Free Refund on Card

This form would only be used if the Tax Free Provider has supplied "Tokenization Devices" to the store, otherwise the cashier would select **Skip card data selection**.

This form has the following data fields to be captured:

- **Token #:** Essential in order to use the credit card as refund method; the token must be retrieved externally, via a separate device (for more information, contact the provider). The customer inserts their credit card into the providers device and the device displays a QR Code. The cashier will then scan the QR Code. The next 3 fields are usually automatically populated.
- **First six digits of card number:** The first 6 digits of the credit card number.
- **Card type:** Select the type of credit card.
- **Expiration date:** Set the month and year in which the card will expire.

Note: The credit card used here could be different from the one that will be used for the payment.

4. Select **Accept card data**, or **Skip card data selection** if you choose to use a refund method different than a credit card.

Note: Important: The Refund Methods available depend upon the refund methods offered by the provider. Contact your provider for more information.

5. Select a **Refund Method** and enter the **Voucher Formula**.

Figure 23–5 Tax Free Invoice Service and Refund Method

The screenshot shows a software interface titled "Tax Free Invoice". A sub-header says "Select the parameters of the Tax Free Invoice". There are two input fields: "Refund method" and "Voucher Formula", both enclosed in red boxes. At the bottom are three buttons: "Back", "Help", and "Print Tax Free".

If Alipay is selected as the **Refund Method**, enter the phone number.

Figure 23–6 Refund Method - Alipay

The screenshot shows a software interface titled "CUSTOMER TAX FREE REFUND METHOD". A sub-header says "Set the additional information required". There is one input field labeled "Phone Number" with a red border.

If Alipay Instant is selected as the **Refund Method**, enter the Alipay barcode the customer should provide to you via their mobile device application.

Figure 23–7 Refund Method - Alipay Instant

The screenshot shows a software interface titled "CUSTOMER TAX FREE REFUND METHOD". A sub-header says "Set the additional information required". There is one input field labeled "Alipay barcode" with a red border.

If Etihad Guest Card is selected as the **Refund Method**, enter the card number.

Figure 23–8 Refund Method - Etihad

CUSTOMER TAX FREE REFUND METHOD

Set the additional information required

Card #

6. Select **Print Tax Free** when all the mandatory information has been entered.
- The Tendering screen opens.
- The tax free invoice will automatically print during the sale completion process.

Note: Refund Methods

In the majority of cases, the customer pays all the amount, tax included. The reimbursement is done at a later time at the providers' desks.

There are some refund methods however, for which the refund is immediately given to the traveler, so they do not pay the taxes at source. Those methods are called (VATOFF, Refund OFF, TOPOS).

Global Blue

With Global Blue IC2, the IC2 Webform is displayed embedded within Xstore.

Figure 23–9 Tax Free Invoice Form - Global Blue

Oracle Retail Xstore Point of Service

TEST SHOP ORACLE - TEST STREET 123 -- LONDON - E26-UNITED KINGDOM - 19326

TRAVELLER

PERSONAL INFO

GLOBAL BLUE REFERENCE: 308604077217730
PASSPORT NO.: X777777
PASSPORT COUNTRY: RUS-RUSSIAN FEDERATION
FIRST NAME: John LAST NAME: Traveller
DATE OF BIRTH: 15/05/1980

CONTACT INFO

COUNTRY OF RESIDENCE: 643-RUSSIAN FEDERATION
STREET: Test Address 123
CITY: Test City
ZIP: 54321
EMAIL: john.Traveller@globalblue.com
MOBILE NUMBER: +7

SUMMARY

TRAVELLER: X777777 - Traveller, John
RUS-RUSSIAN FEDERATION

PURCHASE: 218.99
10.43 VAT

REFUND: 6.20
Cash

PURCHASE

SHOP INVOICE NUMBER: 07331971000013

VATS

GROSS AMT.: 218.99

REFUND

REFUND METHOD

Back Help FLEX REFUND CASH

PURCHASE TOTAL: 218.99 VAT TOTAL: 10.43 REFUND TOTAL: 6.20

Note: When using Xstore Mobile Tablet or HHT, the IC2 webform auto adjusts to the relevant screen size.

1. Enter the customer's information.

The IC2 form controls which fields are displayed, which are mandatory and which refund methods are available. The cashier can lookup the customer details using the customers Global Blue Card or passport number, and if located by IC2, the customers details will be displayed into the form, saving the cashier from manually keying all of these details. If a customer is already attached to the sales transaction, then Xstore will default the customers details, which can be edited if required.

2. When all mandatory fields have been entered, the cashier selects the required refund method.
3. The cashier then selects **Issue**, in order to issue and print the Tax Free Invoice - the cashier will hand this over to the customer, along with the Xstore receipts, after the tendering process is completed.

Figure 23–10 Sample Global Blue Tax Free Invoice

Global Blue

BRITAIN

Tax Refund Form (version of file 4000)

THIS TAX FREE FORM IS THE EXCLUSIVE PROPERTY OF GLOBAL BLUE. REFUND ONLY BY GLOBAL BLUE OR ITS AUTHORISED REFUND PARTNERS.

Return address for stamped Tax Free Form: Global Blue, PO Box 363, 810 00 Bratislava, Slovakia. To contact Customer service visit www.globalblue.com/contactus

C. RETAILER DECLARATION (Retailer must sign X below) **19326**

TEST Shop Oracle
TEST Street 123

54321 London
826 United Kingdom

I declare that:
I sold the goods to the customer on / /
The goods are new.
I am satisfied this customer is entitled to use the VAT Retail Export Scheme.
The customer has completed and signed the form in my presence.

X RETAILER SIGNATURE DATE (DD/MM/YY)

B. DESCRIPTION OF GOODS

ITEM	QUANTITY	DESCRIPTION	PRICE INC. VAT
1004	1	BLK WHITE CAP SLEEVE DRESS	69.50
1005	1	PEASANT TOP JERSEY DRESS	79.99

DATE OF ISSUE **10/12/2019** TOTAL VAT AMOUNT **10.43** TOTAL PRICE INC. VAT **218.99**

SERVICE FEE **4.23** NET REFUND DUE **6.20**

REFUND RULES
An Immediate Refund will always be paid in the currency of the country where the Refund Office is located. The Refund Office is located in Slovakia. Global Blue reserves the right to change the Refund Bureau de Change at the same location on where the refund is presented will be applied for the currency conversion. Global Blue reserves the right of choosing the appropriate refund method in accordance with the law. This form is valid for purchases made in the EU. The amount of the refund will be converted into the currency in which the Tax Free Form ("Form") is issued, the current Global Blue "we sell" rate based on the exchange rate on the day of issue. The amount of the refund will be converted into the local currency according to the exchange rate on the day of issue. Credit card accounts will always be credited in the customer's local currency.

REFUND PERIODS
Immediate Refund in cash is made upon receipt of a duly filled in and validated Form. Immediate Refund in credit/debit card is made within 3 months of receipt of a duly filled in and validated Form. The refund in credit/debit card account is made within 3 months of receipt of a Form by mail. Processing time for any immediate refund in cash is 10 working days.

IMMEDIATE REFUND IN CASH
At some Refund Offices a cash handling fee per "Form" will be charged should you require an immediate refund in cash.

GLOBAL BLUE PRIVACY POLICY
GLOBAL BLUE WILL NOT SHARE YOUR INFORMATION WITH ANYONE.
By joining, interacting or making purchases with Global Blue, we will collect and use information about you. This includes your name, address, telephone number, email address, and use of your SHOP TAX FREE Card, Flying and travel purchases and other information that you give us. We will use this information to process your tax refund and administer your participation in the Global Blue Tax Free Shopping network.
We will also use this information to process your tax refunds and administer your participation in the Global Blue Tax Free Shopping network.
We will use this information to process your tax refunds and administer your participation in the Global Blue Tax Free Shopping network.
By providing your email address, phone number or other communication details to us, you agree that we may contact you via email, telephone or other communication channels to provide you with information about our products and services, special offers and promotional events.

WHO WILL NOT SHARE YOUR INFORMATION WITH?
We will not share your information with other Global Blue group of companies and with our shipping, hotel, travel and payment partners. For details please provide in the Tax Free Shopping FAQs section of www.globalblue.com.
We will not share your information with relevant tax authorities, customs officials, refund offices and your bank and/or credit card companies as necessary to process your tax refunds.

GLOBAL BLUE
You have a right to access personal data held about you. To obtain a copy of the information we hold about you, please contact us.

We are part of the Global Blue group. Our head office is Global Blue S.A. based in Switzerland. You can contact us at privacy@globalblue.com or GlobalBlue.com.

Barcode Export Scheme

Doc-ID 12003.019326.2935.22030

A. CUSTOMER DETAILS
POSTCODE **44139** CITY **Solon** STATE
COUNTRY **UNITED STATES** DATE OF DEPARTURE
NAME OF ADDRESS
FINAL DESTINATION COUNTRY

MORSE CODE: NO INCLUDE COUNTRY CODES

CUSTOMER DECLARATION
By signing or submitting this Tax Free Form ("Form") I use the Global Blue tax refund service. I understand that I am responsible for paying any taxes in the term of the refund.
I am not a resident of the EU or am an EU resident, student or migrant worker and intend to leave the EU within 12 months of issue.
I purchased goods according to the Description of Goods entry on the attached sales receipt(s), and return them to the EU within 3 months of issue.
My personal details are filled in correctly and completely.
I understand that I am responsible for paying any taxes in the term of the refund.
I understand that Global Blue or one of its authorised refund partners may refund my VAT and that service fees apply.
I understand that I am responsible for paying any taxes in the term of the refund.
I understand that the refund will not be made unless all Global Blue Refund Conditions are met.

X CREDIT CARD
REFUND METHOD
 CREDIT MY CREDIT CARD
 CREDIT CARD NUMBER

GLOBAL BLUE MOBILE PHONE NO.
FOR CHARGE
 BANK
ACCOUNT HOLDER NAME
IBAN
BIC

BANK CHECK
DATE OF EXPIRY
ADDRESS ABOVE
 CASH REFUND REQUESTED

X CUSTOMER SIGNATURE

CUSTOMER DECLARATION
I agree to Global Blue Conditions
I declare that I am not a resident of the EU or am an EU resident, student or migrant worker and intend to leave the EU within 12 months of issue.
I intend to export the goods listed on this Form from the EU within 3 months after the month in which I signed this Form.
My personal details are filled in correctly and completely.
An administration charge is deducted from your refund. If you do not receive your postal refund within 4 weeks of issue, you should write to Global Blue at the above address.
I will delete any goods left in the EU before making a declaration to Customs.

GENERAL INFORMATION
Proof of posting this form to Global Blue is not proof of receipt. Please retain a photocopy of the form for your records.
Global Blue operates a personal export service and does not cover goods which are shipped outside the EU.
An administration charge is deducted from your refund. If you do not receive your postal refund within 4 weeks of issue, you should write to Global Blue at the above address.

DOING BUSINESS IN THE EU
If you are doing business in the EU, you must complete this form in English and/or French. It is a serious offence to present this form and make an untrue declaration to Customs & excise if the goods are not exported from the EU.

MEMBER!
YOU MUST PRODUCE THIS FORM AND THE GOODS TO CUSTOMS AT THE LAST POINT OF DEPARTURE FROM THE EU

D. FOR OFFICIAL USE AT EXPORT FROM THE EU

GLOBAL FORM NO. 4000

Automatic Eligibility Recognition

Xstore can be configured to check if the customer associated to the current transaction is eligible for tax free based upon the country they live in, or the credit card is from a country eligible for tax free shopping. The prompt is shown only if the value of the transaction is above the local threshold. See the following sections for more information.

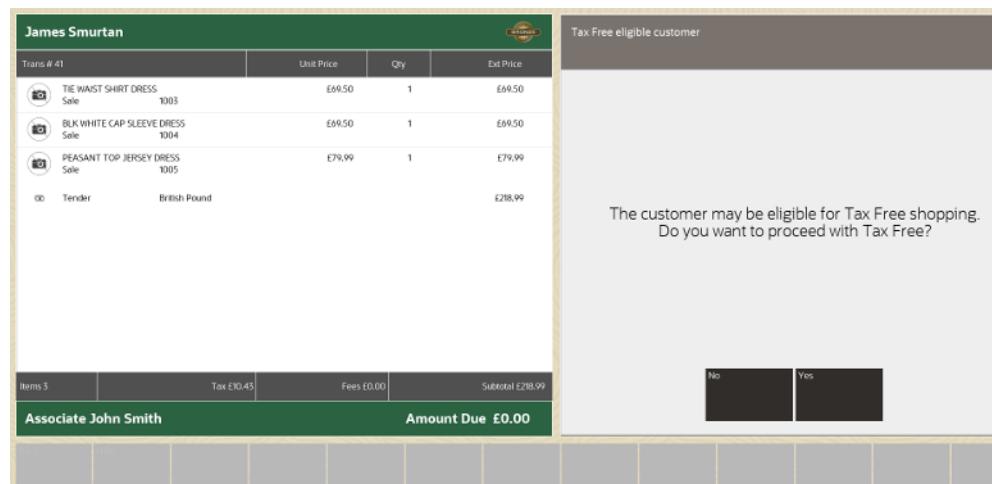
These are applicable for both Global Blue IC2 and Planet:

- [Customer's Country Recognition](#)
- [Credit Card Recognition at Payment Time](#)
- [Credit Card Recognition at Transaction Completion](#)

Customer's Country Recognition

If the transaction is associated to a customer from a country eligible for Tax Free, at the tendering stage, the system recognizes that eligibility and prompts if a Tax Free Invoice should be issued.

Figure 23-11 Tax Free Invoice Customer Prompt - Country Eligible



Select **Yes** to proceed with issuing a Tax Free Invoice. The Tax Free Invoice form opens.

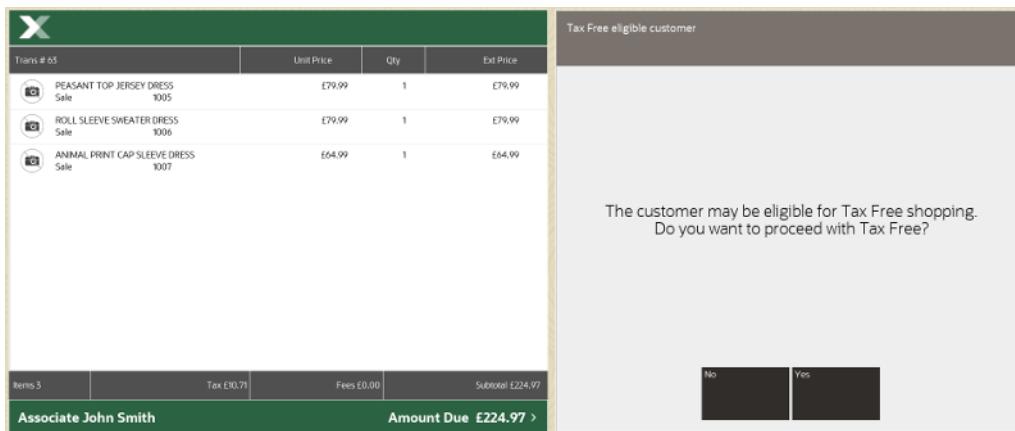
Note: This option requires a high integration level between Xstore and the payment system.

This configuration also affects the behavior during the usage of the other related functions (that is, if the cashier uses the **Tax Free** button at sale time, it is processed at transaction completion time).

Credit Card Recognition at Payment Time

During the payment, if currently used credit card is from a country eligible for Tax Free, the system prompts if a Tax Free Invoice should be issued.

Figure 23–12 Tax Free Invoice Customer Prompt at Payment Time

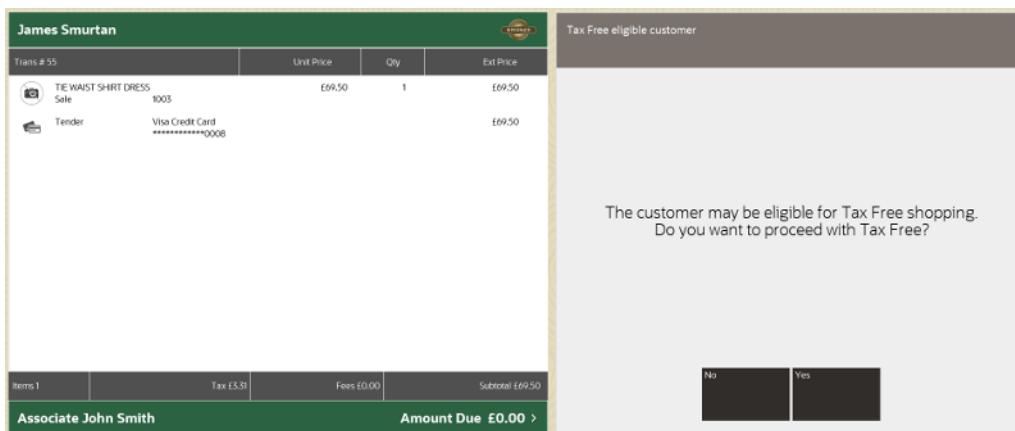


Select Yes to proceed with issuing a Tax Free Invoice. The Tax Free Invoice form opens.

Credit Card Recognition at Transaction Completion

During the completion of the transaction, if at least one of the payment methods is credit card, and if the credit card is from a country eligible for Tax Free, the system prompts if a Tax Free Invoice should be issued.

Figure 23–13 Tax Free Invoice Customer Prompt at Transaction Complete



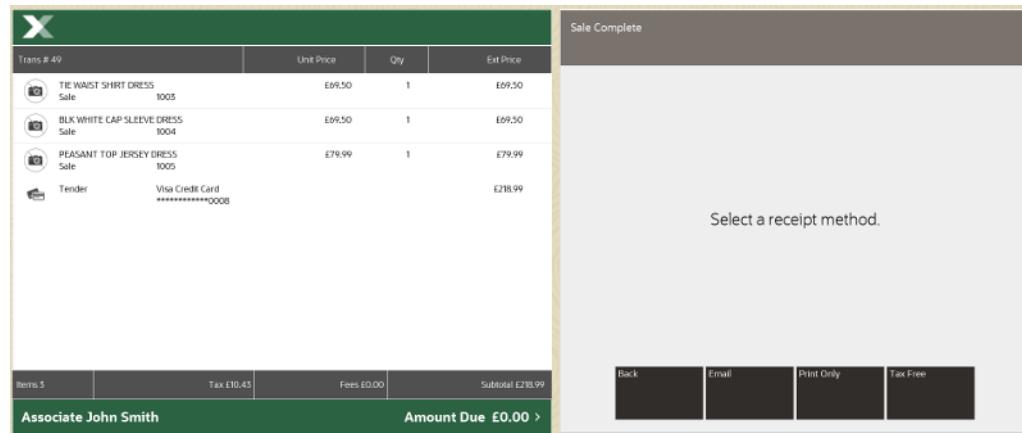
Select Yes to proceed with issuing a Tax Free Invoice. The Tax Free Invoice form opens.

Note: At this point some refund methods are not available.

Delayed Activation

If neither the customer, nor the cashier realizes that the customer is eligible for a Tax Free invoice during the sale and the tendering, there is still available a **Tax Free** button in the transaction completion form.

Figure 23–14 Tax Free Option at Sale Complete



Select **Tax Free** to proceed with issuing a Tax Free Invoice. The Tax Free Invoice form opens.

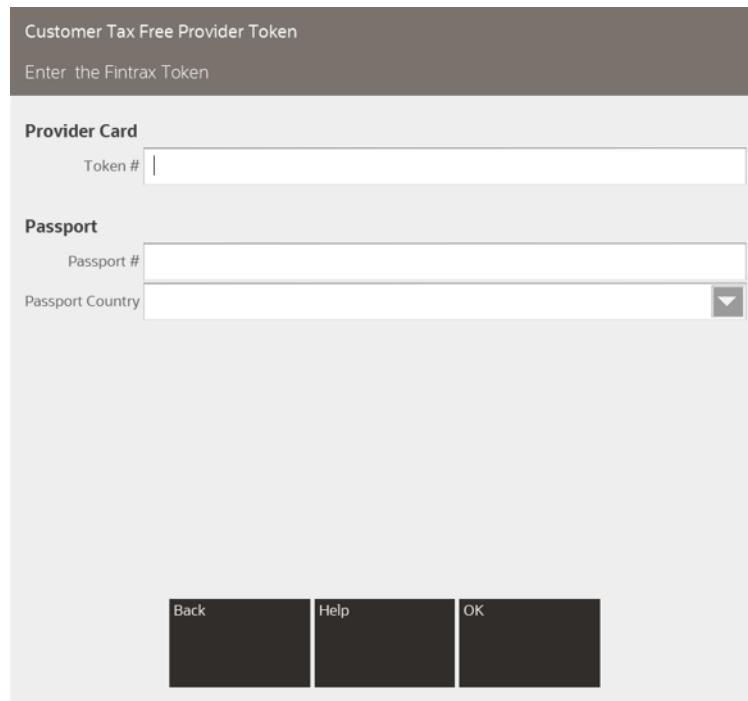
Note: At this point some refund methods are not available.

Get Traveler Information

When using Planet, to retrieve the traveler information for a customer:

1. Click **Lookup Traveler** from either the Sales menu or from the customer data forms.

The Customer Tax Free Provider Token window opens.

Figure 23–15 Customer Tax Free Provider Token Form

2. Enter either the customers Tax Free Card (Provider Card Token#) or the customers Passport# and country:
 - Provider Card Token# - either scan or key the Card Token#
 - Passport - key the passport number and select the Country that issued the passport
3. Select **OK**.
If the customer information is found, the traveler details (non-editable) auto-fills the Identity Check form.

Figure 23–16 Traveler Identity Check

Identity Check

Do you confirm the traveller identity and his/her eligibility to the Tax Free service?

First Name

Last Name

Passport #

Country of Residence

Shop Assistant

Back | Help | Confirm customer identification

Note: If the customer information is not found, re-enter the customer information.

If Xstore Point of Service cannot connect to the Tax Free Provider service, the process will not continue.

4. Check the customer's name, passport number, and country provided by the Tax Free Provider against the customer's passport.
5. Enter the **Shop Assistant** ID.
6. Click **Confirm Customer Identification**.

The Customer Tax Free Provider Token window closes and the fields in the Tax Free Invoice window is populated with information retrieved from the Tax Free Provider.

Figure 23–17 Completed Tax Free Invoice Form

The form is titled "Insert all required data". It has two main sections: "Customer Information" and "Tax Free Information".

Customer Information:

- First Name: Elana
- Last Name: Fallsw
- Address: 1 Rutherford Place
- City: McLeod
- Postal Code: 09291
- State: (empty)
- Country of Residence: AUSTRALIA

Tax Free Information:

- Document Type: (dropdown menu)
- Document Country: (dropdown menu)
- Mobile Number: (text input)
- Final Destination: (dropdown menu)
- Arrival Date: (text input)
- Document #: BE501557D
- Tax Number: (text input)
- Birth Date: (text input)
- Email: bclafz20@epitaphs.org
- Departure Date: (text input)

At the bottom, there are buttons for "Back", "Help", "Select Tax Free Reimbursement", and "Lookup Traveller".

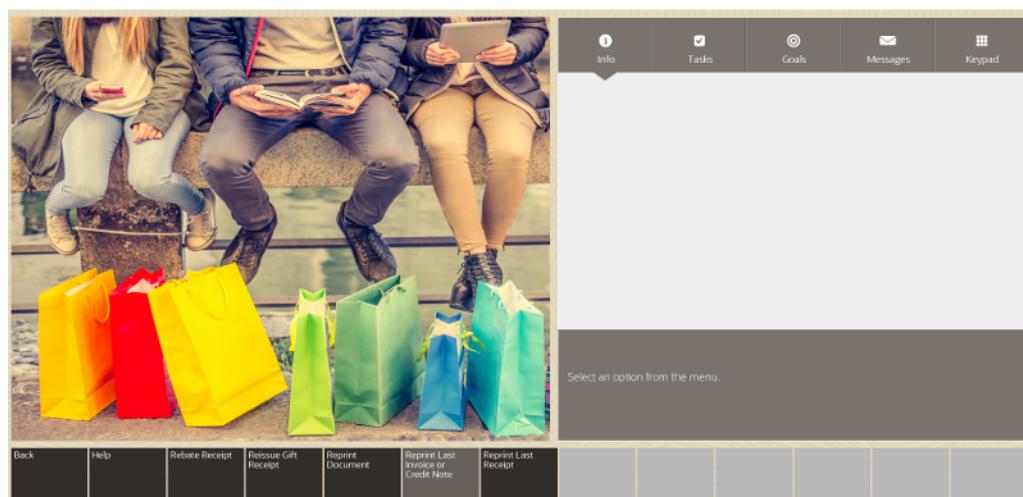
Reprint a Tax Free Invoice

A Tax Free Invoice (TFI) can be reprinted after a transaction that issued a TFI completes. The TFI is no longer available to be reprinted after a certain amount of time has passed, or a new transaction is started.

Note: If the Tax Free Invoice is not available to be reprinted, it can be reprinted from the Xstore Point of Service Back Office.

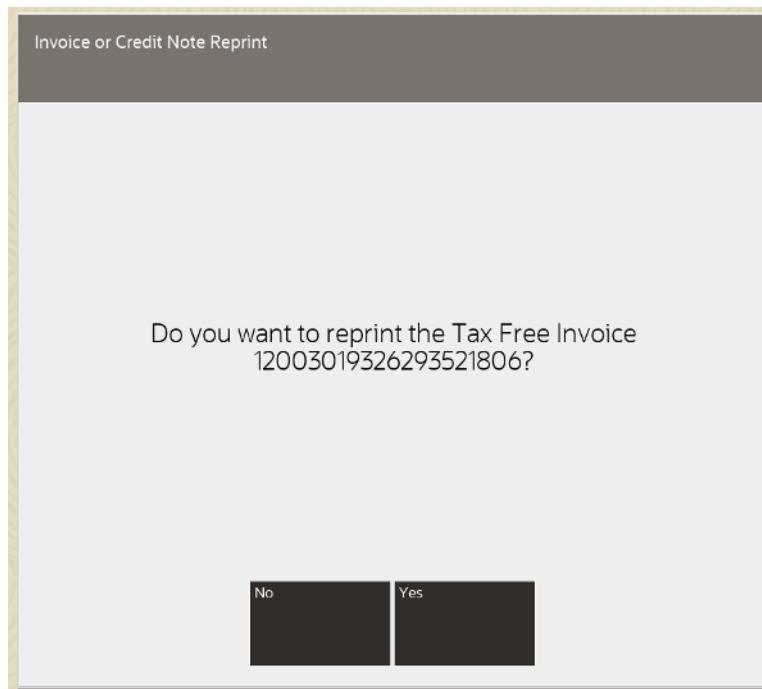
To reprint a Tax Free Invoice:

1. Click Receipt Reprint Options.

Figure 23–18 Receipt Reprint Options

2. Click Reprint Last Invoice or Credit Note.

Figure 23–19 Reprint Tax free Invoice Prompt



The Tax Free Invoice is reprinted.

24

Flash Sales

From the register you can view the Flash Sales Summary Report which provides an instant snapshot of sales at the moment that you select it. The report displays data in a column format as well as in graphic format with bar charts and pie charts. It includes sales results from two perspectives:

- **Sales** - The count of transactions and the dollar amount of the transactions in the following categories: gross sales, net sales, returns, discounts and total tax.
- **Tenders** - The count of transactions and the dollar amount for each tender type that was used such as cash, various credit cards, store credit, gift certificates, and so on.

The last page of the Flash Sales Summary report includes a pie chart of the tenders used and a bar chart of the sales results.

You can set the date parameters that are used to select the data included in the report, and to specify whether or not zero values are suppressed and whether or not the charts are shown. See Running the Flash Sales Summary Report.

The report may be viewed online and printed immediately, or saved so that it may be viewed later. Saved reports may be preserved with the original selection parameters or with the original data.

Additional Flash Sales reports are accessible from the Back Office Reports Menu. Refer to the *Oracle Retail Xstore Point of Service Manager's Guide*, and the *Oracle Retail Xstore Point of Service Reports Guide* for more information about the Flash Sales Report.

Run the Flash Sales Summary Report

To run the Flash Sales Summary Report from the Register Login screen:

Figure 24-1 Register Login Screen



1. Click Flash Sales in the Register Login screen.

The Flash Sales criteria window opens.

Figure 24–2 Criteria Entry Form for Flash Sales Summary Report

Flash Sales

Enter parameters to use when running this report.

Date	10/25/2017
	Specific Date <input type="button"/>
Display Options	Summary <input type="checkbox"/>
Show Chart	Yes <input checked="" type="checkbox"/>
Show Criteria	Yes <input checked="" type="checkbox"/>

Back Help Run Report Save Print

2. Enter the report criteria:

- **Start Date/Specific Date** - Enter a date on the top line or select a relative date from the drop-down list.
- **Display Options** - Select how the report will display data:
 - **Summary** - Display a summary of all data.
 - **By Department** - Organize the data by the item department.
 - **By Employee** - Organize the data by the employee who performed the sale.
 - **By Hour** - Organize the data by the hour at which the sales were made.
- **Show Chart** - Select **Yes** to display a chart or **No** to only show data.
- **Show Criteria** - Select **Yes** to display the criteria used when creating the report or **No** to only show the results.

3. Finish the report:

- Click **Run Report** to execute the report and display the results on the screen.
- Click **Print** to execute the report and send the results to a printer.
- Click **Save** to keep the report with the current data, or save only the report parameters to run this specific report with these parameters again. See [Save a Report or Report Parameters](#) for more information.

Save a Report or Report Parameters

To save a report or the parameters for a report:

1. Click **Save** in the Flash Sales report criteria window.

A Save Flash Sales Summary window opens.

Figure 24–3 Save Report Options**2.** Enter the save file information:

- **Save Report As** - Name of the save file.
- **Report Save Options** - The information to be saved:
 - **Save Report with Current Data** - To save the report with the current values.
 - **Save Report Parameters** - To save only the parameters to use these parameters as a template to generate a new report at another time.

3. Select OK.

The report is saved to your personal report area and can be retrieved from the Back Office Main Menu by selecting **Reports**, then the **Saved Reports** option.

Note: Refer to the *Oracle Retail Xstore Point of Service Reports Guide* for more information about setting up and running reports.

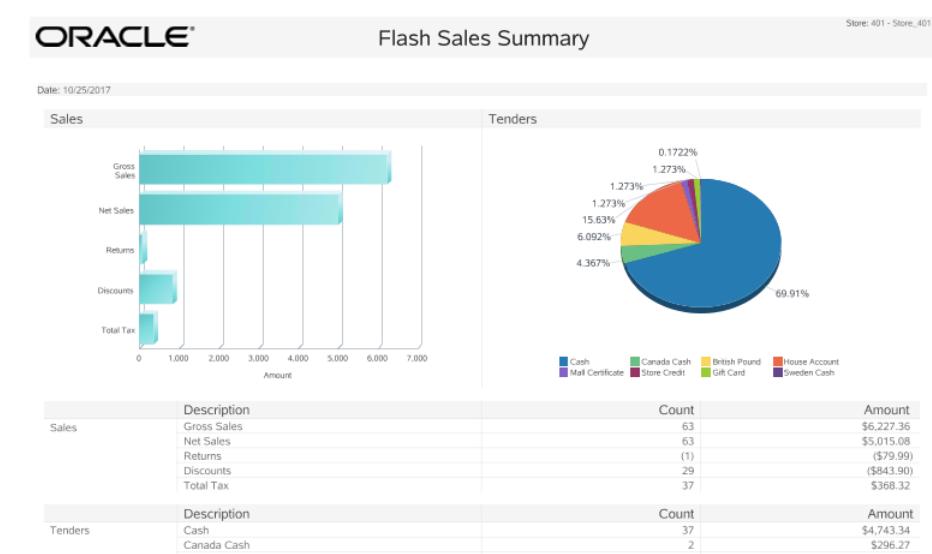
Figure 24–4 Flash Sales Summary Report

Figure 24–5 Flash Sales Summary Report - No Graph

ORACLE® Flash Sales Summary

Store: 401 - Store_401

Sales		Description	Count	Amount
		Gross Sales	63	\$6,227.36
		Net Sales	63	\$5,015.08
		Returns	(1)	(\$79.99)
		Discounts	29	(\$843.90)
		Total Tax	37	\$368.32

Tenders		Description	Count	Amount
		Cash	37	\$4,743.34
		Canada Cash	2	\$296.27
		British Pound	5	\$413.31
		Issue Store Credit	1	(\$1,050.39)
		House Account	3	\$1,060.67
		Mall Certificate	1	\$86.39
		Store Credit	1	\$86.39
		Gift Card	1	\$86.39
		Sweden Cash	1	\$11.68

On-screen Navigation for Flash Sales Report

All the Flash Sales Reports have a consistent interface for navigating through multi-page reports, changing the display size, printing reports and saving reports so that they may be reused.

Figure 24–6 Report Navigation Options

After you make your criteria selections and a report is displayed on the screen, options display at the bottom of the screen:

- **Back** - Return to the criteria selection screen for the report.
- **Print Report** - Send the report to a printer.
- **Save Report** - Assign a name to the report so that it can be reused later with current criteria or current data.
- **Previous Page/Next Page** - Go to the next lower page number or next higher page number.
- **Top of Page/Bottom of Page** - Go to the beginning or end of the current page number.
- **First Page/Last Page** - Jump to page 1 or the last page number in the report.
- **Zoom In/Zoom Out** - Increase or decrease the on-screen magnification of the text.

25

Register Open and Close

The Register Open and Close procedures explain the steps you must perform to open and close a register.

Register Open

Opening the register is a process that can be quickly completed by managers or associates who have the proper security privileges. The process is highly configurable and your process may be different from the instructions below. Every effort has been made to include notes or examples of additional steps that may be configured for your store.

The register open process depends upon the configuration of your system.

- [Standard Open](#) - Open a register that is not configured for 24/7 processing.
- [24/7 Open](#) - Open a register that is configured for 24/7 processing.
- [Networked Cash Drawer Open](#) - Open a register that uses a networked cash drawer.

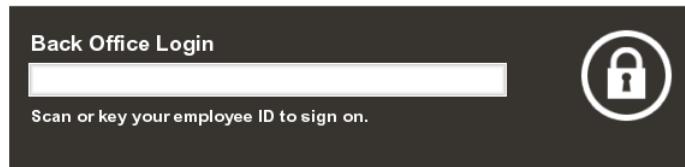
Standard Open

To open a register that is not configured for 24/7 trading:

1. Select **Back Office** in the Register Login screen.

Note: Touchscreen users can tap the red register status to begin the register open process.

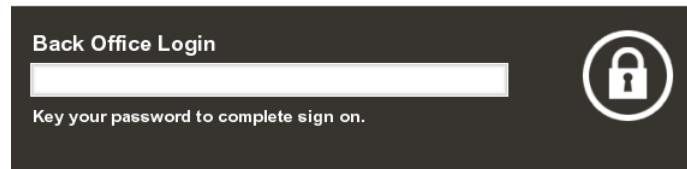
Figure 25–1 Back Office Login - Employee ID



2. Do one of the following, depending upon the configuration of your system:
 - Enter your user ID and press Enter.
Xstore Point of Service prompts for your password. Continue with Step 3.
 - Scan your finger on the fingerprint reader.

Xstore Point of Service prompts for your new password. Continue with Step 5.

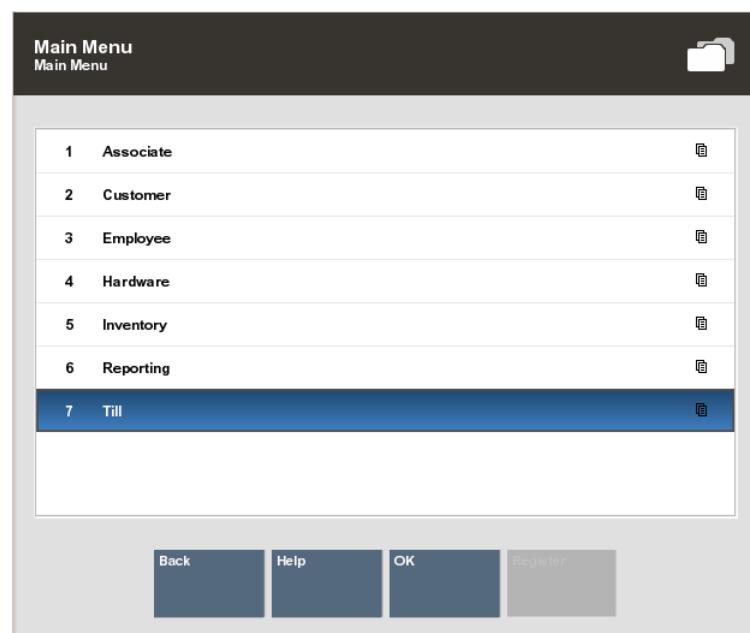
Figure 25–2 Back Office Login - Password



3. Enter your password and press Enter.

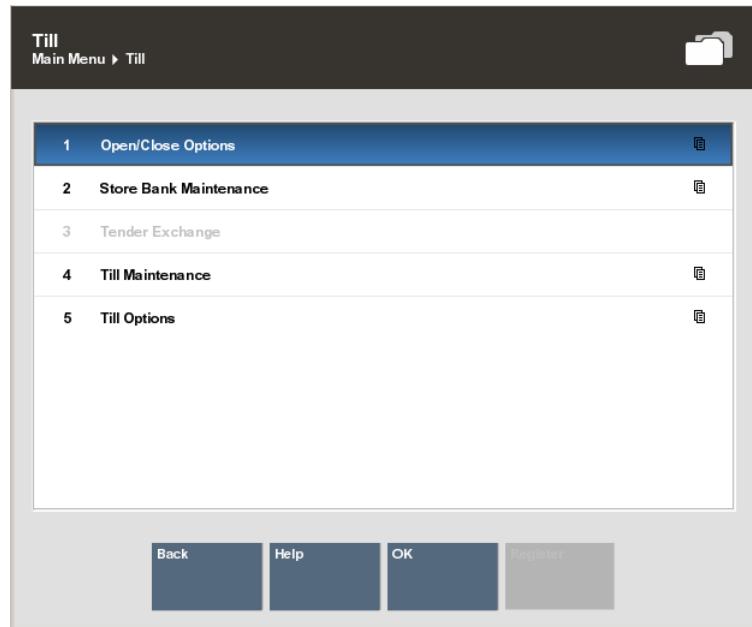
The Back Office Main Menu opens.

Figure 25–3 Back Office Main Menu



4. Select Till.

Figure 25–4 Till Menu Options

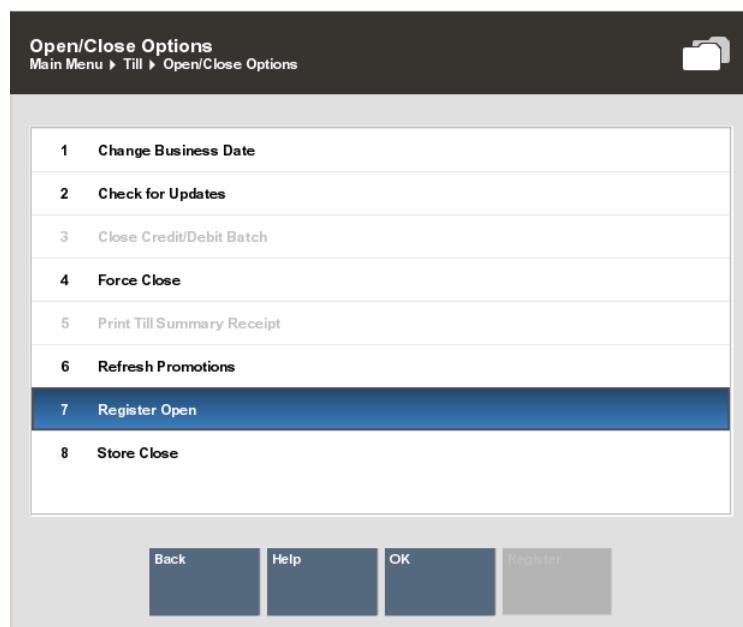


5. Select **Open/Close Options**.

6. Select **OK**.

The Open/Close Options menu opens.

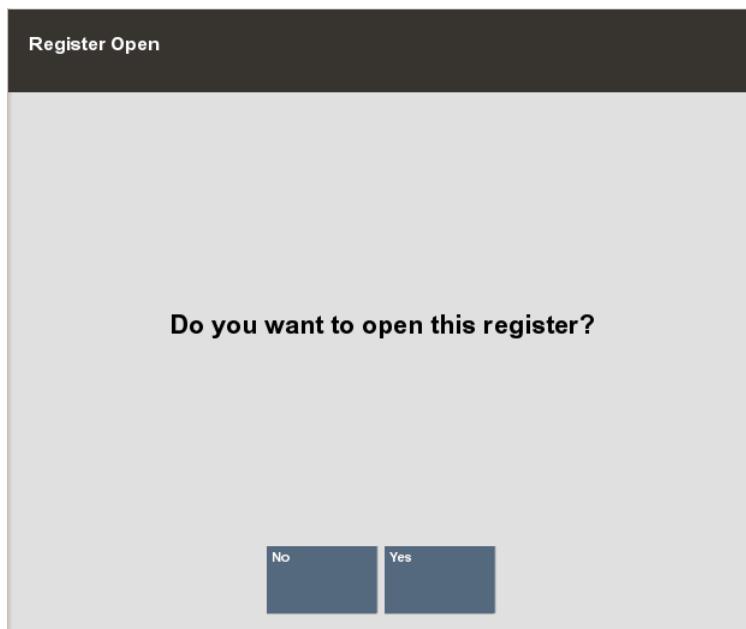
Figure 25–5 Open/Close Options Menu



7. Select **Register Open**.

8. Select **OK**.

A confirmation prompt opens.

Figure 25–6 Open Register Prompt

9. Select Yes.

- If your register has more than one cash drawer, you are prompted to select a drawer. Continue with Step 10.
- If your register has only one cash drawer, the count summary screen opens. Continue with Step 11.

10. If necessary, select the drawer from a list of available cash drawers.

The count summary screen opens.

Figure 25–7 Begin Count Summary Screen

Count Group	Declared Amount	System Amount	Over/Short
Cash	\$0.00	\$0.00	\$0.00
Australian Cash	\$0.00	\$0.00	\$0.00
Canada Cash	\$0.00	\$0.00	\$0.00

11. Count the cash tenders:

- a. Select the tender to count.

- b. Select **Count Selected**.

A list of currency denominations opens.

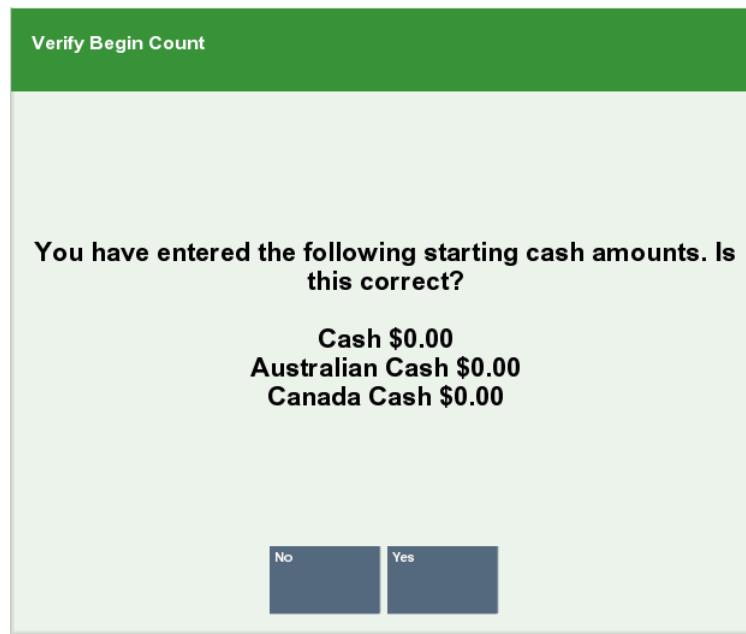
Figure 25–8 Denomination Count - Cash

Denomination Count				Cash
Cashier ID: 100 Till Name: Test Till 1				
Denomination	Qty	②	Amount	
Penny	0	0.010000	\$0.00	
Nickel	0	0.050000	\$0.00	
Dime	0	0.100000	\$0.00	
Quarter	0	0.250000	\$0.00	
Dollar	0	1.000000	\$0.00	
Five Dollar	0	5.000000	\$0.00	
Ten Dollar	0	10.000000	\$0.00	
Twenty Dollar	0	20.000000	\$0.00	
Fifty Dollar	0	50.000000	\$0.00	
Hundred Dollar	0	100.000000	\$0.00	
Half Dollar	0	0.500000	\$0.00	
Dollar Coins	0	1.000000	\$0.00	
				Total
				\$0.00

- c. Count a denomination currency.
 d. Select the denomination in the **View Port**.
 e. Enter the count of the currency denomination in the **Focus Bar** and press **Enter**.
 f. Repeat Steps c to e for each denomination.
 g. Select **Back**.
 Xstore Point of Service returns to the Count Summary screen.
 h. Repeat Steps a to g for each currency.
12. Click **Counting Complete** when all counts are completed.

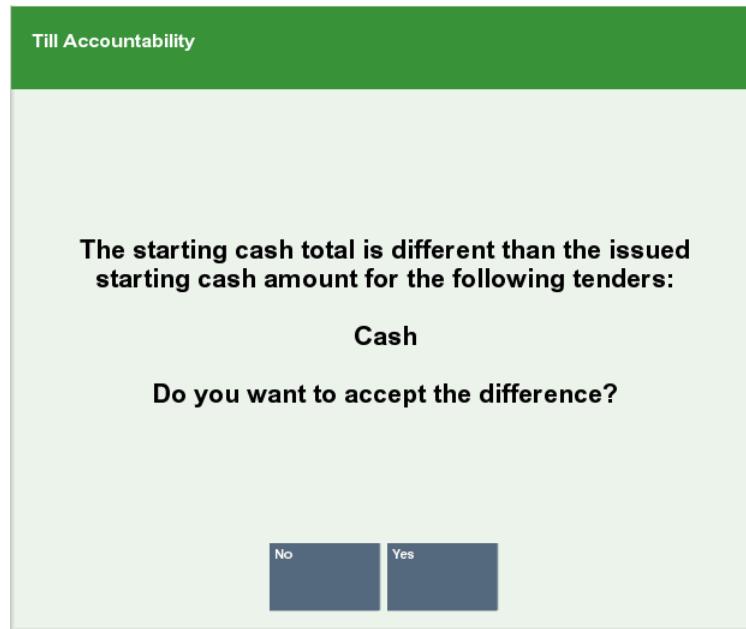
Note: Check the Over/Short column to see if your till is balanced with the system values for each tender type.

Figure 25–9 Verify Begin Count Prompt



- If the starting cash amount matches, the system prompts to confirm the amount for all cash currencies you entered and opens the register after you acknowledge the system amount. Continue with Step 13.

Figure 25–10 Starting Cash Difference Prompt



- If the currency amounts do not match, the system displays a prompt to either recount the till or to accept the difference. Continue with Step 14.

13. Click Yes.

The register opens. Receipts for the register open may print.

14. Do one of the following:

- Click **Yes** to continue opening.
The register opens. Receipts for the register open may print.
- Click **No** to return to the count screen. Return to Step 11.

24/7 Open

For systems using 24/7 trading, the register open process must be performed on each register every day. Depending upon the configuration of your system, and the time that the register is opened, the register may open for the previous day or the next day.

To open a register that is configured for 24/7 trading:

1. Select **Back Office** in the Register Login screen.

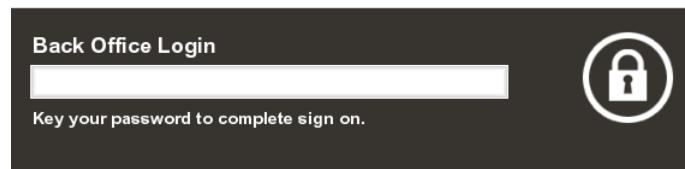
Note: Touchscreen users can tap the red register status to begin the register open process.

Figure 25–11 Back Office Login - Employee ID

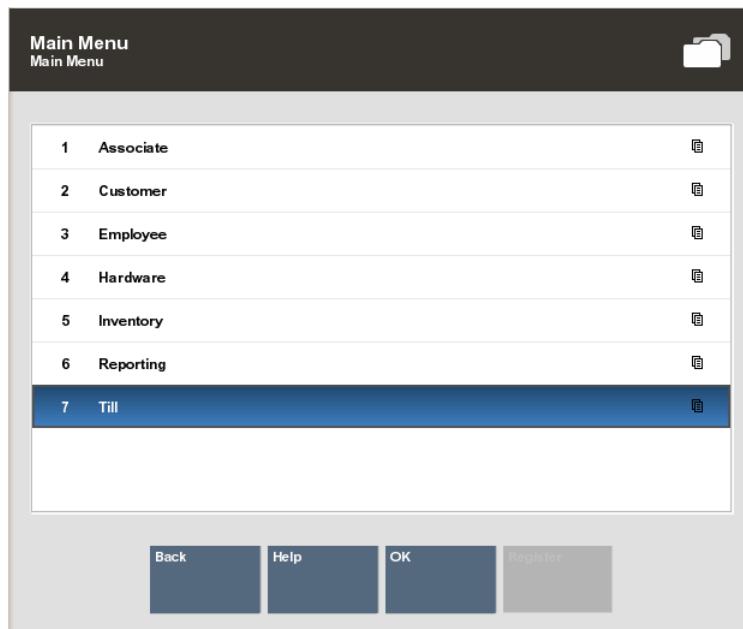


2. Do one of the following, depending upon the configuration of your system:
 - Enter your user ID and press Enter.
Xstore Point of Service prompts for your password. Continue with Step 3.
 - Scan your finger on the fingerprint reader.
Xstore Point of Service prompts for your new password. Continue with Step 5.

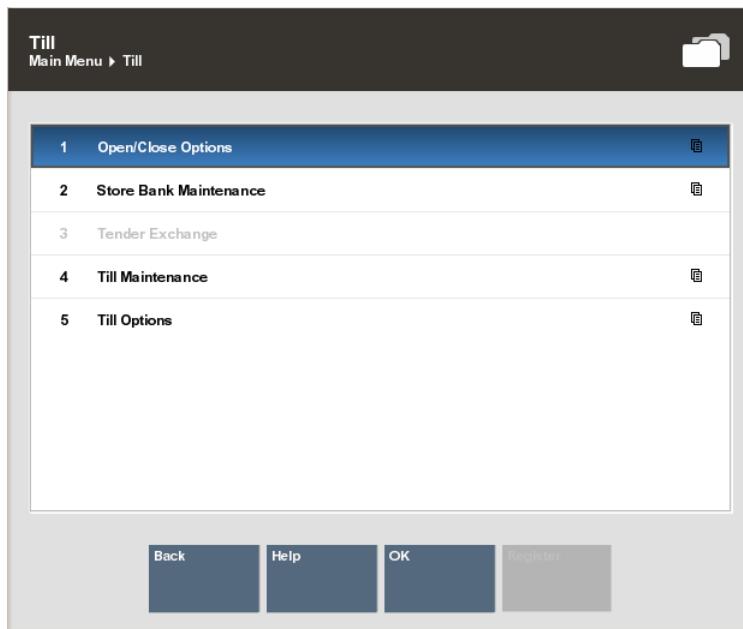
Figure 25–12 Back Office Login - Password



3. Enter your password and press Enter.
The Back Office Main Menu opens.

Figure 25–13 Back Office Main Menu

4. Select **Till**.

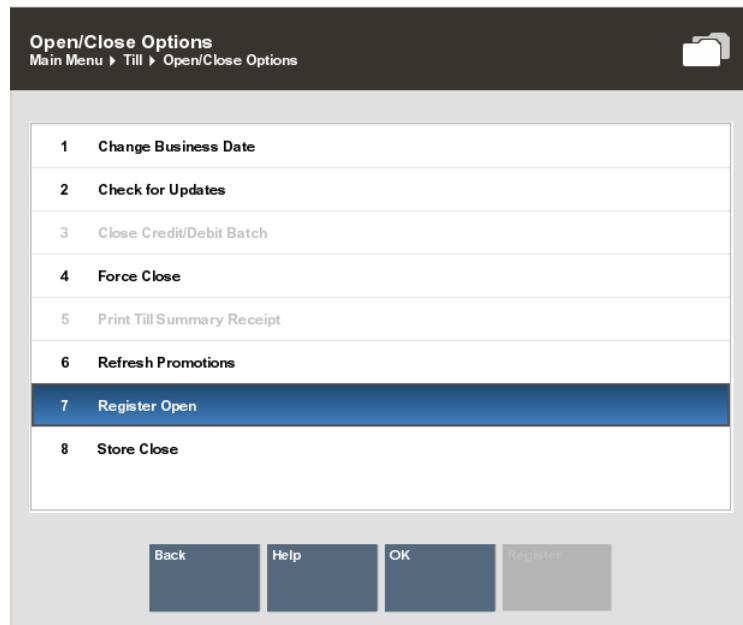
Figure 25–14 Till Menu Options

5. Select **Open/Close Options**.

6. Select **OK**.

The Open/Close Options menu opens.

Figure 25–15 Open/Close Options Menu

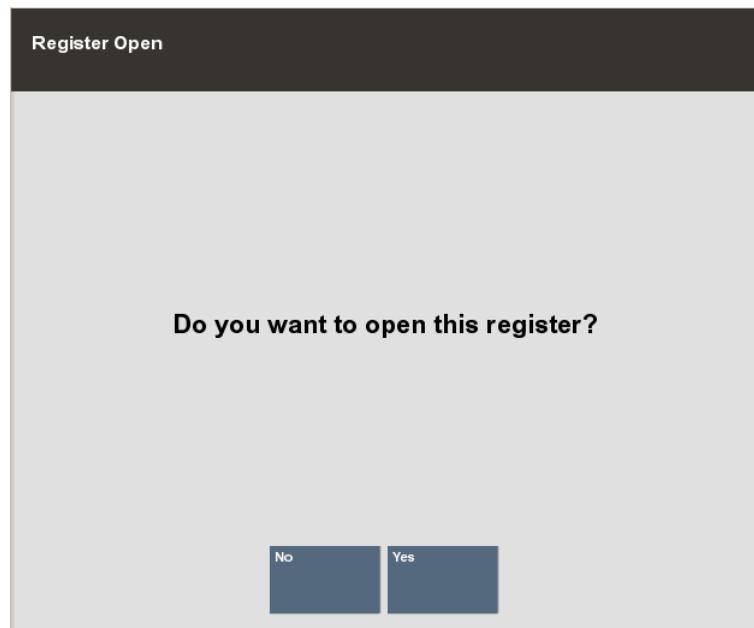


7. Select **Register Open**.

8. Select **OK**.

A confirmation prompt opens.

Figure 25–16 Open Register Prompt



9. Click **Yes**.

An insert till notification window opens.

- Select **OK** to open the till.

The cash drawer opens. Continue with Step 18.

- Click **Change Float** to change the float amount. Continue with Step 10.

Xstore Point of Service prompts for the reason for changing the float.

- 10.** Select the reason for changing the float:

- Click the reason.
- Use the up and down arrows to highlight the correct reason then press the Spacebar.

- 11.** Select **OK**.

Xstore Point of Service prompts for additional comments.

- 12.** Enter any additional comments.

- 13.** Select **OK**.

Xstore Point of Service prompts for the currency to change.

- 14.** Select the currency to change:

- Click the currency.
- Use the up and down arrows to highlight the correct currency then press the Spacebar.

- 15.** Select **OK**.

Xstore Point of Service prompts for the new float value.

- 16.** Enter the new float amount and press Enter.

A confirmation prompts opens.

- 17.** Click **Yes** to confirm the new amount.

An insert till notification window opens.

- Select **OK** to open the till.

The cash drawer opens. Continue with Step 18.

- Click **Change Float** to change the float amount. Go to Step 10.

Xstore Point of Service prompts for the reason for changing the float.

- 18.** Insert the till into the cash drawer.

- 19.** Close the cash drawer.

The register opens.

Networked Cash Drawer Open

In a register configured to use a networked cash drawer, opening the register is done by opening the cash drawer.

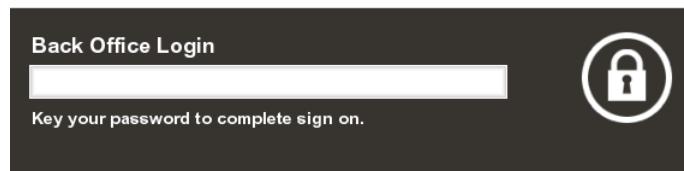
To open a networked cash drawer:

- 1.** Select **Back Office** in the Register Login screen.

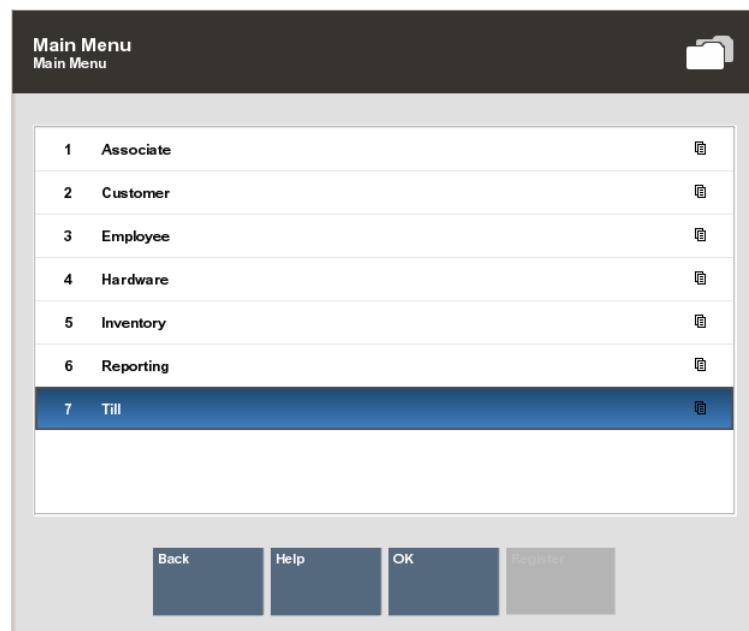
Note: Touchscreen users can tap the red register status to begin the register open process.

Figure 25–17 Back Office Login - Employee ID

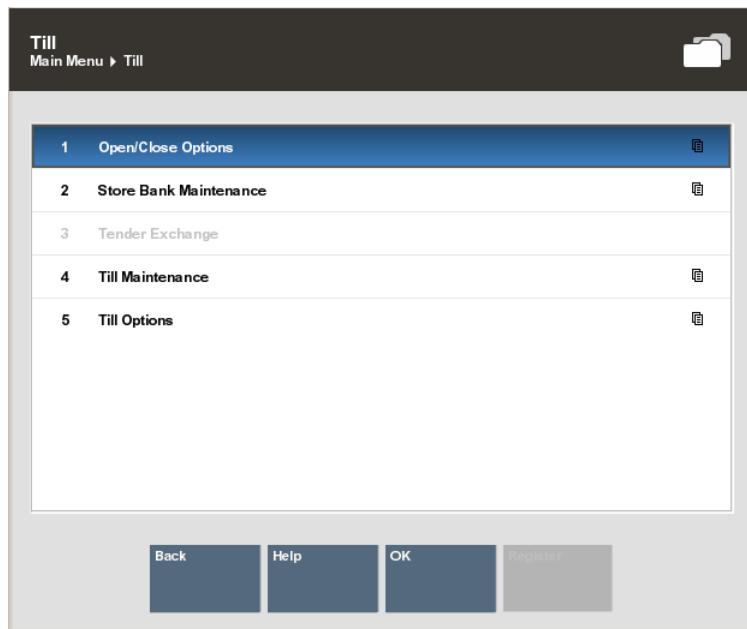
2. Do one of the following, depending upon the configuration of your system:
 - Enter your user ID and press Enter.
Xstore Point of Service prompts for your password. Continue with Step 3.
 - Scan your finger on the fingerprint reader.
Xstore Point of Service prompts for your new password. Continue with Step 4.

Figure 25–18 Back Office Login - Password

3. Enter your password and press Enter.
The Back Office Main Menu opens.

Figure 25–19 Back Office Main Menu

4. Select Till.

Figure 25–20 Till Menu Options

5. Select **Open/Close Options**.

6. Select **OK**.

The Open/Close Options menu opens.

7. Click **Cash Drawer Open**.

8. Select **OK**.

A list of cash drawers opens.

9. Select the cash drawer to open:

- Click the cash drawer.
- Use the up and down arrow keys to highlight the cash drawer and press the Spacebar.

10. Select **OK**.

A confirmation prompt opens.

11. Click **Yes**.

A list of tills opens.

12. Select the till to assign to the cash drawer:

- Click the till.
- Use the up and down arrow keys to highlight the till and press the Spacebar.

13. Select **OK**.

The Count Summary screen opens.

14. Count the cash tenders:

- a. Click the tender to count.
- b. Click **Count Selected**.

- A list of currency denominations opens.
- c. Count a currency denomination.
 - d. Click the denomination in the [View Port](#).
 - e. Enter the count of the currency denomination in the [Focus Bar](#) and press Enter.
 - f. Repeat Steps c to e for each denomination.
 - g. Click **Back**.
- Xstore Point of Service returns to the Count Summary screen.
- h. Repeat Steps a to g for each currency.
- 15.** Click **Counting Complete** when all counts are completed.

Note: Check the Over/Short column to see if your till is balanced with the system values for each tender type.

- If the starting cash amount matches, the system prompts to confirm the amount for all cash currencies you entered and opens the register after you acknowledge the system amount. Continue with Step 16.
 - If the currency amounts do not match, the system displays a prompt to either recount the till or to accept the difference Continue with Step 17.
- 16.** Click **Yes**.
- The register opens. Receipts for the register open may print.
- 17.** Do one of the following:
- Click **Yes** to continue opening. Continue with Step 18.
The register opens. Receipts for the register open may print.
 - Click **No** to return to the count screen. Return to Step 14.
- 18.** Open the till to associate with the Cash Drawer. See [Open a Till](#) for more information.
- 19.** If necessary, click **Register**.

The register opens. Opening receipts may print.

Register Close

The register close process can be performed by store managers or associates who have the proper security privileges. A register close can be completed any time during the day.

This process is highly configurable and your process may be different than the instructions below. Every effort has been made to include notes or examples of additional steps that may be configured for your store.

The procedures described in this section assume that till accountability is not being used (this is a configurable option). For more information on till accountability and its requirements, refer to the *Oracle Retail Xstore Point of Service Manager's Guide*.

The register open process depends upon the configuration of your system:

- [Standard Close](#) - Close a register that is not configured for 24/7 processing.
- [24/7 Close](#) - Close a register that is configured for 24/7 processing.
- [Networked Cash Drawer Close](#) - Close a register on a system that uses a networked cash drawer.

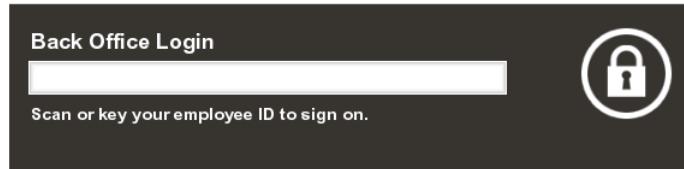
Standard Close

To close a register with the standard close process:

1. Click **Back Office** in the Register Login screen.

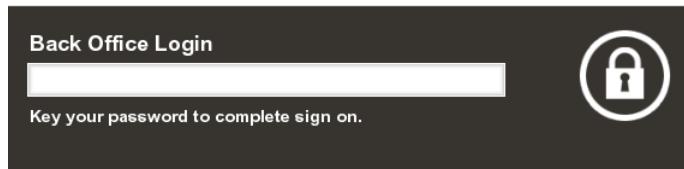
Note: Touchscreen users can tap the red register status to begin the register open process.

Figure 25–21 Back Office Login - Employee ID



2. Do one of the following, depending upon the configuration of your system:
 - Enter your user ID and press Enter.
Xstore Point of Service prompts for your password. Continue with Step 3.
 - Scan your finger on the fingerprint reader.
Xstore Point of Service prompts for your new password. Continue with Step 4.

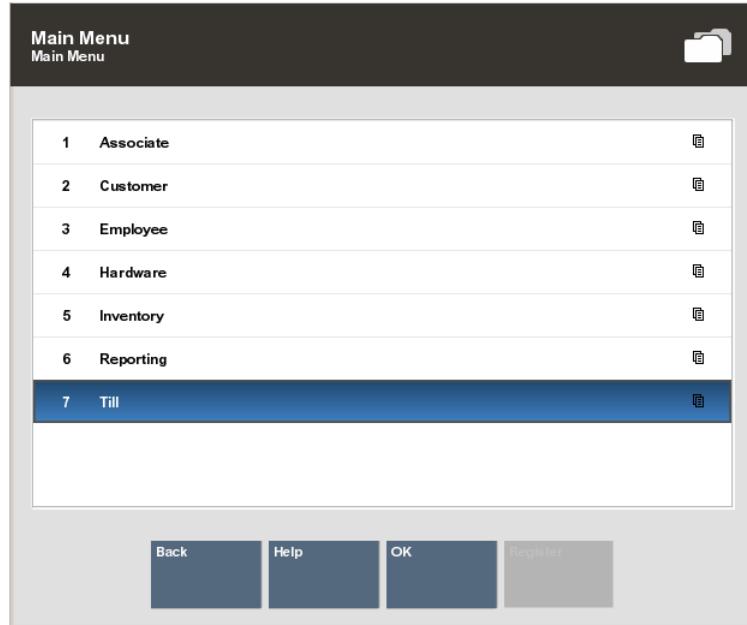
Figure 25–22 Back Office Login - Password



3. Enter your password and press Enter.

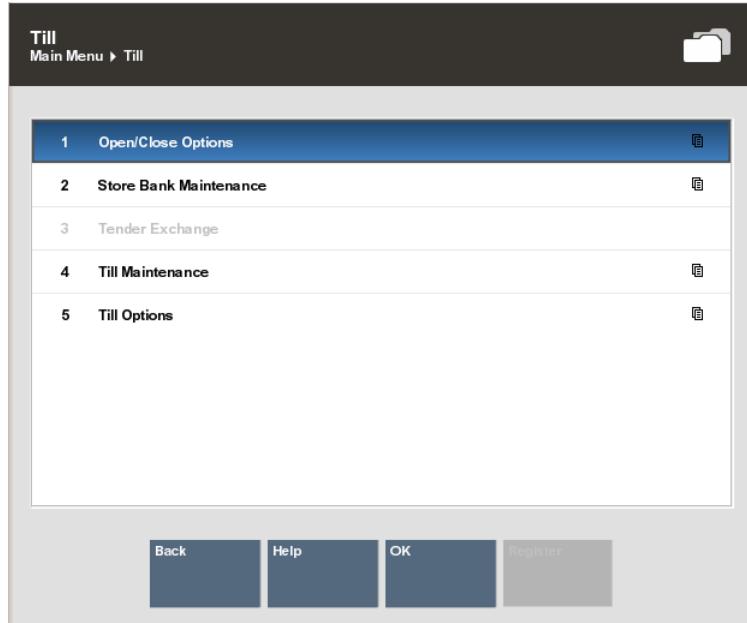
The Back Office Main Menu opens.

Figure 25–23 Back Office Main Menu



4. Select Till.

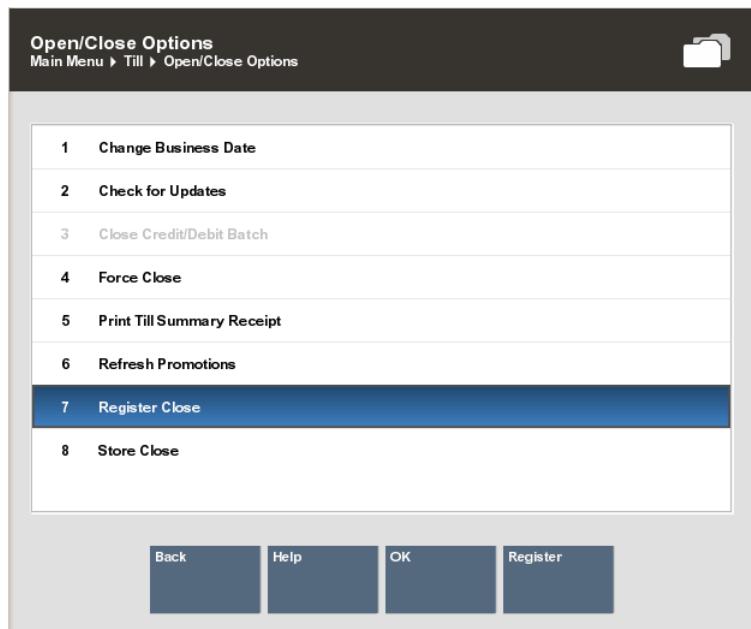
Figure 25–24 Till Menu Options



5. Select Open/Close Options.

6. Select OK.

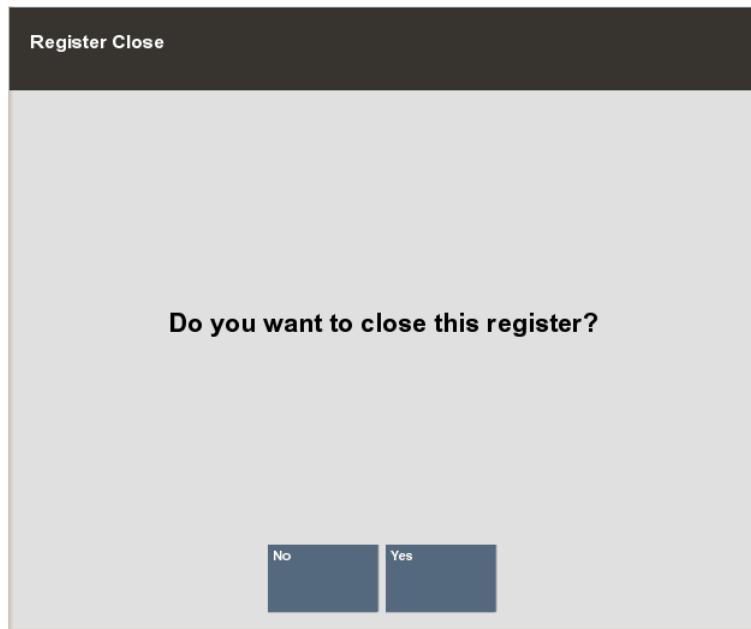
The Open/Close Options menu opens.

Figure 25–25 Open/Close Options

7. Select **Register Close**.

8. Select **OK**.

A confirmation prompt opens.

Figure 25–26 Close Register Prompt

9. Select **Yes**.

The cash drawer opens and Xstore Point of Service displays the Close Count Summary screen. Each count group (tender type) is counted individually.

Figure 25–27 Close Count Summary Screen

The screenshot shows the 'Count Summary' screen for a register. At the top, it displays 'Casher ID: 100 Till Name: Test Till 1'. On the right, there's a 'Balance Summary Over/Short' button. Below the header is a table with columns: 'Count Group', 'Declared Amount', 'System Amount', and 'Over/Short'. The table lists various tender types with their respective amounts. At the bottom of the screen is a toolbar with buttons for 'Back', 'Help', 'Count Selected', 'Counting Complete', and other system functions. The status bar at the bottom shows the date and time: '10/25/2017 9:50 AM'.

Count Group	Declared Amount	System Amount	Over/Short
Credit Card	\$0.00	\$0.00	\$0.00
Issue Store Credit	\$1,050.39	(\$1,050.39)	\$2,100.78
Miscellaneous	\$0.00	\$0.00	\$0.00
Store Credit	\$0.00	\$86.39	(\$86.39)
US Traveler Check	\$0.00	\$0.00	\$0.00
Gift Card	\$0.00	\$86.39	(\$86.39)
Cash	\$0.00	\$998.66	(\$998.66)
Sweden Cash	\$0.00	\$150.00	(\$150.00)
Mexico Cash	\$0.00	\$0.00	\$0.00

10. Count the cash tenders:
 - a. Click the tender to count.
 - b. Click **Count Selected**.
A list of currency denominations opens.
 - c. Count a currency denomination.
 - d. Click the denomination in the **View Port**.
 - e. Enter the count of the currency denomination in the **Focus Bar** and press **Enter**.
 - f. Repeat Steps c to e for each denomination.
 - g. Click **Back**.
Xstore Point of Service returns to the Count Summary screen.
 - h. Repeat Steps a to g for each currency.
11. If necessary, count the credit card tender:
 - a. Click to select **Credit Card**.
 - b. Click **Count Selected**.
Xstore Point of Service prompts for the credit card tender count.
 - c. Enter the number of credit card tender counts and press **Enter**.
Xstore Point of Service prompts for the amount of credit card tenders.
 - d. Enter the total amount of all credit card tenders and press **Enter**.
 - e. Click **Back**.
Xstore Point of Service returns to the Count Summary screen.
12. If necessary, count the check tender:
 - a. Click to select **Check**.
 - b. Click **Count Selected**.

Xstore Point of Service prompts for a check serial number.

- c. Enter the serial number for the check and press **Enter**.

Xstore Point of Service prompts for the amount of the check.

- d. Enter the amount of the check and press **Enter**.

- e. Repeat Steps c to d for each check.

- f. Click **Back**.

Xstore Point of Service returns to the Count Summary screen.

13. If necessary, count the other tenders:

- a. Click to select the tender.

- b. Click **Count Selected**.

- c. Follow the prompts to count the tender.

- d. Click **Back**.

Xstore Point of Service returns to the Count Summary screen.

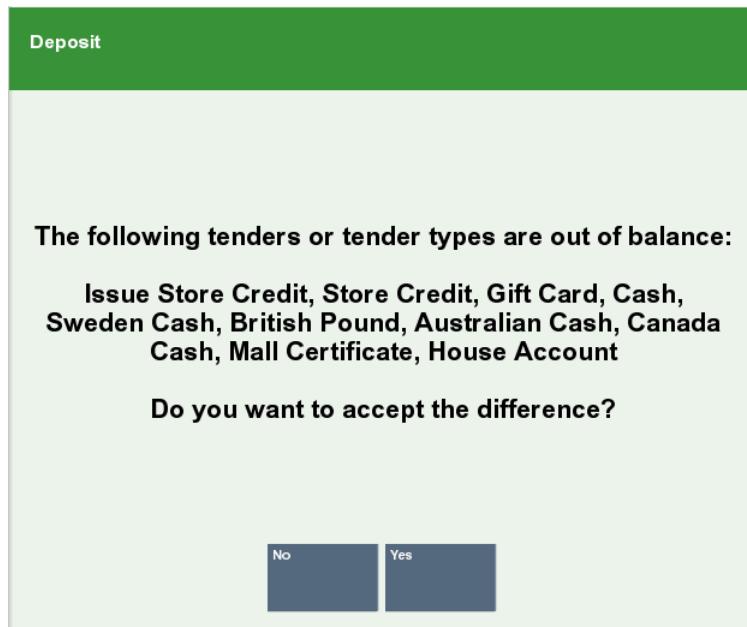
- e. Repeat Steps a to d for each currency.

14. Click **Counting Complete** when all counts are completed.

Note: Check the Over/Short column to see if your till is balanced with the system values for each tender type.

- If the cash amount matches, the system prompts to confirm the amount for all cash currencies you entered and closes the register after you acknowledge the system amount. Continue with Step 15.

Figure 25–28 Tenders Out of Balance Prompt



- If the currency amounts do not match, the system displays a prompt to either recount the till or to accept the difference. Continue with Step 16.
- 15.** Click **Yes**.
- Continue with Step 17.
- 16.** Do one of the following:
- Click **Yes** to continue the close process. Continue with Step 17.
The register closes. Receipts for the register close may print.
 - Click **No** to return to the count screen. Perform Steps 10, 11, 12, or 13 as necessary.
- 17.** If necessary, select the deposit amount:
- Click **Accept Deposit** to accept the suggested amount.
The register closes. Close receipts may print. Continue with Step 19.
 - Click **Change Deposit** to enter a new deposit amount.
Xstore Point of Service prompts for a new deposit amount. Continue with Step 18.
 - Click **Deposit Calculator** to calculate a new deposit amount.
Xstore Point of Service displays a denomination count screen that can be used as a calculator (see Step 10). Enter the count for each denomination. A running total at the bottom of the screen is updated as you count the cash amount to be deposited.
- 18.** Enter the new deposit amount and press Enter.
- 19.** Close the cash drawer.
- The close is complete.

24/7 Close

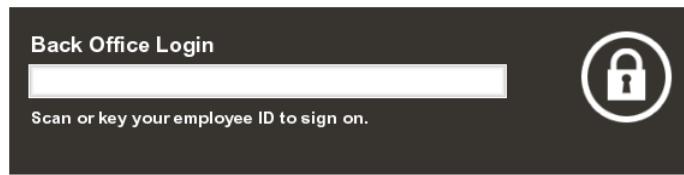
The register close process must be performed on each opened register for it to be rolled over into the next day.

Note: Near the end of a day, warning messages will appear on registers that remain open close to and after the required close time. If a register continues to stay open past the required close time, the register will eventually prevent the user from opening any more transactions until the register is closed and reopened for the next day.

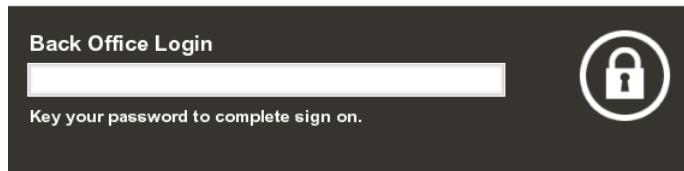
To close a register configured for 24/7 trading:

1. Click **Back Office** in the Register Login screen.

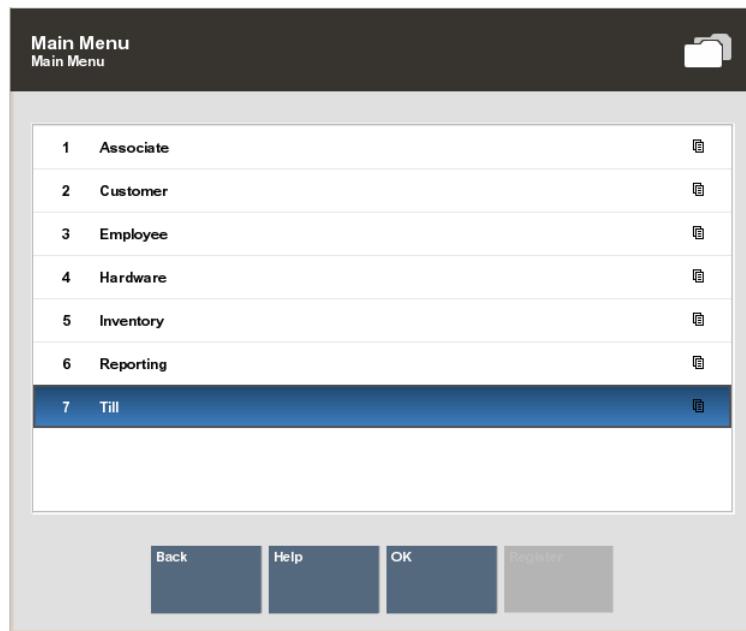
Note: Touchscreen users can tap the red register status to begin the register open process.

Figure 25–29 Back Office Login - Employee ID

2. Do one of the following, depending upon the configuration of your system:
 - Enter your user ID and press Enter.
Xstore Point of Service prompts for your password. Continue with Step 3.
 - Scan your finger on the fingerprint reader.
Xstore Point of Service prompts for your new password. Continue with Step 4.

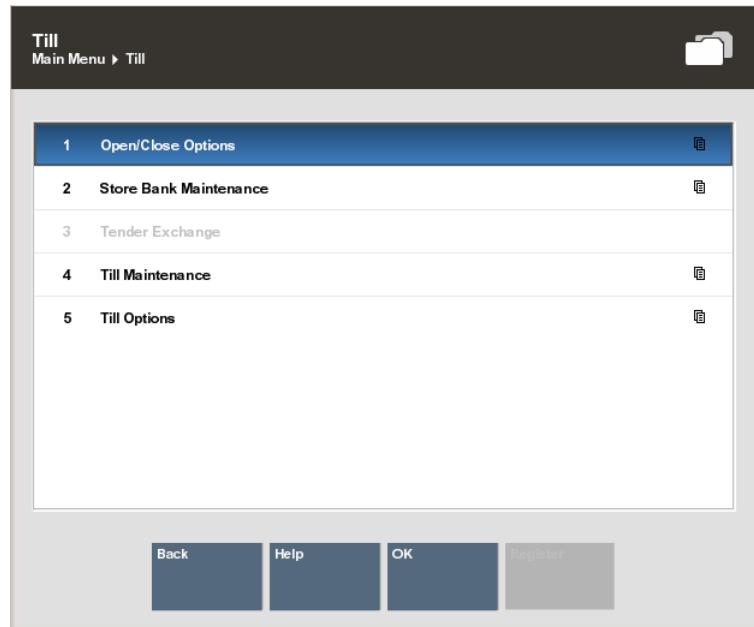
Figure 25–30 Back Office Login - Password

3. Enter your password and press Enter.
The Back Office Main Menu opens.

Figure 25–31 Back Office Main Menu

4. Select Till.

Figure 25–32 Till Menu Options

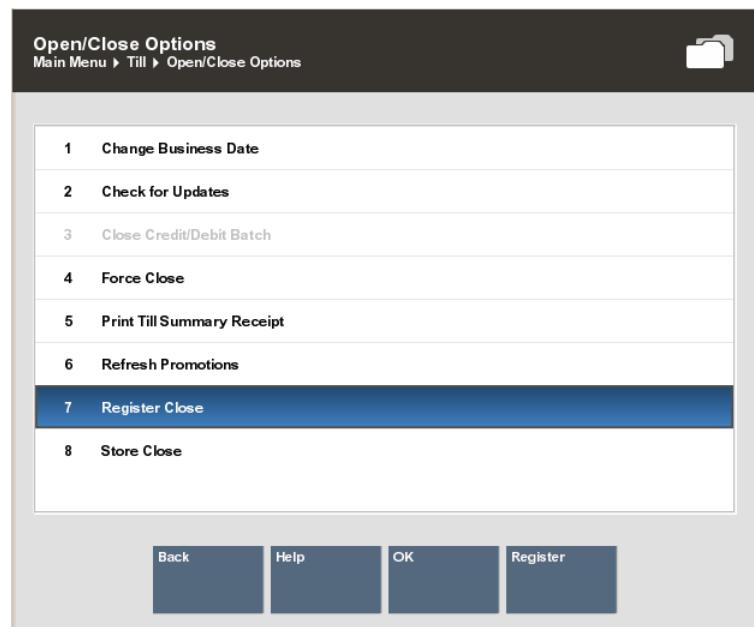


5. Select **Open/Close Options**.

6. Select **OK**.

The Open/Close Options menu opens.

Figure 25–33 Open/Close Options

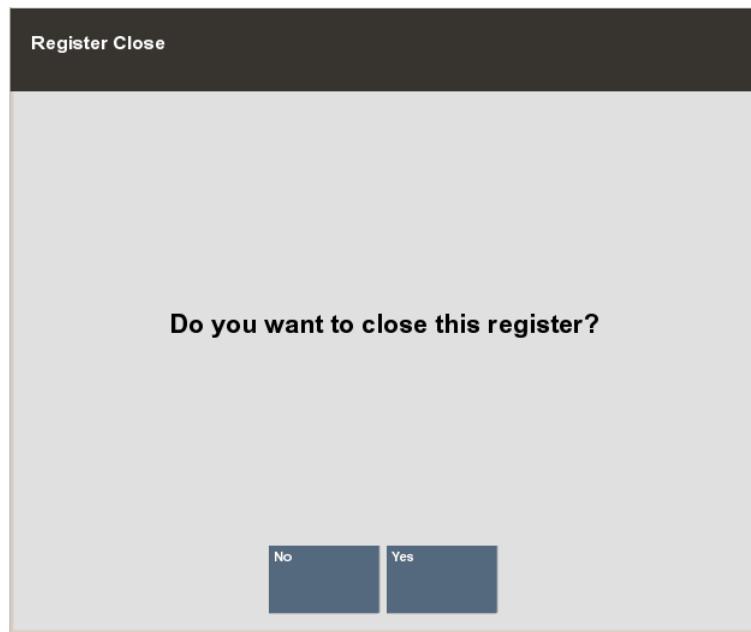


7. Select **Register Close**.

8. Select **OK**.

A confirmation prompt opens.

Figure 25–34 Close Register Prompt



9. Select **Yes**.

The cash drawer opens.

10. Perform the instructions on the screen. Depending upon the configuration of your system, you may be prompted to do one of the following:

- Remove all non-cash tenders from the till.
- Remove the till.

11. Close the cash drawer.

Register close receipts may print.

You may be prompted whether to open the register.

12. If necessary, indicate whether to open the register:

- Click **Yes** to open the register. See [24/7 Open](#) for the open procedure.
- Click **No** to keep the register closed.

Networked Cash Drawer Close

If your system is configured to use network-enabled cash drawers, closing the register is done by closing the cash drawer.

You must remove the till before closing the cash drawer. See [Remove a Till from a Register](#) for more information.

To close a register with a networked cash drawer:

1. Click **Back Office** in the Register Login screen.

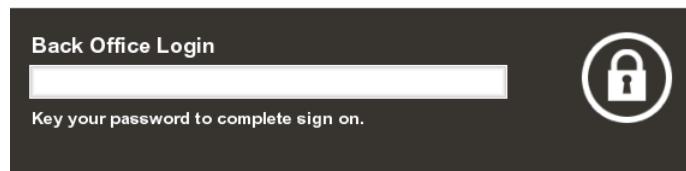
Note: Touchscreen users can tap the red register status to begin the register open process.

Figure 25–35 Back Office Login - Employee ID



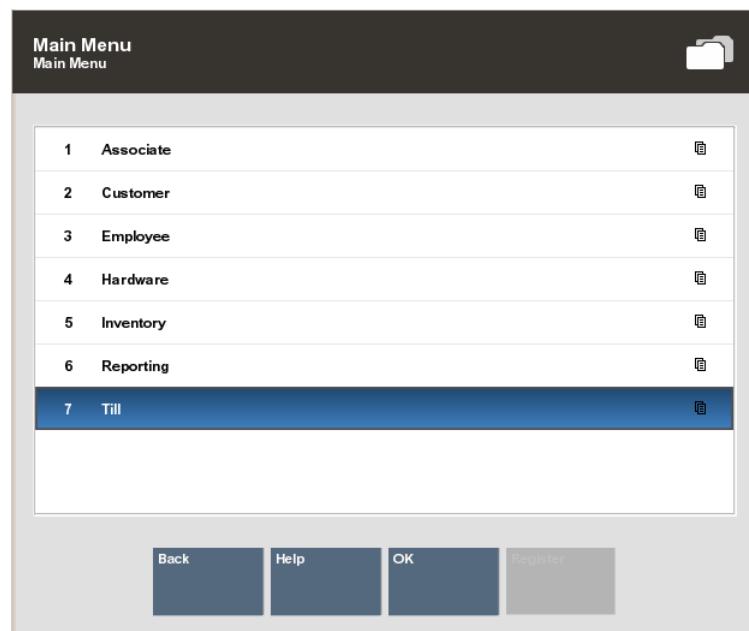
2. Do one of the following, depending upon the configuration of your system:
 - Enter your user ID and press Enter.
Xstore Point of Service prompts for your password. Continue with Step 3.
 - Scan your finger on the fingerprint reader.
Xstore Point of Service prompts for your new password. Continue with Step 4.

Figure 25–36 Back Office Login - Password

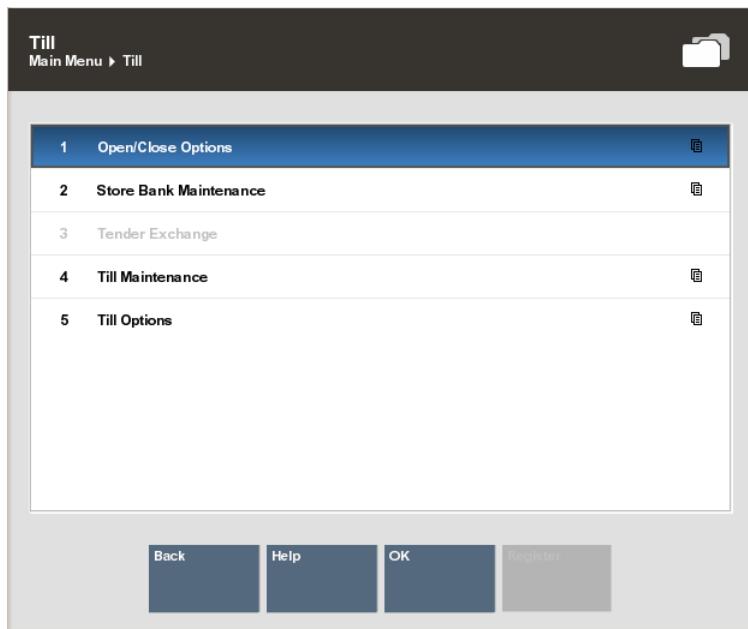


3. Enter your password and press Enter.
The Back Office Main Menu opens.

Figure 25–37 Back Office Main Menu



4. Select Till.

Figure 25–38 Till Menu Options

5. Select **Open/Close Options**.

6. Select **OK**.

The Open/Close Options menu opens.

7. Click **Cash Drawer Close**.

8. Select **OK**.

A list of cash drawers opens.

9. Select the cash drawer to close:

- Click the cash drawer.
- Use the up and down arrows to highlight the cash drawer, then press the Spacebar.

10. Select **OK**.

A confirmation prompt opens.

11. Click **Yes**.

The physical cash drawer opens and Xstore Point of Service displays the Close Count Summary screen. Each count group (tender type) is counted individually.

12. Count the cash tenders:

- a. Click the cash tender to count.
- b. Click **Count Selected**.
A list of currency denominations opens.
- c. Count a currency denomination.
- d. Click the denomination in the **View Port**.
- e. Enter the count of the currency denomination in the **Focus Bar** and press **Enter**.

- f. Repeat Steps c to e for each denomination.
 - g. Click **Back**.
Xstore Point of Service returns to the Count Summary screen.
 - h. Repeat Steps a to g for each currency.
- 13.** If necessary, count the credit card tender:
- a. Click to select **Credit Card**.
 - b. Click **Count Selected**.
Xstore Point of Service prompts for the credit card tender count.
 - c. Enter the number of credit card tender counts and press **Enter**.
Xstore Point of Service prompts for the amount of credit card tenders.
 - d. Enter the total of all credit card tenders and press **Enter**.
 - e. Click **Back**.
Xstore Point of Service returns to the Count Summary screen.
- 14.** If necessary, count the check tender:
- a. Click to select **Check**.
 - b. Click **Count Selected**.
Xstore Point of Service prompts for a check serial number.
 - c. Enter the serial number for the check and press **Enter**.
Xstore Point of Service prompts for the amount of the check.
 - d. Enter the amount of the check and press **Enter**.
 - e. Repeat Steps c to d for each check.
 - f. Click **Back**.
Xstore Point of Service returns to the Count Summary screen.
- 15.** If necessary, count the other tenders:
- a. Click to select the tender.
 - b. Click **Count Selected**.
 - c. Follow the prompts to count the tender.
 - d. Click **Back**.
Xstore Point of Service returns to the Count Summary screen.
 - e. Repeat Steps a to d for each currency.
- 16.** Click **Counting Complete** when all counts are completed.

Note: Check the Over/Short column to see if your till is balanced with the system values for each tender type.

- If the starting cash amount matches, the system prompts to confirm the amount for all cash currencies you entered and closes the register after you acknowledge the system amount. Continue with Step 17.

- If the currency amounts do not match, the system displays a prompt to either recount the till or to accept the difference Continue with Step 18.

17. Click Yes.

The register closes. Receipts for the register close may print.

18. Do one of the following:

- Click **Yes** to continue the close process. Continue with Step 19.
The register closes. Receipts for the register close may print.
- Click **No** to return to the count screen. Perform Steps 12, 13, 14, or 15 as necessary.

19. Close the physical cash drawer.

The close is complete.

26

Self Checkout Register

To avoid queues at a manned Xstore POS, Xstore has a Self-Checkout (SCO) mode. In this mode, it will enable customers to use Xstore to scan their own items and pay for the sale.

It uses exactly the same hardware as standard Xstore manned register mode, and this helps reduce costs, since self-checkout registers are far more expensive.

It uses exactly the same Xstore software, but operating with a simplified UI, a reduced set of functions and some SCO specific configurations.

Because of this, each Xstore register can now operate essentially in one of three modes:

- As a fixed traditional manned register only
- As a fixed Self-Checkout register only

Note: Self-checkout mode does not support store and register open/close functionalities. The store and register needs to be opened from traditional mode before switching to self-check out mode.

- Or as a dual mode manned or SCO register, that can be easily switched between modes:

This can be achieved by allowing the register screen to swivel from cashier facing to customer facing. This allows the sharing of scanners, receipt printers and payment terminals.

These registers allow:

- Self-scanning of items by customers
- Non-barcoded items to be added to the sale via picture buttons
- Manual keying of barcodes and SKUs
- Coupon scanning
- Loyalty card scanning
- Payment by debit, credit and gift card only
- Receipt printing
- Prompt for the "Number of carrier bags used"

This section describes the following topics:

- [Basic Sale](#)
- [Alternate Methods to Add Items](#)
- [Supervisor Access Functions](#)
- [Other SCO Functionality](#)

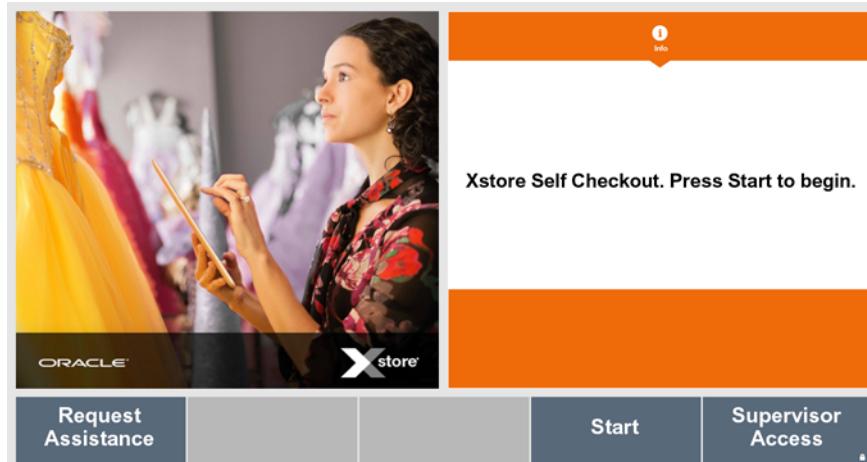
Basic Sale

The process of a sale on the SCO is in two parts - the customer needs to scan their items, and secondly to pay by card. Loyalty or customer ID capture associates the transaction with a customer. Depending on configuration, the number of carrier bags used may be prompted for.

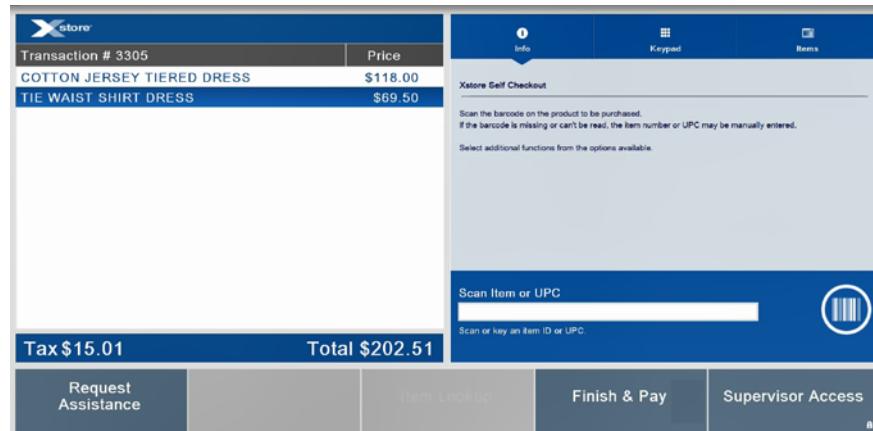
To perform a self check out:

1. Select the **Start** button.

Figure 26–1 SCO Start Button



2. If your store has a loyalty program, the customer can scan their loyalty or customer card.
After scanning the loyalty or customer card, the customer's name is displayed.
If no loyalty or customer card is available, select **Skip** to continue to scan the items.
3. Scan items (or add items via another method - see [Alternate Methods to Add Items](#)).

Figure 26–2 SCO Scan Items Prompt

4. Scan any Bounceback coupons. The discount is recorded and the Item Panel displays the updated transaction amount.
5. Select **Finish & Pay**.

If prompted, enter the number of bags used on the keypad.

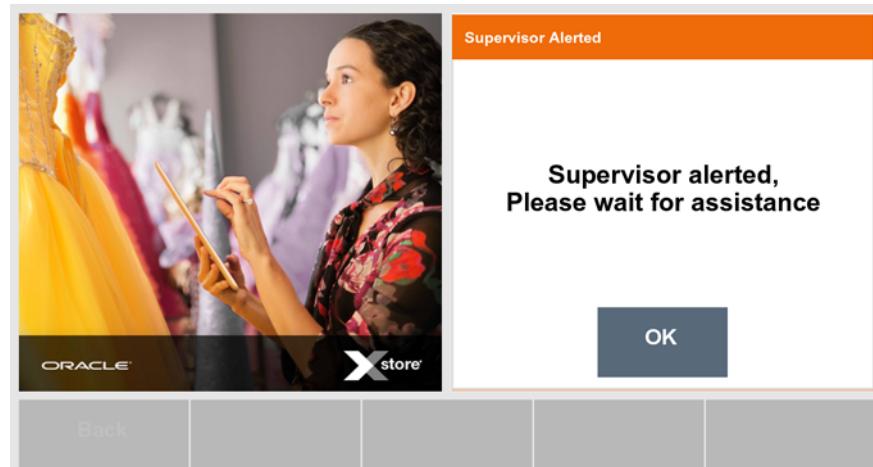
The payment terminal (PED) displays the transaction amount and instructs the customer to insert their payment card and enter a PIN or tap their payment card.

6. Confirm the card payment on the payment terminal (PED).

A customer sale receipt can be requested and the customer is prompted to take their receipt.

The transaction is cleared from the screen and is ready for the next transaction.

At any time in the transaction help is needed, select **Request Assistance** and wait for a supervisor. A sound is made by the register requesting assistance.

Figure 26–3 SCO Supervisor Alerted

If a customer payment card is declined for any reason, such as invalid PIN, card expired, insufficient funds on card, and so on, the following options are available:

- Try Another Card

- Request Assistance
- Back to Basket

Alternate Methods to Add Items

If items cannot be scanned in because there is no barcode on the item, or the barcode is damaged, the identification of the item can be added by an alternative methods:

- [Lookup Item](#)
- [Manual Entry of Barcodes](#)
- [Manual Entry of SKU Numbers](#)

Once the item has been added, continue the sale (see Step 3 above), or complete the sale by selecting **Finish & Pay**. See Step 5 above.

Lookup Item

To find items that do not have a barcode, such as bakery items, for example, croissants, or self service hot drinks:

1. Select the **Lookup Items** tab. The Quick Items panel displays the configured item images.
2. Locate and select the required item image. When the item image is selected, the item is added to the basket.

Manual Entry of Barcodes

To manually enter the barcode number:

1. Select the **Keypad** tab.
2. Manually key in the barcode by entering the barcode number using the keypad.
3. Select **Enter**.

Manual Entry of SKU Numbers

To manually enter the SKU number:

1. Select the **Keypad** tab.
2. Manually enter the SKU number using the keypad.
3. Select **Enter**.

Supervisor Access Functions

Occasionally a customer issue needs resolving at the register during a sale. This may be in order to verify the sale of age restricted items, to cancel an item or sale, or to suspend a sale.

The supervisor access function is also required when reprinting a receipt, locking the SCO register, restarting the SCO register, and switching to a standard register.

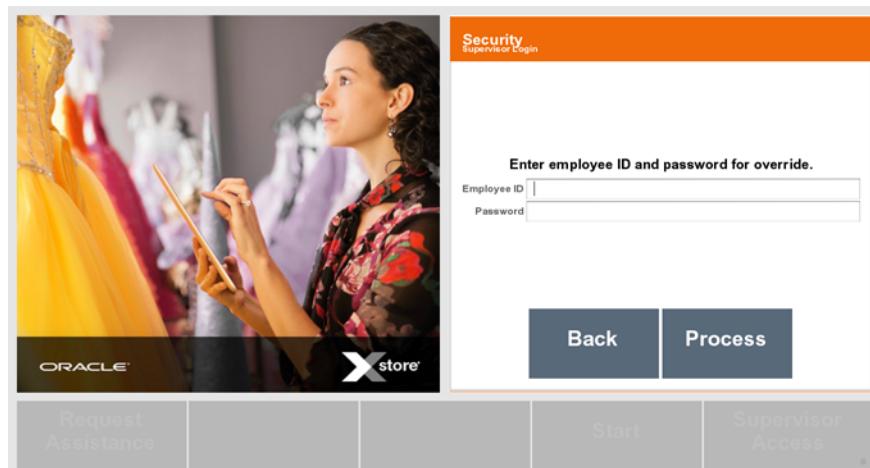
The following section describes the functions and options available with supervisor access:

- [Supervisor Login](#)
- [Supervisor Access Menu](#)
- [Age Restricted Items](#)
- [Cancel Items](#)
- [Unrecognized Items](#)
- [Cancel Sale](#)
- [Suspend Sale](#)
- [Reprint Receipt](#)
- [Close \(Lock\) SCO](#)
- [Switch SCO to Standard Register](#)
- [Restart \(Reboot\) Register](#)

Supervisor Login

To gain access to the supervisor functions, login is required.

Figure 26–4 SCO Supervisor Login



1. Enter your **Employee ID**.
2. Enter your **Password**.
3. Select **Process**.

The Manage SCO Register menu is displayed.

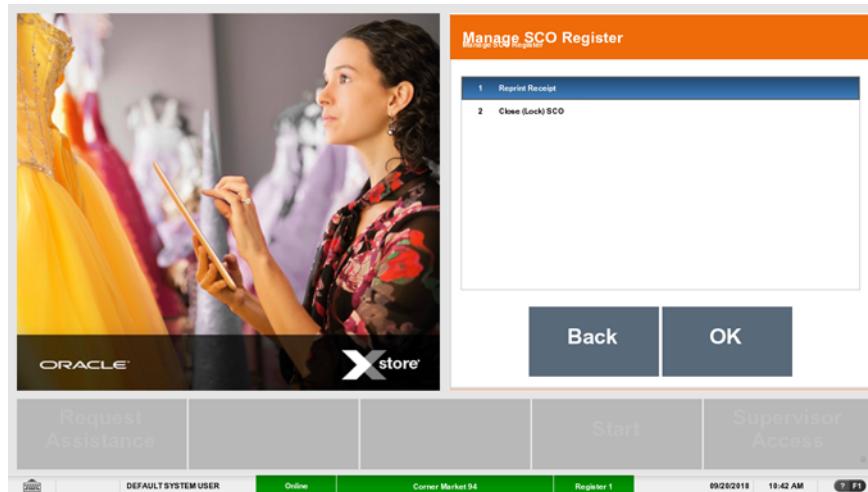
Supervisor Access Menu

The options displayed on the Supervisor Access menu, when logging on, depends on whether the SCO is already in the middle of a transaction.

When the SCO is in sale mode, the following Supervisor Access menu options are available:

- Cancel Item From Sale
- Barcode Not Found - Enter Item Manually
- Cancel Sale
- Suspend Sale

Figure 26–5 SCO Manage SCO Register



Age Restricted Items

Certain items, such as alcohol, medicines, glues and solvents, and so on, that are age restricted cannot be purchased until the age of the customer is verified by a supervisor. When an age restricted item is scanned, a warning message is displayed and the supervisor alerted. The supervisor must log in to verify the date of birth of the customer.

1. Log in as a supervisor. See [Supervisor Login](#).
2. A message relating to the age restriction is displayed. If **Yes** is selected, the item is added to the basket.

Further age restricted items that require same age or less, are automatically added to the basket.

If **No** is selected, the item is not added to the basket.

Maximum Quantity Items

Certain items such as medicines are restricted in the quantity permitted to be sold. When a customer tries to exceed the maximum quantity for an item, the supervisor is alerted. The supervisor must log in to clear the message before the customer can continue with the sale without the additional items.

Unrecognized Items

If Xstore detects that the barcode scanned is invalid and does not exist, it displays an error message that the item cannot be found and alerts a supervisor. A supervisor may be able to add the item details (name and price) manually, or cancel the item.

Cancel Items

An item may need to be canceled (voided) from a sale in cases of accidental double scanning or change of mind after scanning the item.

To cancel an item:

1. Log in as a supervisor. See [Supervisor Login](#).
2. Xstore displays the In Sale menu. Swipe the item left to right to remove the item from the basket.
3. Enter a reason code if prompted.

The basket total is updated to reflect the canceled item. Xstore removes the item from the sale and item line display.

4. When done, select **Back** to return to the SCO sale.

Cancel Sale

The SCO sale may need to be canceled if a customer abandons a sale and walks away from the store, or if they wish to purchase items that can only be purchased on a standard register and therefore wish to cancel the SCO sale and start again on a standard manned register.

To cancel a sale:

1. Log in as a supervisor. See [Supervisor Login](#).
2. Xstore displays the In Sale menu. Select **Cancel Sale**.

Xstore clears the transaction and returns to the main SCO start screen.

Suspend Sale

A sale on the SCO register may be suspended and picked up on a manned register when a customer, for example, cannot pay at the SCO or specific items cannot be checked out on the SCO. This may occur when a customer does not have a card, or money on the account, or if additional items, which are not available in SCO mode, (such as cigarettes, gift cards and so on), are to be included in the transaction.

To suspend a sale:

1. Log in as a supervisor. See [Supervisor Login](#).
2. Xstore displays the In Sale menu. Select **Suspend Sale**.

Xstore clears the transaction and returns to the main SCO start screen. The suspended sale can be resumed and completed on a standard Xstore register.

Other SCO Functionality

When not in a transaction, the register in SCO mode can be used to:

- [Reprint Receipt](#)
- [Close \(Lock\) SCO](#)
- [Open \(Unlock\) SCO](#)
- [Switch SCO to Standard Register](#)
- [Restart \(Reboot\) Register](#)

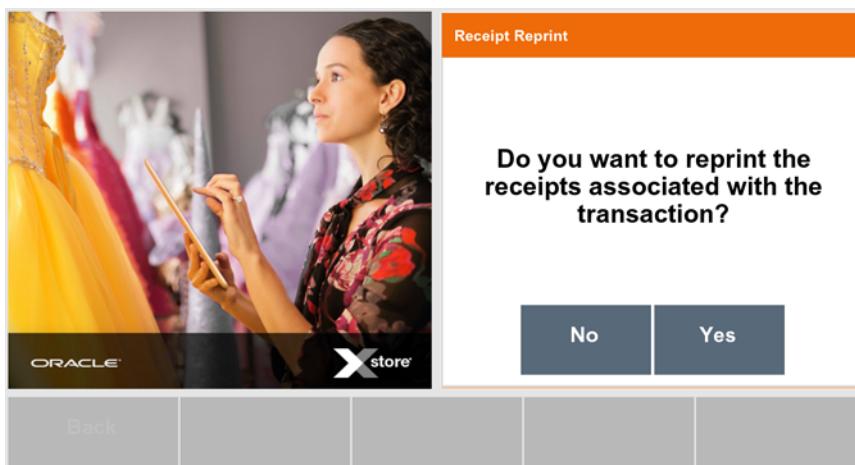
Reprint Receipt

The receipt for the last sale only can be printed again in cases where the receipt failed to print correctly the first time. If a receipt needs reprinting for SCO sales prior to the last SCO sale, then the customer will need to go to a manned register, and the cashier will use the Reprint Receipt option in the Electronic Journal. Refer to the *Oracle Retail Xstore Manager's Guide* for more details.

To reprint the last receipt:

1. Log in as a supervisor. See [Supervisor Login](#).
2. Xstore displays the Manage SCO Register menu. Select **Reprint Receipt**.
Xstore prints the receipt for the last SCO transaction on that register.
3. Select **OK** to clear the message prompt that the receipt has printed and to return to the Manage SCO menu.
4. Select **Back** to return to the main SCO start screen.

Figure 26–6 SCO Receipt Reprint



Close (Lock) SCO

A SCO register can be closed (locked) so that it is not available for customers to use. This may be due to the self checkout lane not being ready for customers due to requiring cleaning or no bags available, issues with the SCO printer or payment terminal, or the store just wants customers to use manned Xstore registers for a period of time. The register cannot be locked when in a SCO sale.

To close the SCO register:

1. Log in as a supervisor. See [Supervisor Login](#).
2. Xstore displays the Manage SCO Register menu. Select **Close (Lock) SCO**.
Xstore locks the register and displays the Register Locked screen.

Open (Unlock) SCO

A SCO register must be opened by a cashier so that it is available for customers to use.

To open the SCO register:

1. Enter **Employee ID**.
2. Enter **Employee Password**.

Switch SCO to Standard Register

The Xstore POS register can be swapped between SCO mode POS and standard manned POS.

To switch SCO to standard register mode:

1. Select **Alt-tab** on the Keypad to switch windows and open Xenvironment on the register.
2. Select **Support (F2)** on Xenvironment.
3. Select **Stop SCO**.
4. Enter **User ID**.
5. Enter **Password**.

Restart (Reboot) Register

To restart SCO register mode:

1. Select **Alt-tab** on the Keypad to switch windows and open Xenvironment on the register.
2. Select **Support (F2)** on Xenvironment.
3. Select **Reboot SCO**.
4. Enter **User ID**.
5. Enter **Password**.

27

Store Open and Close

When a store is physically opened at the start of the day, Xstore Point of Service may also perform a store open process to get ready for the day. The store must be opened to allow registers to be opened and to allow business transactions in the system.

When the store is physically closed at the end of business hours, Xstore Point of Service may also run a store close to prevent the operation of certain business functions. From an application perspective, the store close process clears daily data, accepts downloads from corporate headquarters, purges old data, runs reports, and prepares your store to open for a new day.

All cash registers must be closed before the store close process can be run. See [Chapter 25, Register Open and Close](#) for the register close process.

Figure 27–1 Open Registers

Register Status		
These registers are still open and must be closed before the store is closed.		
Retail Location	Register ID	Status
401	2	OPEN
401	3	OPEN

The store close is divided into a number of separate processes. If the system must be restarted, any completed process, any process that ended with errors, or any process that was skipped is not re-processed.

Store Open

The store is opened to allow business transactions in the system. The store must be opened using the Back Office Store Open process. Once the store is open, you cannot ring sales until the register is opened and a till is counted for the register.

Note: Store open and store close activities are controlled by user security. You must have the proper security privileges to open and close the store. Refer to the *Oracle Retail Xstore Point of Service Manager's Guide* for detailed information about opening and closing the store.

During the store open process, the system may also list any pending orders that require attention. Once the store is open, the associate can take any action as needed on the orders. See [Chapter 14, Order Transactions Through Order Broker Cloud Service](#) for more information about processing orders.

When the store is open, the Store indicator on the status bar is green indicating that the store is open.

Figure 27–2 Status Bar: Store Open - Register Closed



When both the store and the register are open, the Store and Register indicators on the status bar are green.

Figure 27–3 Status Bar: Store Open - Register Open



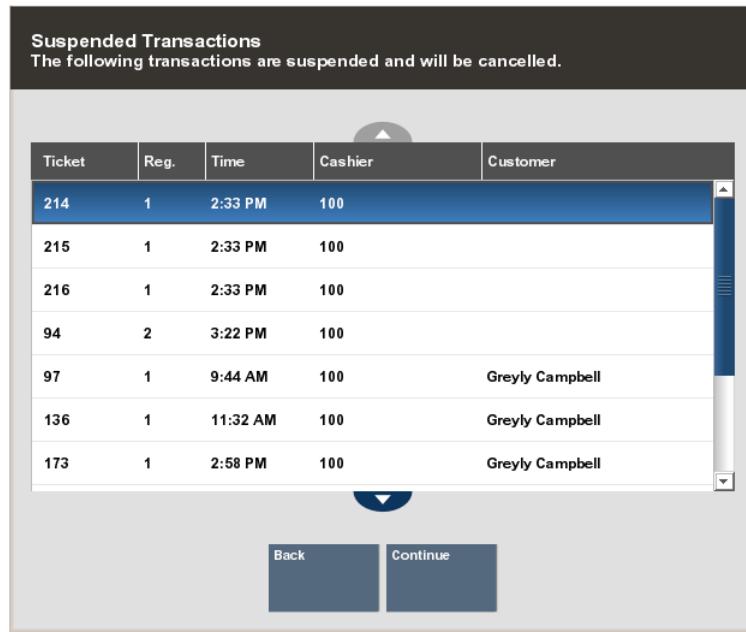
Store Close

To close a store:

- All registers must be closed.
- Depending upon the configuration of your system, all tills must be reconciled.
- Depending upon the configuration of your system, all retail periods must be ended. See [End Retail Period](#) for more information.

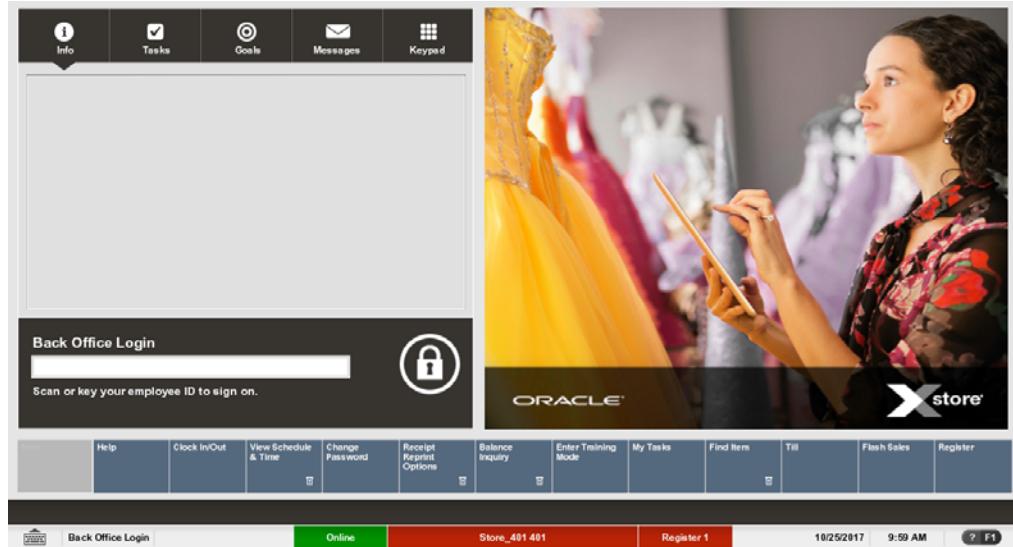
Note: Store open and store close activities are controlled by user security. You must have the proper security privileges to open and close the store. Refer to the *Oracle Retail Xstore Point of Service Manager's Guide* for detailed information about opening and closing the store.

During the store close process, the system automatically finds and lists any suspended transactions that were not resumed during the day. The associate performing the store close can either cancel the store close process at this point, or allow Xstore Point of Service to automatically cancel all listed transactions and continue with the store close.

Figure 27–4 Suspended Transactions

In addition, the system may also list any pending orders that require attention. The associate performing the store close can either cancel the store close process, or allow Xstore Point of Service to continue with the store close. The pending orders retain the same status and are not changed in any way by this notification prompt.

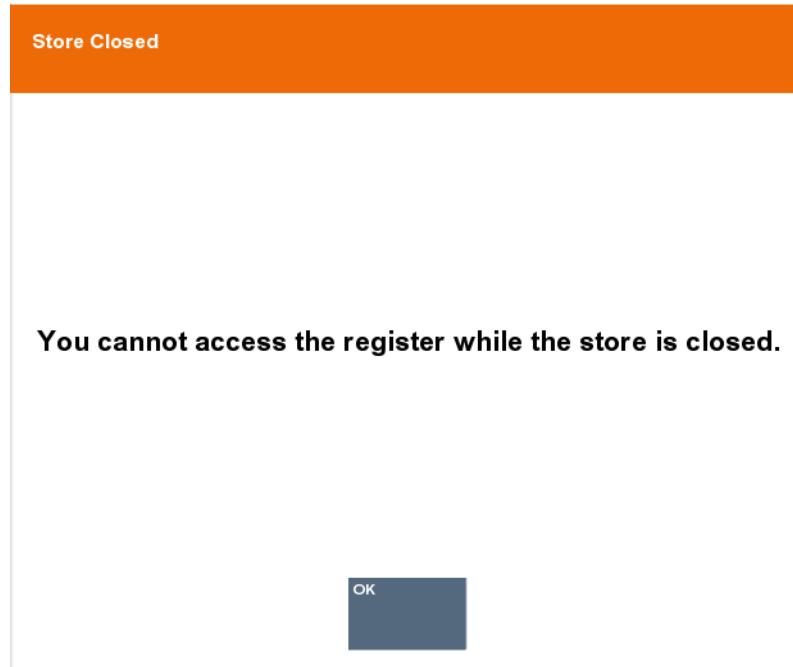
When the store is closed, the Store Indicator may be yellow or red, depending upon your system configuration, and the Register Indicator is red. An exception may occur if the register is being closed remotely. In that case, the Register Indicator is yellow while the processes are occurring, but it becomes red when it is completely closed.

Figure 27–5 Register Login Screen - Store Closed

Note: Depending upon your system configuration and store policy, you may have access to some register functions while the store is closed. For example, you may be able to clock in and out, and view your timecard and schedule information.

You cannot log in to the register until the store is opened. If you try to log in before opening the store, the system prompts you that you cannot continue until the store is opened.

Figure 27–6 Store Closed Message



Select **OK** to acknowledge the message and return to the Register Login screen.

End Retail Period

Depending upon the configuration of your system, you may need to end the retail periods on your system. To end a retail period:

1. Log into the Back Office.
2. Select **Open/Close Options**.
3. Select **End Retail Period**.
 - If there are unreconciled retail periods outstanding, an End Retail Period window opens, displaying a list of unreconciled retail periods. Continue with Step 4.
 - If all retail periods have been reconciled, a notification window opens indicating that all retail periods have been closed. Continue with Step 16.
4. Select the retail period to close:
 - Select the retail period.

- Use the up and down arrow keys to highlight the retail period, then press the Spacebar.
5. Select **OK**.
- A confirmation prompt opens asking whether to close the retail period.
6. Select **Yes**.
7. Count the cash tenders:
- a. Click the cash tender to count.
 - b. Click **Count Selected**.
A list of currency denominations opens.
 - c. Count a currency denomination.
 - d. Click the denomination in the **View Port**.
 - e. Enter the count of the currency denomination in the **Focus Bar** and press **Enter**.
 - f. Repeat Steps c to e for each denomination.
 - g. Click **Back**.
Xstore Point of Service returns to the Count Summary screen.
 - h. Repeat Steps a to g for each currency.
8. If necessary, count the credit card tender:
- a. Click to select **Credit Card**.
 - b. Click **Count Selected**.
Xstore Point of Service prompts for the credit card tender count.
 - c. Enter the number of credit card tender counts and press **Enter**.
Xstore Point of Service prompts for the amount of credit card tenders.
 - d. Enter the total amount of all credit card tenders and press **Enter**.
 - e. Click **Back**.
Xstore Point of Service returns to the Count Summary screen.
9. If necessary, count the check tender:
- a. Click to select **Check**.
 - b. Click **Count Selected**.
Xstore Point of Service prompts for a check serial number.
 - c. Enter the serial number for the check and press **Enter**.
Xstore Point of Service prompts for the amount of the check.
 - d. Enter the amount of the check and press **Enter**.
 - e. Repeat Steps c to d for each check.
 - f. Click **Back**.
Xstore Point of Service returns to the Count Summary screen.
10. If necessary, count the other tenders:
- a. Click to select the tender.

- b. Click **Count Selected**.
- c. Follow the prompts to count the tender.
- d. Click **Back**.

Xstore Point of Service returns to the Count Summary screen.

- e. Repeat Steps a to d for each currency.

11. Click **Counting Complete** when all counts are completed.

Note: Check the Over/Short column to see if your till is balanced with the system values for each tender type.

- If the cash amount matches, the system prompts to confirm the amount for all cash currencies you entered. Continue with Step 12.
- If the currency amounts do not match, the system displays a prompt to either recount the till or to accept the difference Continue with Step 13.

12. Click **Yes**.

Xstore Point of Service prompts for the deposit amount. Continue with Step 14.

13. Do one of the following:

- Click **Yes** to continue the close process. Continue with Step 14.
The register closes. Receipts for the register close may print.
- Click **No** to return to the count screen. Perform Steps 7, 8, 9, or 10 as necessary.

14. If necessary, select the deposit amount:

- Click **Accept Deposit** to accept the suggested amount.
A notification window opens. Continue with Step 16.
- Click **Change Deposit** to enter a new deposit amount.
Xstore Point of Service prompts for a new deposit amount. Continue with Step 15.
- Click **Deposit Calculator** to calculate a new deposit amount.

Xstore Point of Service displays a denomination count screen that can be used as a calculator (see Step 7). Enter the count for each denomination. A running total at the bottom of the screen is updated as you count the cash amount to be deposited.

15. Enter the new deposit amount and press Enter.

16. Click **OK**.

The retail period ends.

28

Manage Till Options

Till options and maintenance functions are primarily related to the movement of money into and out of a till (a cash drawer). Till options include Paid In and Paid Out, No Sale, Post Void, Foreign Currency Maint., Tender Exchange, and Change Float. Several other till maintenance options deal with the control and auditing of funds in the till. They include Cash Pickup, Cash Transfer, Till Audit, and Mid-Day Deposit. Finally, the Lock Register option provides physical security for the till.

Note: Because Xstore Point of Service is highly configurable, menu options in this guide are not identified by a function key number (F2, F3, and so on.). Instead, the name on the button is used throughout the procedures and processes. Many Till Options are controlled by user security and may not be available to all associates.

Open the Till Options Menu

The Till Options menu can be opened from two locations in Xstore Point of Service:

- [Register Login Screen](#)
- [Register Sale Screen](#)

Register Login Screen

To open the Till Options menu from the Register Login Screen:

1. Click **Till** in the Register Login screen.

Figure 28–1 Register Login



2. Do one of the following, depending upon the configuration of your system:

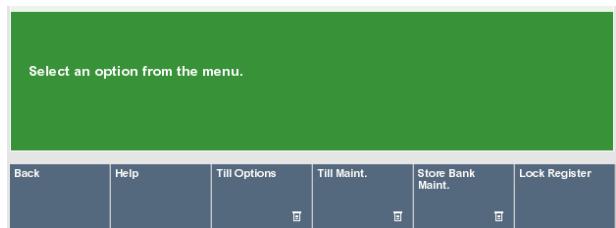
- Enter your user ID and press Enter.
Xstore Point of Service prompts for your password. Continue with Step 3.
- Scan your finger on the fingerprint reader.

The Manage Tills menu opens. Continue with Step 4.

3. Enter your password and press Enter.

The Back Office Main Menu opens.

Figure 28–2 Till Main Menu



4. Click **Till Options**.

The Till Options menu opens.

Figure 28–3 Till Options Menu Buttons



Register Sale Screen

To open the Till Options menu from the Register Sale screen:

1. Click **Register Options** in the Register Sale screen.
2. Click **Till Options**.

The Till Options menu opens.

Open the Till Maintenance Menu

To open the Till Options menu from the Register Login Screen:

1. Click **Till** in the Register Login screen.
2. Do one of the following, depending upon the configuration of your system:
 - Enter your user ID and press Enter.
Xstore Point of Service prompts for your password. Continue with Step 3.
 - Scan your finger on the fingerprint reader.
The Till menu opens. Continue with Step 4.
3. Enter your password and press Enter.
The Back Office Main Menu opens ([Figure 28–2](#)).
4. Click **Till Maint.**
The Till Maintenance menu opens.

Figure 28–4 Till Maintenance Menu Buttons



Paid In and Paid Out Transactions

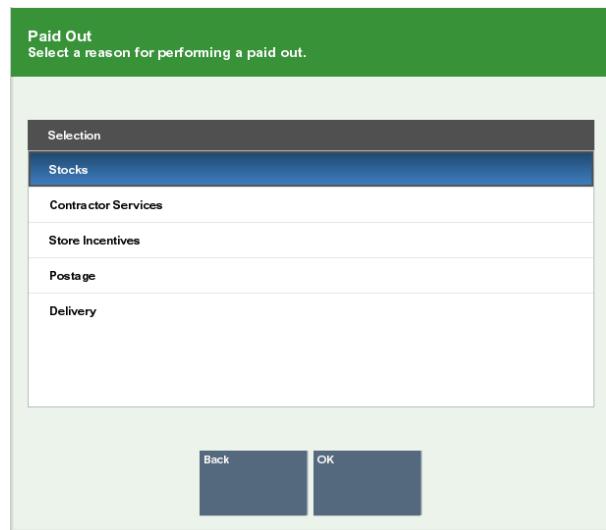
A paid in transaction allows you to move funds into a till from non-sale sources. A paid out transaction moves funds out of a till for non-refund purposes. The system's configuration controls which associates are allowed to move funds in or out of the till. It also specifies the list of valid reasons that an associate can select when performing a paid in or paid out transaction. In addition, the system's configuration controls whether or not receipts are produced by these two transaction types.

Paid Out

To perform a paid-out transaction:

1. [Open the Till Options Menu.](#)
2. Click **Paid Out**.
 - If you are prompted to scan a cash drawer, continue with Step 3.
 - If you are prompted to select a reason for the paid out, continue with Step 4.
3. If necessary, scan the cash drawer to use for the paid out transaction.
A reason code selection window opens.
4. Select the reason for the paid out transaction:

Figure 28–5 Paid Out Reason Codes



- Click the reason.
 - Use the up and down arrows to highlight the reason, then press the Spacebar.
5. Click **OK**.
 - If you are prompted to enter more information, continue with Step 6.
 - If you are prompted for the amount of the paid out, continue with Step 8.
 6. Enter more information about the reason for the paid out transaction.
 7. Click **OK**.
 8. Enter the amount of the paid out, then press Enter.

Note: If you exceed your store's maximum amount allowed for a paid out transactions a notification window opens. Click **OK** to close the prompt and reenter a new paid out amount.

The cash drawer opens.

9. Remove the entered amount of the paid out from the cash drawer, then close the cash drawer.

The paid out transaction is complete.

Paid In

To perform a paid-in transaction:

1. [Open the Till Options Menu.](#)
2. Click **Paid In**.
 - If you are prompted to scan a cash drawer, continue with Step 3.
 - If you are prompted for a tracking number for the paid in, continue with Step 4.
3. If necessary, scan the cash drawer to use for the paid in transaction.

Xstore Point of Service prompts for a paid in tracking number.

Figure 28–6 Paid Out Receipt Barcode Prompt



4. Do one of the following:
 - Enter a tracking number for a previous paid-out transaction from which you are returning funds:
 - Scan the paid-out transaction receipt barcode and press Enter.
 - Enter tracking number for the paid-out transaction and press Enter.
 - Press Enter to skip entering a tracking number.
- A reason code selection window opens.
5. Select the reason for the paid in transaction:
 - Click the reason.
 - Use the up and down arrows to highlight the reason, then press the Spacebar.
6. Click **OK**.
 - If you are prompted to enter more information, continue with Step 6.
 - If you are prompted for the amount of the paid in, continue with Step 8.
7. Enter more information about the reason for the paid in transaction.
8. Click **OK**.

9. Enter the amount of the paid in, then press **Enter**.
The cash drawer opens.
10. Put the paid-in money in the cash drawer, then close the cash drawer.
The paid in transaction is complete.

Tender Exchange

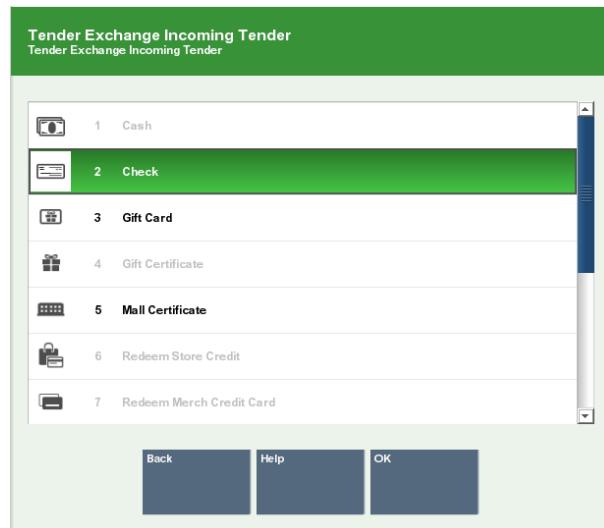
The Tender Exchange function permits an associate to exchange one form of tender for another. The types of tender that may be exchanged and the threshold exchange amounts are determined by your store policy.

To perform a Tender Exchange:

1. [Open the Till Options Menu](#).
2. Click **Tender Exchange**.

A Tender Exchange Incoming Tender window opens.

Figure 28–7 Tender Exchange Incoming Tender



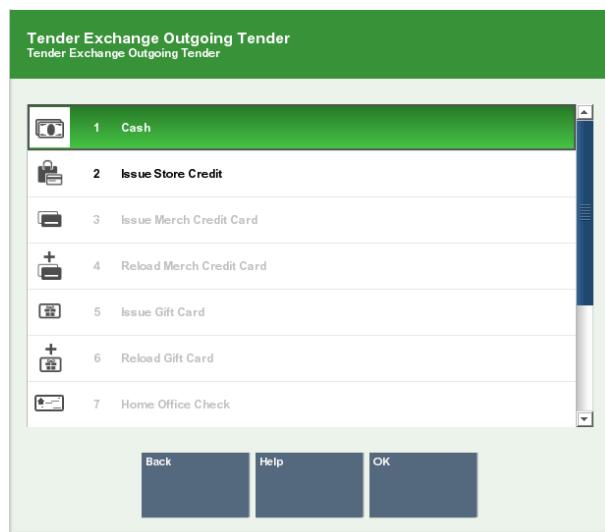
3. Select the incoming tender type from the tender exchange list:
 - Click the tender.
 - Use the up and down arrow keys to highlight the correct tender, then press the Spacebar.
4. Click **OK**.
5. If a check tender was selected in Step 3, enter information about the check:
 - a. Enter the check MICR number, then press **Enter**.
 - b. Enter the check number, then press **Enter**.
 - c. Enter the state or province that issued the ID being used to verify the customer's identity, then press **Enter**.
 - d. Enter the ID number, then press **Enter**.
 - e. Enter the birthdate on the ID, then press **Enter**.

6. Enter the amount of the incoming tender.
7. If necessary, select whether to add another incoming tender to the exchange:

- Click **Yes** to add another tender. Return to Step 3.
- Click **No** to continue with the current tenders.

A Tender Exchange Outgoing Tender window opens. Continue with Step 8.

Figure 28–8 Tender Exchange Outgoing Tender



8. Select the outgoing tender:
 - Click the tender.
 - Use the up and down arrow keys to highlight the correct tender, then press the Spacebar.
9. Click **OK**.

Xstore Point of Service prompts for the amount of the outgoing tender.

Note: The default value is equal to the maximum amount that can be redeemed in the selected tender.

10. If necessary, change the amount to return to the customer.
11. Press Enter.
12. If necessary, scan the cash drawer with which to perform the tender exchange.
 - If the entered outgoing amount was less than the maximum, a Tender Exchange Outgoing Tender window opens. Return to Step 8.
 - If the outgoing amount was the maximum amount, Xstore Point of Service prompts whether the tender exchange is complete. Continue with Step 13.
13. Indicate whether the tender exchange is complete:
 - Click **Yes** to complete the transaction.
Receipts will print.

- Click **No** and a Tender Exchange Incoming Tender window opens. Return to Step 3.

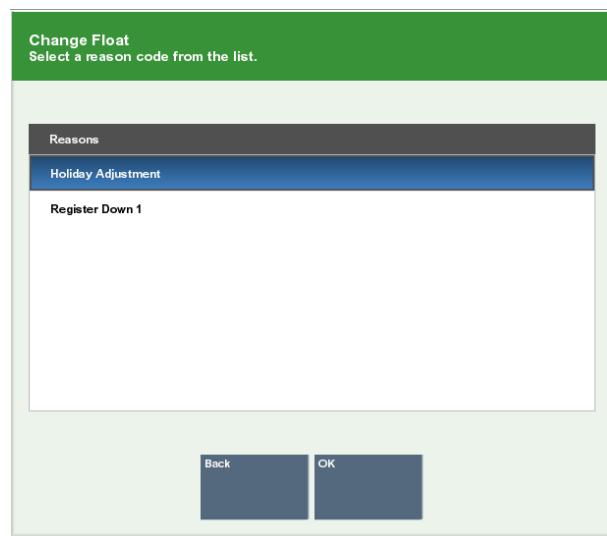
Change Float

The Float is the total value of cash counted and removed from the till, but not included in the bank deposit. This cash remains in circulation to be used the next time the till is opened. This option can be used whenever you need to change the amount withheld from the bank deposit, and can be adjusted per till. For example, you may want to change the float amount during the holiday shopping season to plan for increased sale activity.

To change the float:

1. [Open the Till Options Menu.](#)
2. Click **Change Float**.

Figure 28–9 Change Float Reason Code List



3. Select the reason for changing the float:
 - Click the reason.
 - Use the up and down arrows to highlight the reason, then press the Spacebar.
4. Click **OK**.
 - If you are prompted to enter more information, continue with Step 5.
 - If you are prompted for the amount of the float change, continue with Step 7.
5. Enter more information about the reason for the float change transaction.
6. Click **OK**.
7. If you are prompted for a currency, select the currency:
 - Click the currency.
 - Use the up and down arrows to highlight the currency, then press the Spacebar.
8. Click **OK**.

Xstore Point of Service prompts for the tills.

Figure 28–10 Change Float Till Selection

The screenshot shows a software interface titled "Change Float" with the sub-instruction "Select tills to change for Cash." Below this is a table with three columns: "Register", "Till ID", and "Float Amount". The table contains six rows, each with a register number from 1 to 6, a till ID (TILL1 through TILL6), and a float amount of \$100.00. At the bottom of the screen are two buttons: "Back" and "OK".

Register	Till ID	Float Amount
1	TILL1	\$100.00
2	TILL2	\$100.00
3	TILL3	\$100.00
4	TILL4	\$100.00
5	TILL5	\$100.00
6	TILL6	\$100.00

9. Select the tills:
 - Click the tills.
 - Use the up and down arrows to highlight the tills, then press the Spacebar.
10. Click **OK**.

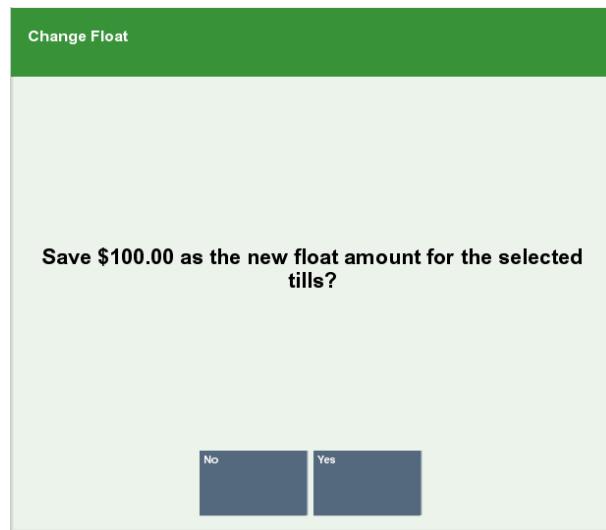
Xstore Point of Service prompts for the new float amount for the selected tills.

Figure 28–11 Change Float Amount

The screenshot shows a software interface titled "Change Float Amount". It features a text input field with a placeholder "Enter the new float amount for Cash." and a circular arrow icon indicating a numeric keypad or input method. Below the input field is a confirmation message: "Enter the new float amount for Cash."

11. Enter the new float amount, then press Enter.

A confirmation prompt opens.

Figure 28–12 Change Float New Amount**12. Click Yes.**

The float is changed and the change float process completes.

Cash Pickup

Cash Pickup is a till feature that allows an associate to take cash from a till so that the amount does not exceed a specified threshold amount. The system may be configured to prompt for an associate to make a cash pickup when the amount in the till is greater than the threshold amount.

Note: Your system's configuration may specify the maximum amount that should be kept in a till.

If that amount is exceeded after completing the tendering process for a transaction, the system may display a prompt indicating that a cash pickup should be made.

However, you do not have to wait for this prompt to make a cash pickup.

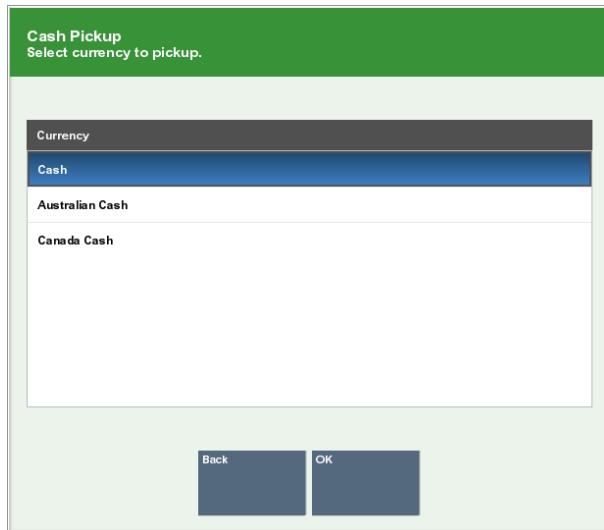
After you have assigned a customer to a transaction or added items to a sale, you cannot perform a cash pickup.

To perform a cash pickup:

1. [Open the Till Maintenance Menu.](#)
2. Click **Cash Pickup**.
 - If you are prompted to scan a cash drawer, continue with Step 3.
 - If you are prompted for a currency, continue with Step 4.
 - If you are prompted for the amount of the cash pickup, continue with Step 6.
3. Scan the cash drawer.
 - If you are prompted for a currency, continue with Step 4.

- If you are prompted for the amount of the cash pickup, continue with Step 6.

Figure 28–13 Cash Pickup Currency List



4. Select the currency:
 - Click the currency.
 - Use the up and down arrows to highlight the currency, then press the Spacebar.
5. Click **OK**.
6. Enter the amount of the cash pickup then press Enter.

Figure 28–14 Cash Pickup Amount



Note: Your system's configuration may specify the minimum amount that should be kept in a till. If you try to remove an amount that results in the till amount going below this level, the system displays a prompt indicating the amount that must remain in the till after a pickup. Click **OK** to return to the Cash Pickup amount prompt.

Your system may be configured to count the Cash Pickup currency.

The cash drawer opens.

7. Remove the entered amount from the cash drawer.
8. Close the cash drawer.

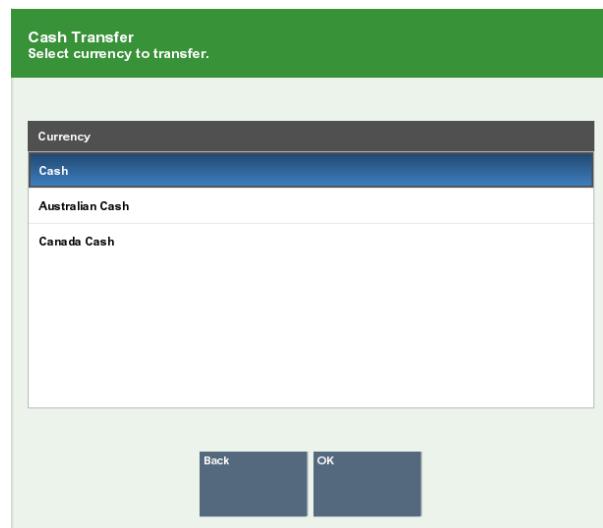
The cash pickup is complete.

Cash Transfer (From Store Bank To Till)

To perform a Cash Transfer from the store bank to a till:

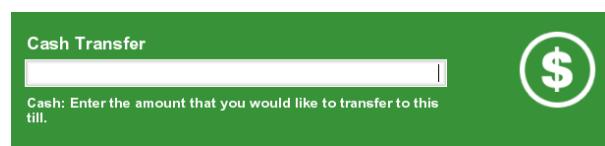
1. [Open the Till Maintenance Menu.](#)
2. Click **Cash Transfer**.
 - If you are prompted to scan a cash drawer, continue with Step 3.
 - If you are prompted for a currency, continue with Step 4.
 - If you are prompted for the amount of the cash transfer, continue with Step 6.
3. Scan the cash drawer.
 - If you are prompted for a currency, continue with Step 4.
 - If you are prompted for the amount of the cash transfer, continue with Step 6.

Figure 28–15 Cash Transfer Currency List



4. Select the currency:
 - Click the currency.
 - Use the up and down arrows to highlight the currency, then press the Spacebar.
5. Click **OK**.
6. Enter the amount of the cash transfer then press Enter.

Figure 28–16 Cash Transfer Amount Prompt



Note: Your system may be configured to count the Cash Transfer currency.

The cash transfer is complete.

Mid-Day Deposit

A Mid-Day Deposit allows you to place funds into the store bank (safe) during the course of a working session. This activity is not necessarily restricted to a specific time, and may be performed as often as necessary.

To perform a mid-day deposit:

1. [Open the Till Maintenance Menu.](#)
2. Click **Mid-Day Deposit**.
 - If you are prompted to scan a cash drawer, continue with Step 3.
 - If the Count Summary screen opens, continue with Step 4.
3. Scan the cash drawer.

Figure 28–17 Mid-Day Deposit Count Summary Screen

The screenshot shows a software interface titled "Count Summary" with the subtitle "Cashier ID: 100 Till Name: Test Till". At the top right, it says "Balance Summary Over/Short". The main area is a table with columns: "Count Group", "Declared Amount", "System Amount", and "Over/Short". The table lists various currency types with their respective declared and system amounts, and the over/short difference. The bottom of the screen has a toolbar with buttons for "Back", "Help", "Count Selected", and "Counting Complete".

Count Group	Declared Amount	System Amount	Over/Short
US Traveler Check	\$0.00	\$0.00	\$0.00
Cash	\$0.00	\$411.24	(\$411.24)
Sweden Cash	\$0.00	\$50.00	(\$50.00)
Mexico Cash	\$0.00	\$0.00	\$0.00
British Pound	£0.00	£0.00	£0.00
Australian Cash	\$0.00	\$100.00	(\$100.00)
Brazilian Cash	\$0.00	\$0.00	\$0.00
Canada Cash	\$0.00	\$100.00	(\$100.00)
Euro Cash	€0.00	€0.00	€0.00

4. If necessary, count the cash tender amounts you are depositing:
 - a. Click the cash tender to count.
 - b. Click **Count Selected**.

A list of currency denominations opens.

Figure 28–18 Denomination Count

The screenshot shows the Xstore Point of Service software interface. At the top is a navigation bar with icons for Info, Tasks, Goals, Messages, and Keypad. Below this is a numeric keypad with digits 7, 8, 9, 4, 5, 6, 1, 2, 3, 0, and a decimal point, along with left and right arrow keys. To the right of the keypad is a green panel titled "Denomination Count" with the sub-tittle "Cash". It displays a table of currency counts:

Denomination	Qty	@	Amount
Penny	0	0.010000	\$0.00
Nickel	0	0.050000	\$0.00
Dime	0	0.100000	\$0.00
Quarter	0	0.250000	\$0.00
Dollar	0	1.000000	\$0.00
Five Dollar	0	5.000000	\$0.00
Ten Dollar	0	10.000000	\$0.00
Twenty Dollar	0	20.000000	\$0.00
Fifty Dollar	0	50.000000	\$0.00
Hundred Dollar	0	100.000000	\$0.00
Half Dollar	0	0.500000	\$0.00
Dollar Coins	0	1.000000	\$0.00

A "Total" row at the bottom shows \$0.00. Below the table is a note: "Select a denomination and enter the quantity for Cash." At the bottom of the screen are buttons for Back, Help, Prior Group, Next Group, and a large "Count" button.

- c. Count a denomination currency.
 - d. Click the denomination in the **View Port**.
 - e. Enter the count of the currency denomination in the **Focus Bar** and press **Enter**.
 - f. Repeat Steps c to e for each denomination.
 - g. Click **Back**.
Xstore Point of Service returns to the Count Summary screen.
 - h. Repeat Steps a to g for each currency.
5. If necessary, count the credit card tender:
- a. Click to select **Credit Card**.
 - b. Click **Count Selected**.
Xstore Point of Service prompts for the credit card tender count.
 - c. Enter the number of credit card tender counts and press **Enter**.
Xstore Point of Service prompts for the amount of credit card tenders.
 - d. Enter the total amount of all credit card tenders and press **Enter**.
 - e. Click **Back**.
Xstore Point of Service returns to the Count Summary screen.
6. If necessary, count the check tender:
- a. Click to select **Check**.
 - b. Click **Count Selected**.
Xstore Point of Service prompts for a check serial number.
 - c. Enter the serial number for the check and press **Enter**.
Xstore Point of Service prompts for the amount of the check.
 - d. Enter the amount of the check and press **Enter**.
 - e. Repeat Steps c to d for each check.
 - f. Click **Back**.

Xstore Point of Service returns to the Count Summary screen.

7. If necessary, count the other tenders:
 - a. Click to select the tender.
 - b. Click **Count Selected**.
 - c. Follow the prompts to count the tender.
 - d. Click **Back**.
 Xstore Point of Service returns to the Count Summary screen.
- e. Repeat Steps a to d for each tender.
8. Click **Counting Complete** when the deposit count is complete.
A deposit receipt prints.
9. Close the cash drawer.
The mid-day deposit is complete.

Till Audit

A Till Audit provides the capability to select a tender type, record its total current value, and see if that value balances with the amount that the system shows for the same tender. The system calculates and displays any difference (over/short) between the two amounts.

A till audit may be performed any time after the Beginning Count and before the Ending Count. The till does not need to be removed after the audit is completed.

To perform a till audit:

1. [Open the Till Maintenance Menu](#).
2. Click **Till Audit**.
 - If you are prompted to scan a cash drawer, continue with Step 3.
 - If the Count Summary screen opens, continue with Step 4.
3. Scan the cash drawer.

Figure 28-19 Till Audit Count Summary Screen

Count Group	Declared Amount	System Amount	Over/Short
Credit Card	\$0.00	\$0.00	\$0.00
Issue Store Credit	\$0.00	\$0.00	\$0.00
Miscellaneous	\$0.00	\$0.00	\$0.00
Store Credit	\$0.00	\$0.00	\$0.00
US Traveler Check	\$0.00	\$0.00	\$0.00
Gift Card	\$0.00	\$0.00	\$0.00
Cash	\$0.00	\$411.24	(\$411.24)
Sweden Cash	\$0.00	\$50.00	(\$50.00)
Mexico Cash	\$0.00	\$0.00	\$0.00

Balance Summary Over/Short

Back Help Count Selected Counting Complete

4. Count the cash tender amounts you are auditing:
 - a. Click the cash tender to count.
 - b. Click **Count Selected**.
A list of currency denominations opens.
 - c. Count a denomination currency.
 - d. Click the denomination in the **View Port**.
 - e. Enter the count of the currency denomination in the **Focus Bar** and press **Enter**.
 - f. Repeat Steps c to e for each denomination.
 - g. Click **Back**.
Xstore Point of Service returns to the Count Summary screen.
 - h. Repeat Steps a to g for each currency.
5. If necessary, count the credit card tender:
 - a. Click to select **Credit Card**.
 - b. Click **Count Selected**.
Xstore Point of Service prompts for the credit card tender count.
 - c. Enter the number of credit card tender counts and press **Enter**.
Xstore Point of Service prompts for the amount of credit card tenders.
 - d. Enter the total amount of all credit card tenders and press **Enter**.
 - e. Click **Back**.
Xstore Point of Service returns to the Count Summary screen.
6. If necessary, count the check tender:
 - a. Click to select **Check**.
 - b. Click **Count Selected**.
Xstore Point of Service prompts for a check serial number.
 - c. Enter the serial number for the check and press **Enter**.
Xstore Point of Service prompts for the amount of the check.
 - d. Enter the amount of the check and press **Enter**.
 - e. Repeat Steps c to d for each check.
 - f. Click **Back**.
Xstore Point of Service returns to the Count Summary screen.
7. If necessary, count the other tenders:
 - a. Click to select the tender.
 - b. Click **Count Selected**.
 - c. Follow the prompts to count the tender.
 - d. Click **Back**.
Xstore Point of Service returns to the Count Summary screen.

- e. Repeat Steps a to d for each tender.
8. Click **Counting Complete** when the till audit is complete.
A till audit receipt prints.
9. Close the cash drawer.
The till audit is complete.

Till Accountability Mode Functions

Some till options are available only if your system uses till accountability, in which responsibility for a till is assigned to a specific cashier. This also allows Xstore Point of Service to support more than one cash drawer on a single register. Till assignment is done through the Back Office Menu. Refer to the *Oracle Retail Xstore Point of Service Manager's Guide* for more information about all the functions available in Till Accountability mode.

Attach a Till to a Register

This is an automatic function that occurs only in the till accountability mode of operation. When a cashier who has been assigned to a specific till logs in to the system, a prompt displays indicating that you must have a till attached.

To attach a till to a register:

1. [Log In to Xstore Point of Service](#).
A confirmation prompt asks whether a till must be attached to the register.
2. Click Yes.
3. Count the cash tender amounts:
 - a. Click the cash tender to count.
 - b. Click **Count Selected**.
A list of currency denominations opens.
 - c. Count a denomination currency.
 - d. Click the denomination in the [View Port](#).
 - e. Enter the count of the currency denomination in the [Focus Bar](#) and press **Enter**.
 - f. Repeat Steps c to e for each denomination.
 - g. Click **Back**.
Xstore Point of Service returns to the Count Summary screen.
 - h. Repeat Steps a to g for each currency.
4. Click **Counting Complete** when all currencies have been counted.
 - If the starting cash amount matches, the system prompts to confirm the amount for all cash currencies you entered and opens the register after you acknowledge the system amount. Continue with Step 6.
 - If the currency amounts do not match, the system displays a prompt to either recount the till or to accept the difference. Continue with Step 5.
5. Select whether to continue attaching the till:

- Click Yes to attach the till to the register.
 - Click No to return to Step 3 and perform the count again.
- 6. Click Yes.**

The till is attached to the register.

Open a Till

If your system is configured to use network-enabled cash drawers, you must open a till to begin using a cash drawer.

To open a till:

- 1. Open the Till Maintenance Menu**
- 2. Click Attach Cash Drawer Till.**
A list of tills opens.
- 3. Select the till to open:**
 - Click the till.
 - Use the up and down arrow keys to highlight the till.
- 4. Click OK.**
Xstore Point of Service prompts you to scan a cash drawer.
- 5. Scan the cash drawer to which the till will be attached.**
A confirmation prompt opens.
- 6. Click Yes.**
The cash drawer opens.
- 7. Insert the till into the cash drawer.**
- 8. Close the cash drawer.**
- 9. Click OK in the notification prompt.**

The till is open.

Remove a Till from a Register

Removing a till is performed only in the till accountability mode of operation in which a till is assigned to a specific cashier. When a cashier who has been assigned to a specific till logs out of the register, the system may prompt to remove the till.

This option allows a cashier to physically remove a till from a register so that it can be temporarily stored or reconciled at a different register. When a till is removed, reconciliation is not required. Another till may be attached to the register immediately.

- 1. Open the Till Maintenance Menu.**
- 2. Click Remove Till or Remove Cash Drawer Till.**

Note: The name of the option depends upon the configuration of your system.

- If you are prompted with a list of cash drawers, continue with Step 3.

- If you are prompted to scan a cash drawer, continue with Step 5.
 - If you are prompted whether to remove the till, continue with Step 6.
3. Select the cash drawer:
 - Click the cash drawer.
 - Use the up and down arrows to highlight the cash drawer, then press the Spacebar.
 4. Click **OK**.

Xstore Point of Service asks whether to remove the till. Continue with Step 6.
 5. Scan the cash drawer.

Xstore Point of Service asks whether to remove the till.
 6. Click **Yes**.

The cash drawer opens.
 7. Remove the till.
 8. Click **OK** after you remove the till.
 9. Close the cash drawer.

The till removal process is complete.

Perform a Close Count

The Close Count function provides the capability to declare final amounts for all the tender groups when a till is closed at any time. The system displays the values for each group in the System Amount column and any overages or shortages are indicated in the Over/Short column on the Close Count screen (if your system is configured to display them). If any of the tender groups are not in balance when an attempt is made to close a till, the system displays a warning message indicating which groups are out of balance. You may decide to accept the differences or to correct them before final closing.

To perform a close count:

1. [Open the Till Maintenance Menu](#).
2. Click **Count Till**.

The Count Summary screen displays and the cash drawer opens.
3. Count the cash tenders:
 - a. Click the cash tender to count.
 - b. Click **Count Selected**.

A list of currency denominations opens.
 - c. Count a denomination currency.
 - d. Click the denomination in the [View Port](#).
 - e. Enter the count of the currency denomination in the [Focus Bar](#) and press **Enter**.
 - f. Repeat Steps c to e for each denomination.
 - g. Click **Back**.

- Xstore Point of Service returns to the Count Summary screen.
- h. Repeat Steps a to g for each currency.
 4. If necessary, count the credit card tender:
 - a. Click to select **Credit Card**.
 - b. Click **Count Selected**.
 Xstore Point of Service prompts for the credit card tender count.
 - c. Enter the number of credit card tender counts and press **Enter**.
 - d. Xstore Point of Service prompts for the amount of credit card tenders.
 - e. Enter the total amount of all credit card tenders and press **Enter**.
 - f. Click **Back**.
 Xstore Point of Service returns to the Count Summary screen.
 5. If necessary, count the check tender:
 - a. Click to select **Check**.
 - b. Click **Count Selected**.
 Xstore Point of Service prompts for a check serial number.
 - c. Enter the serial number for the check and press **Enter**.
 - d. Xstore Point of Service prompts for the amount of the check.
 - e. Enter the amount of the check and press **Enter**.
 - f. Repeat Steps c to d for each check.
 - g. Click **Back**.
 Xstore Point of Service returns to the Count Summary screen.
 6. If necessary, count the other tenders:
 - a. Click to select the tender.
 - b. Click **Count Selected**.
 - c. Follow the prompts to count the tender.
 - d. Click **Back**.
 Xstore Point of Service returns to the Count Summary screen.
 - e. Repeat Steps a to d for each tender.
 7. Click **Counting Complete** when all counts are completed.

Note: Check the Over/Short column to see if your till is balanced with the system values for each tender type.

- If the cash amount matches, the system prompts to confirm the amount for all cash currencies you entered and closes the register after you acknowledge the system amount. Continue with Step 8.
 - If the currency amounts do not match, the system displays a prompt to either recount the till or to accept the difference. Continue with Step 9.
8. Click **Yes**.

The count is complete and the till can be removed from the register. See [Remove a Till from a Register](#).

9. Do one of the following:
 - Click **Yes** to complete the count.
The till can be removed from the register. See [Remove a Till from a Register](#)
 - Click **No** to return to the count screen. Perform Steps 3, 4, 5, or 6 as necessary.

Reconcile a Till

Depending upon the configuration of your system, till reconciliation may be performed separately from the close process.

To perform a till reconciliation:

1. [Open the Till Maintenance Menu](#).
2. Click **Reconcile Register**.
A list of registers opens.
3. Select the register to count:
 - Click the register.
 - Use the up and down arrows to highlight the register, then press the Spacebar.
4. Click **OK**.
A confirmation prompt opens.
5. Click **Yes**.
6. Count the cash tenders:
 - a. Click the cash tender to count.
 - b. Click **Count Selected**.
A list of currency denominations opens.
 - c. Count a denomination currency.
 - d. Click the denomination in the [View Port](#).
 - e. Enter the count of the currency denomination in the [Focus Bar](#) and press **Enter**.
 - f. Repeat Steps c to e for each denomination.
 - g. Click **Back**.
Xstore Point of Service returns to the Count Summary screen.
 - h. Repeat Steps a to g for each currency.
7. If necessary, count the credit card tender:
 - a. Click to select **Credit Card**.
 - b. Click **Count Selected**.
Xstore Point of Service prompts for the credit card tender count.
 - c. Enter the number of credit card tender counts and press **Enter**.
Xstore Point of Service prompts for the amount of credit card tenders.

- d. Enter the total amount of all credit card tenders and press **Enter**.
- e. Click **Back**.
Xstore Point of Service returns to the Count Summary screen.
- 8. If necessary, count the check tender:
 - a. Click to select **Check**.
 - b. Click **Count Selected**.
Xstore Point of Service prompts for a check serial number.
 - c. Enter the serial number for the check and press **Enter**.
Xstore Point of Service prompts for the amount of the check.
 - d. Enter the amount of the check and press **Enter**.
 - e. Repeat Steps c to d for each check.
 - f. Click **Back**.
Xstore Point of Service returns to the Count Summary screen.
- 9. If necessary, count the other tenders:
 - a. Click to select the tender.
 - b. Click **Count Selected**.
 - c. Follow the prompts to count the tender.
 - d. Click **Back**.
Xstore Point of Service returns to the Count Summary screen.
 - e. Repeat Steps a to d for each tender.
- 10. Click **Counting Complete** when all counts are completed.

Note: Check the Over/Short column to see if your till is balanced with the system values for each tender type.

- If the cash amount matches, the system prompts to confirm the amount for all cash currencies you entered and closes the register after you acknowledge the system amount. Continue with Step 11.
 - If the currency amounts do not match, the system displays a prompt to either recount the till or to accept the difference. Continue with Step 12.
11. Click **Yes**.
Continue with Step 13.
12. Do one of the following:
- Click **Yes** to continue the close process. Continue with Step 13.
 - Click **No** to return to the count screen. Perform Steps 6, 7, 8, or 9 as necessary.
13. If necessary, select the deposit amount:
- Click **Accept Deposit** to accept the suggested amount.
The register closes. Close receipts may print. Continue with Step 15.
 - Click **Change Deposit** to enter a new deposit amount.

Xstore Point of Service prompts for a new deposit amount. Continue with Step 14.

- Click **Deposit Calculator** to calculate a new deposit amount.

Xstore Point of Service displays a denomination count screen that can be used as a calculator (see Step 6). Enter the count for each denomination. A running total at the bottom of the screen is updated as you count the cash amount to be deposited.

14. Enter the new deposit amount and press **Enter**.

15. Close the cash drawer.

The close process is complete.

Foreign Currency Maintenance

If permitted by your store's policy, you can edit the currency exchange rate for the foreign currencies that are accepted as tenders for sale transactions. Since some currency rates fluctuate frequently, this feature allows you to edit the exchange rate as often as necessary.

Note: Your system's configuration may make Foreign Currency Maintenance available from a different location than described below.

To perform foreign currency maintenance:

1. [Open the Till Options Menu](#).
2. Click **Foreign Currency Maint.**
3. [Log In to Xstore Point of Service](#) if necessary.
4. Select the currency to change:
 - Click the currency.
 - Use the up and down arrows to highlight the tender, then press the Spacebar.
5. Click **OK**.

A Currency Exchange window opens, showing information about the currency.

6. Enter the new exchange rate:
 - **New Exchange Rate** - The new exchange rate for the currency.
 - **Print as Inverted** - Allows the use of 1/n value of the exchange rate in the receipts.
 - **Comments** - Additional information about the reason for the change to the exchange rate.
7. Click **Save New Rate**.

A confirmation prompt opens.

8. Click **Yes**.
- Foreign currency transactions use the new exchange rate.

Employee Scheduling

Employee Scheduling allows you to perform a variety of scheduling activities:

- Create and maintain employee work shifts
- Schedule and maintain employee time-off events such as vacations and other times when employees may not be available for work
- Assign employees to defined work shifts

Refer to the *Oracle Retail Xstore Manager's Guide* for more information on these tasks.

Employees can view and print their schedules at the Register Login screen. They may also view a list of other employees who are assigned to work on a specific day.

This chapter describes the following topics:

- [View Your Work Schedule](#)
- [View Others Employees' Work Schedules](#)

View Your Work Schedule

The option to view your work schedule is only available from the Register Login screen or the Back Office Login screen before you log in.

To view your work schedule:

1. Click **View Schedule & Time** in the Register Login screen or the Back Office login screen.
2. Click **View Schedule**.
3. Do one of the following, depending upon the configuration of your system:
 - Enter your user ID and press Enter.
Xstore Point of Service prompts for your password. Continue with Step 4.
 - Scan your finger on the fingerprint reader.
Xstore Point of Service displays your schedule.
4. Enter your password and press Enter.
Xstore Point of Service displays your schedule for the week.

Schedule Information

Xstore Point of Service displays the following information for each timecard:

- **Sched. Hrs.** - Total number of hours scheduled for the week.
- **Sched. Amt.** - Pay amount scheduled for the week.
- **From** - Start date for the timecard.
- **To** - End date for the timecard.

Xstore Point of Service displays the following information for the week:

- Employee name.
- **Working** - Total number of working hours.
- **Break** - Total number of break hours.

Xstore Point of Service displays the following schedule information for each day of the week:

- Clock in time.
- Clock out time.
- Work code used for the time clocked in.

View Another Schedule Week

To change the schedule week you are viewing:

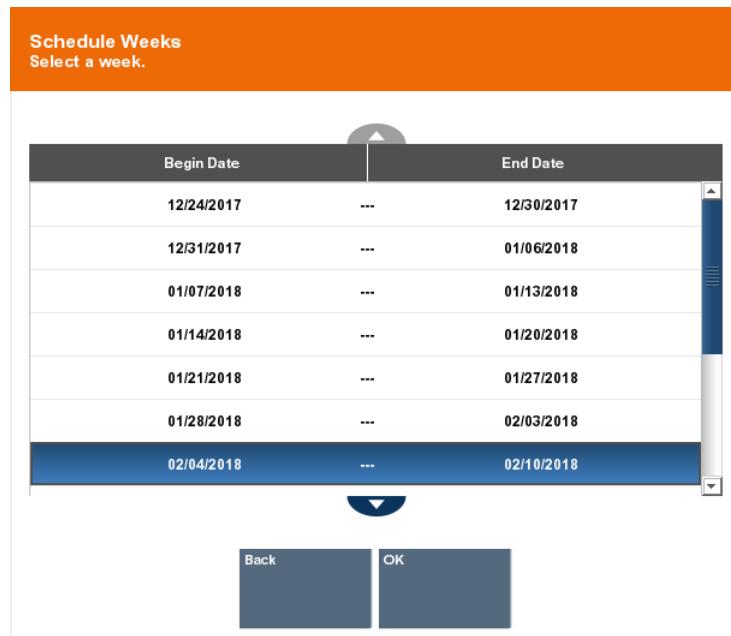
- Click **Previous Week** to view the previous week.
- Click **Next Week** to view the next week.
- [Select the Schedule Week](#)

Select the Schedule Week

To select the schedule week to view:

1. Click **Schedule Dates**.

A Schedule Weeks window opens.

Figure 29–1 Schedule Week Dates

2. Click the week to view:
 - Click the date.
 - Use the up and down arrows to highlight the correct date, then press the Spacebar.
3. Click OK.

The schedule for the selected dates is displayed.

Print Your Schedule

Click **Print Schedule** to print the currently displayed schedule.

View Others Employees' Work Schedules

The option to view the work schedules for a specific day for other employees is only available from the Register Login screen or the Back Office Login screen before you log in.

To view another employee's work schedule:

1. Click **View Schedule & Time** in the Register Login screen or the Back Office login screen.
2. Click **View Scheduled Employees**.
3. Do one of the following, depending upon the configuration of your system:
 - Enter your user ID and press Enter.
Xstore Point of Service prompts for your password. Continue with Step 4.
 - Scan your finger on the fingerprint reader.
Xstore Point of Service displays the employee work schedule for today. Continue with Step 5.
4. Enter your password and press Enter.
Xstore Point of Service displays the employee work schedule for today.
5. Select the day to view:
 - Click **Previous Day** to view the employees working on the previous day.
 - Click **Next Day** to view the employees working on the next day.
6. Click **Back** to close the window.