

Oracle Retail Xstore Point of Service
User Guide
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Oracle® Retail Oracle Retail Xstore Point of Service User Guide, Release 16.0

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Preface

This guide describes the technical frameworks used in the development of Xstore Point of Service.

Audience

This Technical Guide is for administrators and programmers of Oracle Retail Xstore Point of Service.

Documentation Accessibility

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Related Documents

For more information, see the following documents in the Xstore Point of Service 16.0 documentation set:

- Xstore Suite Release Notes
- Xstore Suite Oracle Retail Xstore Suite 16.0/Merchandising 16.0 Implementation Guide
- Xstore Point-of-Service Mobile User Guide
- Xstore Point-of-Service Reports Guide
- Xstore Point-of-Service Manager's Guide
- Xstore Point-of-Service Shipping, Receiving, and Inventory Guide
- Xstore Office User Guide
- Oracle Retail Xstore Point-of-Service, Lane Checkout User Interface User Guide
- Xstore Suite Implementation and Security Guide
- Xstore Point-of-Service Technical Guide
- Xstore Point-of-Service Frameworks and Technologies Guide
- Xstore Suite Deal Pricing Guide
- Xenvironment User Guide
- Xstore Point-of-Service Services Guide
- Xstore Point-of-Service Host Interface Guide
- Xstore Point-of-Service POS Log Files

-
- Xstore Point-of-Service Database Dictionary Guide
 - Xstore Office Database Dictionary Guide

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- 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, 16.0) or a later patch release (for example, 16.0.1). If you are installing the base release or 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.

Oracle Retail Documentation on the Oracle Technology Network

Documentation is packaged with each Oracle Retail product release. Oracle Retail product documentation is also available on the following Web site:

http://www.oracle.com/technology/documentation/oracle_retail.html

(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

Documentation should be available on this Web site within a month after a product release.

Conventions

Navigate: This is a navigate statement. It tells you how to get to the start of the procedure and ends with a screen shot of the starting point and the statement “the Window Name window opens.”

This is a code sample
It is used to display examples of code

Documentation and Screen Conventions

Overview

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 [Basic Navigation](#) 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.

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

Note: Due to the flexibility of the system, menu options in this guide are not identified by a function key number [F2, F3, etc.]. 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 xxxxx	This 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]	This refers to a key on the keyboard. The text inside the brackets is the name of the key.

Basic Navigation

Table 1-1: Documentation Conventions in the User Guide

When you see...	Then...
<u>Blue, underlined text</u>	This indicates the tagged text is a link to another area of the user document. Click on 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

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

Important: This information is important for the user to be aware of. For example, information that can help prevent the loss of data.

Tip: This information is related to the task at hand, but not required to perform the task. For example, this information may include best practices or practical information that can help the user in the performance of the task.

Basic Navigation

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

Touch-Screen Navigation

Xstore uses multi-touch gesture navigation throughout to allow for full touch-screen transactions.

Important: 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.

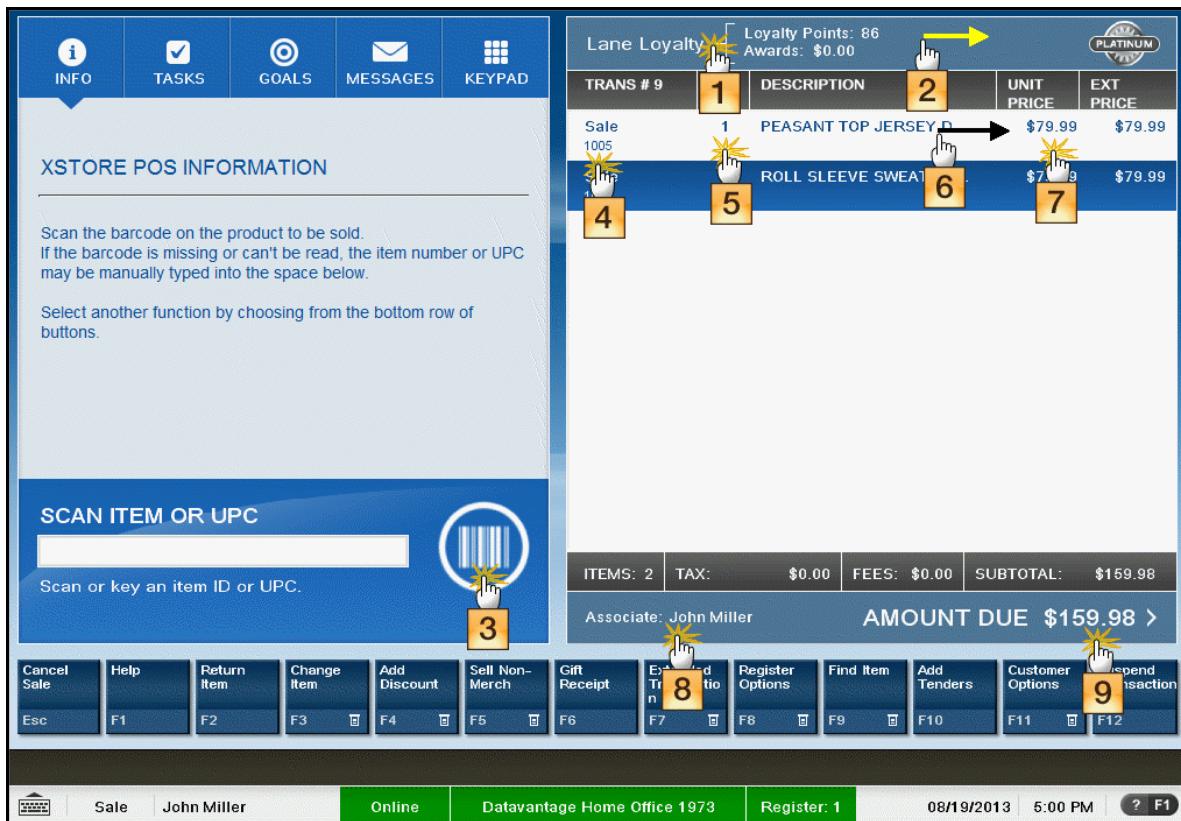


Figure 1-1: Sales Screen Touch-Screen Navigation

Touch-Screen Component #	Description
1. Tap Customer Loyalty Banner	<ul style="list-style-type: none"> If no customer is attached, Xstore invokes the add-customer process. If a customer has been assigned to the transaction, Xstore opens the customer maintenance screen.
2. Swipe Customer Loyalty Banner	From left to right, prompts to remove the assigned customer. Unassign
3. Tap Bar Code Graphic	Invokes the find item feature. Xstore Base is set to open the item matrix.
4. Tap Item ID	Displays item information (see Locating Items: Inventory Lookup).
5. Tap item quantity	Invokes the change quantity process. This displays the numeric keypad.
6. Swipe Item	From left to right, prompts to void the item. Void

Basic Navigation

Touch-Screen Component #	Description
7. Tap Unit Price	Invokes the change price process. This displays the numeric keypad.
8. Tap Associate Area	Invokes the change commissioned associate process (with an item selected).
9. 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

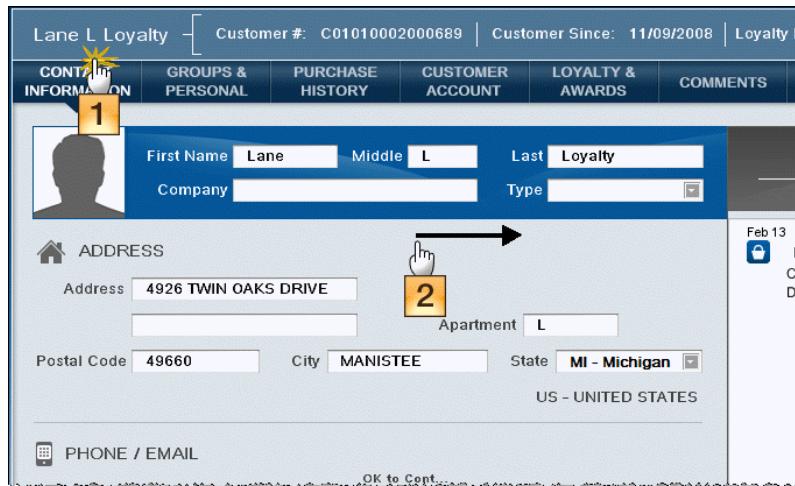


Figure 1-2: Customer Maintenance Touch-Screen Navigation

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

Purchase History Tab Navigation

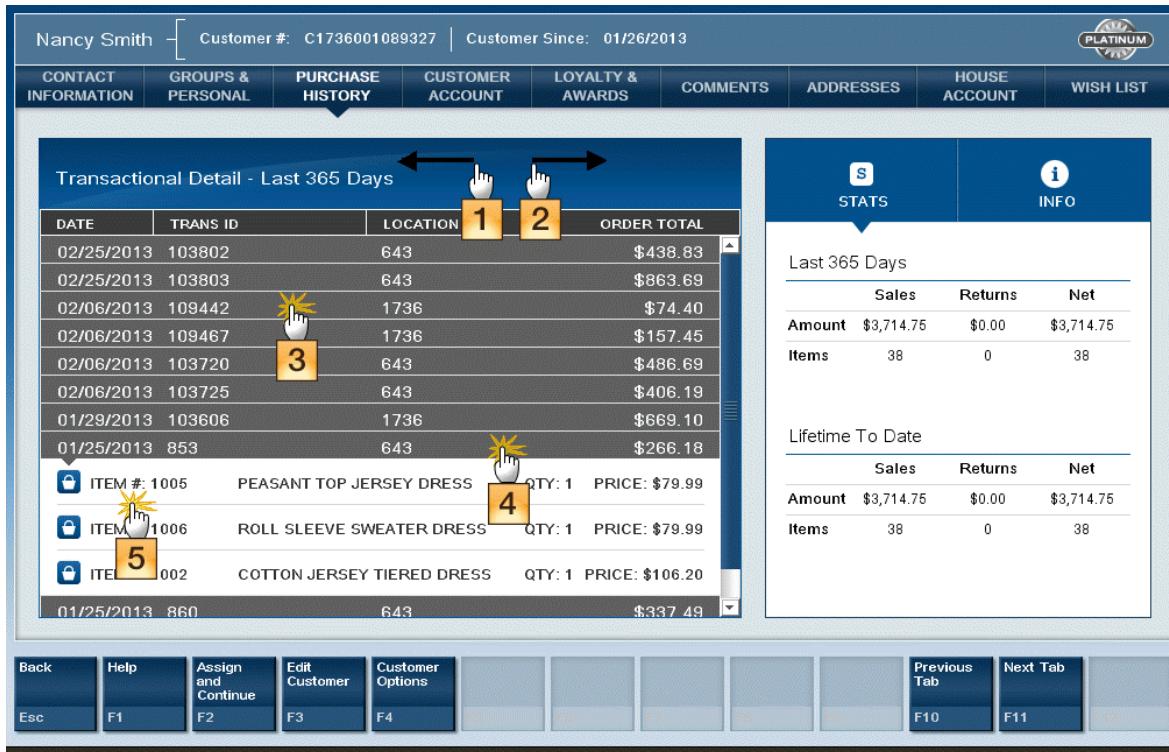


Figure 1-3: Purchase History Tab Touch-Screen Navigation

Touch-Screen Component #	Description
1. Swipe Transaction Detail Header	Swipe from right to left in the Transaction Detail Header to collapse the history display.
2. Swipe Transaction Detail Header	Swipe from left to right in the Transaction Detail Header to open the history display.
3. Tap Transaction Header	Tap one Transaction Header to collapse the selected transaction.
4. Tap Transaction Header	Tap a collapsed Transaction Header to open the selected transaction.
5. Tap 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: f

Table 1-2: Virtual Keyboard Navigation

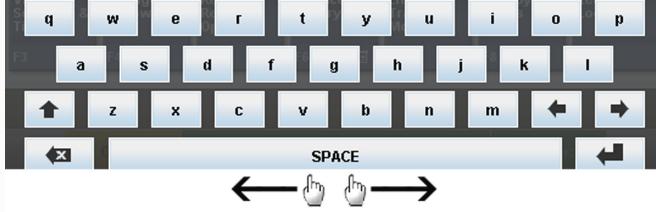
Function	Navigation
Launch virtual keyboard	Options include: <ul style="list-style-type: none"> Swipe up from the keyboard icon region to launch the keyboard. Tap the icon to launch the keyboard. Tap a text field. When you select something other than a text field (or makes an action to change the page) the keyboard hides.
Switch virtual keyboard layouts	Your store may have multiple keyboards. Within the current Keyboard area, swipe left to switch to the next layout, swipe right for the previous layout. 
Data entry	Tap keyboard keys to enter information into a field.
Close virtual keyboard	Options to close the virtual keyboard include: <ul style="list-style-type: none"> Swipe down anywhere on the keyboard. Swipe down directly on the icon. Tap the icon. Tap anywhere outside of the keyboard.

Table 1-2: Virtual Keyboard Navigation (continued)

Function	Navigation
Switch to Xenvironment	<ul style="list-style-type: none"> Tap the Xenvironment button to open Xenvironment.  <ul style="list-style-type: none"> To return to Xstore, select the Start POS button. 

Active Keyboard Keys

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

Table 1-3: 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.
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 the spacebar to select items in multiple-select lists.

Register Screen Conventions Overview

Table 1-3: Active Keyboard Keys

Key	Description
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.

- [Dual Screen](#)
- [Screen Layout Overview](#)
- [Active Keyboard Keys](#)
- [Menu Buttons](#)
- [Focus Bar](#)
- [View Port](#)
- [Status Bar](#)
- [Message Window](#)
- [Info Tab](#)
- [Tasks Tab](#)
- [Goals Tab](#)
- [Messages Tab](#)
- [Prompts and Forms](#)
- [Response Required Prompt](#)
- [Selection Required Prompt](#)
- [Entry Required Prompt](#)
- [Search Form](#)
- [Data Entry Form](#)
- [System Information Prompts](#)
- [Error Screen](#)

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 the Register functions is very similar to the example shown below. The names of the seven sections identified in the figure below are used throughout this manual.

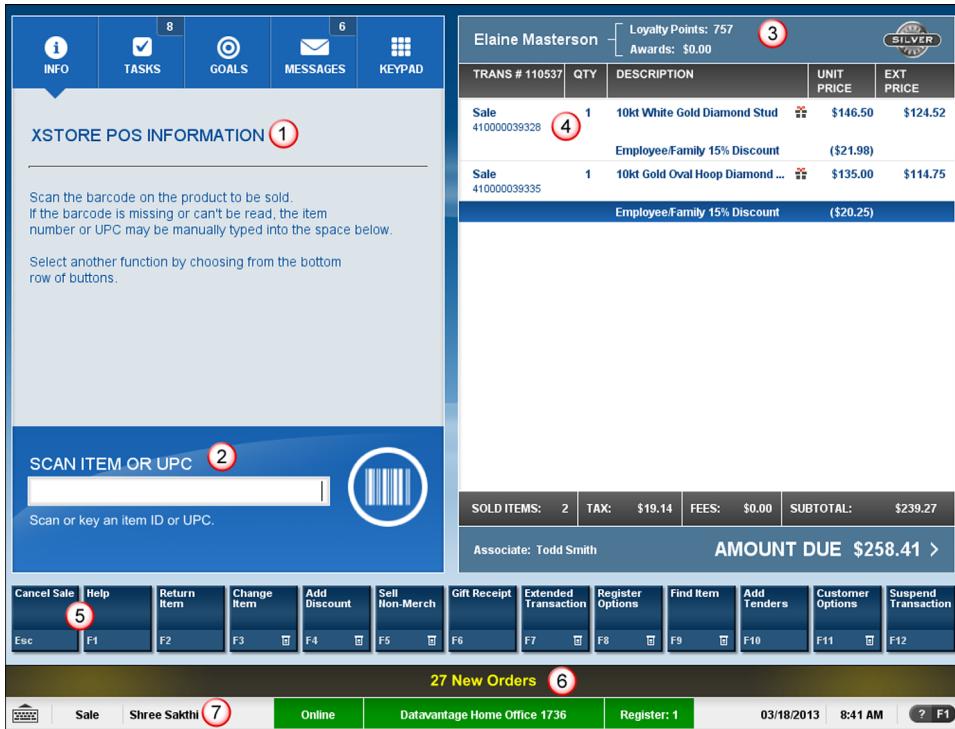


Figure 1-5: Sale Screen Layout

Component #	Refer To
1. Message Window	Message Window
2. Focus Bar	Focus Bar
3. Customer Loyalty Banner	Customer Loyalty Banner
4. View Port	View Port
5. Menu Buttons	Menu Buttons
6. Message Bar	Message Bar
7. Status Bar	Status Bar

Menu Buttons

Menu buttons with the following icons denote additional functions:

	This icon indicates there are more sub-menu choices associated with this option. Selecting an option displaying this icon opens another menu with additional options.
	This icon indicates this function is not available to the user currently signed on to Oracle Retail Xstore Point of Service, without manager override. This function is based on security levels.
	The ellipsis (...) after the word "More" indicates that there are additional menu options available at this screen. Selecting the "More..." option displays another set of menu buttons.

Function Keys

Note: Touch-screen users do not use function keys. You can tap the buttons but you are not using a regular keyboard.

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] --> [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: Due to the flexibility of the system, menu options in this guide are not identified by a function key number (F2, F3, etc.). Instead the procedures and processes that follow use the name of the button.



Figure 1-6: Menu Buttons

Message Window

The tab colors vary depending on which screen you are using.

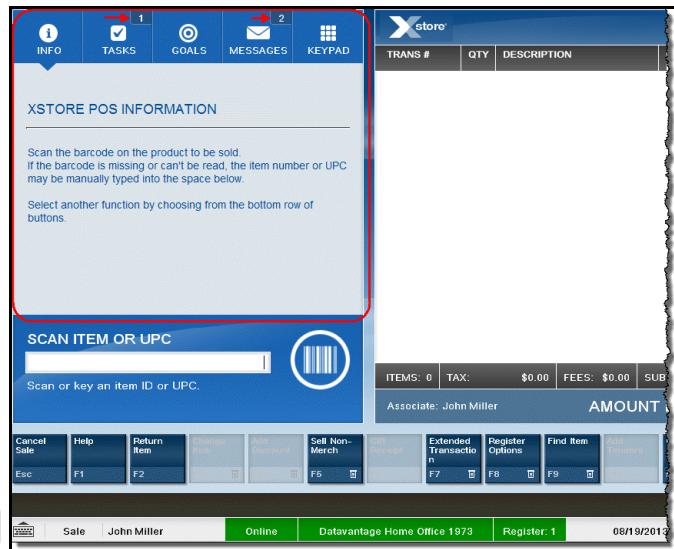
Important: Your home office may have configured additional message tabs customized for your store. This manual describes the features standard in Xstore base.

The information message area is located in the upper left section of various screens. The following message tabs are available in base:

- [Info Tab](#)
- [Tasks Tab](#)
- [Goals Tab](#)
- [Messages Tab](#)
- [Prompts and Forms](#)
-

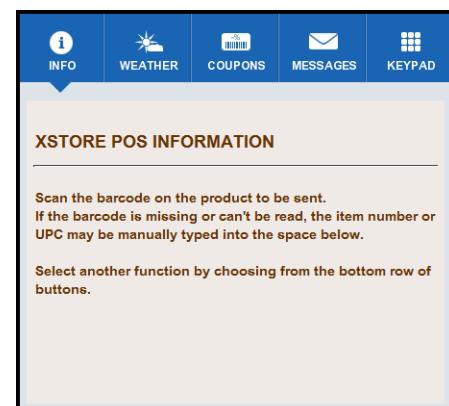
You have the following options to access the tabs:

- Use a mouse for navigation.
- Touch the tabs if you have a touch-screen.
- Press the  keys on the keyboard to move one tab forward, and press the  keys on the keyboard to move one tab backward.



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.



Register Screen Conventions Overview

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.

- To view and maintain task assigned to you see [Viewing and Maintaining Your Tasks](#).
- To view tasks for a specific customer, see [Tasks Tab](#).

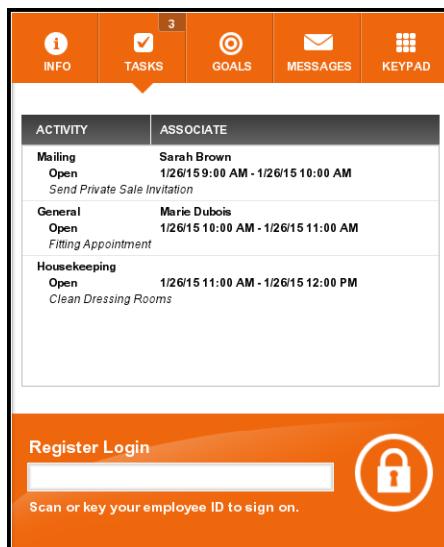


Figure 1-7: Tasks Tab

Note: In previous versions, Tasks and Appointments were separate tabs. They are now combined in the Task tab.

The numeric value shown on the Tasks tab indicates how many tasks there are.

Information displayed includes:

Table 1-4: Task Tab Information

Column	Information Displayed
Activity	The type, status, and description associated with the task.
Associate	The assigned associate, appointment start date/time, and end date/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.

STORE GOALS DESCRIPTION	EFF. DT	END DT	GOAL	% TO DATE
Darla Collection Sales	08/18/13	08/19/13	\$500.00	0%
New Item Sale	08/19/13	08/20/13	\$1,500.00	17.7%
Special Daily Goal	08/20/13	08/21/13	\$300.00	N/A

Figure 1-8: Store Goals Tab

The goals are listed in the following order:

- 1) Completed goals
- 2) Active goals
- 3) Future goals

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

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

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

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.

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.

Coupons Tab

The Coupons tab displays coupons that are available and whether they have been applied.

The following information is displayed for each coupon:

- **Coupon ID** - ID for the coupon.
- **Description** - Description of the coupon.
- **Applied?** - Indicates whether the coupon has been applied to the transaction.

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).

Note: The numeric value shown on the Messages tab indicates how many messages there are.

These messages are time-based, and no longer display once the expiration date has passed.

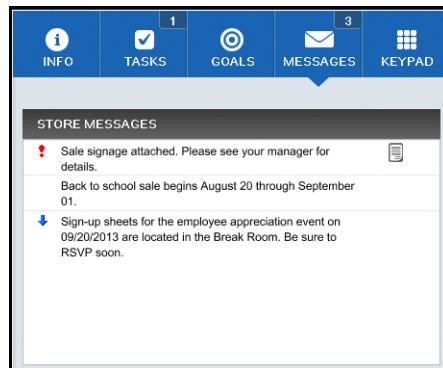


Figure 1-9: Messages Tab

Messages use the following icons to indicate priority:

Table 1-5: Messages priority level/icon

Priority Level	Icon
High	!
Medium	None
Low	↓

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

Keypad Tab (Touch-Screen)

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 1-10: Keypad Tab

Tip: Touch-Screen users, when you tap on a numeric field (such as quantity), the keypad automatically displays.

Focus Bar

The focus bar 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 area above the entry field shows the title of the focus bar (①).

The message area displays instructions for the current operation (②).

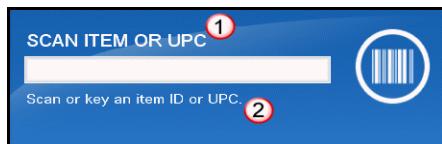


Figure 1-11: Focus Bar (Scan Item or Enter UPC Example)

The focus bar changes color to indicate the specific function you are performing. The base version of Xstore 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

Register Screen Conventions Overview

- Light Purple — special order transaction

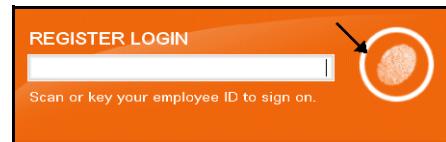
Tip: Touch-screen users can click on the bar code of the scan item focus bar to open the Item Matrix. See [Searching for Items Using the Item Matrix](#).

The image on the focus bar provides a visual clue for the type of data accepted for the function you are performing. For example, the two Login prompts below accept different types of input for the same information: Employee ID.

The user must type an Employee ID number or scan an Employee ID card at this focus bar prompt.



This prompt accepts a fingerprint scan from a biometric device for Employee ID and password in addition to keyed or scanned entry.



Customer Loyalty Banner

When a customer is attached to a transaction and your store has a loyalty program, a Customer Loyalty Banner displays.

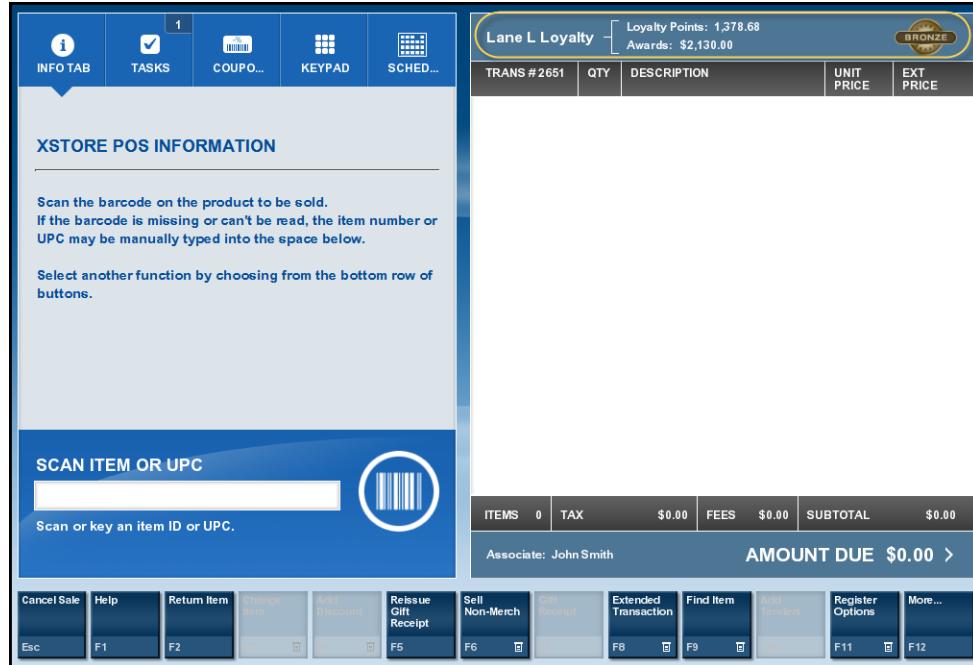


Figure 1-12: Customer Loyalty Banner

Table 1-6: Loyalty Banner Display

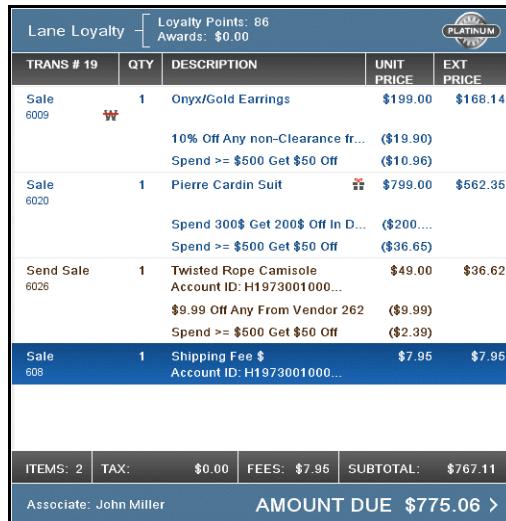
If	then Xstore
a customer is not signed up for loyalty rewards,	prompts if the customer would like to sign up for rewards.

Table 1-6: Loyalty Banner Display

If	then Xstore
a customer is signed up for rewards,	displays the reward information along with a loyalty badge (Figure 1-12 shows a platinum banner). Loyalty badges vary depending on your store's configurations and policies.
your store does not have rewards,	displays your store banner.

View Port

The View Port area of the screen 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.



Loyalty Points: 86
Awards: \$0.00

TRANS #	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 6009	1	Onyx/Gold Earrings	\$199.00	\$168.14
		Warranty Declined		
		10% Off Any non-Clearance fr...	(\$19.90)	
		Spend >= \$500 Get \$50 Off	(\$10.96)	
Sale 6020	1	Pierre Cardin Suit	\$799.00	\$562.35
		Attached Item		
		Spend 300\$ Get 200\$ Off In D...	(\$200....)	
		Spend >= \$500 Get \$50 Off	(\$36.65)	
Send Sale 6026	1	Twisted Rope Camisole	\$49.00	\$36.62
		Account ID: H1973001000...		
		\$9.99 Off Any From Vendor 262	(\$9.99)	
		Spend >= \$500 Get \$50 Off	(\$2.39)	
Sale 608	1	Shipping Fee \$	\$7.95	\$7.95
		Account ID: H1973001000...		
ITEMS: 2		TAX: \$0.00	FEES: \$7.95	SUBTOTAL: \$767.11
Associate: John Miller		AMOUNT DUE \$775.06 >		

Figure 1-13: View Port**Table 1-7: View Port Icons and Indicators**

Icon	Description
	Gift
	Warranty Declined
	Attached Item
	Mark Down or Airside Store Special Price Code
	Rain Check
	Wish List

Register Screen Conventions Overview

Table 1-7: View Port Icons and Indicators

Icon	Description
\$88.50 E	Airside Store Tax Exempt (E)

Tip: Note the “Items” count in the lower left section of the View Port. This count represents the number of items the customer physically takes out of the store. In this example, the 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. In this scenario, the item count is 2 since the customer will be taking 2 items out of the store and the third item will be processed for shipping by the store.

Message Bar

The message bar is located above the status bar and indicates if there are any new orders. The yellow portions fade in and out when messages are available.

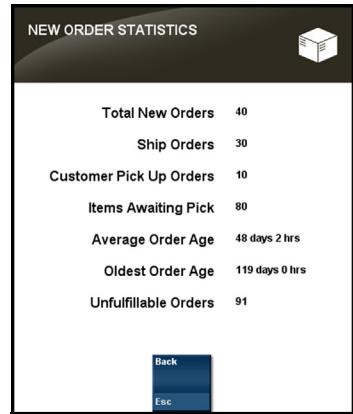
Note: To view the message bar information here, you must have a touch-screen or a mouse. This additional information is view-only.



Figure 1-14: Message Bar

Select the message to view information.

- * **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.



See the *Oracle Retail Xstore Point of Service Manager’s Guide* for more information about processing orders in the Back Office.

Status Bar

The Status Bar is a screen component that displays several sections containing store-related information. It is always visible from every Register screen and Back Office screen.

Urgency levels - Stoplight-like color indicators convey urgency for the online, store, and register sections:

- * **Red** = High Urgency
- * **Yellow** = Medium Urgency
- * **Green** = Low Urgency (Informational conditions)

Tip: On a touchscreen:

- Tap online/offline to view the database indicator.



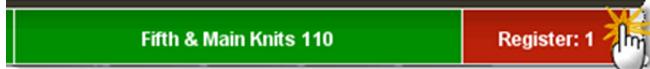
- Tap the store to open the store. To close the store, use the Back Office.



- Swipe the store area to open the Dashboard.



- Tap the register area to open the register. To close the register use the Back office.



- Tap the F1 help to open the help feature.



Figure 1-15: Status Bar

Table 1-8: Status Bar Components

Component #	Description
1. Keyboard icon	For touch screen monitors this icon opens the keyboard see Virtual Keyboard .
2. Area Locator	This field indicates where you are within the system (i.e. Sale, Return, etc.).
3. Signed-In User Identifier	This field identifies the user that is currently signed into Xstore.

Register Screen Conventions Overview

Table 1-8: Status Bar Components

Component #	Description
4. Database Status Indicator	<p>Green indicates the Datasources are online.</p> <p>Yellow indicates at least one WAN Datasource is offline. The system is using the local Datasource.</p> <p>Red indicates at least one LAN Datasource is offline. The system is using the offline process set up for your store.</p> <p>Touch-screen users tap the indicator to view the Datasource Status.</p>
	
5. Store Identifier	<p>This field identifies your store name and store number. Green indicates the store is open. Yellow or red indicates the store is closed.</p>
6. Register Identifier	<p>This field identifies the register number. Green indicates the register is open and Red indicates the register is closed.</p>
7. Date	<p>This field displays the current register date.</p>
8. Time	<p>This field displays the current register time. If using a touch screen, swipe this field to clock-in/clock-out.</p>
9. ? F1	<p>This icon is available from all screens. Clicking or touching this icon opens the help feature.</p> <p>Note: The [F1] key is a configurable key. It is not automatically assigned to the Help option. If the help option is enabled and available for the function, pressing the [F1] key displays a context-sensitive HTML page.</p>

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, etc. Oracle Retail Xstore Point of Service provides several different types of prompts and forms to help you complete a task.

Response Required Prompt

During a transaction process, you may be required to confirm an action. For example, in [Figure 1-16](#) below, you would press [Y] (Yes) to confirm that you want to cancel the transaction, or press [N] (No) to remove the prompt and return to the transaction.

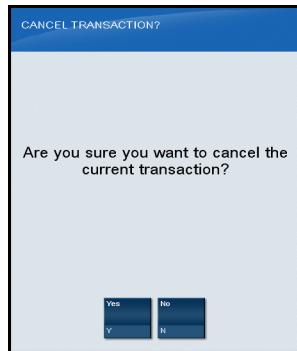


Figure 1-16: Response Required Prompt

Selection Required Prompt

During a transaction process, you may be required to select from a list of options. For example, in [Figure 1-17](#) below, you would use the up and down arrow keys to select a non-merchandise item from the list, or press the number on the keyboard associated with the option you want to select. To save your selection, press [Enter] to choose **Ok**. To exit without making a selection, press [Esc].

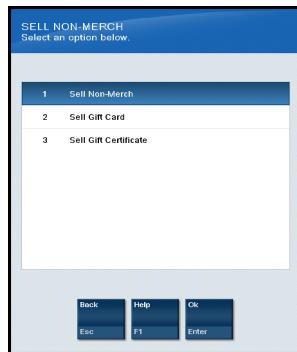


Figure 1-17: Selection Required Prompt

Entry Required Prompt

During a transaction process, you may be required to enter a value before continuing. For example, in [Figure 1-18](#) below, you must enter your employee ID and password. After entering your employee ID number and password, you would select **Process** to continue. To return to the previous screen, press [Esc] (Back).

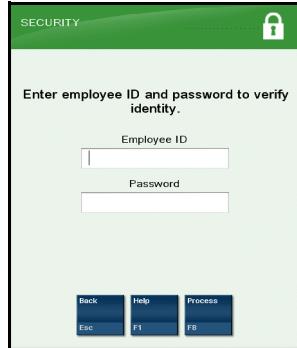


Figure 1-18: Entry Required Prompt

Note: The Fingerprint scan is also supported at the Security prompt.

Search Form

In a search form you 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, Xstore 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 appear in a different order or have different text than the search forms shown in this guide.

Figure 1-19: Search Form (Customer Search)

	An arrow on the right side of a field indicates a drop-down list of options is available.
	A red triangle in the upper left corner of a field indicates that information must be entered.

Tip: When applicable, use the *Change Country* menu option on the Customer Search screen to modify the drop-down State options and further refine your search. In this example, the search is for Nancy Smith and the country has been changed to Canada so that the drop-down options contain Canadian Provinces (New Brunswick).

Data Entry Form

In a data entry form you enter specific information about the initiated activity. For example, in [Figure 1-20](#) below you must enter specific information about the tax exempt customer for the transaction.

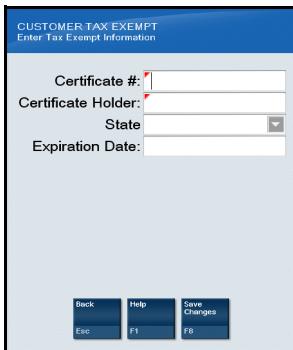


Figure 1-20: Data Entry Form (Tax Exempt Form)

	An arrow on the right side of a field indicates a drop-down list of options is available.
	A red triangle in the upper left corner of a field indicates that information must be entered.
	A grayed out field indicates the field is non-editable.

Enter the information as required and select **Save Changes** to continue or press [Esc] (Back) to return to the previous screen without saving the data. If you select **Save Changes** before completing all the required fields, then Oracle Retail Xstore Point of Service displays a message explaining the error, as shown in [Figure 1-21](#) below.

System Information Prompts

Throughout Oracle Retail Xstore Point of Service, the system displays prompts and messages to indicate that the system is processing a request or transaction, or to provide additional information about a process or error. For example, [Figure 1-21](#) below provides additional information about a required field on the tax exempt form before the tax exempt transaction process can continue.

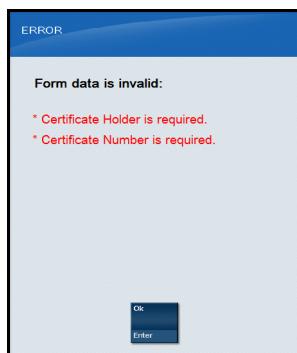


Figure 1-21: Error Message

Error Screen

If a help desk error occurs during processing, Oracle Retail Xstore Point of Service alerts you that an error has occurred and that you should call the help desk.



Figure 1-22: Help Desk Error Occurred

Note: The phone number shown in [Figure 1-22](#) is only a sample help desk number. Call the phone number displayed on your screen.

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

- Press [**Enter**] to 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. Oracle Retail Xstore Point of Service prompts you for your name, a description of what you were doing, and the module you were using. Enter the requested information, then select the **Process** option.

Figure 1-23: Error Report Form

An email 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

Overview

A basic transaction consists of the exchange of store merchandise for a customer's tender. No transactions can be entered into Oracle Retail Xstore Point of Service until you log in at the Register Login screen. 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/register is 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 [Clocking In and Clocking Out](#).

Tip: 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.

Logging In to Oracle Retail Xstore Point of Service

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

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



Figure 2-1: Register Login ID Prompt

Note: If your system is set up to use a Biometric Fingerprint device, an Employee ID Login prompt displays. 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.

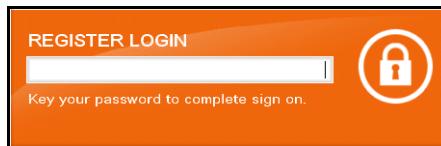


Figure 2-2: Employee Login Password Prompt

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

Entering Pre-Sale Information

Depending on your store configuration, pre-sale screens that display after login may include:

- [Associating Flight Information](#)
- [Airside Sales on Arrivals](#)
- [Airside Sales for Staff](#)
- [Selecting Commissioned Associates](#)
- [Associating a Customer with the Sale](#)

Associating Flight Information

Airside stores scan or manually enter boarding pass information into Xstore to determine the tax of the transaction based on flight destination.

1. Scan the boarding pass barcode or enter the flight information and select **Process**.

- **Flight #:** Flight number.

Tip: 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.

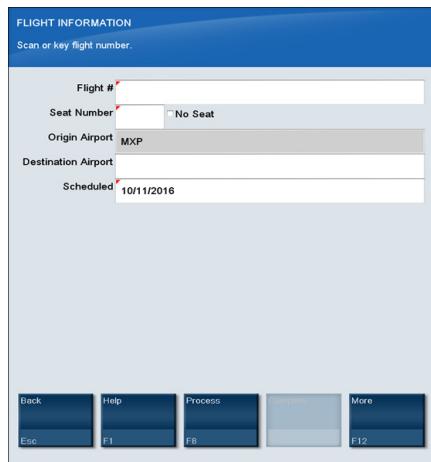


Figure 2-3: Flight Information Prompt

2. If the information is valid, confirmation that the flight information was added to the transaction displays. Select **Ok** to return to the transaction.

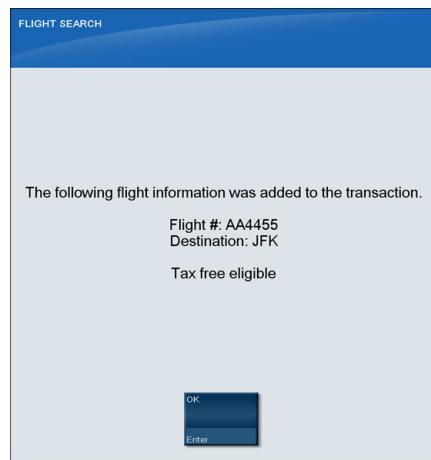


Figure 2-4: Flight Information Added Prompt

Entering Pre-Sale Information

3. If the information is *invalid*, the following prompt displays:

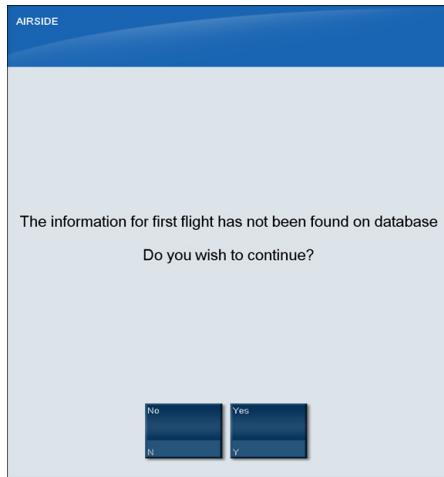


Figure 2-5: Invalid Flight Information

- Select **No** to return to the flight information prompt.
 - Select **Yes** to return to the flight information prompt (step 1).
4. If the destination flight is not eligible for tax free, the system asks for a second flight (if configured).

Figure 2-6: Second Flight Information Prompt

- If the customer does not have a second boarding pass, select **Complete**.
- If the customer does have a second boarding pass, scan the boarding pass barcode or enter the flight information and select **Process**.

* **Flight #:** Flight number.

Tip: 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.

5. If the flight is found and eligible for tax-free shopping, select OK to complete the transaction (see [Figure 2-4](#)).

If the flight is not eligible for tax-free shopping, a notification opens. Select OK to continue the transaction.



Figure 2-7: Boarding Pass Not Eligible for Tax Free

Airside Sales on Arrivals

In some airports, it is allowed to sell goods to the passengers on arrival. In this case, the passengers must pay taxes. This function must be activated simply selecting the **Arrivals** button. No further information is necessary. The screen displays a notification that the passenger is an arriving passenger.

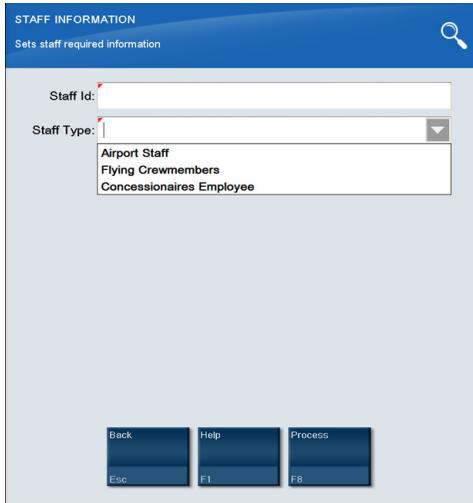


Figure 2-8: Airside Sale to Arriving Passenger

Airside Sales for 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. Select the **Staff** button.
2. Enter information about the staff member:
 - **Staff Id:** Enter the ID for the staff member.
 - **Staff Type:** Select the type of staff member.



3. Select **Process**.

The transaction continues with a notification that the sale is for a staff member.



Figure 2-9: Sale to Staff Member

Selecting 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.

Oracle Retail Xstore Point of Service awards commissions on a per-item basis, either automatically based on the associate(s) 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. See [Changing the Commissioned Associate](#) for more information about associating a commissioned associate with a specific item in a transaction.

1. If prompted, add a commissioned associate to the sale transaction through one of two methods:
 - Select the sale associate(s) for this transaction from the list and press [Enter].

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

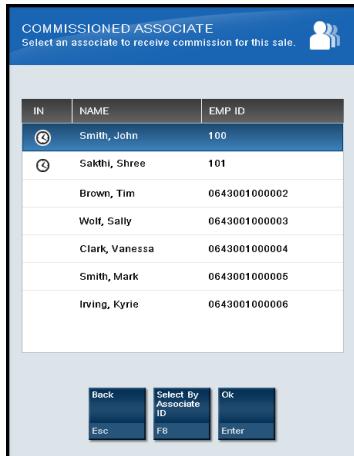


Figure 2-10: List of Commissioned Associates

Procedure:

Tip: Touch-screen users, tap the associate's name and then tap **OK**.

- a. Use the up and down arrow keys to highlight an associate's name.
- b. Press the **[Spacebar]** to select each associate's name.
 - * After selecting a name, you may move up or down the list of names using the Up and Down arrow keys, then press **[Spacebar]** to select one or more additional associates.
 - * If you make a mistake, press the **[Spacebar]** again to deselect the currently highlighted name.

<OR>

- Select the **Select By Associate ID** option to enter the associate's ID and press **[Enter]**.



Figure 2-11: Commissioned Associate Prompt

Entering Pre-Sale Information

2. The system adds the associate(s) to the sale transaction and displays the associates' names on the view port.



Figure 2-12: Associate Name in View Port

If your system prompts for the commissioned associate for each item, the associate's name displays below the line item in the View Port.

TRANS #	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1002	1	COTTON JERSEY TIERED...	\$70.00	\$63.00
		10% Off Any non-Price Overrid... (\$7.00)		
		Commission: John Miller		
		Commission: Vanessa Clark		
Sale 1004	1	BLK WHITE CAP SLEEVE ...	\$69.50	\$69.50
		Commission: John Miller		
ITEMS: 2		TAX: \$10.61	FEES: \$0.00	SUBTOTAL: \$132.60
Associate: John Miller			AMOUNT DUE \$143.11 >	

Figure 2-13: Items with the Commissioned Associate's Name in the View Port

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

Note: Your store policy determines the minimum and maximum number of commissioned associates assigned to a transaction.

Associating a Customer with the Sale

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, select the *Skip* option to continue with the sale process.

1. Enter your search criteria and then select **Process**.

If the customer has a loyalty card, you may swipe it. You may also manually enter the customer's number or name, loyalty number, house account number, or enter other customer information in the Customer Search form and select **Process** to continue.

The Customer Search form is titled "CUSTOMER SEARCH" and "Enter search criteria." It contains fields for Phone #, Last Name, First Name, City, State, Postal Code, Loyalty #, and Customer #. Below the fields are buttons for Back (Esc), Help (F1), Skip (F4), Change Country (F5), and Process (F8).

Tip: Enter as much information as possible in the Customer Search form to limit the number of customer records that are returned. 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.

If the name you want is not listed, select the **Back** option to return to the Customer Lookup form. Enter the customer's full name or make additional entries in the other searchable fields. Select **Process** to search again.

The Customer Search form shows a search for "Nancy Smith". The State dropdown menu is open, displaying options: AB - Alberta, BC - British Columbia, MB - Manitoba, NB - New Brunswick, NL - Newfoundland and Labrador, NS - Nova Scotia, NT - Northwest Territories, and NU - Nunavut. The "NB - New Brunswick" option is highlighted.

When applicable, use the **Change Country** menu option on the Customer Search screen to modify the drop-down State options and further refine your search. In this example, the search is for Nancy Smith and the country has been changed to Canada so that the drop-down options contain Canadian Provinces (New Brunswick).

Entering Pre-Sale Information

2. Depending on the configuration of your system, if only one matching customer is found, the system may display the customer record in Customer Maintenance. Verify that the information is correct, and select the **Assign Customer To Tran** option to associate the customer's information to the sale in progress and return to the Sale Screen. If the information needs to be corrected, see [Customer Maintenance](#).

If a list of matching customer records is found, select a customer from the list and choose one of these options:

- **Select & Continue** – Assigns the selected name to the sale transaction.
- **Select & View** – Opens the selected customer record for viewing, editing, or printing. See [Viewing a Customer Record](#). Once you are done viewing or editing the record, select **Assign Customer To Tran** option to associate the customer's information to the sale.
- **New** – Displays a form for adding a new customer record to the customer database. See [Adding a New Customer Record](#).

If the name you want is not listed, select the **Back** option to return to the Customer Search form and enter the customer's full name or make additional entries in other searchable fields. Select **Process** to search again.

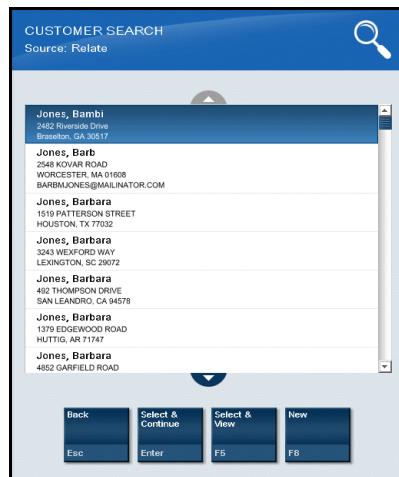
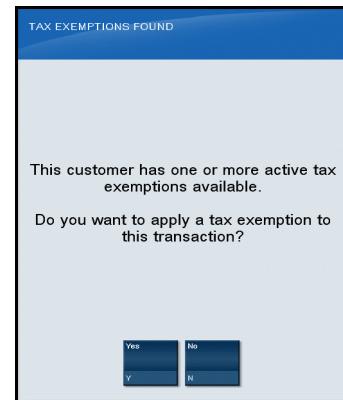


Figure 2-14: Customer Search Multiple Results

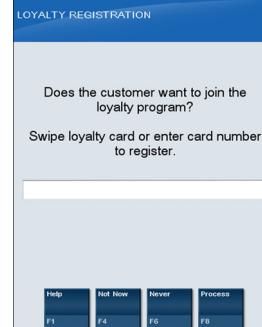
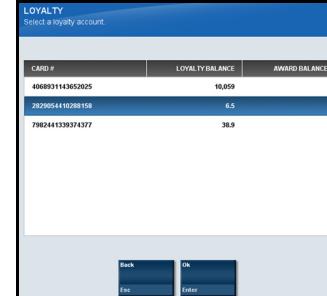
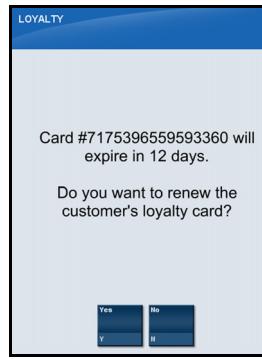
The associated customer's name is displayed on the Customer Loyalty Banner of the Register Screen. See [Customer Loyalty Banner](#).

3. If the customer you selected has a tax exemption(s) on file, the system displays a prompt asking if the customer wants to apply one of them to the transaction. Based on the customer's decision about the exemption, select **Yes** or **No**.
 - If you select **Yes**, the system displays a list of the customer's exemptions that may be applied. Select an exemption from the list and choose **Select & Continue** (to proceed to the next prompt) or choose **Select & View** (if you need to see the details of the exemption).
 - If you select **No**, the system goes to the next prompt.



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

Table 2-1: Loyalty Card Pre-Sale Scenarios

Condition	Action
The customer assigned to the transaction is <i>not</i> enrolled in a loyalty program.	<p>The system prompts you to ask the customer about enrollment.</p> <p>To enroll the customer in a loyalty program:</p> <ul style="list-style-type: none"> If your store does <i>not</i> provide a physical card, select Process. <p><OR></p> <ul style="list-style-type: none"> If your store gives the customer a physical card, swipe the loyalty card, or enter the loyalty number found on the card and select Process. If the customer decides not to enroll now, select Not Now. <p>If the customer indicates no intention to enroll at any time, select Never.</p> 
The customer assigned to the transaction has more than one loyalty card.	Select from the list. This list may not show the cards expiration date depending on your store configuration.
The customer's loyalty card has expired (your store may be configured to display a prompt to renew the card).	<p>Press [Y] for yes to renew the card. A confirmation prompt displays with the new expiration date (configured by your corporate office).</p> <p>Press [N] for no, 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.</p>  

Note: If the customer declines the loyalty program and then decides to enroll during the sale transaction, you can enroll the customer through the Customer Maintenance screen, see [To Enroll the Customer in a Loyalty program](#).

If the customer declines the loyalty program and then decides to purchase a Loyalty card during the transaction, void the line item ([Voiding an Item](#)) or cancel the sale ([Cancelling a Sale](#)).

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.

Entering Items into the Sale Screen

Use the options on the Register Sale menu to enter items, add discounts, and to add non-merchandise items such as gift certificate sales. Refer to [Adding a Discount/Award to an Item or Transaction](#), [Email Receipt Options](#), [Modifying Line Items in a Sale](#), and [Gift Registry](#) for more information about these activities. You may also be able to enter special order, layaway, work order, order, send sale, pre-sale and on hold transactions.

Note: To look up an item see [Searching for Items](#).

1. At the scan item prompt, scan or enter an item ID or UPC and press [Enter] to process. Repeat as needed per item.

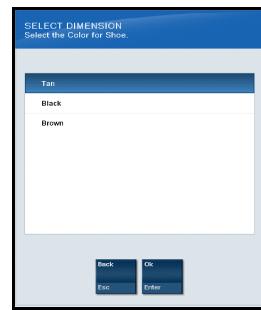


Figure 2-15: Scan Item Prompt

Note: When scanning items, you do not need to press [Enter].

Other Prompts

A style is an entry in the Item database that has properties such as size, color, and width. Multiple regular items may be associated with a style ID. If you enter a Style ID, the system prompts for additional information such as size, color, width, etc.



When an item that requires a serial number is added to a sale, you will be prompted for the serial number. Enter the serial number for that item.



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 Oracle Retail 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.

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

Lane Loyalty					
TRANS # 56 Loyalty Points: 28 Awards: \$2,409.00					
Sale	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE	
Kit	1	Business Dress Kit	\$600.00	\$600.00	
1: Hounds tooth Sport Coat 1: White Dress Shirt 1: Black Slack 3: Silk Tie					
Spend 500\$ & Get 20\$ Off In D. (\$200)					
ITEMS: 1 TAX: \$0.00 FEES: \$0.00 SUBTOTAL: \$300.00					
Associate: John Miller AMOUNT DUE \$300.00 >					

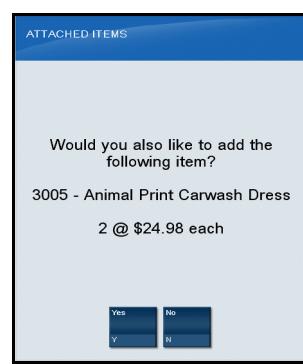


When an item with an associated attached item is added to a sale, you may be prompted whether or not this additional item should be added to the sale.

- If prompted, choose **Yes** to add the item or choose **No** if the customer does not want the additional item.
- If you are not prompted per your store policy, the item is added to the sale automatically.

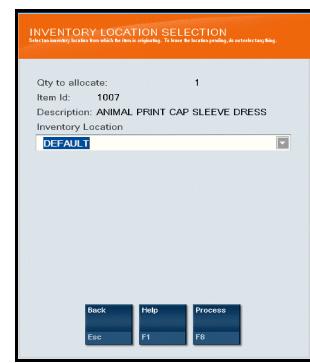
Attached items are shown with the Link  icon.

Note: If multiple attached items are available, you may be prompted with a list showing the items. If prompted, select the items to be added and press [Enter] to add them to the transaction.



Entering Items into the Sale Screen

Depending on the configuration of your system, you may be prompted for an originating inventory location. If prompted, select the inventory location from which the item originated, or leave the inventory location blank to leave the location pending. Select the **Process** option.



2. The system automatically looks up the price and displays the item information on the View Port. For more information see [Sale Screen Touch-Screen Navigation](#) and [Screen Layout Overview](#).

Note: For Airside stores, Xstore calculates the price based on the departure zone and customer's destination zone from the boarding pass. See [View Port Icons and Indicators](#).

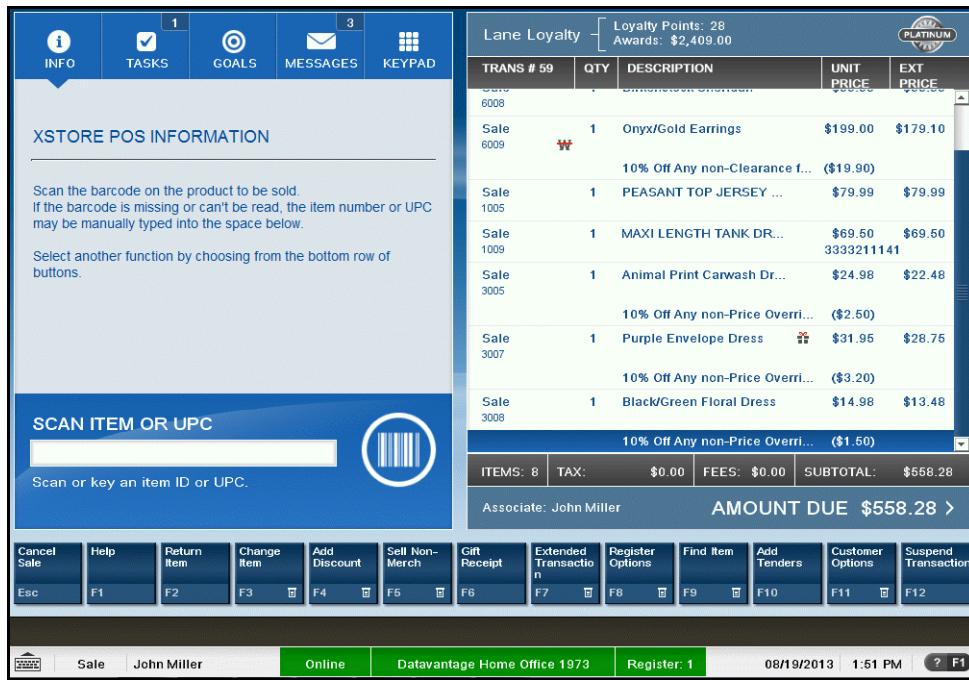


Figure 2-16: Sale Screen

Note: If you enter more items than can fit on the View Port, Oracle Retail Xstore Point of Service displays a scroll bar on the right side of the View Port. Press the [Page Up] and [Page Down] keys to scroll through the listed items.

Purchasing Wish List Item(s)

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

1. Open the type of transaction screen needed with the customer assigned to the sale (see [Associating a Customer with the Sale](#)):
 - Sale Transaction ([Entering Pre-Sale Information](#))
 - Extended Transactions:
 - * Order Broker Order ([Order Transactions via Order Broker](#))
 - * Send Sale ([Send Sale Transactions](#))
 - * Layaway ([Layaway Transactions](#))
 - * Special Order([Special Order Transactions](#))
 - * Pre-Sale ([Pre-Sale Accounts](#))
 - * On-Hold ([Hold Account Transactions](#))

Note: You cannot purchase wish list items when creating a Work Order.

2. From the Sale screen, select **Customer Options** and then **View Customer**.
<OR>
From an Extended Transaction screen, **View Customer**.

Tip: Touch-screen users tap the Customer Loyalty Banner within a transaction to view the customer record. See [Customer Maintenance Touch-Screen Navigation](#).

3. Select the **Wish List** tab.
4. Select the **Purchase Items** button, or select the **Order Items** button to start an order transaction.
5. Select the item(s) to purchase and then press [**Enter**] or if purchasing everything on the list, choose **Select All** and then press [**Enter**].
6. The Wish List Confirmation Prompt displays:
 - Select **Back** to return to the Wish List screen. The item(s) are not added to the sale transaction or removed from the wish list.
 - Select **Yes** to add item(s) to the sale transaction and remove the item(s) from the wish list.
 - Select **No** to add item(s) to the sale transaction but not remove the item(s) from the wish list.

Note: If the transaction is post-voided or returned, the wish list item is not reinstated to the wish list.

Purchasing Wish List Item(s)

7. If you selected the **Order Items** button, follow the prompts to create the appropriate order.

Note: If you entered the wish list from an already created order, the items will be added to that order.

Wish list items can only be added to one order at a time, and can only be shipped or fulfilled at or from one location. To create multiple order types, or use multiple locations, create the orders separately.

8. Continue the transaction.

The items appear in the Sale screen view port with a View Port with a Wish List icon.

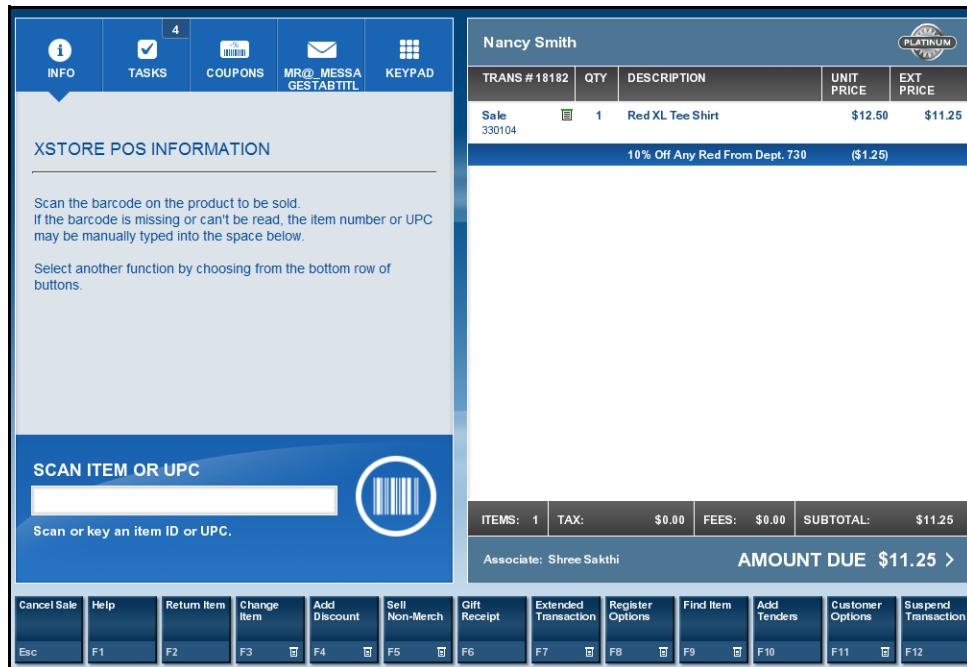
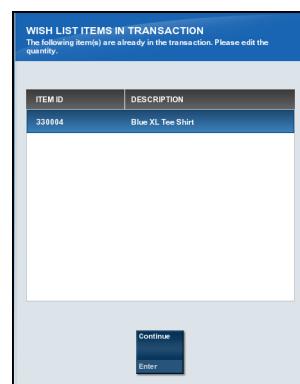


Figure 2-17: Sale Screen - Wish List Item

9. If the customer wishes to purchase greater quantity of a wish list item, follow the [Changing the Item Quantity](#) instructions.

Note: If you attempt to add the same item through the Wish List options, a prompt displays indicating the item is already in the transaction. Select **Continue** to return to the Sale screen and follow the [Changing the Item Quantity](#) instructions.



10. To add a warranty to a wish list item, see [Adding a Warranty/Service Plan to an Item](#).
11. Add any additional items needed and complete the transaction.

Purchasing Digital Cart Item(s)

Digital cart items are purchased through the Digital Cart tab of the Customer Maintenance screen.

1. Open the type of transaction screen needed with the customer assigned to the sale (see [Associating a Customer with the Sale](#)):
 - Sale Transaction ([Entering Pre-Sale Information](#))
 - Extended Transactions:
 - * Order Broker Order ([Order Transactions via Order Broker](#))
 - * Send Sale ([Send Sale Transactions](#))
 - * Layaway ([Layaway Transactions](#))
 - * Special Order([Special Order Transactions](#))
 - * Pre-Sale ([Pre-Sale Accounts](#))
 - * On-Hold ([Hold Account Transactions](#))

Note: You cannot purchase digital cart items when creating a Work Order.

2. From the Sale screen, select **Customer Options** and then **View Customer**.
 <OR>
 From an Extended Transaction screen, **View Customer**.

Tip: Touch-screen users tap the Customer Loyalty Banner within a transaction to view the customer record. See [Customer Maintenance Touch-Screen Navigation](#).

3. Select the **Digital Cart** tab.
4. Select the **Purchase Items** button, or select the **Order Items** button to start an order transaction.
5. Select the item(s) to purchase and then press **[Enter]** or if purchasing everything on the list, choose **Select All** and then press **[Enter]**.
6. A prompt opens, asking whether to remove the purchased items from the digital cart:
 - Select **Back** to return to the Digital Cart screen. The item(s) are not added to the sale transaction or removed from the digital card.
 - Select **Yes** to add item(s) to the sale transaction and remove the item(s) from the digital cart.

Note: If the transaction is post-voided or returned, the item is not reinstated to the digital cart.

Purchasing Digital Cart Item(s)

- Select **No** to add item(s) to the sale transaction but not remove the item(s) from the digital cart.
7. If you selected the **Order Items** button, follow the prompts to create the appropriate order.

Note: If you entered the digital cart from an already created order, the items will be added to that order.

Digital cart items can only be added to one order at a time, and can only be shipped or fulfilled at or from one location. To create multiple order types, or use multiple locations, create the orders separately.

8. Continue the transaction.

The items appear in the Sale screen view port with a digital cart icon.

9. If the customer wishes to purchase greater quantity of a digital cart item, follow the [Changing the Item Quantity](#) instructions.
10. To add a warranty to a digital cart item, see [Adding a Warranty/Service Plan to an Item](#).
11. Add any additional items needed and complete the transaction.

Adding Item Coupons

To add a coupon to a sale, enter a valid coupon id in the **Scan Item or UPC** prompt and press **[Enter]**. This tab will be active during the entire transaction even if there are no coupons scanned. The count in the upper right corner is the number of coupons entered/scanned into the transaction.

Note: If the coupon was applied to the sale, a green check mark displays in the applied column.

To void the item to which the coupon is associated see [Voiding an Item](#).

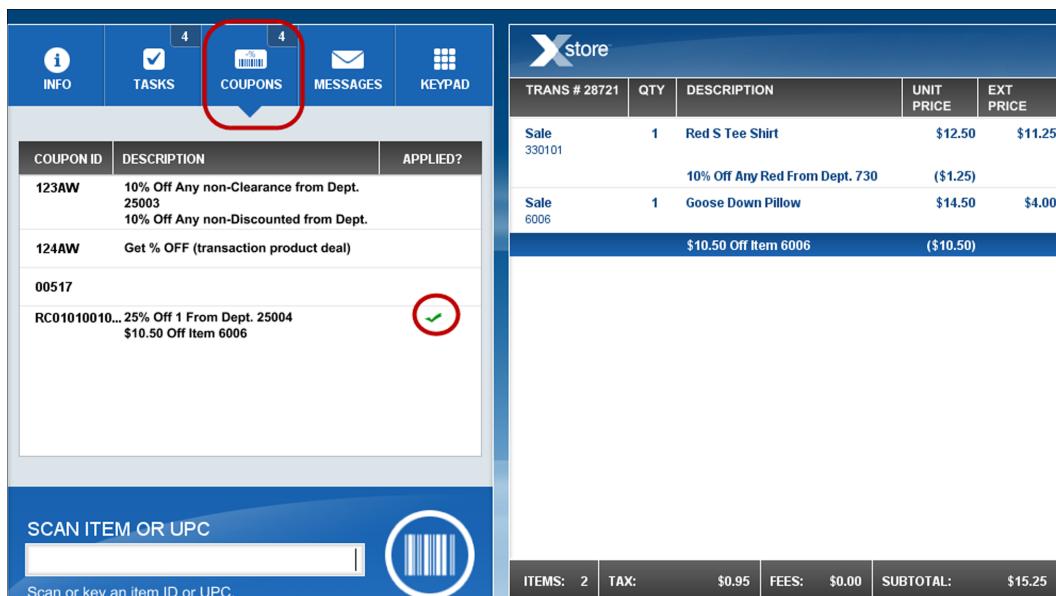


Figure 2-18: Coupon Tab

Redeeming a Rain Check

Rain Check is an optional feature that allows customers to purchase out of stock items for the same price at a later date.

Important: Once a customer uses a rain check, it cannot be used again. Rain checks are only redeemable through the Sale screen (not extended transactions).

Depending on your store configuration may not be able to redeem rain checks issued from other stores.

To redeem a rain check:

1. From the Sale screen, select the **Register Options** menu button.

Redeeming a Rain Check

2. Select the **Redeem Rain Check** menu button.

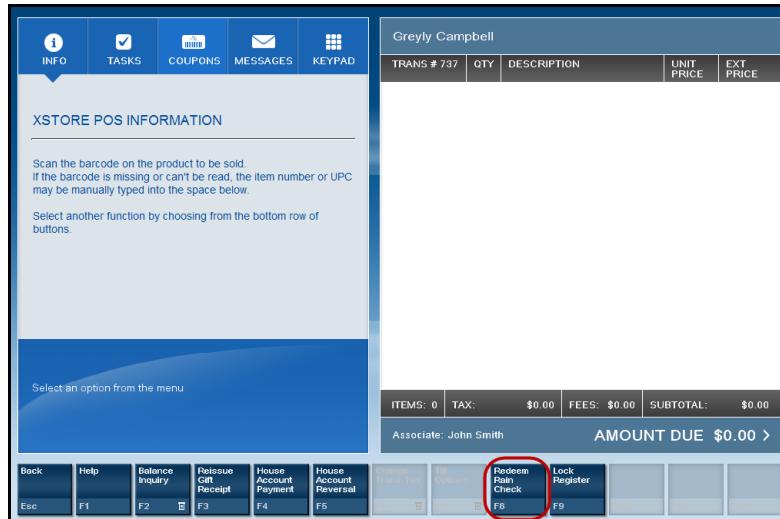


Figure 2-19: Redeem Rain Check Menu Option

3. Scan the barcode or type the rain check ID (begins with RC) in the **Redeem Rain Check** field and press [Enter].

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

4. The Redeem Rain Check prompt displays. Select **Yes** to redeem the rain check. Select **No** to return to the Sale screen.

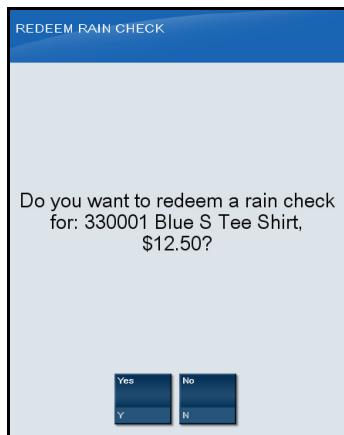


Figure 2-20: Redeem Rain Check Confirmation Prompt

The item appears in the View Port with a Rain Check icon.

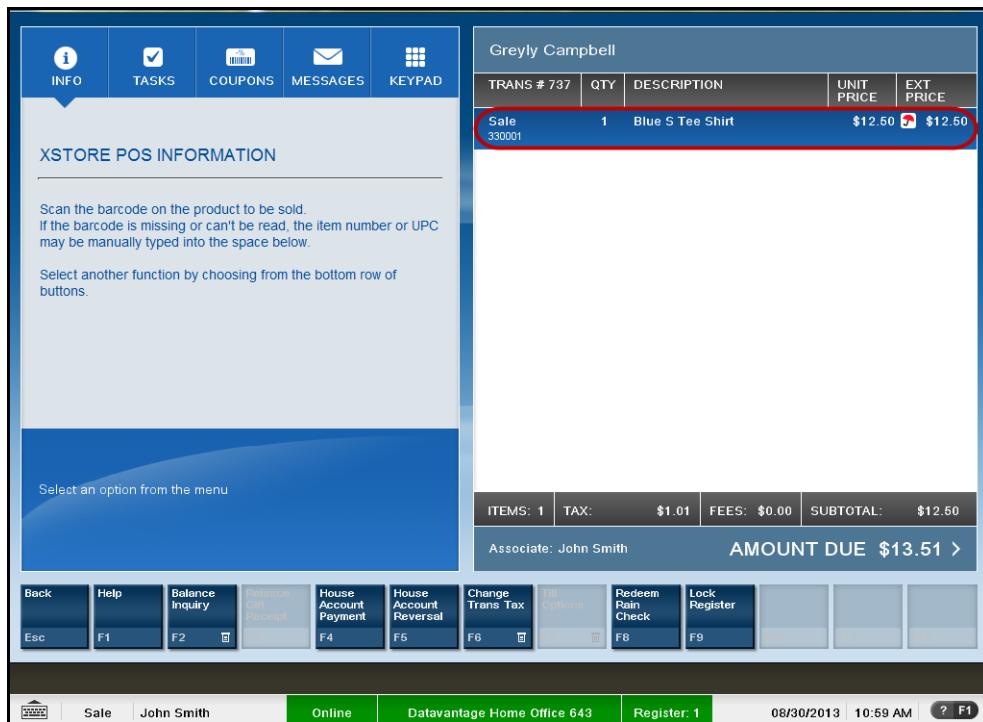


Figure 2-21: Rain Check Item View Port

- Customers can purchase additional quantities for the rain check item. See [Changing the Item Quantity](#). The quantity limit for a rain check is configurable. If you enter more than the limit a validation message displays.

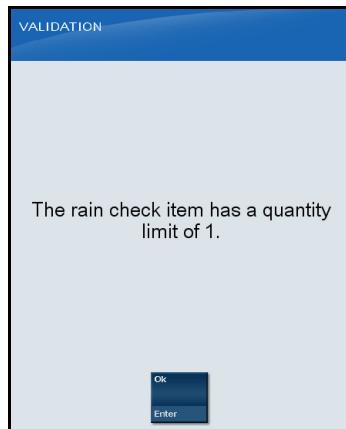


Figure 2-22: Validation Prompt

- Add any additional items to the purchase and then complete the Sale. See [Entering Items into the Sale Screen](#) and [Sale Tenders](#).

Important: If you cancel the transaction, the rain check is still valid.

During a basic sale you can also perform the following activities before tendering the sale:

Tendering the Transaction

- * If you sell non-merchandise items such as gift cards or services such as gift wrapping, refer to [Adding Non-Merchandise Items to the Sale](#) for more information.
- * If you do not know the item number and cannot scan the item, use the “Item Lookup” option to find the item number. Refer to [Searching for Items Using Item Lookup](#) for more information.
- * If the item is not found in the current inventory at this store, use the “Inventory Lookup” option to locate the item at another location. Refer to [Locating Items: Inventory Lookup](#) for more information.
- * To add a discount, refer to [Adding a Discount/Award to an Item or Transaction](#) for more information.
- * To change the tax (both item and transaction), refer to [Changing Item Taxes](#) for more information.
- * If your system is configured to support awards and the customer’s accumulated rewards can be applied to this transaction, select the **Add Discount menu** option. Refer to [Adding a Discount/Award to an Item or Transaction](#) for more information.

You can also use the following options to modify a line item in the sale:

- * To change item quantities, refer to [Changing the Item Quantity](#) for more information.
 - * To override a price, refer to [Changing the Item Price](#) for more information.
 - * To void an item, refer to [Voiding an Item](#) for more information.
 - * To change the commissioned sale associate for the sale, refer to [Changing the Commissioned Associate](#) for more information.
 - * To add a comment for an item, refer to [Adding/Editing a Line Item Comment](#).
7. After you have entered all of the items for the transaction, and completed all of the processing you wish to perform at the Sale screen, press [Enter] at the item prompt or select **Add Tenders**.

Tip: If you are using a touch-screen, tap the amount due area and go to step 3.

8. Continue with [Tendering the Transaction](#).

Tendering the Transaction

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

- Form of payment (also called tender type—cash, check, credit card, etc.)
- 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
- 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)
- Customer name
- Customer address
- Security approval for large sales or refunds

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

Completing the Transaction

1. When you are ready to complete the transaction, you can press [Enter] at the item prompt, or select the **Add Tenders** option to display a list of tender types. You can also swipe a credit card in a MSR or in a signature capture device.
2. A Charitable Donation prompt may display asking if the customer would like to make a charitable donation. Select the appropriate answer.

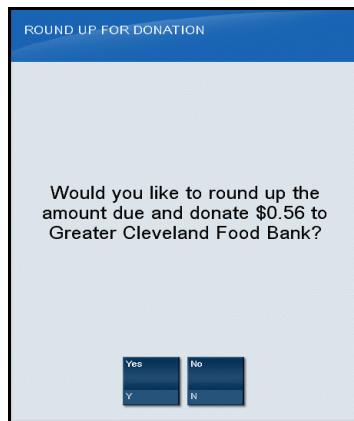


Figure 2-23: Round Up For Donation Prompt

3. At the tender list, use the up and down arrow keys to select the tender type and press [Enter] to continue, or select the number associated with the tender option.

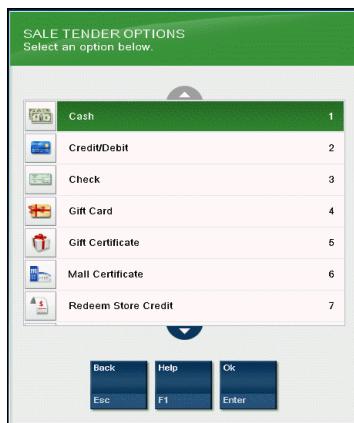


Figure 2-24: List of Tender Types

Tendering the Transaction

Note: You may return to the previous sale screen by pressing the [Esc] key, unless you have added all tenders and the system is prompting you to confirm that the sale is complete. In that case, you must void the tenders before you can return to the Register Sale screen. Refer to [Voiding the Tender](#) for procedural information.

4. At the tender amount prompt, enter the amount of the tender and press [Enter] to continue. Depending upon the tender type you selected, the tender amount prompt may default to the total amount due for the sale transaction.



Figure 2-25: Tender Cash Amount Prompt

Tip: *Split Tenders:* You may enter a partial amount if the purchase is paid with more than one tender type. After selecting a tender type, entering the amount and pressing [Enter], the system automatically prompts for the remaining balance due and you may select any of the valid tender types.

<OR>

Select one of the Quick Cash buttons.



Figure 2-26: Quick Cash Buttons

5. A prompt may display asking if the sale is complete.

Note: Your system may print receipts without prompting you to confirm that the sale is complete. In that case, the system prints receipts as soon as the total of all tenders selected equals or exceeds the amount due.

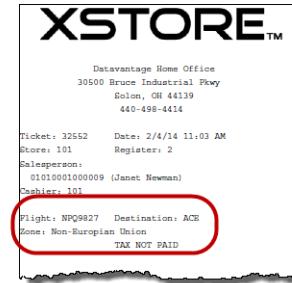
If prompted, press [Y] for Yes to complete the transaction. Press [N] for No to return to the Sale Tender screen.

-
6. The system prints receipts as required.
-

Important: If your store issues email receipts, additional/different prompts display. Refer to [Email Receipt Options](#) for more information about sending email receipts.

Note: See [Printing a Gift Receipt](#) for information about printing Gift Receipts.

The Airside store receipt prints the Flight number, Destination, Zone, and tax exemption (if applicable).



-
7. Depending upon the configuration of your system, you may be prompted to scan a cash drawer. Scan the appropriate cash drawer for your system.
-

Note: If you are prompted that the cash drawer is unavailable, either wait for the cash drawer to become available, or scan a different cash drawer.

8. Close the cash drawer to complete the transaction.
 9. On occasion, upon completing a transaction, a prompt may open asking whether to apply a system update.
-

Important: 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.

- Select **No** to be asked again after a period of time.
- Select **Yes** to apply the update.

A confirmation prompt opens:

- * Select **Apply** to perform the update.
- * Select **Cancel** to cancel the update and be asked to perform the update after a period of time.

Email Receipt Options

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

1. After tendering the sale, you are prompted to select a receipt method, unless the customer has been set up to automatically receive email receipts, in which case go directly to the next step.

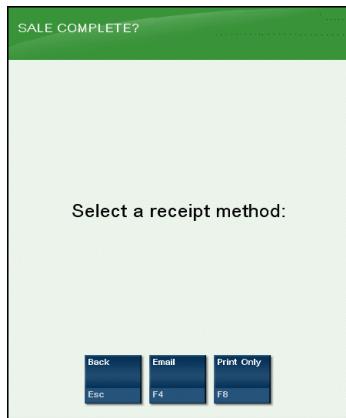


Figure 2-27: Sale Complete Prompt - Email Receipts Enabled

Note: The choice you make here applies to all receipts. For example, if you choose to email receipts, then all receipts such as Gift and Customer receipts are sent in an email. You cannot print one but email the other.

However, any receipt types that are not supported for distribution in an email, per your store policy, automatically print on the receipt printer.

- To *print* the receipt(s), select **Print Only**. All receipts are printed on the receipt printer and the transaction is complete.
 - To *email* the receipt(s) to the customer, select **Email** and continue with step 2 below.
2. If you chose to email the receipt(s), you are prompted for the customer's email address:
 - If no customer is associated with the sale, enter the customer's email address.
 - If a customer with an email address on file is associated with the sale, verify the customer's email address is correct as shown on the prompt. You can change the address if needed.

-
3. Select a receipt option:

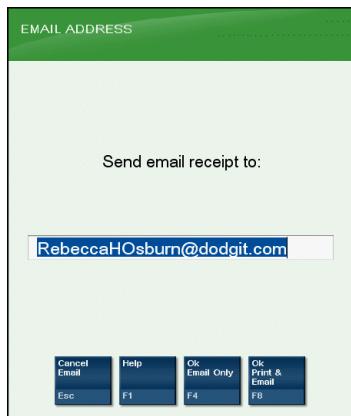


Figure 2-28: Email Address Form

- To email the receipt(s) to this email address, select **Ok Email Only** and the transaction is complete.
- To both print the receipts and send an email copy to this email address, select **Ok Print & Email** and the transaction is complete.
- If you decide not to send an email receipt, select **Cancel Email** to return to the Sale Complete prompt ([Figure 2-27](#)) where you can choose to print the receipts.

Note: The customer may have indicated that they wish to have email receipts as their default (see [Contact Information Tab](#)). If this is the case, you will not be prompted for the customer's email address.

Email addresses are validated for proper format. If the email address does not have proper formatting, a warning message displays. Press [Enter] to acknowledge the message and return to the Email Address prompt where you can correct the error.

If you make any changes to a customer's email address on file, you may be prompted whether or not the customer's profile should be updated with this new email address:

- Select **No** to send the receipt to the new address, but keep the old address on file.
- Select **Yes** to send the receipt to the new address and to also update the customer's profile with the new email address.

If there are multiple receipts on the transaction, they are sent as multiple PDFs in one email.

Reprinting Receipts and Documents

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

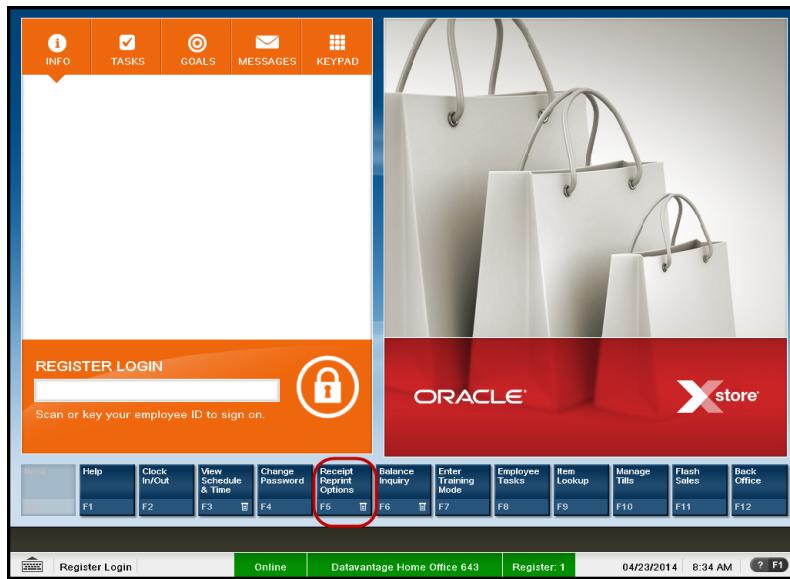


Figure 2-29: Login Screen - Receipt Reprint Options Menu Button

Reprinting the Last Receipt

- At the Register Login screen, select **Receipt Reprint Options** to reprint the receipts from the last transaction rung on this register.
- Oracle Retail Xstore Point of Service displays the Receipt Reprint Options menu.



Figure 2-30: Receipt Reprint Options Menu.

- Select the **Reprint Last Receipt** option.
- The system prompts to confirm that you want to reprint the receipts. Press [Y] to reprint the receipts from the most recent transaction. The receipts are clearly labeled as reprints.

Reprinting a Document (Rebate Offer)

- Select the **Reprint Document** option ([Figure 2-30](#)) to reprint a rebate offer for a customer.

The system prompts for search information to locate the applicable rebate.

Figure 2-31: Reprint Document Lookup Form

2. Enter the information as required to locate the correct rebate offer and select **Process** to continue.

The system displays a list of rebate documents matching your search criteria.

3. Select a document from the list and press [**Enter**]. The system prints the rebate offer on the report printer.

Note: If the source for a document is not in a PDF file format, it may also be printed on a receipt printer.

Printing a Rebate Receipt

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

1. Select the **Rebate Receipt** option ([Figure 2-30](#)) to print a rebate receipt for a customer.
2. The system prompts for transaction information. Scan or enter the transaction barcode information.
3. The rebate receipt is printed on the receipt printed and is clearly labeled as a Rebate Authorization receipt. This receipt is not valid for merchandise return and may have other restrictions.

Reissuing a Gift Receipt

See [Gift Receipts—After the Sale](#) for more information.

Printing a Gift Receipt

Gift receipts can be issued at the end of a sale transaction for a completed sale transaction and also from the Electronic Journal for eligible items in a transaction. Eligible items include regular sale items, special order pickup items, and layaway pickup items.

You may select items for a gift receipt before a tender is selected or between tenders. Once the sale is finalized, the gift receipt option is no longer available.

Gift receipts may also be printed when the transaction is complete by using the **Issue Gift Receipts** menu option at the Electronic Journal. They may also be reprinted from the Register Login screen by using the **Receipt Reprint Options**.

Gift Receipts—From a Sale

Use the following steps to designate which items require a gift receipt during the sale transaction. You may select items for a gift receipt before a tender is selected.

Note: Because each Oracle Retail Xstore Point of Service menu is configurable, the location of the *Gift Receipt* option on your system may be different than the option location shown here.

- During the sale transaction, select the **Gift Receipt** option from the Register Sale menu.

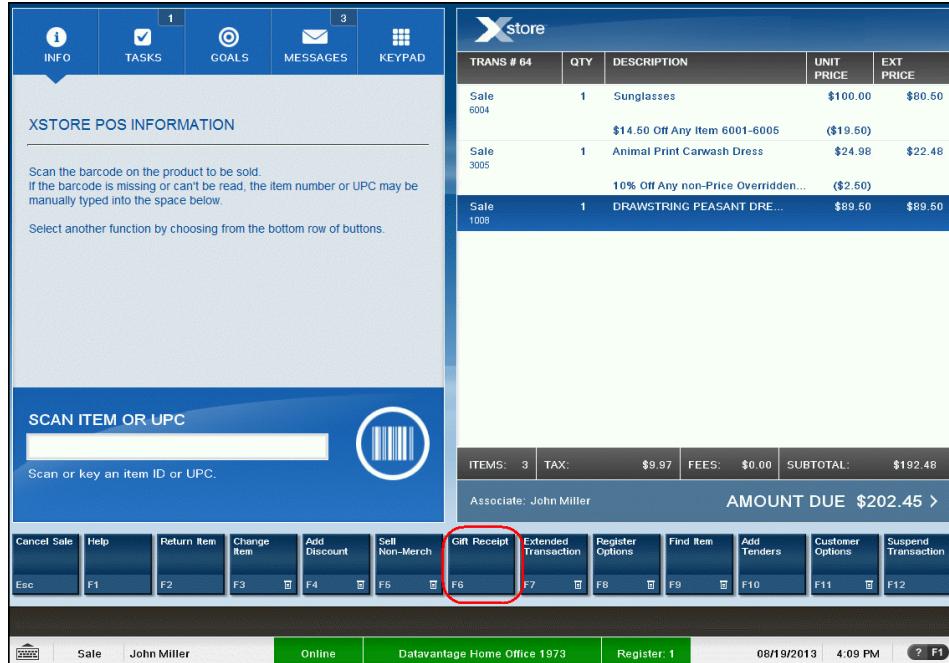


Figure 2-32: Sale Menu - Gift Receipt Button

- Oracle Retail Xstore Point of Service displays a list of the items eligible for a gift receipt.

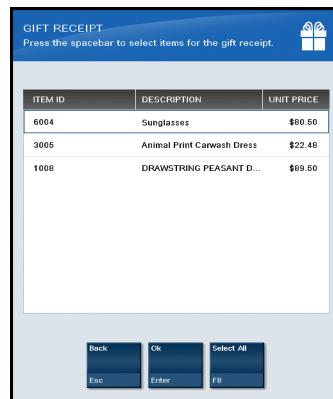


Figure 2-33: List of Items Eligible for a Gift Receipt

- Use the up and down arrow keys to select an item. Press the [Spacebar] to mark it for a gift receipt, or select the **Select All** option to print gift receipts for all listed

items. You may select as many individual items as necessary. Press [Enter] to continue.

4. Items that have been selected for a gift receipt are identified by the Gift  icon next to the item on the View Port.



TRANS #	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 6004	1	Sunglasses	\$100.00	\$80.50
		\$14.50 Off Any Item 6001-6004	(\$19.50)	
Sale 3005	1	Animal Print Carwash Dress	\$24.98	\$22.48

5. Continue processing the sale transaction as normal. After tendering, gift receipts are printed for the designated items.

Note: If you select 2 or more items for gift receipts, you may be prompted whether you want to print a single gift receipt for all the items (No) or a separate gift receipt for each item (Yes).

If supported by your store policy, you may be prompted whether or not to group the gift items on a gift receipt.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Email Receipt Options](#) for more information about sending email receipts.

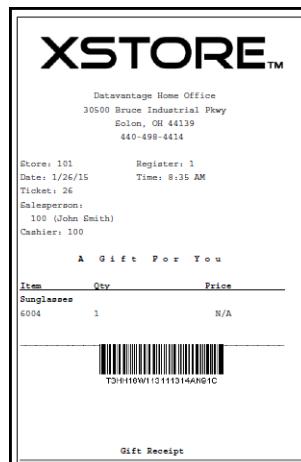


Figure 2-34: Gift Receipt Example

Multiple Gift Items - Grouping Items for Gift Receipts

After tendering the sale, if there are multiple items that have been labeled as requiring a gift receipt, you may be prompted whether or not the items should be grouped on

Reprinting Receipts and Documents

separate gift receipts. For example, 2 items on one receipt, and 3 items on another receipt.



Figure 2-35: Multiple Gift Items - Group Receipts Prompt

- To group the items, select **Yes**, and continue with [To Group Gift Items](#).
- If you do not want to group the items, select **No** and continue with [To Continue Without Grouping Gift Items](#).

To Group Gift Items

After selecting **Yes** at the Multiple Gift Receipts prompt (Figure 2-35), the system displays the list of items that were labeled as requiring gift receipts. Press the [**Spacebar**] to highlight and select the gift items for the first gift receipt, then select one of the following options:

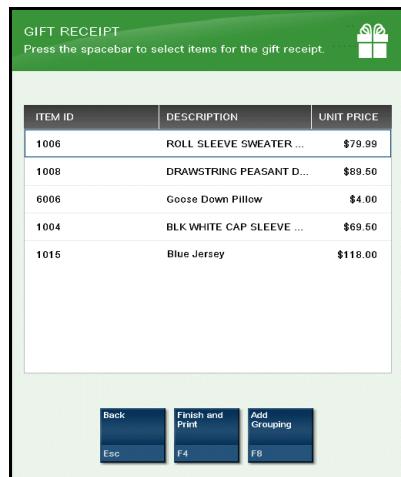


Figure 2-36: Items for Gift Receipts

Finish and Print option

- Select **Finish and Print** to print a gift receipt with the grouped items you selected.
 - If there are at least 2 or more gift items still available after setting up the grouping, you are prompted whether or not you want to print a separate gift receipt for each remaining gift item:

- * When prompted, select **Yes** to print a separate gift receipt for each remaining gift item.
- <OR>
- * Select **No** to print the remaining gift items on a single gift receipt.
- If only 1 gift item is still available after setting up the grouping, the system automatically prints that gift item on a separate gift receipt.

Add Grouping option

- Select **Add Grouping** to create multiple grouped gift receipts, beginning with the first group of gift items you selected.
 - The system then displays the gift item list again showing only the items that are still available for grouping. Select the gift items to be printed on the next gift receipt.
 - You can continue grouping the items using the **Add Grouping** option as long as there are at least two remaining items in the list.
 - When only one item remains in the list, the **Add Grouping** option is no longer available and a gift receipt for the remaining gift item is created.
 - If there are two or more gift items still available after setting up the groupings, you are prompted whether or not you want to print a separate gift receipt for each remaining gift item:
 - * When prompted, select **Yes** to print a separate gift receipt for each remaining gift item.
 - <OR>
 - * Select **No** to print the remaining gift items on a single gift receipt.

To Continue Without Grouping Gift Items

1. After selecting **No** at the Multiple Gift Receipts prompt ([Figure 2-35](#)), the system prompts whether or not you want to print a separate gift receipt for each gift item.

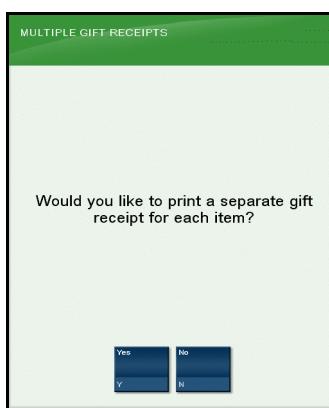


Figure 2-37: Multiple Gift Receipts - Print Separate Receipts Prompt

2. Select one the following options:
 - Select **Yes** to print one gift receipt per gift item.
 - Select **No** to print a single gift receipt with all gift items.

Gift Receipts—After the Sale

If you have completed tendering a sale, you can find the original sale transaction information in the database and print gift receipts once the transaction has been located.

1. At the Register Login screen, select the **Receipt Reprint Options** option ([Figure 2-29](#)) to print gift receipts for a completed transaction.
2. At the Receipt Reprint Options menu, select **Reissue Gift Receipt** to reissue only the Gift Receipts or select **Reprint Last Receipt** to print both the transaction sale receipt and the Gift Receipts.



Figure 2-38: Receipt Reprint Options Menu

3. The system prompts for the original transaction barcode information. Scan the barcode on the original receipt or enter the barcode information.



Figure 2-39: Transaction Lookup Prompt

Oracle Retail Xstore Point of Service retrieves the item information from the original transaction and displays a list of the items eligible for a gift receipt.

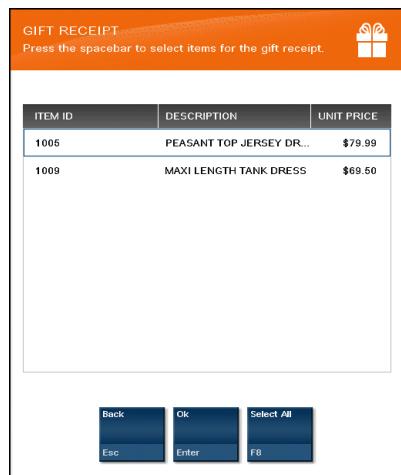


Figure 2-40: List of Items Eligible for a Gift Receipt

4. Use the up and down arrow keys to select an item. Press the [Spacebar] to mark it for a gift receipt, or select the **Select All** option to print gift receipts for all listed items. Press **[Enter]** to continue.

Note: Refer to [Multiple Gift Items - Grouping Items for Gift Receipts](#) for more information about grouping items on gift receipts.

5. Oracle Retail Xstore Point of Service prints gift receipts for the designated items.

3

Return Transactions

Overview

Returns allow you to create transactions for returned merchandise and to associate the reason the item was returned with the transaction. Oracle Retail 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

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

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

- 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 Oracle Retail 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, Oracle Retail 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, Oracle Retail 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.

With Original Receipt or Credit Card

- 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 Oracle Retail 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.

With Original Receipt or Credit Card

Verified Returns (With Original Receipt or Credit Card)

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.

If you scan the transaction barcode at the Sale screen:

1. At the Register Sale screen, scan the barcode on the customer's original receipt. The system recognizes that this is a sale receipt barcode rather than an item identifier. If the original transaction is found in the database, the system immediately transitions to return mode and the original transaction information is shown on the View Port. Refer to [What happens if the original transaction is not found or is missing data](#) for the return process if the original transaction cannot be found.
 - * If a customer record was associated with the original sale transaction, the customer's record is automatically associated with the return.
 - * If a customer record was not associated with the original sale transaction, you may be prompted to associate a customer record with the return transaction before continuing.
2. Skip to step 6.

If you select the Return Item menu option:

- At the Register Sale screen, select the **Return Item** option from the Register Sale menu. Perform the following steps to create a **verified** return.

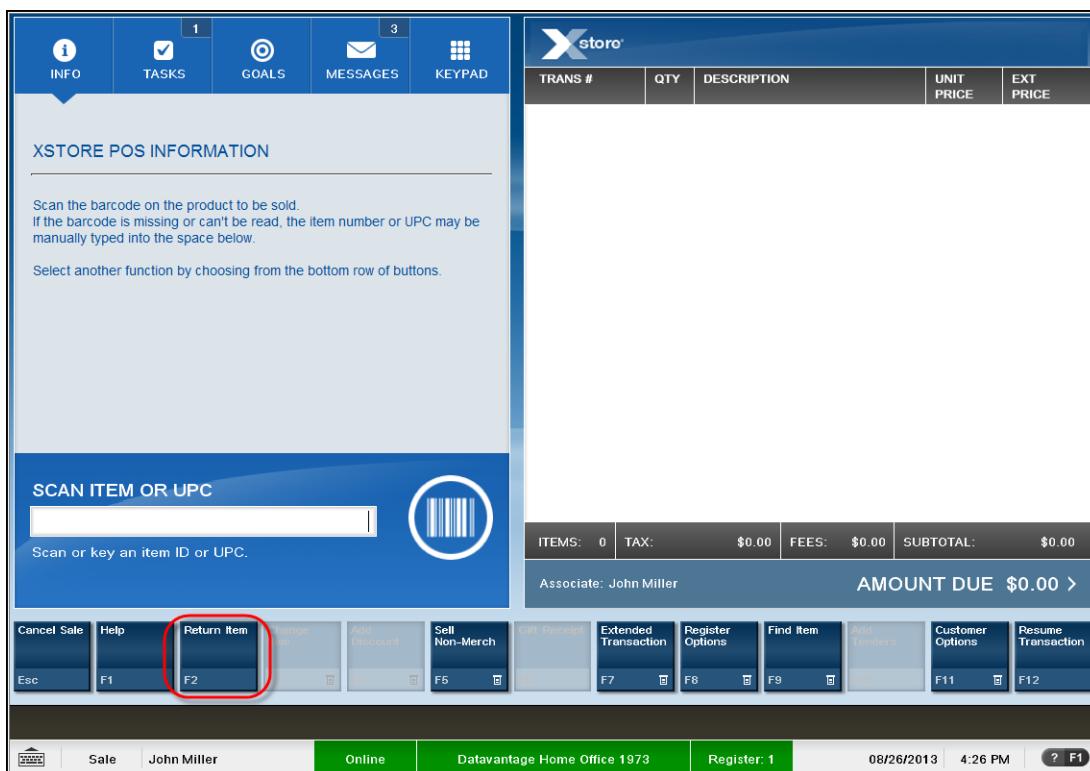
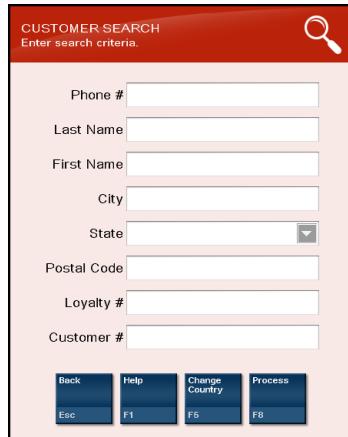


Figure 3-1: Register Sale Screen

With Original Receipt or Credit Card

2. Depending upon your system's configuration, you may be prompted for customer information if a customer has not been associated with the current transaction. Enter the customer's information and select the **Process** option. When the customer information is found or added, the customer record is associated with this transaction.



The Customer Search Form interface is a red-themed window titled "CUSTOMER SEARCH" with the sub-instruction "Enter search criteria." It contains several input fields: "Phone #", "Last Name", "First Name", "City", "State" (with a dropdown arrow), "Postal Code", "Loyalty #", and "Customer #". Below the fields are four buttons: "Back", "Help", "Change Country", and "Process". Underneath these buttons are two more buttons: "Esc" and "F8". A magnifying glass icon is located in the top right corner of the form area.

Figure 3-2: Customer Search Form

Note: For more information about the *Change Country* option on the Customer Search form, see [Search Form](#).

3. The system displays a prompt asking if the customer has the original receipt, original credit card, gift receipt or serial number for the item. Press [Y] for Yes.

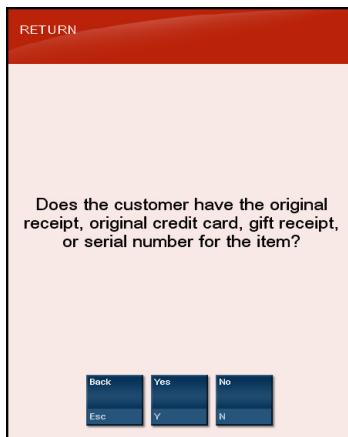


Figure 3-3: Return Original Receipt Prompt

Note: Depending on your payment system, the original credit card may not be an option.

4. The system displays a prompt asking for the original transaction information for the return item. Scan the transaction barcode on the receipt, swipe the credit card, or

manually enter the required receipt information and select the **Process** option to continue.

Note: Depending on your payment system, the credit card search field may not be available.

Figure 3-4: Original Transaction Return Information

Note: What happens if the original transaction is not found or is missing data

If your store accepts cross-channel returns (for example, items purchased on your website and returned in your store), a field on the Original Transaction Return Information form displays where you can enter the Web Order ID in order to perform a verified return.

The customer must present a shipping document to process the return. If the customer does not have the shipping document for the web purchase, or the shipping document cannot be verified, you must perform a blind or unverified return.

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

If the customer used a credit card in the original purchase transaction and, you can swipe or enter the credit card number (if field is available) and enter the Item ID to locate the original transaction. Your payment system may only allow swiping of the card and not manual entry.

With Original Receipt or Credit Card

5. Oracle Retail Xstore Point of Service searches the database for the original transaction information.

- If you swiped or entered the customer's credit card number, enter or scan the item ID. If more than one transaction is found, select the transaction from the Available Transactions list when prompted.

Oracle Retail Xstore Point of Service displays the original item information in the View Port ([Figure 3-5](#)).

AVAILABLE TRANSACTIONS				
Please select the transaction involving the customer's credit card to initiate a verified return.				
DATE	TRANS	QTY	TMP	TOT.
08/26/2013	289	4	\$166.84	
08/13/2013	40	2	\$107.99	

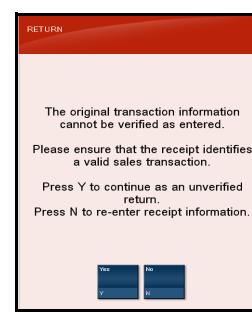
- If you entered the receipt information, Oracle Retail Xstore Point of Service displays the original item information in the View Port.

If the original receipt is not found in the database, this prompt displays.

- Select **No** to enter/scan the receipt information again.
- Select **Yes** to process the return as an unverified return. See [Entering Returns without Original Receipt](#) for processing information. If you want to search for the original transaction using the customer's credit card, go to step 1.

If the original receipt is found in the database, but is missing any data required to process the return, a message displays indicating the transaction must be processed as an unverified return.

See [Entering Returns without Original Receipt](#) for processing information.



- With the original transaction information displayed, select the return item from the list and then select either the **Return All** or the **Return Selected Item(s)** option. You can also scan or type the item ID for the return item.

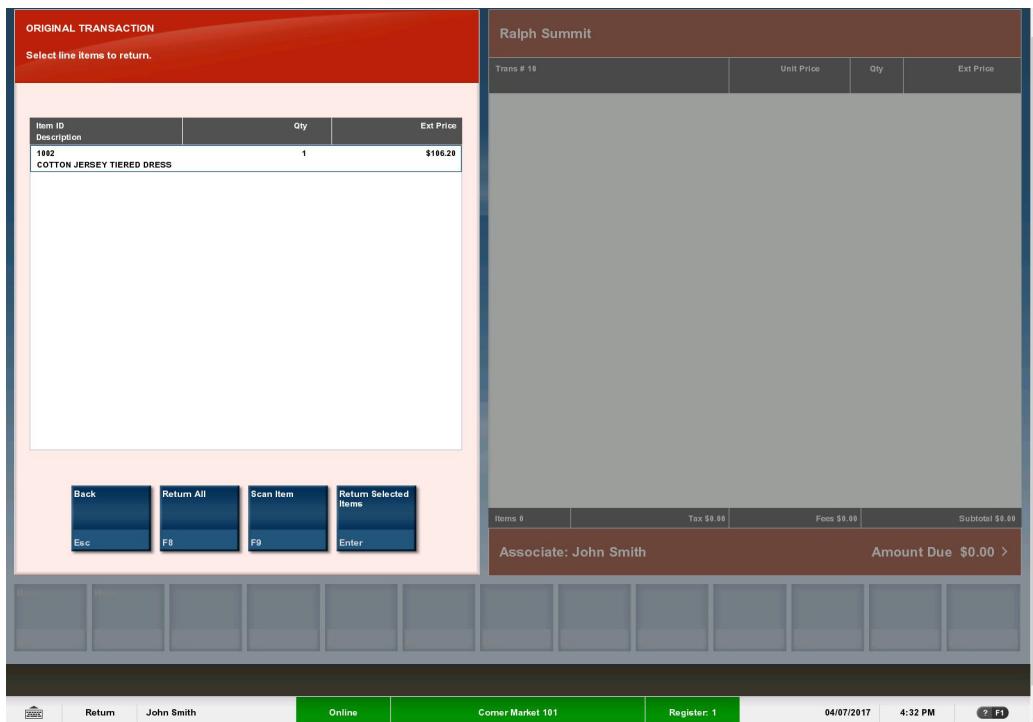


Figure 3-5: Original Transaction Information

- Depending upon your system's configuration and the number of items in the transaction, you may be prompted for the item quantity to be returned. If prompted, enter the quantity and press [Enter] to continue.
- Serialized items within a kit can be exchanged through functionality in the Back Office. See the *Oracle Retail Xstore Point of Service Manager's Guide* for more information about Back Office processing.

With Original Receipt or Credit Card

7. Oracle Retail Xstore Point of Service prompts for a reason for the return. Use the up and down arrow keys to select a reason for the return and then press [Enter].

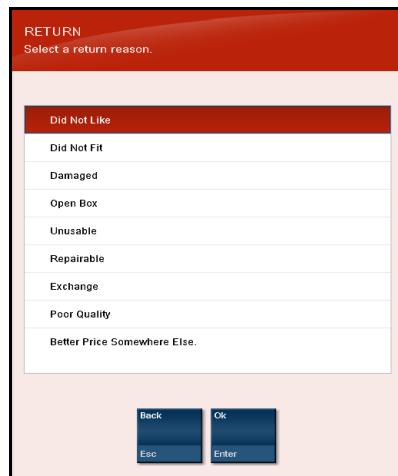


Figure 3-6: List of Return Reasons

8. Depending upon the return reason you chose, you may be prompted for additional information as shown in [Figure 3-7](#) below. Enter the required information and press [Enter] to continue.

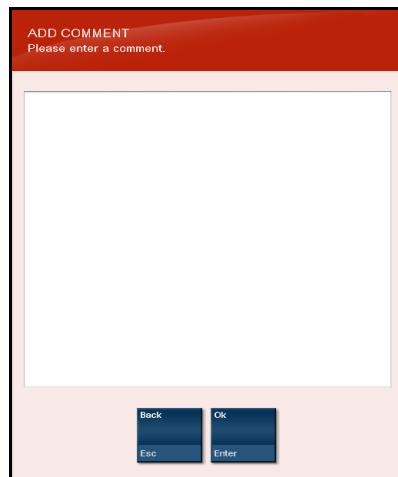


Figure 3-7: Return Comment Form

9. If you are prompted for a serial number, enter the serial number and press [Enter] to continue.

Note: If you the item being returned is a kit that includes one or more serial numbers, you will be prompted for a serial number for each serialized item in the kit.

10. If the return item is a Kit composed of multiple items, all items that make up the kit must be returned. You may be prompted with a list showing all items that make up the Kit.

If prompted, choose **No** if all component items are not available. The current return item entry is cancelled and the system goes back to the return item prompt.

Choose **Yes** to continue with the return process to return all component items from the Kit.

KIT RETURN Please ensure that the following items are being returned with this kit. Proceed with return?		
ITEM ID	DESCRIPTION	QUANTITY
6013	Hounds tooth Sport Coat	1
6016	White Dress Shirt	1
6017	Black Slack	1
6022	Silk Tie	3

11. Depending upon your store policy, you may be prompted with additional information about the return transaction. If prompted, press [Enter] to acknowledge the message.

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.

12. Oracle Retail Xstore Point of Service returns to the Register Return screen. Note that the return item quantity has been decremented by the quantity returned. In the example below, the original purchase quantity was 1 and 1 item was returned; $1 - 1 = 0$.

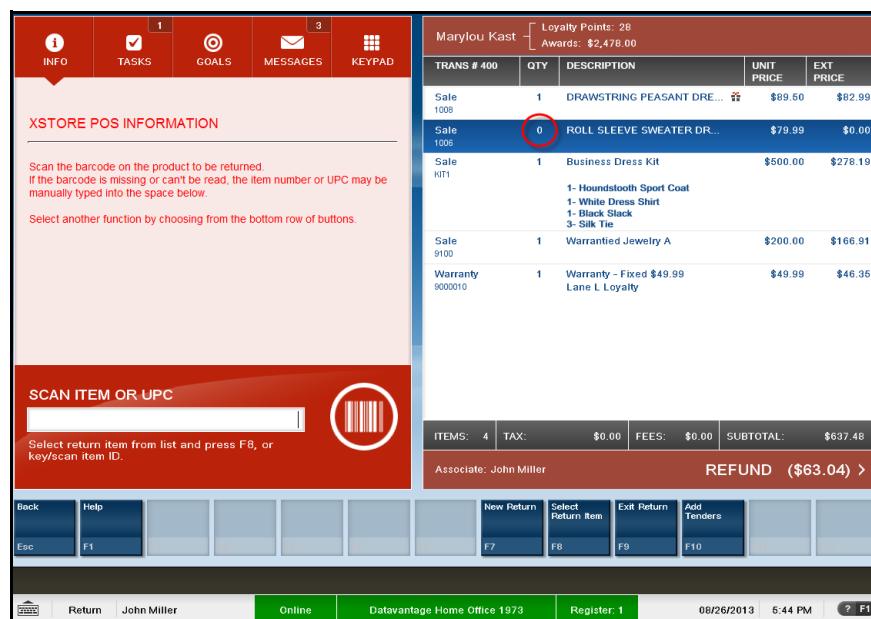


Figure 3-8: Register Return Screen

13. When all of the return items are selected, perform one of the following functions to complete the process:

Entering Returns without Original Receipt

- Select **Add Tenders** or press [Enter] to tender the refund. Refer to [Return Tenders \(Refunds\)](#) for more information about tendering refund transactions.
- Select **Exit Return** to return to the Register Sale screen to continue selling items.
- Select **New Return** if the customer would like to return additional items that do not appear on this original receipt.

When the transaction is complete, the system prints receipts.

Entering Returns without Original Receipt

Blind Returns & 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.

Note: If your store is set up to use customer purchase history to determine return item pricing, see [Entering Returns without Original Receipt, Using Customer Purchase History](#).

1. At the Register Sale screen, select the **Return Item** option from the Register Sale menu. Use the following steps to perform a **blind** (or **unverified**) return.

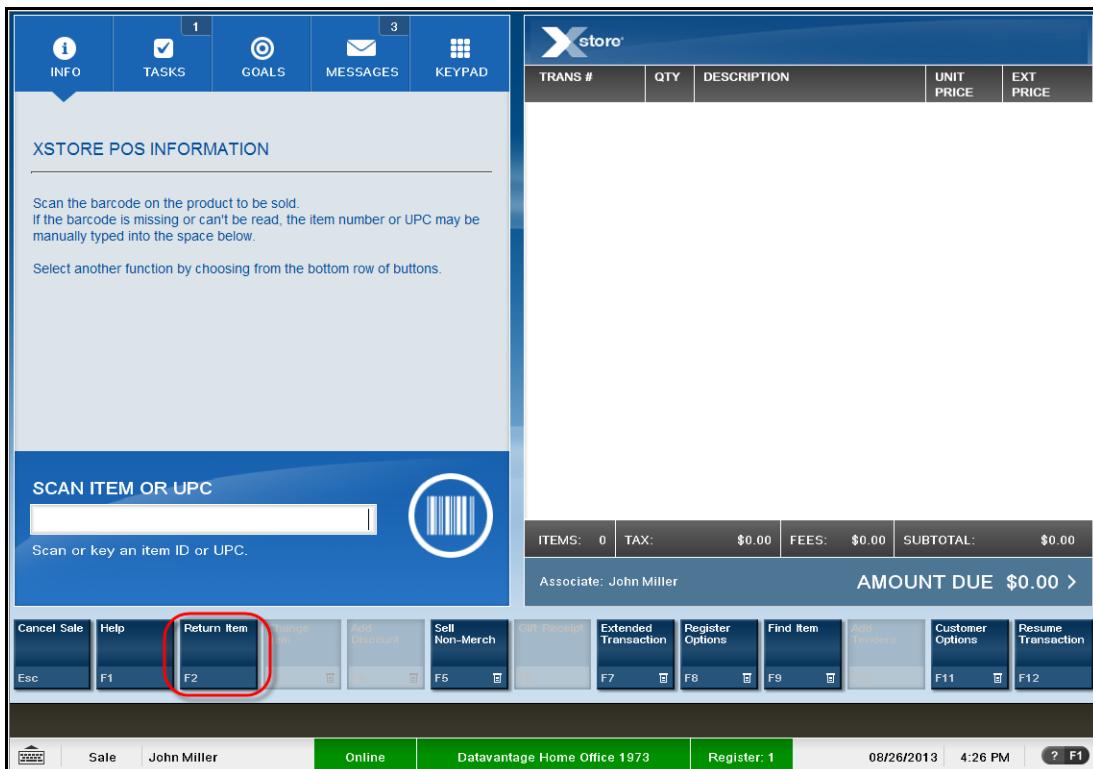
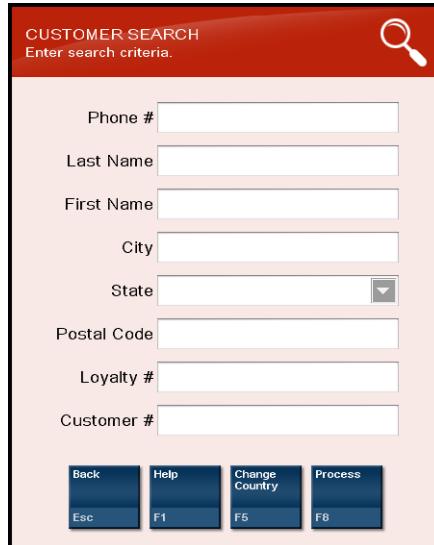


Figure 3-9: Register Sale Screen Menu

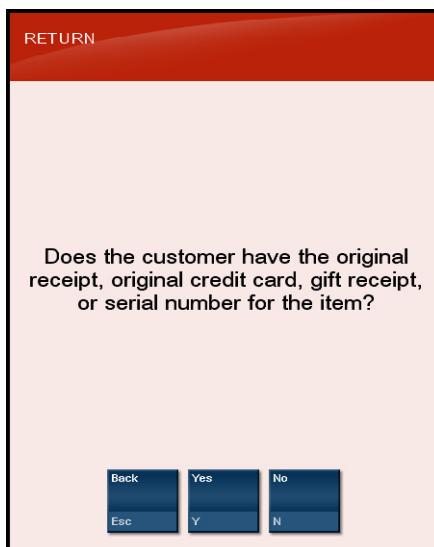
2. Depending upon your system's configuration, you may be prompted for customer information if a customer has not been associated with the current transaction. Enter the customer's information and select the **Process** option.



The Customer Search Form is a red and white interface. At the top, it says "CUSTOMER SEARCH" and "Enter search criteria." Below this is a search icon. The form contains several input fields: "Phone #", "Last Name", "First Name", "City", "State" (with a dropdown arrow), "Postal Code", "Loyalty #", and "Customer #". At the bottom are four buttons: "Back" (Esc), "Help" (F1), "Change Country" (F5), and "Process" (F8).

Figure 3-10: Customer Search Form

3. A prompt displays asking if the customer has the original receipt or a gift receipt for the item. Press [N] for No.



The Return Original Receipt Prompt is a red and white interface. At the top, it says "RETURN". In the center, there is a question: "Does the customer have the original receipt, original credit card, gift receipt, or serial number for the item?". At the bottom are three buttons: "Back" (Esc), "Yes" (Y), and "No" (N).

Figure 3-11: Return Original Receipt Prompt

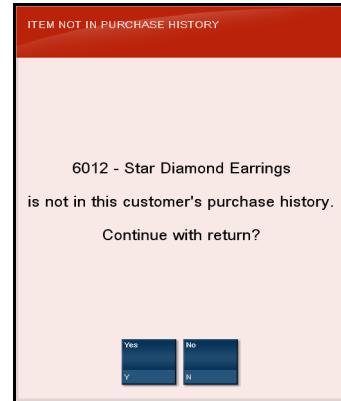
Note: Depending on your payment system, original credit card may not be listed as an option.

4. Scan the item's barcode, or enter the item ID manually and then press [**Enter**].
5. If prompted for the quantity, enter the item quantity and then press [**Enter**].

Entering Returns without Original Receipt

6. If prompted that the item was not found in the customer's purchase history, select **Yes** to continue with the blind return.

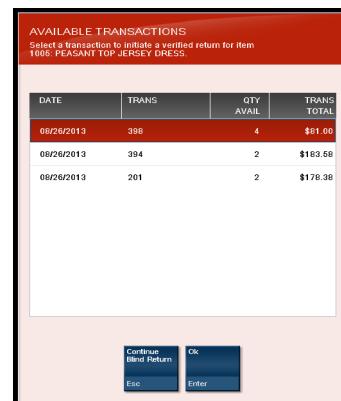
Go to step 7 below.



If the item is found in the customer's purchase history, select a transaction from the list and press [Enter] to create a verified return. Continue with step 6 of [With Original Receipt or Credit Card](#).

<OR>

Press [Esc] and continue with the blind return.
Go to step 7 below.



7. Use the up and down arrow keys to select a reason for the return and then press [Enter].

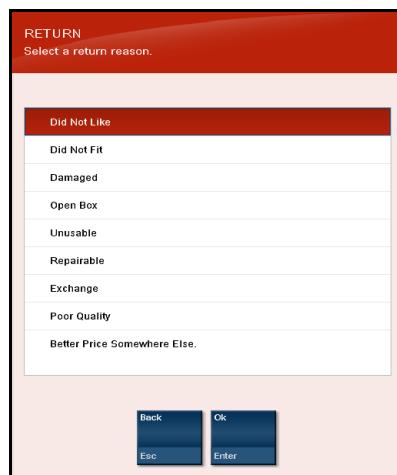


Figure 3-12: List of Return Reasons

8. Depending upon the return reason you chose, you may be prompted for additional information as shown in [Figure 3-13](#) below. Enter the text of your comment and press [Enter] to continue.

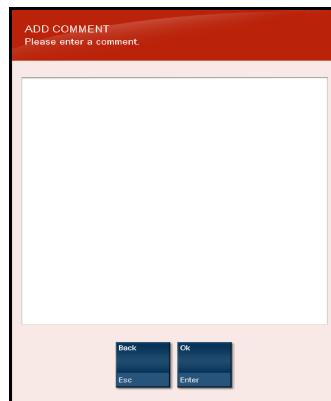
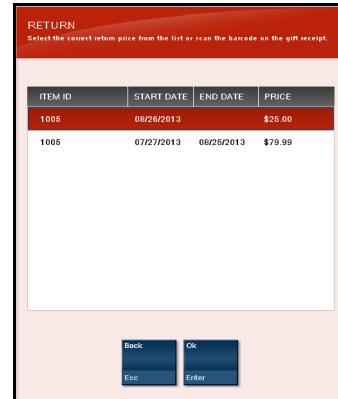
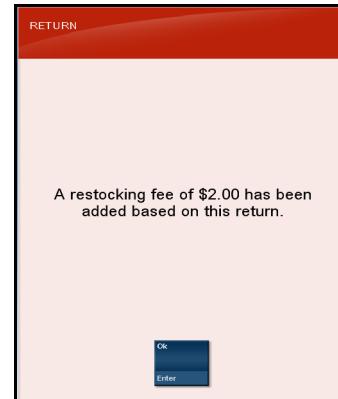


Figure 3-13: Return Comment Form

9. Depending upon your system's configuration:
 - You may be prompted with additional information about the return transaction. Press [Enter] to acknowledge the message.
 - The price history window may display a list of previous promotional prices. Use the up and down arrow keys to select the correct price for the return item and press [Enter] to continue.

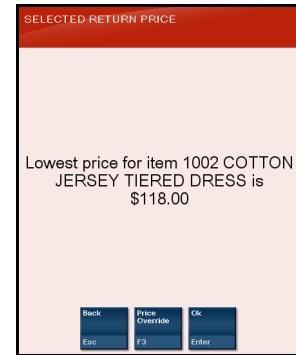


- A prompt may appear stating that a restocking fee has been added based on the item returned. This amount is deducted from the amount of the refund. Press [Enter] to continue.



Entering Returns without Original Receipt

- The lowest price for the item may display. To override the price, select **Price Override**. A manager will need to enter an **Employee ID** and **Password** to override.



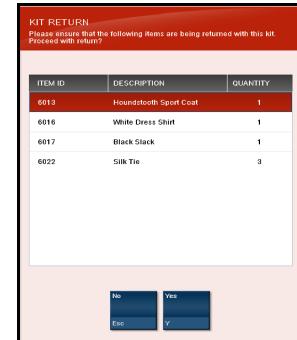
- If you are prompted for a serial number, enter the serial number and press [Enter] to continue.

Note: If the item being returned is a kit that includes one or more serial numbers, you will be prompted for a serial number for each serialized item in the kit.

- If the return item is a Kit composed of multiple items, all items that make up the kit must be returned. You may be prompted with a list showing all items that make up the Kit.

If prompted, choose **No** if all component items are not available. The current return item entry is cancelled and the system goes back to the return item prompt.

Choose **Yes** to continue with the return process to return all component items from the Kit.



- 12.** Oracle Retail Xstore Point of Service returns to the Register Return screen. When all return items have been entered, perform one of the following functions to complete the process:

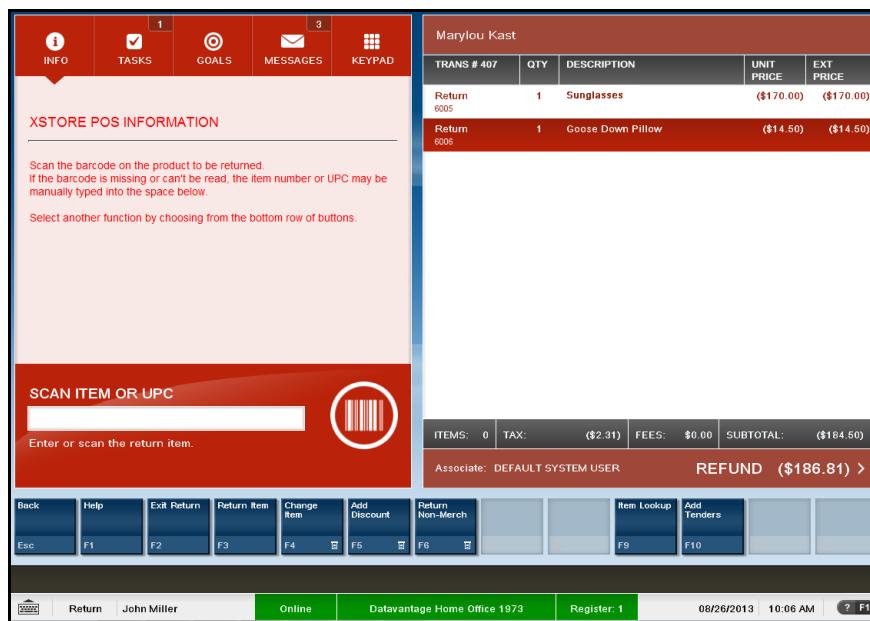


Figure 3-14: Return Items Displayed in View Port

- Select **Add Tenders** or press [**Enter**] to tender the refund. Refer to [Return Tenders \(Refunds\)](#).

Note: Your store may have a blind return threshold. If the amount of the return exceeds this threshold, a Blind Return Threshold Amount security prompt displays. A manager will need to enter an *Employee ID* and *Password* to override.

If your store does not allow overrides, you will be unable to complete the return.

- Select **Exit Return** to return to the Register Sale screen to continue selling items.
- Select **Return Item** if the customer would like to return additional items (for example, items that appear on an original receipt).
- Select **Change Item** to modify an item. You may change quantity, change price, change tax, void line, modify discount (if the item was discounted), or change the commissioned associate. Refer to [Modifying Line Items in a Sale](#) for more information about these options.
- Select **Add Discount** if the return item is on sale at the time it is returned. Then select a type of discount from a list, and select the specific item that is discounted. The discount you apply may be a percentage discount or a dollar amount discount. This ultimately reduces the amount due to the customer when the return is tendered.
- Select **Return Non-Merch** to return a non-merchandise item.

Entering Returns without Original Receipt

- Select **Item Lookup** to find the Item ID for the return item. Refer to [Searching for Items Using Item Lookup](#) for more information about looking up item information.

Returning Non-Merchandise Items Without a Receipt

1. At the Register Sale screen, select the **Return Item** option from the Register Sale menu. The system prompts you to specify whether or not the customer has a receipt or serial number for the return item.
2. Respond to the prompt by selecting **No**. After confirming that the customer does not have the original receipt, select the **Return Non-Merchandise** option from the Register Return screen.

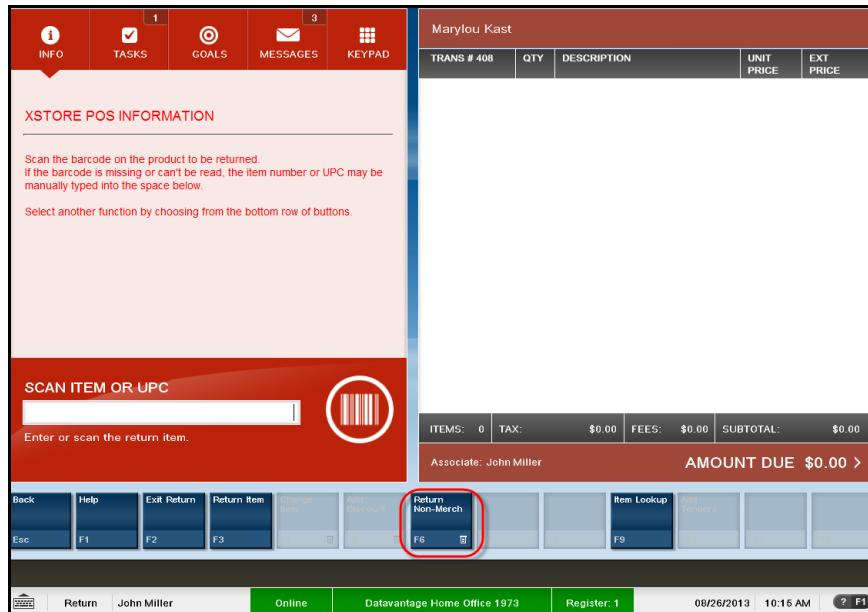


Figure 3-15: Register Screen

3. Select the category of non-merchandise item to be returned from the list and press **[Enter]** to continue.

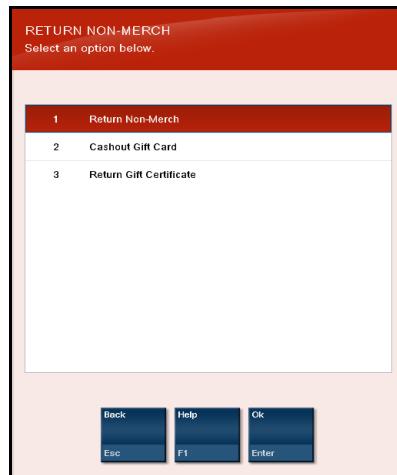


Figure 3-16: List of Non-Merchandise Categories

4. The options to return a gift card or a gift certificate may require a security login, depending on store policy. To perform those two options, you must have the required security level. Enter your login ID and password when prompted, and select **Process**.

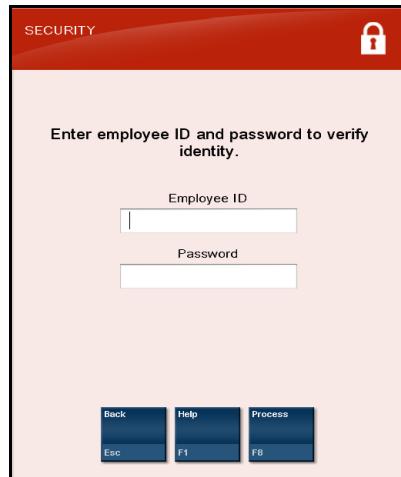


Figure 3-17: Security Verification Prompt

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. However, keyed entry and card scan are also supported here.

5. Enter the appropriate information when prompted. For example the voucher ID for a Gift Certificate, the Gift Card number for a gift card, or the item price. The prompts vary, depending on the item selected.
6. You may be prompted to select a reason for returning the non-merchandise item. If so, select a reason from the list and press **[Enter]** or select **Ok**.
7. When all return items have been selected, choose one of the following functions to complete the process:
 - Select **Add Tenders** or press **[Enter]** to tender the refund. Refer to [Return Tenders \(Refunds\)](#)
 - Select **Exit Return** to return to the Register Sale screen to continue selling items.
 - Select **Return Item** if the customer would like to return additional items (for example, items that appear on an original receipt).
 - Select **Return Non-Merch** if the customer would like to return additional non-merchandise items (for example, non-merchandise items that appear on an original receipt).
 - Select **Change Item** to modify an item: change quantity, change price, change tax, void line, modify discount (if item was discounted), or change the commissioned associate. Refer to [Modifying Line Items in a Sale](#) for more information about these options.
 - Select **Add Discount** if the non-merchandise return item is on sale at the time it is returned. You must select a type of discount from a list, and then select the specific item that to be discounted. The discount you apply may be a percentage

Entering Returns without Original Receipt, Using Customer Purchase History

discount or a dollar amount discount. This ultimately reduces the amount due to the customer when the return is tendered.

Entering Returns without Original Receipt, Using Customer Purchase 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, when available.

- If the return item(s) can be found in the customer's purchase history record, the transaction is processed like a verified return as described in [With Original Receipt or Credit Card](#).
- If the item(s) cannot be found in the customer's purchase history record, the transaction is processed like a blind return as described in [Entering Returns without Original Receipt](#).

Perform the following steps to determine return item pricing using customer purchase history.

1. At the Register Sale screen, select the **Return Item** option from the Register Sale menu.
2. If a customer has not been associated with the current transaction, enter the customer's information when prompted and select the **Process** option.
3. When prompted if the customer has the original receipt or a gift receipt for the item, press [N] for No.
4. At the item prompt, scan or enter the return item ID:

ITEM FOUND

If the item is found in the customer's purchase history, the system lists the customer's previous transaction(s) that include the return item.

This Available Transaction list shows the following information for each transaction:

- * **Date** – The original transaction date.
 - * **Trans** – The original transaction ID number.
 - * **Qty Avail** – The item quantity available for return from the original transaction.
 - * **Trans Total** – The original *transaction* total amount.
- To use the customer's purchase history record for return pricing, select a transaction from the list and press [**Enter**]. Go to step 6 to complete the return.
 - To use Blind Return processing rather than selecting the item from the customer's purchase history record, select the **Continue Blind Return** menu option and go to step 5 to complete the return.

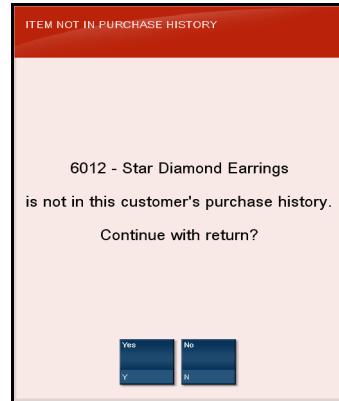
ITEM NOT FOUND

AVAILABLE TRANSACTIONS Select a transaction to initiate a verified return for item 1005: PEASANT TOP/JERSEY DRESS.			
DATE	TRANS	QTY AVAIL	TRANS TOTAL
08/26/2013	398	4	\$81.00
08/26/2013	394	2	\$183.68
08/26/2013	201	2	\$178.38

Continue Blind Return Ok Enter

If the item is not found in the customer's purchase history, the Item Not in Purchase History prompt displays.

- * Select **Yes** to continue with a blind return. Go to step 5.
(This option may be controlled by security permissions. If so, you may be prompted for a manager override to continue).
- * Select **No** to cancel the return from customer's purchase history process. The system returns to the **Scan or Enter the Return Item** prompt in return mode.



Taxes For Return Items

Taxes for return items are determined by the original store number entered in the original Receipt Information form.

Note: If an original store number is not entered (because the customer does not have the original receipt), the return store's tax rate is used.

You can change the tax on the return item using the **Change Item** option on the menu. Refer to [Changing Item Taxes](#) for more information about changing taxes.

Taxes For Return Items

4

Processing Tenders

Overview

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 (also called tender type; i.e., cash, check, credit card, etc.)
- 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:

- * Credit card account number, CID number, and expiration date
- * 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 is the final step in a transaction. Many types of tender can be exchanged for merchandise.

1. When you are ready to complete the transaction, select the **Add Tenders** option, or press [Enter] to list the tenders that are available for the type of transaction you are processing. You can also swipe a credit card at the sale screen.
 - * If you swiped a credit card, refer to [Credit Card](#).

Sale Tenders

- * If you selected the **Add Tenders** option, Oracle Retail Xstore Point of Service displays a list of tender types as shown in [Figure 4-1](#) and [Figure 4-2](#) below.

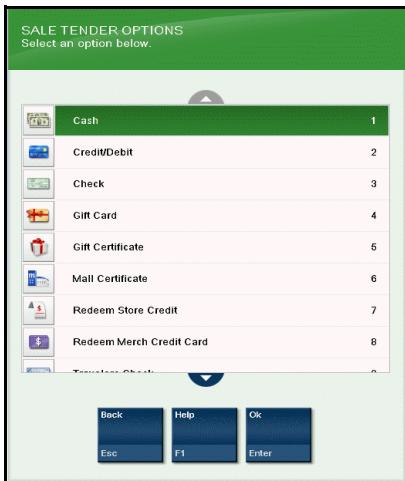


Figure 4-1: Sale Tender List

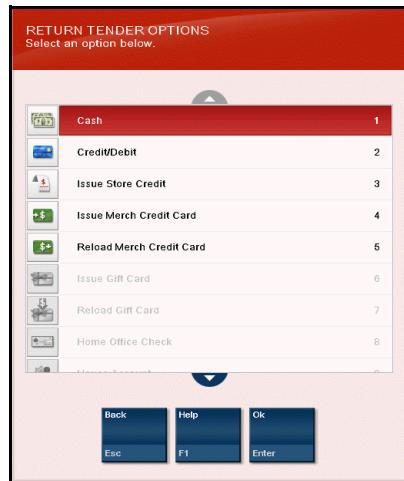


Figure 4-2: Refund Tender List

Use the up and down arrow keys to select a tender and press [Enter].

Note: Your tender lists may be different from the examples shown here.

Sale Tenders

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

Tender Type	Refer To
Cash	Cash
Check	Check (Personal)
Credit/Debit Card	Credit Card , and Debit Card
Gift Certificate	Gift Certificate
Travelers Check	Traveler's Check
Foreign Currency	Foreign Currency
Redeem Store Credit	Redeem Store Credit
Coupon	Coupon Tender
Redeem Merchandise Credit Card	Redeem Merchandise Credit Card
House Account	House Account
Gift Card	Gift Card
Room Charge	Room Charge

Cash

Cash is one type of tender that can be exchanged for merchandise.

- When all items have been entered or scanned, use the up and down arrow keys to select the **Cash** option and then press [Enter]. See [Figure 4-1](#) and [Figure 4-2](#).

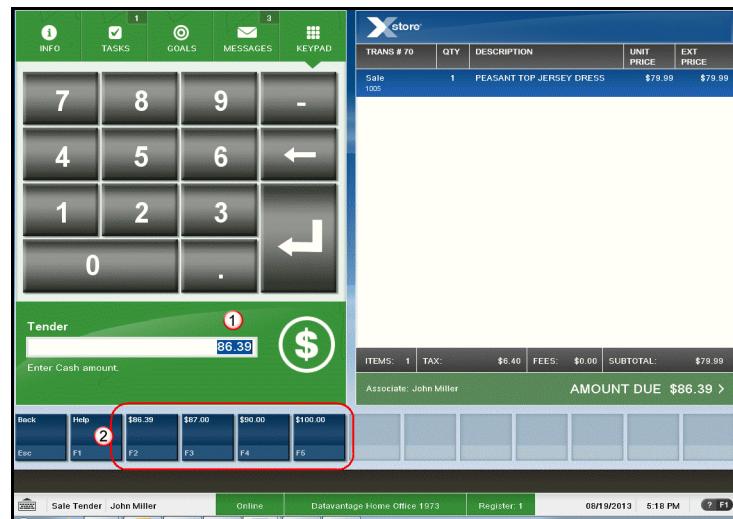
Note: Depending upon the configuration of your system, the Cash Amount Due prompt may default to the total amount owed for the transaction.

- Enter the amount of cash presented by the customer and then press [Enter].

1 Enter dollar amounts.

<OR>

2 Choose one of the **Quick Cash** options.



- A prompt may display asking if the sale is complete.

If prompted, press [Y] for Yes to complete the transaction. Press [N] for No to return to the Sale Tender screen to re-tender with another tender type. See [Split Tenders](#) for more information.

Note: Your system may be configured to print receipts without prompting you to confirm that the sale is complete. In that case, the system prints receipts as soon as the total of all tenders selected equals or exceeds the amount due.

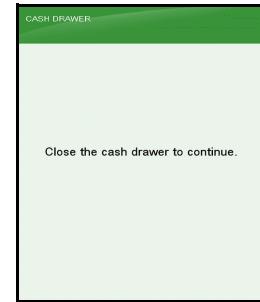
- The system prints receipts as required.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#) for more information about sending email receipts.

Sale Tenders

- When you complete the sale, Oracle Retail Xstore Point of Service opens the cash drawer. You can accept money from the customer, place it in the cash drawer and return the change due amount, if the total of all tenders exceeds the amount due.

If configured, a prompt displays reminding you to close the cash drawer. After the cash drawer has been closed, the sale receipt is printed and the system is ready for the next transaction.



The receipt indicates that the purchase was paid with cash, shows the amount tendered, the change amount, and the tender type received.



Figure 4-3: Customer Sale Receipt - Cash Tender Example

Large Cash Transactions; Greater Than \$10,000

United States law requires that you submit IRS Form 8300 if you receive more than \$10,000 cash in a single transaction. You must report the transaction to the IRS within 15 days of receipt of the cash. The law also requires that a properly filed Form 8300 that lists the correct cash payer's name, address and tax identification number. It must also include the amount of cash received, transaction date and nature of the transaction.

1. If the customer tenders a transaction with more than \$10,000 in cash, the system automatically displays Form 8300. Complete all required fields.

Figure 4-4: IRS Form 8300

Note: The system checks to see that all required fields have an entry. If you leave any required fields blank, the system does not allow you to leave this form.

2. Select **Process** to continue.

Sale Tenders

The system prints copies of IRS Form 8300 as required by your store policy.

Report of Cash Payments Over \$10,000 Received In a Trade or Business				
PART I Individual From Whom The Cash Was Received				
1 Last Name Hastrop	2 First Name Lori	3 MI M	4 Birth Date 06/12/1987	5 Social Security Number 228228222
6 Number and Street 711 James Street	7 Passport Number	8 Country	9 Alien Registration Number	10 Country
Atlanta	NY 14808	US	DL	338547539
PART II Individual Or Organization For Whom This Transaction Was Conducted				
17 Last Name Miller	18 First Name Rate	19 MI	20 Birth Date 02/06/1911	21 Social Security Number 028666111
22 Name of Organization	23 Employer Identification Number	24 Passport Number	25 Country	
26 Number and Street 88 Peachtree Lane	27 Business Or Occupation	28 Alien Registration Number	29 Country	
Atlanta	NY 14808	us	DL	69745840N
PART III Description of Transaction and Method of Payment				
35 Amount Of Cash \$14,500.00	36 Amount In Item 35 in \$100 Bills or Higher _____			
37 Nature Of Transaction: <input type="checkbox"/> Merchandise Purchased <input type="checkbox"/> Payments On Credit Account <input type="checkbox"/> Deposit On Layaway, Etc. <input type="checkbox"/> Other (specify) > _____	Check here If Part Of Multiple Or Installment Sale	Specific Description of Merchandise (sku#)		
		6012	\$13,500.00	
38 Method of Payment By Customer: <input type="checkbox"/> Paid With U.S. Currency Or Coin <input type="checkbox"/> Paid With Foreign Currency (describe) _____			39 Date Paid 04/12/2018	

Figure 4-5: IRS Form 8300 Example

- Continue with step 5.

Check (Personal)

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.

- After all items have been entered or scanned, select **Add Tenders** or press [Enter]. Oracle Retail Xstore Point of Service displays the Sale Tender list. Use the up and down arrow keys to select the **Check** option and then press [Enter].

Note: After selecting the Check option from the Sale Tender list, the system may automatically prompt you to place the check in the MICR device. After the system gets the required information from the check, other on-screen prompts may follow, depending on your system's configuration. If the MICR fails to read the check information, the system may display a prompt that allows you to reinsert the check and try again, or disable the device and enter the information manually. Disabling a device may require a particular security level.

- If prompted, enter the check's MICR number (Route number + Account number + Check number) and then press [Enter].



Figure 4-6: Check MICR Number Prompt

Note: The entry must consist of a single string of characters with no other embedded spaces or additional characters.

3. If prompted, enter the check number and then press [Enter]. It must be the same check number that you entered when the system prompted for the MICR number.



Figure 4-7: Check Number Prompt

4. If prompted, enter the state from which the customer's ID was issued and then press [Enter].

Tip: Enter only the two-letter abbreviation for the state.

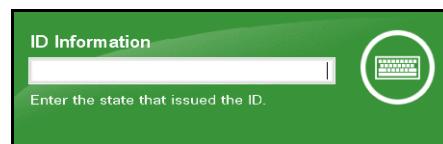


Figure 4-8: Tender State Prompt

5. If prompted to enter the customer's driver's license number, a credit card number, or other form of ID, enter the ID number and then press [Enter].

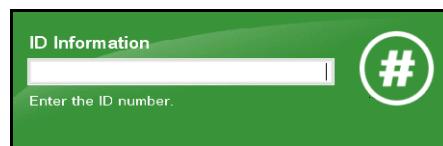


Figure 4-9: ID Prompt

6. If prompted, enter the customer's birth date (as printed on the state-issued ID card) in the MM/DD/YYYY format and then press [Enter].



Figure 4-10: Check Birth Date Prompt

7. Enter the check amount, or accept the default amount for the total due, and press [Enter].

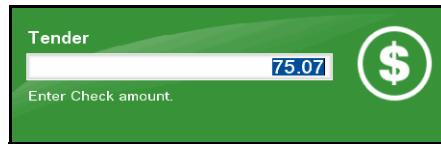


Figure 4-11: Check Amount Prompt

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

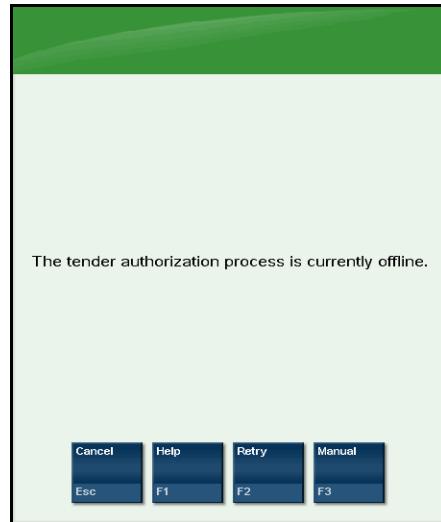


Figure 4-12: Tender Authorization Offline Prompt

- Select the **Cancel** option to re-tender with another tender type. Oracle Retail Xstore Point of Service returns to the tender list where you can select a different tender type.
- Select the **Retry** option to attempt to process the check again.
- Select the **Manual** option to begin the manual authorization process.

If you chose to authorize the card manually, follow the instructions on the prompt and enter the authorization number in the **Authorization Number** field. Select the **Ok** option to continue.

9. After the information is processed, the system displays a prompt asking if the sale is complete. Press [Y] for Yes to continue and complete the sale. If you press [N] for No, Oracle Retail Xstore Point of Service returns to the Sale Tender screen.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#), for more information about sending email receipts.

The receipt indicates that the purchase was paid with a check and shows the check number and amount.



Figure 4-13: Receipt Example - Personal Check Tender

Note: If prompted, insert the check into the printer for franking, and press [Enter] if the system prompts you to do so. After franking is complete, remove the check from the printer, and press [Enter].

Credit Card

A Credit Card is a type of tender that can be exchanged for merchandise. If supported by your authorization processor, you can swipe the credit card through the magnetic stripe reader (MSR) without selecting a tender type when you are ready to tender the sale, or you can enter the information manually when prompted. Xstore prompts may vary depending on the payment system your store uses.

- After all items have been entered or scanned, select **Add Tenders** or press [Enter]. Oracle Retail Xstore Point of Service displays the Sale Tender list. Use the up and down arrow keys to select the **Credit/Debit** option and then press [Enter].

Note: If your processor does not allow credit card keyboard entry or MSR swiping, instruct the customer to swipe the card on the PIN pad device and skip to step 4. Examples of processors that restrict keyboard and MSR entry include EFTLink and Tender Retail.

- If prompted, swipe the credit card using the MSR or enter the card number manually and press [Enter].

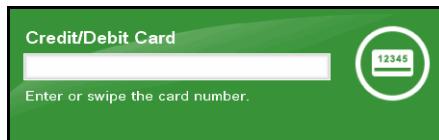


Figure 4-14: Credit/Debit Card Number Prompt

Note: If you swipe the credit card, Oracle Retail Xstore Point of Service automatically captures the card number and expiration date. If you manually enter the credit card number, Oracle Retail Xstore Point of Service prompts for the expiration date. Oracle Retail Xstore Point of Service may display additional prompts based on your system's configuration such as a prompt for the Card Identification Data (CID) number or the customer's zip code.

-
3. If prompted, enter the expiration date in MM/YY format and then press [Enter].

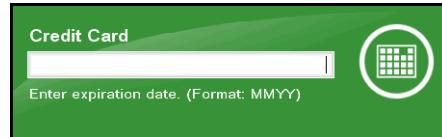


Figure 4-15: Credit Card Expiration Date Prompt

4. At the tender amount prompt, enter the tender amount, or accept the default amount due, and then press [Enter].

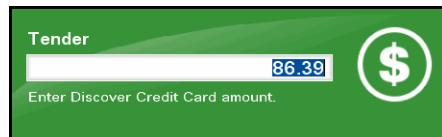


Figure 4-16: Tender Amount Prompt

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.

5. If prompted, enter the CID number found on the card:

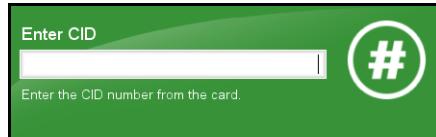


Figure 4-17: Enter CID Prompt

- * American Express Card

Enter the 4-digit CID number (Verification Code). The CID can be found on the FRONT of the card, above the Credit Card number on either the right or the left side of the card number.

- * Discover Card/MasterCard/Visa Card

Enter the 3-digit CID number (Verification Code). The CID can be found on the BACK of the card. The full Credit Card number is located in the signature box and at the end of this number is the CID.

You may be prompted to wait while the credit card is processed.

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

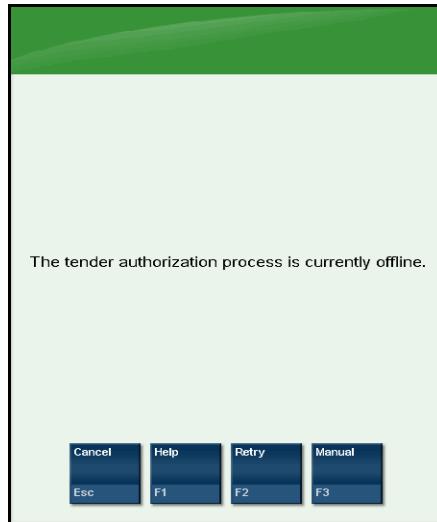
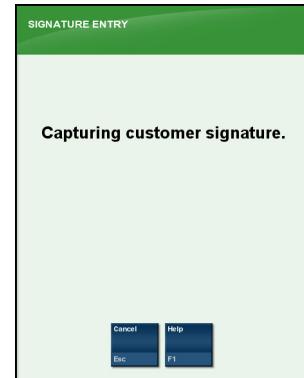


Figure 4-18: Tender Authorization Offline Prompt

- Select the **Cancel** option to re-tender with another tender type. Oracle Retail Xstore Point of Service returns to the tender list where you can select a different tender type.
 - Select the **Retry** option to attempt to process the card again.
 - If available, select the **Manual** option to begin the manual authorization process.
7. To authorize the card manually, follow the instructions and enter the authorization number.
 8. If applicable, wait while the customer signs the signature capture device.



Note: Depending upon your store policy, the customer may not be prompted for a signature based on a store-defined transaction total limit.

Sale Tenders

9. If applicable, verify the customer's signature matches the signature on the credit card.

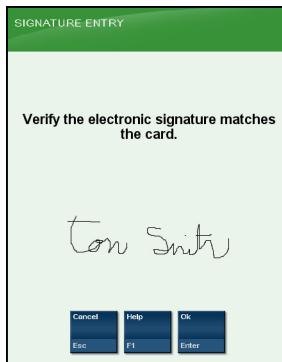
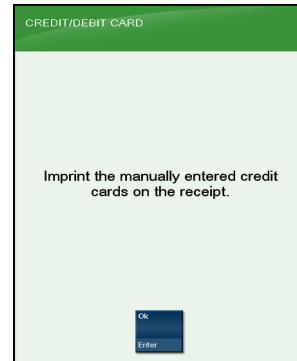


Figure 4-19: Electronic Signature

Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#) for more information about sending email receipts.

10. If prompted, select **Yes** to confirm the sale is complete.
11. If the credit card information was entered manually, a prompt displays asking you to imprint the manually entered credit card(s) on the receipt. Press [**Enter**] to continue.



Depending upon your system's configuration, you may see an additional prompt if the customer did not sign on the [PIN pad](#) device.

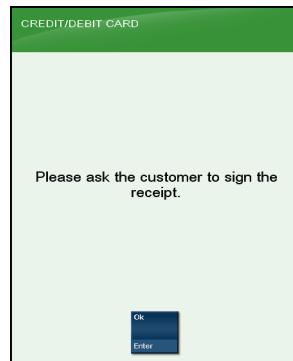


Figure 4-20: Prompt to Sign Receipt

12. Press [**Enter**] to complete the transaction.

13. If multiple receipts print, one is for the customer and one is for the store. The receipt with the customer signature line and credit card imprint area is for the store. The credit card type (Visa, MasterCard, etc.), credit card number (masked), and total amount charged appear on the receipt.



14. 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, Oracle Retail Xstore Point of Service asks whether to issue a TFI.
- Select **Yes** to issue a TFI. See [Issue a Tax Free Invoice](#) for instructions on issuing a TFI.
 - Select **No** to complete the transaction without issuing a TFI.

Debit Card

Debit cards are very similar to credit cards and many debit cards are also credit cards with popular credit card company logos. Debit cards differ from credit cards because they require a PIN number (personal identification number). The customer must enter the PIN number using a PIN pad device. The money is then deducted from the customer's primary account.

1. After all items have been entered or scanned, select **Add Tenders** or press **[Enter]**. Oracle Retail Xstore Point of Service displays the Sale Tender list.
2. Use the up and down arrow keys to select the **Credit/Debit** option and then press **[Enter]**.
3. Swipe Debit card using the MSR or the PIN pad device.

Note: Manual entry is not accepted.

The order of steps 3 and 4 vary depending on the processor you are using. You may be prompted to enter the amount before swiping the card.

4. If the customer's debit card can also be used as a credit card, the system prompts for the card type. The customer must select the **Debit** option on the PIN pad device and then press **[Enter]** to continue.
5. At the debit card amount prompt, enter the amount or accept the default amount due and then press **[Enter]**.
6. After the customer swipes the debit card, the PIN pad device prompts the customer to enter the PIN number and then press **[Enter]**. Oracle Retail Xstore Point of Service

Sale Tenders

displays a message while the customer enters the PIN number on the PIN pad device.

The system processes the information and displays the **Sale Complete** message.

The receipt indicates that the purchase was paid with a debit card and shows the amount tendered.

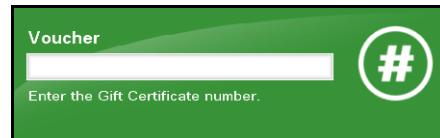
Gift Certificate

- The system records valid gift certificate numbers issued and their amounts. A warning displays if the number you enter is invalid.
 - If your system is configured for gift certificate validation, it may access a remote authorization service or connect to the corporate system to validate the gift certificate number.
 - When using a gift certificate to tender a transaction, Oracle Retail Xstore Point of Service first determines which currency the gift certificate is in. If this currency is different than your store's local currency, then the foreign tender amount of the gift certificate is automatically converted to the local tender and amount using the current exchange rate on file. This localization is shown on the view port and printed on the receipt.
-

1. After all items are entered or scanned, select **Add Tenders** or press [**Enter**]. Oracle Retail Xstore Point of Service displays the Sale Tender list. Use the up and down arrow keys to select the **Gift Certificate** option and then press [**Enter**].

Note: A similar type of tender that may be configured in your system is known as a *Mall Certificate*. It differs from a gift certificate in its ability to be used at any participating store, but it is processed as a gift certificate.

2. Scan or enter the gift certificate number and press [**Enter**].
 - If Oracle Retail Xstore Point of Service locates the gift certificate record, the gift certificate value is applied to the transaction automatically.
 - If Oracle Retail Xstore Point of Service cannot locate the gift certificate record, Xstore prompts: Invalid Gift Certificate number entered. Select **Ok** and re-enter the voucher number. If needed, select **Esc** to return to the Sale Tender list.
3. The tender is processed as follows:
 - 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.
 - If the gift certificate does not cover the entire amount of the purchase, the screen automatically returns to the Sale Tender screen where you are prompted to choose another tender to make up the difference. Use the up and down arrow keys to select another tender and then press [**Enter**] to continue tendering the sale transaction.



- At the Sale Complete prompt, press [Y] to print the receipt, or if applicable, receipts are sent in an email.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#) for more information about sending email receipts.

The receipt shows the total due, the gift certificate number and amount, change due, balance due, and, if necessary, the tender type used to pay any balance due.

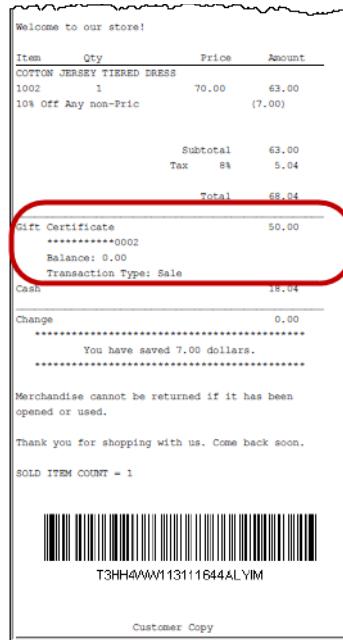


Figure 4-21: Receipt Example - Gift Certificate Tender

Note: If prompted, insert the gift certificate into the printer for franking and follow the prompts to continue.

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 for example, \$10.00, \$20.00, \$50.00, and \$100.00.

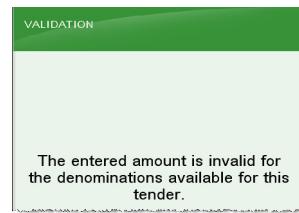
1. After all items have been entered or scanned, select **Add Tenders** or press [Enter]. Oracle Retail Xstore Point of Service displays the Sale Tender list. Use the up and down arrow keys to select the **Traveler's Check** option and then press [Enter].
 2. Enter the traveler's check amount and then press [Enter].

Tender

Enter US Traveler Check amount.

Figure 4-22: Traveler's Check Amount Prompt

Tip: 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.

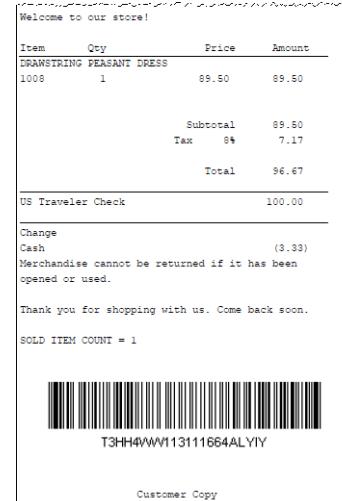


3. The traveler's check value is applied to the transaction:
 - If the traveler's check is worth more than the amount of the purchase, a store credit, gift card, cash, or other tender is issued as change for the remaining balance, depending upon your store policy.
 - If the traveler's check does not cover the entire amount of the purchase, the screen automatically returns to the Sale Tender screen where you are prompted to choose another tender to make up the difference. Use the up and down arrow keys to select another tender and then press [Enter] to continue tendering the sale transaction.
4. At the Sale Complete prompt, press [Y] to print the receipt.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#) for more information about sending email receipts.

Note: If prompted, place the traveler's check into the printer for franking and follow the prompts to continue.

The receipt indicates that the purchase was paid with a traveler's check and shows the amount of the check.



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. After all items have been entered or scanned, select **Add Tenders** or press [**Enter**]. Oracle Retail Xstore Point of Service displays the Sale Tender list. Use the up and down arrow keys to select the **Foreign Currency** option and then press [**Enter**].
2. Oracle Retail Xstore Point of Service displays a list of the foreign tender types accepted at your store. Use the up and down arrow keys to select the type of foreign currency received and then press [**Enter**].

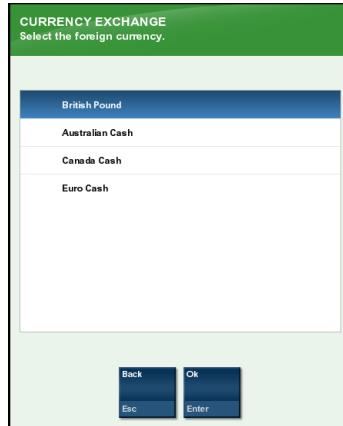


Figure 4-23: List of Foreign Currency Types Accepted

3. Enter the foreign currency amount you received from the customer and then press [**Enter**], or select one of the Quick Cash buttons from the menu. The prompt shows the foreign tender amount required to fulfill the balance owed.

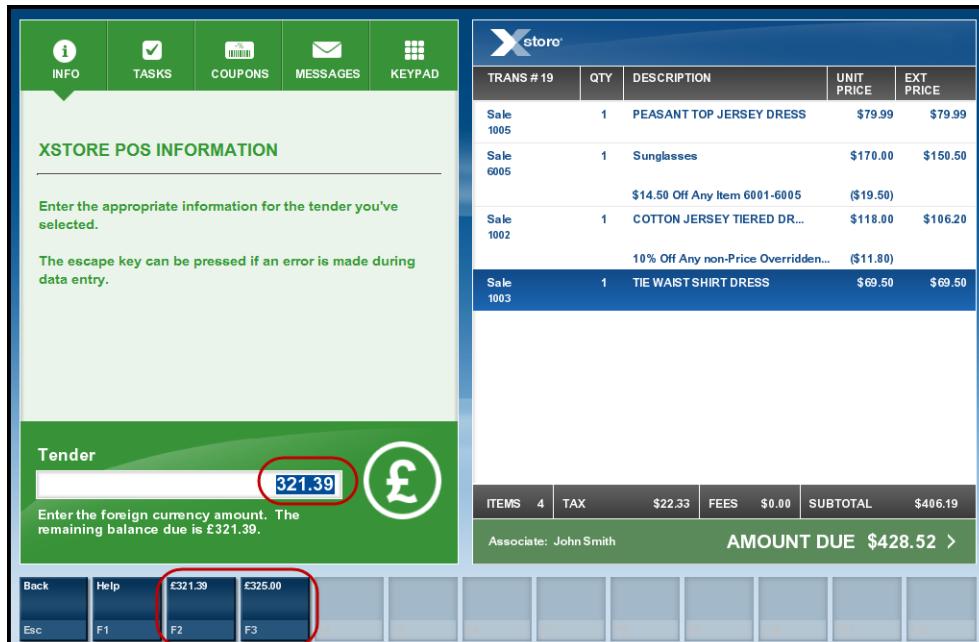


Figure 4-24: Foreign Currency Amount Prompt/Quick Cash Buttons

Sale Tenders

The foreign currency amount you enter is converted to the local currency and shown on the View Port.

Note: If the foreign currency amount does not cover the entire purchase amount, you must select another tender type and enter the additional amount to cover the remaining balance.

4. At the Sale Complete prompt, press [Y] to print the receipt.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#) for more information about sending email receipts.

5. If the customer would like to receive the change due as foreign currency, follow the instructions in [Foreign Currency as Change](#).

The receipt indicates which foreign currency was tendered in the transaction. Also included are the total currency tendered, the exchange rate, the converted amount in local currency, and change due in local currency.

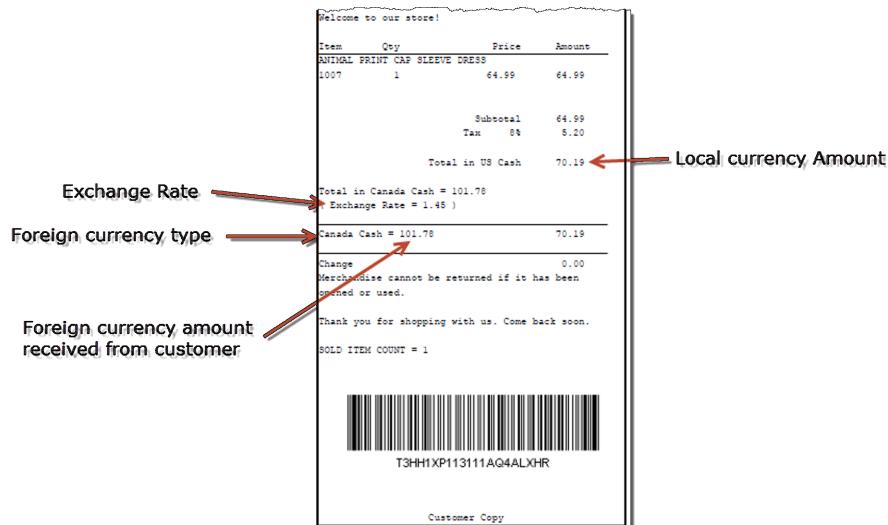
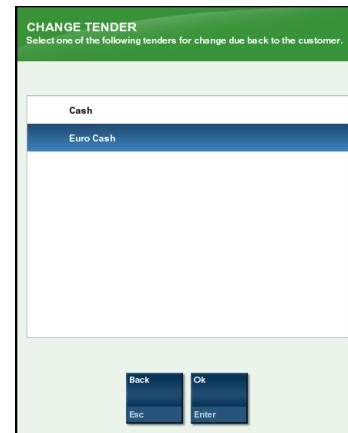


Figure 4-25: Receipt Example - Foreign Currency with Local Change

Foreign Currency as Change

Xstore can be configured to provide certain foreign currency as change when a customer tenders with foreign currency.

- If your store allows change to be given in foreign currency, the system prompts with a list of any foreign tenders that were used in the transaction as well as the local currency. Select from the list and press [Enter].



Important: If the amount due exceeds the cash change limit, Xstore 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.

- If there is enough Foreign Cash in the till, a prompt displays indicating the amount of foreign currency due.

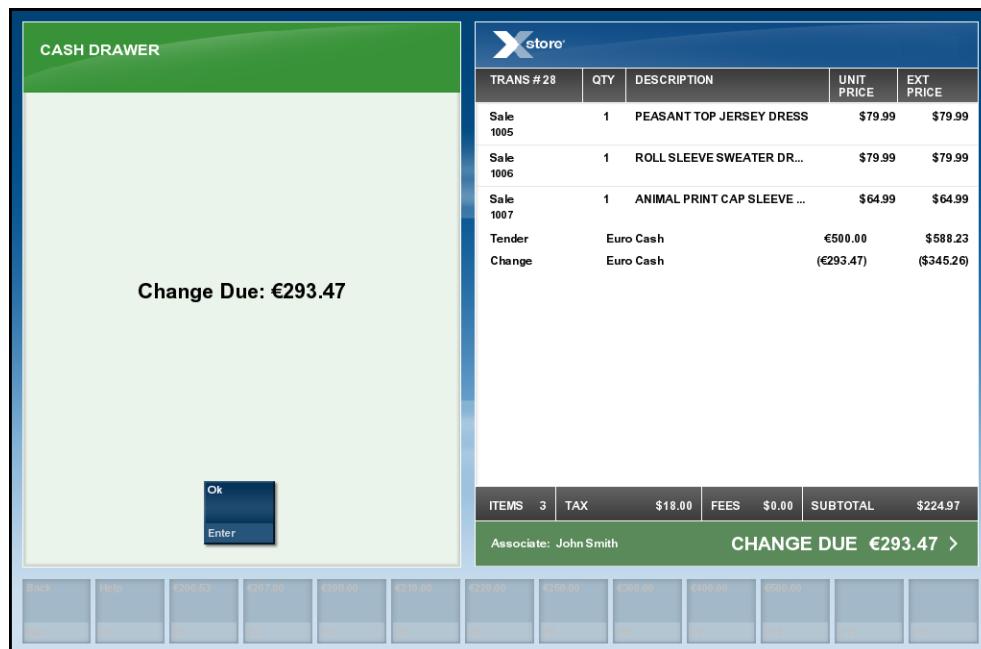


Figure 4-26: Change Due

- If there is *not* enough Foreign Cash Currency in the till, the transaction will either require a manager's override or you will have to select a different currency.

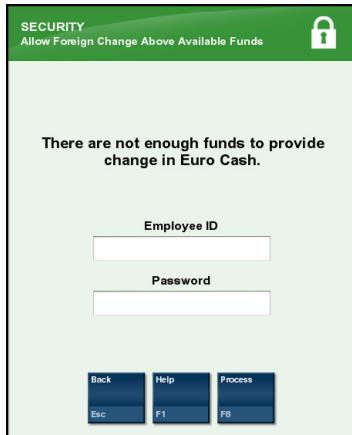


Figure 4-27: Not Enough Funds - Override Allowed

- * If a manager override is allowed, a manager must enter an **Employee ID** and **Password** to override.
 - * If a manager override is not allowed, select the **Back** button to display the cash currency list available to provide as change.
2. Close the cash drawer to continue and press [**Enter**].
 3. At the Sale Complete prompt, press [**Y**] to print the receipt. The receipt indicates the currency provided as change.

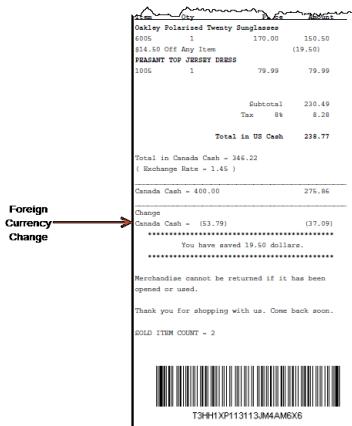


Figure 4-28: Foreign Currency with Foreign Change Receipt

Note: If you made a mistake and selected the wrong foreign tender, a tender exchange will need to be performed. See [Tender Exchange](#).

Redeem Store Credit

- The system maintains a record of valid store credit numbers and their amounts. A warning message displays if the store credit number is invalid.
- If your system is configured for corporate store credit validation, the system connects to the corporate system and validates the store credit number.
- When a store credit is used to tender a transaction, Oracle Retail Xstore Point of Service first determines which currency the store credit is in. If this currency is different than your store's local currency, then the foreign tender amount of the store credit is automatically converted to the local tender and amount using the current exchange rate on file. This localization is shown on the view port and printed on the receipt.

1. When all items have been entered or scanned, press [Enter] or select **Add Tenders**.
2. Use the up and down arrow keys to select the **Redeem Store Credit** option and then press [Enter].
3. Scan or type the store credit serial number found on the credit document and then press [Enter].

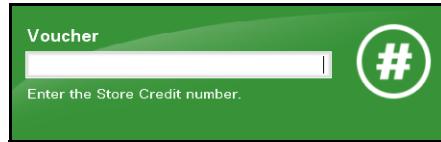


Figure 4-29: Store Credit Number Prompt

4. Oracle Retail Xstore Point of Service retrieves the store credit amount from the database and applies the store credit value 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 Sale Tender screen where you are prompted to choose another tender to make up the difference. Use the up and down arrow keys to select another tender and then press [Enter] to continue tendering the sale transaction.
5. At the Sale Complete prompt, press [Y] to print the receipt.

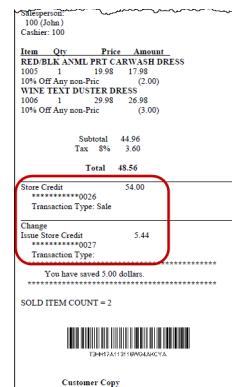
Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#) for more information about sending email receipts.

Note: If prompted, press [Enter] to close the Remember to sign the store credit voucher message.

If prompted, insert the store credit document into the printer for franking and follow the prompts to continue.

Sale Tenders

The receipt shows the total due, the store credit number (masked) and amount, balance due and, if necessary, the tender type used to pay the balance due. In this example, change due was issued as another store credit.



Coupon Tender

- When all items have been entered or scanned in a sale transaction, press [Enter] or select **Add Tenders**. Use the up and down arrow keys to select the **Coupon** tender option and then press [Enter].
- Scan or type the coupon serial number found on the coupon and then press [Enter].

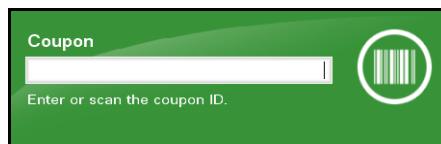


Figure 4-30: Coupon ID Prompt

- Depending upon the coupon type, you may be prompted to enter the coupon value. If prompted, enter the coupon amount and press [Enter].



Figure 4-31: Coupon Amount Prompt

- Oracle Retail Xstore Point of Service applies the coupon value to the transaction:
 - If the coupon is worth more than the amount of the purchase, a store credit, gift card, cash, or other tender may be issued as change for the remaining balance, depending upon your store policy.
 - If the coupon does not cover the entire amount of the purchase, the system automatically returns to the Sale Tender screen where you are prompted to choose another tender to make up the difference. Use the up or down arrow keys to select another tender and then press [Enter] to continue tendering the sale transaction.
- At the Sale Complete prompt, press [Y] to print the receipt.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#) for more information about sending email receipts.

Note: If prompted, insert the coupon into the printer for franking and follow the prompts to continue.

The receipt shows the total due, the coupon number and amount, change due, balance due and, if necessary, the tender type used to pay any balance due.

Redeem Merchandise Credit Card

1. When all items have been entered or scanned in a sale transaction, press [Enter] or select **Add Tenders**. Use the up and down arrow keys to select the **Redeem Merch Credit Card** tender option and then press [Enter].
2. At the merchandise credit card number prompt, enter the card number and press [Enter].

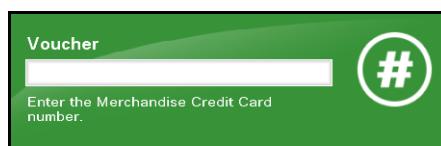


Figure 4-32: Merchandise Credit Card Number Prompt

3. At the merchandise credit card amount prompt, enter the amount or accept the default amount due and then press [Enter].
 - The system maintains a record of valid merchandise credit card numbers and their amounts. A warning message displays if the merchandise credit card is invalid.
 - If your system is configured for corporate merchandise credit card validation, the system may access a remote authorization service or a corporate system to validate the merchandise credit card.
4. The information is processed, and when complete, a prompt displays asking if the sale is complete. Press [Y] for Yes to continue and complete the sale.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#) for more information about sending email receipts.

The receipt indicates that the purchase was paid with a merchandise credit card, shows the amount tendered, and the change received.

House Account

A House Account allows a customer to use an in-house account as a form of tender and to make payments to the account. This type of account must be in an active state to be used as tender by the customer.

Note: A customer cannot over tender (pay more than the amount total) using a house account as payment.

1. When all items have been entered or scanned in a sale transaction, press [Enter] or select **Add Tenders**. Use the up and down arrow keys to select the **House Account** tender option and then press [Enter].
 - If there is no customer assigned to the transaction, you are prompted to add one. Select **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.
2. The system displays a list of authorized buyers associated with this House Account. Select the authorized buyer from the list and press [Enter].

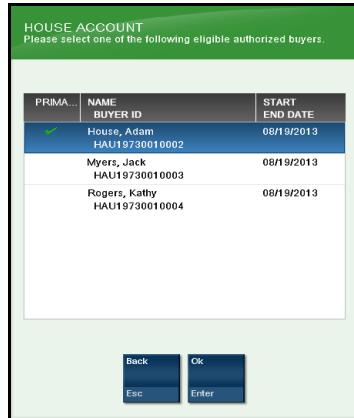


Figure 4-33: House Account Authorized Buyer List

3. Enter the amount to be charged to the House Account and press [Enter] to continue.



Figure 4-34: House Account Amount Prompt

Based on the amount entered in the House Account Amount Prompt, you may have the following options:

- If the amount is within the account limit, skip to step 5.
- If the amount exceeds the account limit, but is within the override limit,

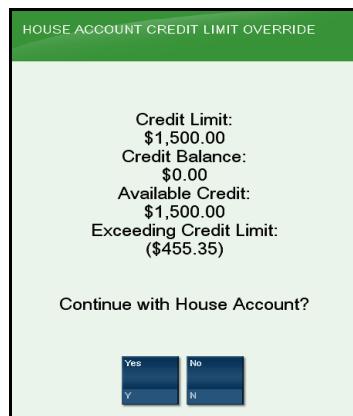


Figure 4-35: House Account Over-Limit Prompt

- * Select **Yes** to use the House Account tender and continue with step 5.
<OR>
- * Select **No** to tender the transaction with a lower House Account amount and the balance with a different tender, then continue with step 5.
<OR>
- * Select **No** to use a different tender for the transaction, then continue with step 5.
- 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. Press [Enter] to close the prompt. Tender the transaction with a lower House Account amount and the balance with a different tender, or use a different tender for the transaction.

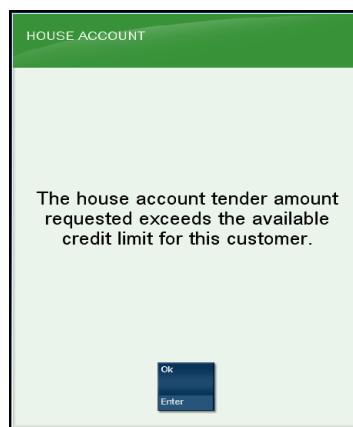


Figure 4-36: Requested Amount Exceeds Credit Limit Prompt

4. If prompted, ask the customer to sign on the PIN pad device and press [Enter] after verifying the customer's signature.

Sale Tenders

5. At the Sale Complete prompt, press [Y] to print the receipt.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#) for more information about sending email receipts.

The receipt indicates that the purchase was paid with a House Account, shows the amount tendered, the authorized buyer, and other information as required based on your store policy.

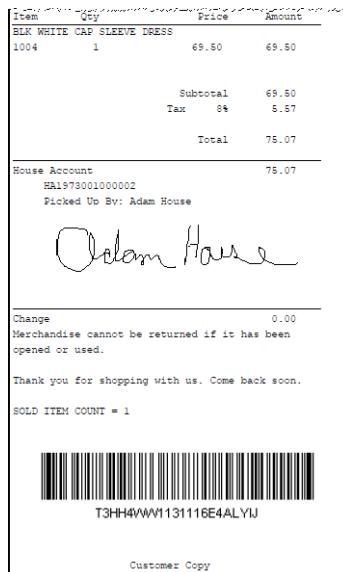


Figure 4-37: House Account Tender Receipt

Gift Card

1. When all items have been entered or scanned, use the up and down arrow keys to select the **Gift Card** tender option and then press [**Enter**].
2. At the card number prompt, scan or type the gift card number and then press [**Enter**].

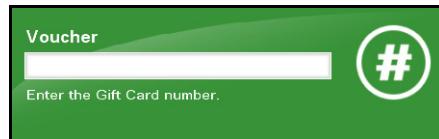


Figure 4-38: Gift Card Number Prompt

3. At the gift card amount prompt, enter the amount to be charged to this gift card or accept the default for the total transaction amount and then press [**Enter**].



Figure 4-39: Gift Card Amount Prompt

4. The system processes the information:

- If the amount entered exceeds the available gift card balance, you are notified that the amount requested exceeds the approved amount on the card.

You can accept the amount to reduce the card balance to zero and then choose another tender to complete the transaction, or you can re-tender using a different tender. (The gift card tender must be voided to replace it with another tender).

- If the balance of the gift card matches or exceeds the requested amount, the Sale Complete prompt displays.
- If the tender authorization is currently offline, you can manually process the gift card just as you would a credit card. See step [6](#).

- At the Sale Complete prompt, press [Y] to print the receipt.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#) for more information about sending email receipts.

The receipt indicates that the purchase was paid with a gift card and shows the amount tendered.



Note: The receipt may be configured to display the new balance available on the card.

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. When all items have been entered or scanned, use the up and down arrow keys to select the **Room Charge** tender option and then press [Enter].
2. At the Guest Lookup form, enter lookup information in one of the fields. Any additional information you enter into another field is ignored. Select **Process** to search.

The form is titled "GUEST LOOKUP" with the sub-instruction "Enter search criteria." It contains three input fields: "Room #: 110", "Guest Name:", and "Guest #:". Below these fields is a note: "Only fill in one field to search on. All others will be ignored." At the bottom are three buttons: "Back" (labeled "Esc"), "Help" (labeled "F1"), and "Process".

Figure 4-40: Guest Lookup Form

3. Select the guest's name from the Guest Selection list and press [Enter].
4. When prompted, enter the amount to be charged to the guest's room bill or accept the default for the total transaction amount, then press [Enter] to continue.
5. When prompted, ask the guest to sign for the room charge and complete the sale transaction.

The receipt indicates that the purchase was charged to the guest's room bill and shows the amount tendered.

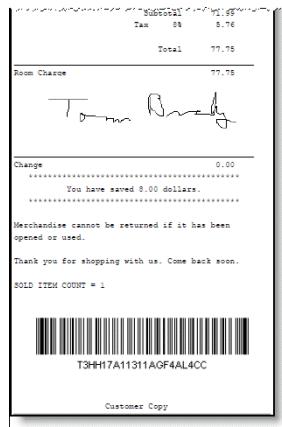


Figure 4-41: Receipt Example - Room Charge Tender

Return Tenders (Refunds)

Return tenders are the tendering types used when money is owed to the customer. The tender types available for sales may be different than those available for refunds. To tender a return, refer to the section for the appropriate tender type indicated below.

Note: Depending on your store policy, returns may be pro-rata for discounts.

Tender Type	Refer to
Cash	Cash
Mail Check Refund	Mail Check Refund - Home Office Check
Credit Card	Credit Card
Debit card	Debit Card
Issue Store Credit	Issue Store Credit
Issue/Reload Merchandise Card	Issue/Reload Merchandise Credit Card
Issue/Reload Gift Card	Issue/Reload Gift Card
Refund Room Charge	Refund Room Charge
House Account	Refund House Account

Note:

- Verified returns always are processed in your 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

- When all items have been entered or scanned in a return transaction, press [Enter] or select **Add Tenders**. Use the up and down arrow keys to select the **Cash** option and then press [Enter].

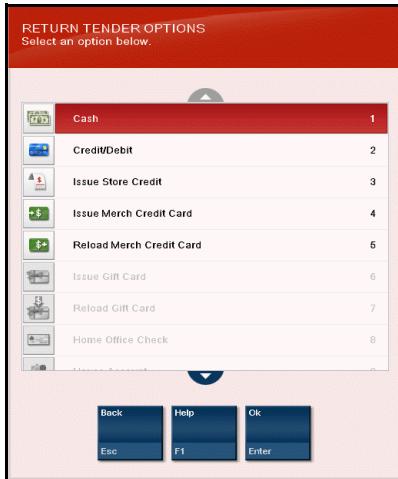


Figure 4-42: Return Tender List - Cash Option

- Depending upon the configuration of your system, the Cash Refund Amount prompt may default to the total amount for the return transaction. Enter the amount of cash to be returned to the customer and then press [Enter].



Figure 4-43: Cash Refund Amount Prompt

Note: If the Tender you are using contains decimal points, enter dollar amounts as dollars and cents without decimal point. For example, for \$10.00 you would enter 1000. Oracle Retail Xstore Point of Service automatically supplies a decimal point in the correct position. If your store requires manager approval for cash refunds over a pre-set amount, you must obtain manager approval for the refund.

Important: The refund amount may not exceed the transaction amount. Press [Enter] to close the prompt "Over tendering a refund transaction is not allowed."

- At the Sale Complete prompt, press [Y] to print the receipt.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#) for more information about sending email receipts.

4. If you decide to complete the sale, Oracle Retail Xstore Point of Service opens the cash drawer to allow you to refund money to the customer.

If configured, a prompt displays reminding you to close the cash drawer. After the cash drawer is closed, the sale receipt is printed or sent in an email and the system is ready for the next transaction.



Figure 4-44: Return Receipt Example - Cash Tender Refund

5. Depending upon the configuration of your system, you may be prompted to scan a cash drawer. Scan the appropriate cash drawer for your system.

If you are prompted that the cash drawer is unavailable, either wait for the cash drawer to become available, or scan a different cash drawer.

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.

1. When all items have been entered or scanned in a sale transaction, press [Enter] or select **Add Tenders**. Use the up and down arrow keys to select the **Home Office Check** option and then press [Enter].
2. Verify the recipient's information is correct and select **Save Changes** to continue.

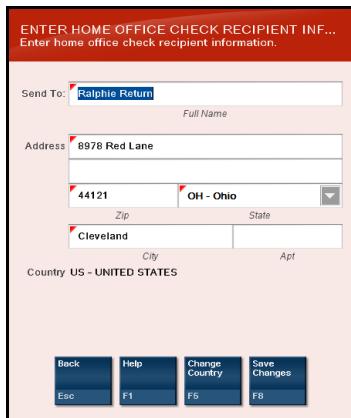


Figure 4-45: Home Office Check Information

3. Depending upon the configuration of your system, the Home Office Check Amount prompt may default to the total amount for the return transaction. Enter the amount to be returned to the customer and then press [Enter].



Figure 4-46: Home Office Check Amount Prompt

Important: The refund amount may not exceed the transaction amount. Press [Enter] to close the prompt "Over tendering a refund transaction is not allowed."

4. At the Sale Complete prompt, press [Y] to print the receipt.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#) for more information about sending email receipts.

The system prints receipts as required.

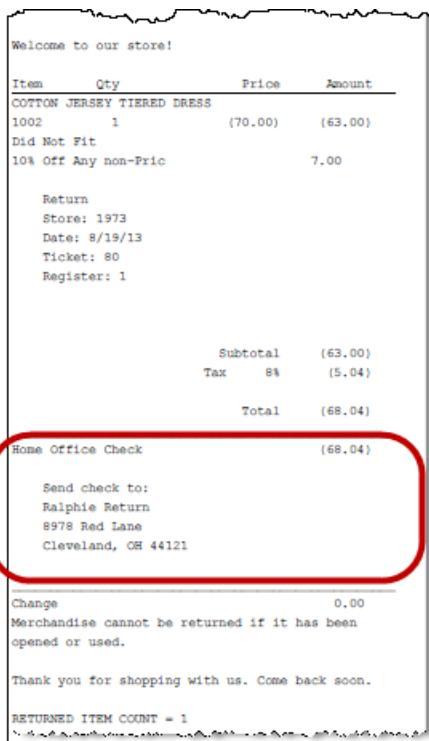


Figure 4-47: Return Receipt Example - Home Office Check Refund

5. Depending upon the configuration of your system, you may be prompted to scan a cash drawer. Scan the appropriate cash drawer for your system.
If you are prompted that the cash drawer is unavailable, either wait for the cash drawer to become available, or scan a different cash drawer.

Credit Card

If the customer used a credit card for the original sale transaction and you are performing a verified return, Oracle Retail Xstore Point of Service presents the original credit card as a return tender option. You can refund the return amount to the credit card or you can press [Esc] to return to the tender list and select a different tender type to complete the return transaction.

Verified Return (Original Receipt)

1. If the customer used a credit card to tender the original transaction, Oracle Retail Xstore Point of Service automatically displays the credit card information for the original transaction when you tender the return.

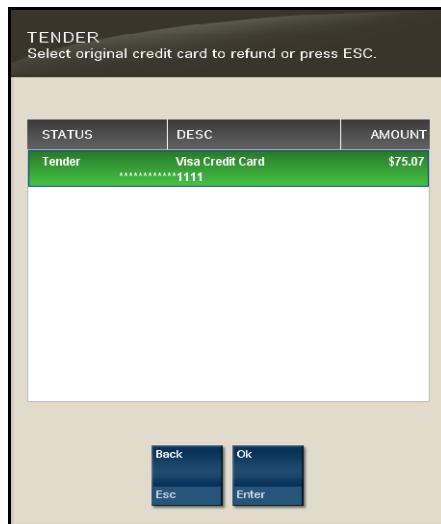


Figure 4-48: Original Credit Card List

2. Either select a credit card from the list, or press [Esc] to choose a different tender for the refund:
 - If you select an original credit card from the list, Oracle Retail Xstore Point of Service processes the refund amount to the credit card and prompts you to confirm that the sale is complete. Press [Y] for Yes to complete the return transaction.
 - If you press [Esc], select a tender from the Return Tender list and follow the prompts to complete the return transaction. The prompts that are displayed depend upon the tender you select.

The credit card type (Visa, MasterCard, etc.), credit card number (masked), and total amount refunded to the card appear on the receipt.

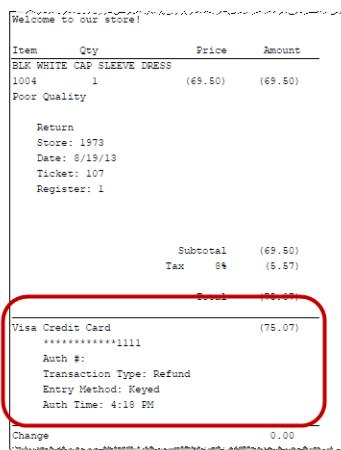


Figure 4-49: Return Receipt Example - Credit Card Tender Refund

3. Depending upon the configuration of your system, you may be prompted to scan a cash drawer. Scan the appropriate cash drawer for your system.
If you are prompted that the cash drawer is unavailable, either wait for the cash drawer to become available, or scan a different cash drawer.

Blind Return (No Original Receipt)

1. When all items have been entered or scanned, press [Enter] or select **Add Tenders**.
2. Use the up and down arrow keys to select the **Credit/Debit** card option and then press [Enter].

Important: If your processor does not allow credit card keyboard entry or MSR swiping, instruct the customer to swipe the card on the PIN pad device and skip to step 4. Examples of processors that restrict keyboard and MSR entry include EFTLink and Tender Retail.

3. At the card number prompt, swipe the credit card using the MSR or enter the card number manually, pressing [Enter] to process.

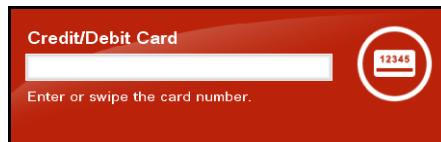


Figure 4-50: Credit/Debit Card Prompt

Note: If you swipe the credit card, Oracle Retail Xstore Point of Service automatically captures the card number and expiration date. If you manually enter the credit card number, Oracle Retail Xstore Point of Service prompts for the expiration date.

Return Tenders (Refunds)

4. At the refund amount prompt, enter the amount or accept the default amount to be returned to the customer, then press [Enter].



Figure 4-51: Refund Amount Prompt

Important: The refund amount may not exceed the transaction amount. Press [Enter] to close the prompt "Over tendering a refund transaction is not allowed."

5. Oracle Retail Xstore Point of Service processes the refund to the credit card and prompts if the sale is complete. At the Sale Complete prompt, press [Y] to print the receipt.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#) for more information about sending email receipts.

The credit card type (Visa, MasterCard, etc.), credit card number (masked), and total amount refunded to the card appear on the receipt.

6. Depending upon the configuration of your system, you may be prompted to scan a cash drawer. Scan the appropriate cash drawer for your system.

If you are prompted that the cash drawer is unavailable, either wait for the cash drawer to become available, or scan a different cash drawer.

Debit Card

Depending upon your store policy, you may credit a customer's debit card during a return transaction. This process is similar to the steps for crediting a customer's credit card with the following exceptions:

1. The customer is prompted to swipe the debit card through the PIN pad device. When the debit card is swiped, Oracle Retail Xstore Point of Service captures the card number and expiration date.
2. The customer is prompted to enter the PIN number and press a button on the PIN pad device. The authorization is completed after a few moments and the refund is applied to the customer's debit card.
3. The debit card number (masked) and total amount refunded to the account appear on the receipt.
4. Depending upon the configuration of your system, you may be prompted to scan a cash drawer. Scan the appropriate cash drawer for your system.

If you are prompted that the cash drawer is unavailable, either wait for the cash drawer to become available, or scan a different cash drawer.

Issue Store Credit

1. When all items have been entered or scanned, use the up and down arrow keys to select the **Issue Store Credit** option and then press [**Enter**].
2. At the prompt for the Issue Store Credit amount, enter the amount to be applied to the store credit and press [**Enter**].

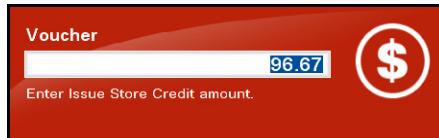


Figure 4-52: Issue Store Credit Amount Prompt

Note: Depending upon the configuration of your system, this prompt may default to the total transaction amount. Or if the transaction total exceeds the maximum amount allowed for store credit, the prompt defaults to the maximum value and you are prompted to select another refund tender to complete the transaction.

The refund amount may not exceed the transaction amount. Press [**Enter**] to close the prompt “Over tendering a refund transaction is not allowed.”

3. If prompted, press [**Enter**] to close the “Remember to sign the store credit voucher” message.
4. At the Sale Complete prompt, press [**Y**] to print the receipt.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#) for more information about sending email receipts.

Return Tenders (Refunds)

The system prints receipts as required, including a Store Credit voucher.



Figure 4-53: Store Credit Voucher

Item	Qty	Price	Amount
DRAWMSTRING PEASANT DRESS	1	(89.50)	(89.50)
Better Price Somewhere Else.			
		Subtotal	(89.50)
		Tax	8%
			(7.17)
		Total	(96.67)
Issue Store Credit			
*****0002			
Balance: 96.67			
Transaction Type: Refund			
Change		0.00	
Merchandise cannot be returned if it has been opened or used.			
Thank you for shopping with us. Come back soon.			
RETURNED ITEM COUNT = 1			

Figure 4-54: Store Credit Refund Receipt - Customer Copy

5. Depending upon the configuration of your system, you may be prompted to scan a cash drawer. Scan the appropriate cash drawer for your system.
If you are prompted that the cash drawer is unavailable, either wait for the cash drawer to become available, or scan a different cash drawer.

Issue/Reload Merchandise Credit Card

1. When all items have been entered or scanned, use the up and down arrow keys to select the **Issue Merch Credit Card** option or the **Reload Merch Credit Card** option and then press [Enter].

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.

2. At the merchandise credit card number prompt, scan the card or enter the card number manually and press [Enter] to continue.

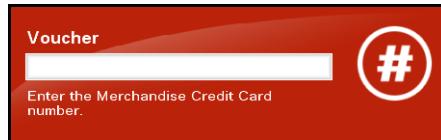


Figure 4-55: Merchandise Credit Card Number Prompt

3. At the prompt for the amount, enter the amount to be applied to the merchandise credit card (issue or reload) and then press [Enter].

Oracle Retail Xstore Point of Service processes the information and the refund amount is applied to either a new card or to the customer's existing card.

4. At the Sale Complete prompt, press [Y] to print the receipt.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#) for more information about sending email receipts.

The merchandise credit card number (masked) and total amount refunded to the card appear on the receipt.

5. Depending upon the configuration of your system, you may be prompted to scan a cash drawer. Scan the appropriate cash drawer for your system.

If you are prompted that the cash drawer is unavailable, either wait for the cash drawer to become available, or scan a different cash drawer.

Issue/Reload Gift Card

To issue a new gift card or to reload a customer's current gift card for a refund, follow the steps described in [Issue/Reload Merchandise Credit Card](#) above. The procedure is the same for both a gift card and for a merchandise credit card.

Note: Be sure to select the Gift Card option instead of Merchandise Credit Card.

Refund Room Charge

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

1. When all items have been entered or scanned in a return transaction, press [Enter] or select **Add Tenders**. Use the up and down arrow keys to select the **Refund Room Charge** option and then press [Enter].
2. At the Guest Lookup form, enter the information to find the guest's room number. Only enter lookup information in one of the fields. Any additional information you enter into another field are ignored. Select **Process** to search.

The form is titled "GUEST LOOKUP" with the sub-instruction "Enter search criteria." It contains three input fields: "Room #:", "Guest Name:", and "Guest #:". Below the fields is a note: "Only fill in one field to search on. All others will be ignored." At the bottom are three function key buttons: "Back" (Esc), "Help" (F1), and "Process" (F6).

3. Select the guest's name from the Guest Selection list and press [Enter].
4. Enter the amount to be refunded to the guest's room bill or accept the default for the total transaction amount, then press [Enter] to continue.
5. When prompted, select **Yes** to confirm that the transaction is complete.

Return Tenders (Refunds)

6. Ask the customer to sign the receipt.

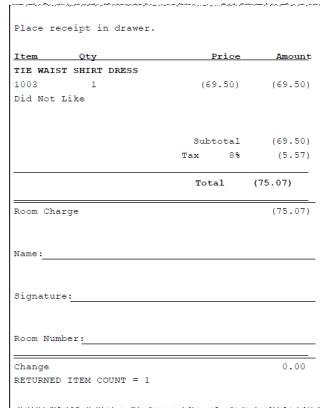


Figure 4-56: Refund Room Charge Receipt

The receipt indicates that the purchase was refunded to the guest's room bill and shows the amount refunded.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#) for more information about sending email receipts.

7. Depending upon the configuration of your system, you may be prompted to scan a cash drawer. Scan the appropriate cash drawer for your system.

If you are prompted that the cash drawer is unavailable, either wait for the cash drawer to become available, or scan a different cash drawer.

Refund House Account

This tender type is only available for customers with valid house accounts.

1. When all items have been entered or scanned, use the up and down arrow keys to select the **House Account** option from the Return Tender Options list and then press [Enter].
2. Select the Authorized Buyer from the list and press [Enter].

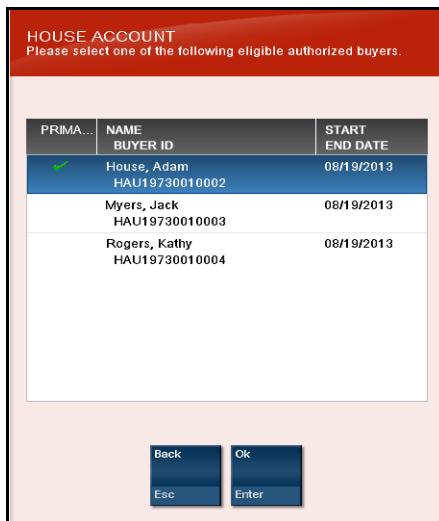


Figure 4-57: House Account

3. At the refund amount prompt, enter the amount or accept the default amount to be applied to the House Account and press [Enter].



Figure 4-58: Refund House Account Prompt

Note: If you do not refund the total amount to the House Account, you are prompted to select another refund tender to complete the transaction.

4. If prompted, ask the customer to sign the receipt.
5. At the Sale Complete prompt, press [Y] to print the receipt.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#) for more information about sending email receipts.

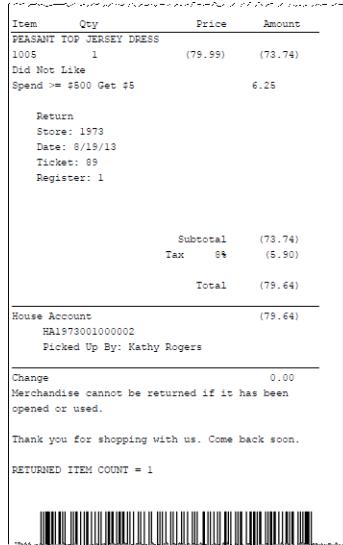


Figure 4-59: Return Receipt: Refund to House Account Example

6. Depending upon the configuration of your system, you may be prompted to scan a cash drawer. Scan the appropriate cash drawer for your system.

If you are prompted that the cash drawer is unavailable, either wait for the cash drawer to become available, or scan a different cash drawer.

Split Tenders

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

1. From the list of tenders, use the up and down arrow keys to select the first method of payment.
2. Enter the amount to be paid with this tender and then press [Enter].
3. After the first tender has been exchanged, the screen automatically returns to the Sale Tender list. Use the up and down arrow keys to select the second method of payment and then press [Enter].
4. Follow all prompts as required for the tender type chosen and then enter the amount of the remaining balance.

The Sale 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 total amount due.

5. At the Sale Complete prompt, press [Y] to print the receipt or press [N] for No to return to the previous screen.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#) for more information about sending email receipts.

6. Depending upon the tender types chosen, a message may appear reminding you to close the cash drawer. Once the cash drawer has been closed, the system is ready for the next transaction.

Changing Tenders

To change tender amounts and delete tenders during the tendering process:

- At the Sale Complete prompt, do one of the following:

- If you see this message, press [N] for No to return to the Sale Tender list.
- If you see this message, press [Esc] to return to the Sale Tender list.

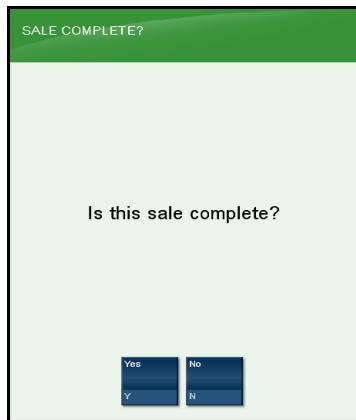


Figure 4-60: Sale Complete Prompt - No Email Options

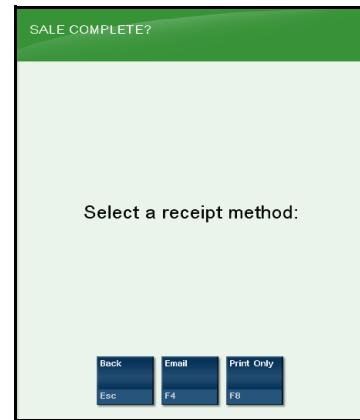


Figure 4-61: Sale Complete Prompt - Email Receipt Options

Note: The background color of the Sale Complete prompt screens vary depending on what form you are in.

- Use the up and down arrow keys to select the **Modify Tender** option and then press **[Enter]**.

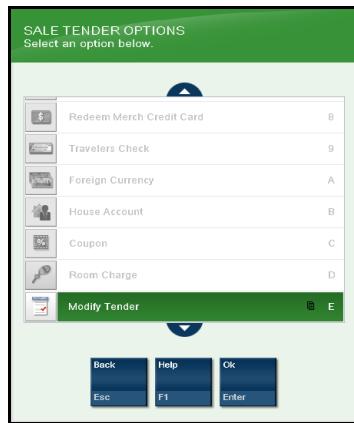


Figure 4-62: Sale Tender List - Modify Tender Option

Changing Tenders

3. Use the up and down arrow keys to select a Modify Tender option from the menu:

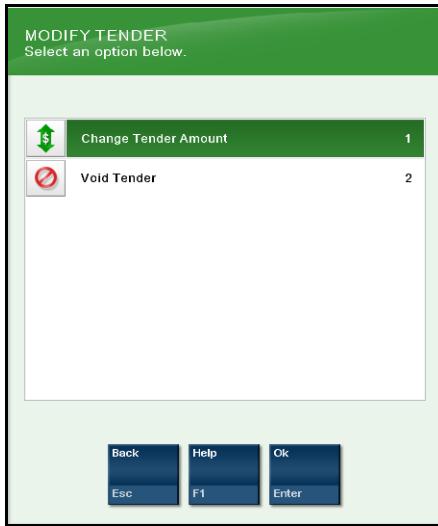
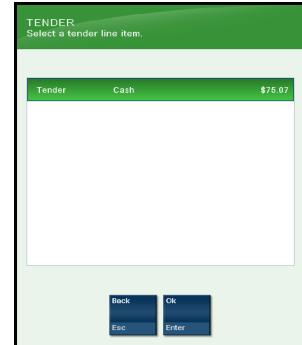


Figure 4-63: Modify Tender Options Menu

- Select the **Change Tender Amount** option to change the amount of a tender. See [Changing the Tender Amount](#).
- <OR>
- Select the **Void Tender** option to remove the tender from the sale. See [Voiding the Tender](#).

Changing the Tender Amount

1. If you selected the **Change Tender Amount** option, select the tender to be changed from a list of tenders on the current transaction and press [Enter]. Refer to [Modify Tender Options Menu](#).



Note: If no tenders in the transaction can be modified, you must void the tender. Press [Enter] to close the prompt "No tender is allowed to be changed." See [Voiding the Tender](#).

2. Enter the new amount for the selected tender and then press [Enter].



Figure 4-64: New Tender Amount Prompt

You must enter a new tender amount greater than \$0. If needed, use the **Void Tender** option to remove the tender type from the transaction and begin the tendering process again. Refer to [Modify Tender Options Menu](#).

Note: If the transaction still has a balance due, you must select another tender from the list of tenders to complete the transaction.

3. At the Sale Complete prompt, press [Y] to print the receipt.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#) for more information about sending email receipts.

Voiding the Tender

1. If you selected the **Void Tender** option, select the tender to be voided from a list of tenders on the current transaction and press [Enter]. Refer to [Modify Tender Options Menu](#).

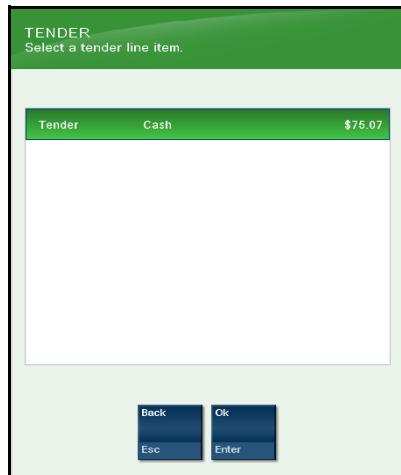


Figure 4-65: List of Tenders That Can Be Voided On The Current Transaction

2. Use the up and down arrow keys to select the tender you want to void, and then press [Enter]. Oracle Retail Xstore Point of Service removes the tender from the transaction.

Note: If the transaction still has a balance due, you must select another tender from the list of tenders to complete the transaction.

3. Use the up and down arrow keys to select a new tender from the Sale Tender list and press [Enter]. The new tender replaces the one that you removed from the transaction.

Currency Rounding

- Process the tender as usual. Once the tender has been processed, a prompt displays asking if the sale is complete. At the Sale Complete prompt, press [Y] to print the receipt.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Chapter 2, Email Receipt Options](#) for more information about sending email receipts.

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. Rounding became necessary when low denomination coins in a currency were removed from circulation and are no longer available. Since it may not be possible to make exact change for a cash purchase, rounding the total bill to the lowest available denomination of coinage is required. For these tenders, Oracle Retail Xstore Point of Service automatically applies rounding rules that enforce the minimum denomination value that can be accepted or refunded.

If payment is being tendered using a credit card, debit card, or check, no rounding is necessary.

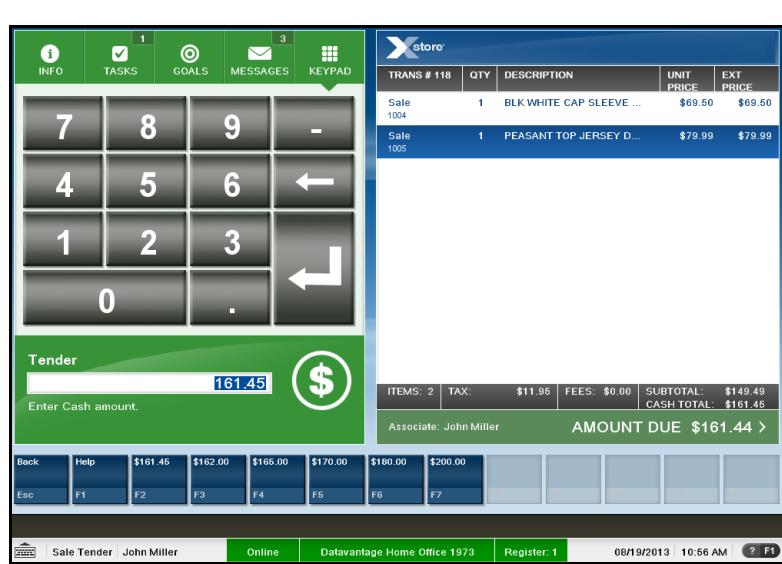
For example, in Australia, the 5 cent coin is the smallest-valued denomination currently in circulation. Because of this, all transaction amounts using Australian currency must be multiples of 5 cents. Oracle Retail Xstore Point of Service Currency Rounding performs the rounding required.

When Currency Rounding is in use, a Cash Total is displayed below the transaction Subtotal.

ITEMS: 2	TAX: \$11.95	FEES: \$0.00	SUBTOTAL: \$149.49
			CASH TOTAL: \$161.45
Associate: John Miller			AMOUNT DUE \$161.44 >

The Cash Total has been rounded to the nearest multiple of the Minimum Cash Denomination Value (for the base currency's cash tender).

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.

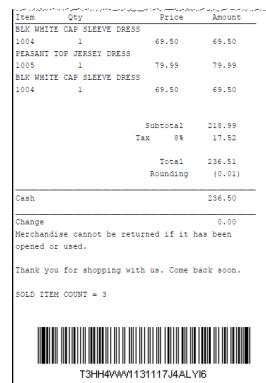


Figure 4-66: Receipt with Currency Rounding

5

Customer Maintenance

Overview

Customer Maintenance includes activities that relate to entering new customers into the customer database, updating customer information, 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. An associate must have privileges in the system to perform any customer maintenance activities.

Searching for a Customer Record

When you want to assign a customer to the sale during a transaction, the database is searched to see if the customer record already exists. If the record is found in the database, you may want to view the information or confirm that it is correct. If the record is not found in the customer database, you can create a new customer record and enter the information provided by the customer.

Note: You must first log in to the register by entering your employee ID and password at the login prompt.

1. Enter your search criteria and then select **Process**.

Note: If the customer has a loyalty card, you may swipe it. You can also search by Customer number.

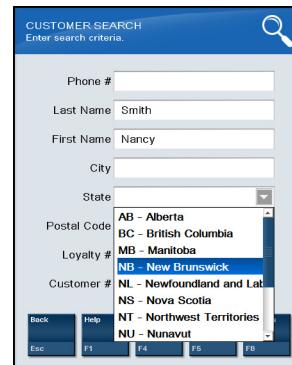
Searching for a Customer Record

The screenshot shows the 'CUSTOMER SEARCH' interface. At the top, it says 'Enter search criteria.' with a magnifying glass icon. Below are seven input fields: 'Phone #' (text), 'Last Name' (text), 'First Name' (text), 'City' (text), 'State' (dropdown menu), 'Postal Code' (text), 'Loyalty #' (text), and 'Customer #' (text). At the bottom are five function key buttons: 'Back' (Esc), 'Help' (F1), 'Skip' (F4), 'Change Country' (F5), and 'Process' (F6).

Figure 5-1: Customer Search Form

Tip: Enter as much information as possible in the Customer Search form to limit the number of customer records that are returned. You may enter partial names in the Last and First name fields.

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. Press [Enter] to close the message.



When applicable, use the *Change Country* menu option on the Customer Search screen to modify the drop-down State options and further refine your search. In this example, the search is for Nancy Smith and the country has been changed to Canada so that the drop-down options contain Canadian Provinces (New Brunswick).

2. If more than one customer record matches your search criteria, the system displays a list of customers.

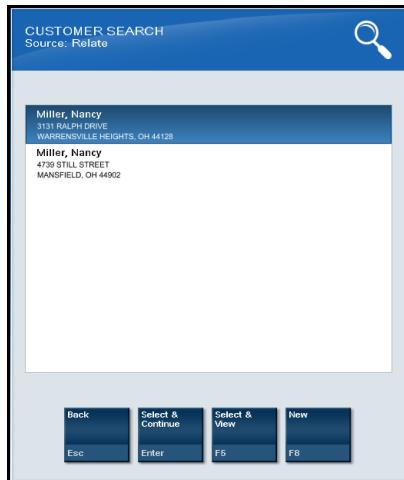


Figure 5-2: Customer Search Results

Note: The Source field below the header *Customer Search* indicates the data source from which this information was retrieved. The data source depends upon your system's configuration. If your system is integrated with the Oracle Retail Customer Engagement Cloud Services (formerly MICROS Retail Relate) application and the customers are found there, Customer Engagement is indicated as the source. Customers may also be found in other configurable sources such as the Oracle Retail Xstore Point of Service database or Xcenter.



Depending upon your system's configuration, the system may automatically display the Customer Maintenance screen when only one name matches the search criteria, rather than showing a list with only one customer name.

3. Choose one of these options:
 - **Back** – Returns to the Customer Search form.
 - **Select & Continue** – Assigns the selected name to the sale transaction.
 - **Select & View** – Opens the selected customer record for viewing, editing, or printing. Go to step 4.
 - **New** – Displays a form for adding a new customer record to the customer database.

If the name you want is not listed, select the **Back** option to return to the Customer Search form and enter the customer's full name or make additional entries in other searchable fields. Select **Process** to search again.

Searching for a Customer Record

If only one name matches the search criteria, the system may automatically display the customer record rather than presenting a list, if your system is set up to do so.

The screenshot shows a software interface for managing customer records. At the top, there's a header bar with tabs: Dashboard, Contact Information, Associations, Purchase History, Accounts, Tasks, Comments, Addresses, House Account, and Wish List. The Contact Information tab is currently selected. Below the header, there's a search bar with fields for First Name (James), Middle Name, Last Name (Forst), and dropdowns for Type (COMPANY), Address (Grandhaven Supply), Company (30500 Bruce Road), City (Solon), State (OH - Ohio), and Country (US - United States). On the left, there's a sidebar with sections for Contact Information (Home, Work, Mobile, Email) and Personal Information (Contact, Anniversary Date, Birth Date, Gender, Language). At the bottom, there are navigation buttons for Cancel, Help, Edit Customer (F3), Customer Options (F4), Previous Tab (F10), Next Tab (F11), and Esc.

Figure 5-3: Customer Record

4. Choose one of these options:
 - **Back** – Returns to the Customer Search form.
 - **Assign and Continue** - Associates the customer with the sale transaction.
 - **Edit Customer** - Allows you to change information in the customer record. See [Edit Customer](#).
 - **Customer Options** – Displays a list of customer options. See [Additional Customer Options](#). Options here include:
 - * Add a new customer record to the customer database.
 - * Print the customer record.
 - * Enroll the customer in the loyalty program.
 - * Maintain the customer's tax exemption information.
 - * Create a House Account for the customer.
 - **Previous Tab and Next Tab** - Provides navigation for the tabs on the screen:
 - * **Contact Information Tab:** Displays the customer's address, contact, and loyalty card information. It also contains an activity stream of recent transactions.
 - * **Groups & Personal Tab:** Displays information about the customer group, customer attributes, segment, tax exempt record, and personal data such as gender, anniversary date, etc.
 - * **Customer History Tab:** Displays sales history information about the customer
 - * **Customer Account Tab:** Displays information about the customer's accounts, including loyalty, and other transaction-related accounts.

- * **Tasks Tab:** Displays customer related tasks and appointments.
- * **Comments Tab:** Displays comments that have been entered about the customer.
- * **Addresses Tab:** Displays the customer's primary address and any other addresses on file.
- * **House Account Tab:** Displays information about the House Account associated with this customer. This tab is only active if the customer has a house account.
- * **Wish List Tab:** If your system is set up to use Customer Engagement, this tab displays the customer's wish list items. Otherwise, this tab is not active.
- * **Digital Cart Tab:** If your system is integrated with RXM, this tab displays the customer's digital cart. Otherwise, this tab is not active.

Note: See [Customer Information Tabs - Overview](#) for more information about each tab.

Adding a New Customer Record

If you search for a customer name and it is not found in the customer database, you can create a new record for the customer. The system displays a message as shown in the [Figure 5-4](#) below if there is no current record.

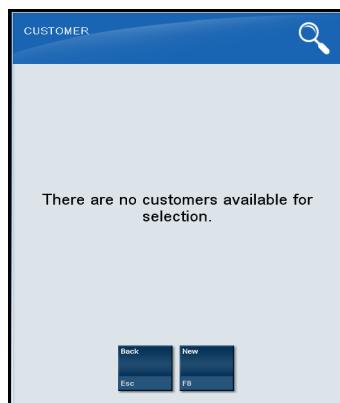


Figure 5-4: Customer Not Found Message

Adding a New Customer Record

1. Select **New** to display the Customer Maintenance Screen in edit mode. The form consists of nine tabs, each containing a different type of information about the customer.

Note: The information you entered in the Customer Search form automatically populates the appropriate fields on the customer maintenance screen.

2. Enter customer contact information. Your system may be configured to capture and display the following information on the Contact Information tab. Any of the fields may be designated as a required entry (per your store policy).

The screenshot shows the Oracle Retail Xstore Point of Service User Guide. The top navigation bar includes tabs for Dashboard, Contact Information (which is selected), Associations, Purchase History, Accounts, Tasks, Comments, Addresses, House Account, and Wish List. The main content area is titled 'Customer ID C01012001000004' and 'Customer Since'. It contains sections for 'Contact Information' and 'Personal Information'. In the 'Contact Information' section, fields include First Name (James), Middle Name, Last Name (Forst), Company (Grandhaven Supply), Address (30500 Bruce Road), Postal Code (44139), City (Solon), and State (OH - Ohio). The 'Personal Information' section includes fields for Home, Work, Mobile, and Email contact methods; Contact (checkboxes); Anniversary Date; Birth Date; Gender; and Language. A note at the bottom states: 'Tip: When you enter a valid postal code for the customer, the system automatically enters the city and state information.'

Figure 5-5: Contact Information Tab

- Any field that requires an entry is marked with a red triangle in the upper left corner of the field.
- Any field that has a selectable list of options displays a down arrow on the right side of the field.
- If your system is configured to provide Address Lookup functions, then an **Address Lookup** button will be available to allow you to quickly look up customer addresses using minimal information. See

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

Table 5-1: Contact Information Fields

Field Name	Description
First name, middle initial, last name	The system automatically creates an initial cap for the first letter you type here if you don't press the [Shift] key when entering the customer's name.
Company	If you enter a company name here, the Organization Type field becomes active.
Type	Associated with Company entries; for example, Club, Company, School, etc. This field is only active after a Company name is entered.
Address	Two address lines are provided. This is the customer's primary address.
Apartment #	Optional field.
Postal Code	The system automatically supplies the city and state if it recognizes the Zip/Postal code that you enter.
City	Automatically populated if the system recognizes the Zip/Postal code that you entered first.
State/Province	If you begin typing, the system auto-fills the field with states/provinces defined for your store.
Country	Defaults to the country in which the store is located, but can be changed using the Change Country . Changing the country will alter the drop-down options in the State field.
Home, Work, Mobile, and Email	As you enter data in these fields, the associated contact permission check marks become active. Indicate whether or not it is okay to contact the customer by selecting the corresponding Yes box.
Language	The language code for the customer's preferred language.
Preference	The customer's preferred method of contact.
Email receipts	Yes indicates the customer would like to have email receipts automatically selected when purchasing items.

Adding a New Customer Record

3. Select the Associations tab.

The screenshot shows the Oracle Retail Xstore Point of Service User Guide. At the top, it displays the customer's name (James Forst), Customer ID (C01012001000004), and the date since the customer was last updated. The main interface has several tabs: Dashboard, Contact Information, Associations (which is currently selected), Purchase History, Accounts, Tasks, Comments, Addresses, House Account, and Wish List. The Associations tab displays a list of group memberships (Customer Groups, Normal Level, Elite Program Member, Employee, Employee Family) and customer attributes (Customer Segments). Below these sections is a Tax Exempt Information section. At the bottom of the screen, there is a legend for keyboard shortcuts: Undo Changes (Esc), Help (F1), Change Country (F5), Save Changes (F8), Previous Tab (F10), Next Tab (F11).

Figure 5-6: Associations Tab Data Entry

- * Select a **Group Membership**. A customer may be associated with one or more groups. If groups are not defined, no customer groups are listed in this section.
- * Add **Personal Information**. The anniversary date will display as today's date.

Table 5-2: Groups & Personal Tab Fields

Field Name	Description
Group Membership	Select a membership if applicable. Your store may have badges such as silver assigned to various group memberships. The badge appears on the header of the Customer Maintenance Screen as well as the Customer Loyalty Banner on various sale screens.
Personal Information	Anniversary date, birth date, and gender. The gender will determine the avatar picture in the contact information tab.
Customer Attributes [NON-EDITABLE]	Attribute categories are defined by the home office and provide additional information about the customer.
Tax Exempt Information	To add tax exempt information see To Add or Maintain a Customer's Tax Exemptions .
Customer Segments [NON-EDITABLE]	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.

4. To add a comment to your new customer you must select **Save Changes** first and re-open the Customer Maintenance screen. Select the **Comments** tab to add comments. See [Comments Tab](#).
5. Select the **Addresses** tab to add and manage multiple addresses for the customer. See [Adding/Maintaining Multiple Customer Addresses](#).
6. Select the **House Accounts** tab to create and maintain a house account.
7. Select the **Wish List** tab to maintain a wish list. Depending on the configuration of your store this may not be available. See [Wish List Tab](#).

Note: The *non-editable* tabs are *Purchase History* and *Customer Account*. These tabs are populated with information automatically when the customer makes purchases.

When you save the data, a prompt may display asking if the customer would like to join the loyalty program.

8. After completing all of the data entry for the new customer, select the **Save Changes** option to store the new customer record in the database.
9. Depending on your system's configuration, you may be prompted to ask the customer about joining a loyalty program. The prompt that displays depends on your system's configuration:
 - **Customer-Centric:** Your store does not provide a physical card to the customer. The loyalty number is automatically assigned by the system and associated with the customer record.
 - **Card-Centric:** Your store provides a physical card with a loyalty account number for the customer. The card's loyalty number may be entered manually or swiped in a device.
10. Based on the customer's response to the loyalty registration prompt, take one of these actions:
 - If **Card-Centric configuration:** Enter the card number or swipe the loyalty card and select **Process** when prompted if the customer wants to join the loyalty program.
<OR>
If Customer-Centric configuration: Select **Yes** when prompted if the customer wants to join the loyalty program.
 - Select **Not Now** if the customer may join the loyalty program later.
 - Select **Never** if the customer is not interested in joining the loyalty program.
11. If you added the new customer record during a *sale transaction* (at the Sale screen), select the **Assign Customer To Tran** option to return to the sale. If you added the new customer during the *Pre-Sale activity*, the system automatically assigns the new customer to the sale transaction.

Locate Addresses Using 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 Oracle Retail Xstore Point of Service address capture screens, including handheld and tablet.

Note: Even if the Address Lookup function has been enabled, it may not be available for all countries.

To use Address Lookup:

1. Select the **Address Lookup** function to open the Address Lookup form.

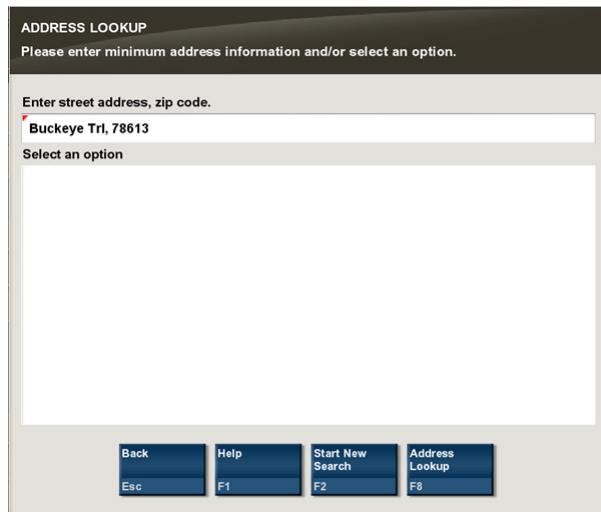


Figure 5-7: Address Lookup Window

2. Enter the first line of the address, followed by 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:

- In the US: Enter the first line of an address and a postal code, or enter the first line of the address, the city or town, and the state code.
 - In the UK: Enter the house number and postal code, or enter the first line of the address and the city/town.
-

3. Select the **Address Lookup** function.

- If only one matching address is found, continue with step 4.
- If too many addresses are found, you will be prompted to enter additional information.
- If no addresses are found, or the desired address is not in the results list, select **Start New Search** to start with a different address.

- If a number of possible address matches are found, they will be displayed in a list.

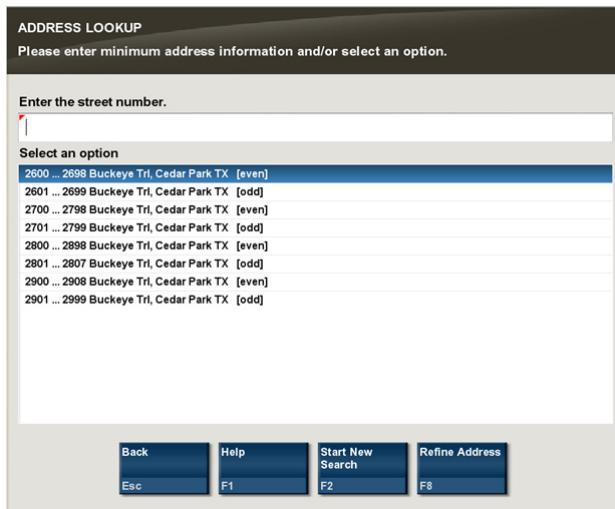
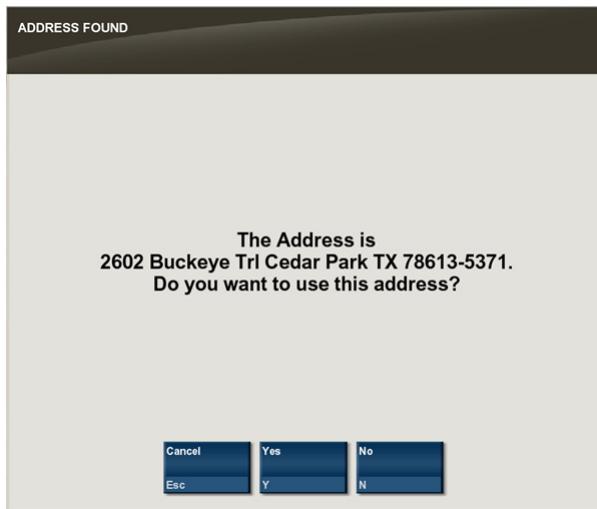


Figure 5-8: Address Lookup Results

- * If necessary, enter the street number or apartment number as requested and select **Refine Address**.
 - * If you see the correct address, select it from the list.
4. When prompted whether the address is correct:



- Select **Yes** to populate the address fields and close Address Lookup.
- Select **No** to return to Address Lookup.
- Select **Cancel** to exit Address Lookup without selecting an address.

Viewing a Customer Record

A customer record always opens in a read-only mode and cannot be edited unless you change to the editing mode. If you only need to see information or confirm that it is correct, just navigate between the tabs on the customer record.

1. The Customer record can be viewed when:

- Associating a Customer to a sale prior to the sale (highlight Customer if applicable and then select the **Select & View** button menu option) or during the sale (select **Customer Options --> View Customer**).
- Touch-screen user's tap the Customer Loyalty Banner within a Sales Transaction. Tap the Customer Loyalty Banner in the Customer Maintenance form to return to the Sales Transaction. See [Customer Maintenance Touch-Screen Navigation](#).

Note: The system may display the customer record automatically if only one record matches the search criteria you entered at the Customer Search form. The source for the customer record is also noted near the top of the results list.

The customer record opens in a read-only mode.

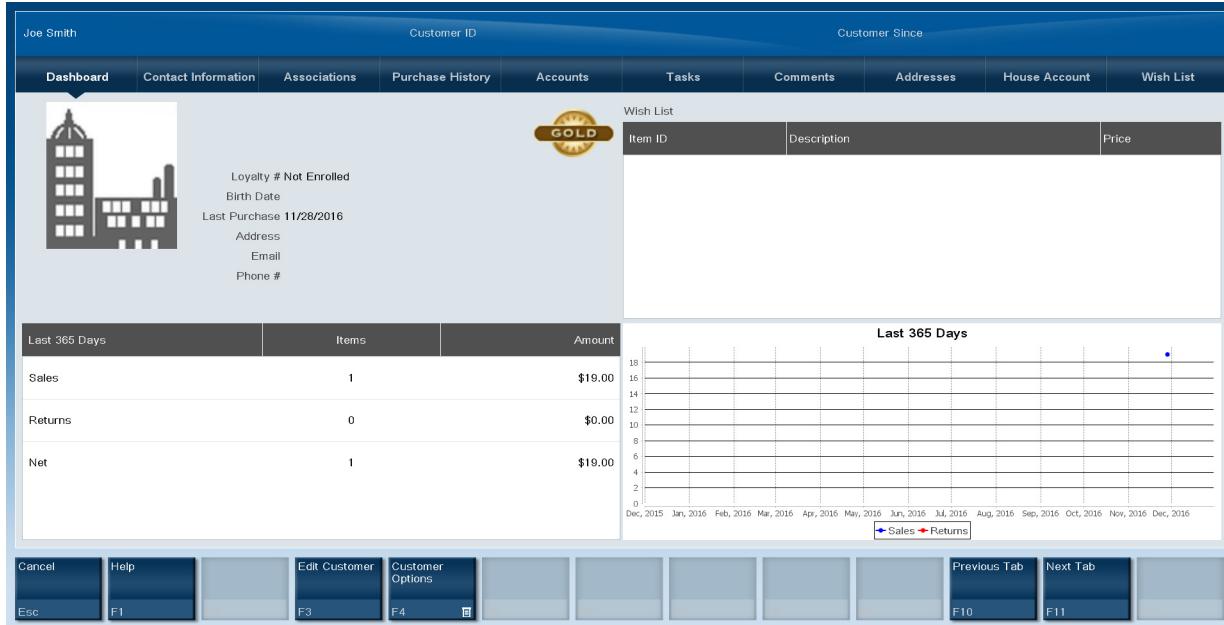


Figure 5-9: Customer Record in Read-Only Mode

Note: The photo area is always present. When a customer's image is not present, an avatar takes its place.

2. Navigate between the tabbed sections on the customer record by selecting the **Previous Tab** and **Next Tab** menu options. See [Customer Information Tabs - Overview](#) for more detail about the information found on each tab.

3. After you are finished viewing the customer record, select the **Back** option to return to the Customer Search form, or select the **Assign and Continue** option to return to the Register Sale screen where the customer's name is added to the sale transaction.

Customer Information Tabs - Overview

There are several tabs on the Customer Maintenance window. This section provides an overview of the information available on each tab.

Dashboard Tab

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

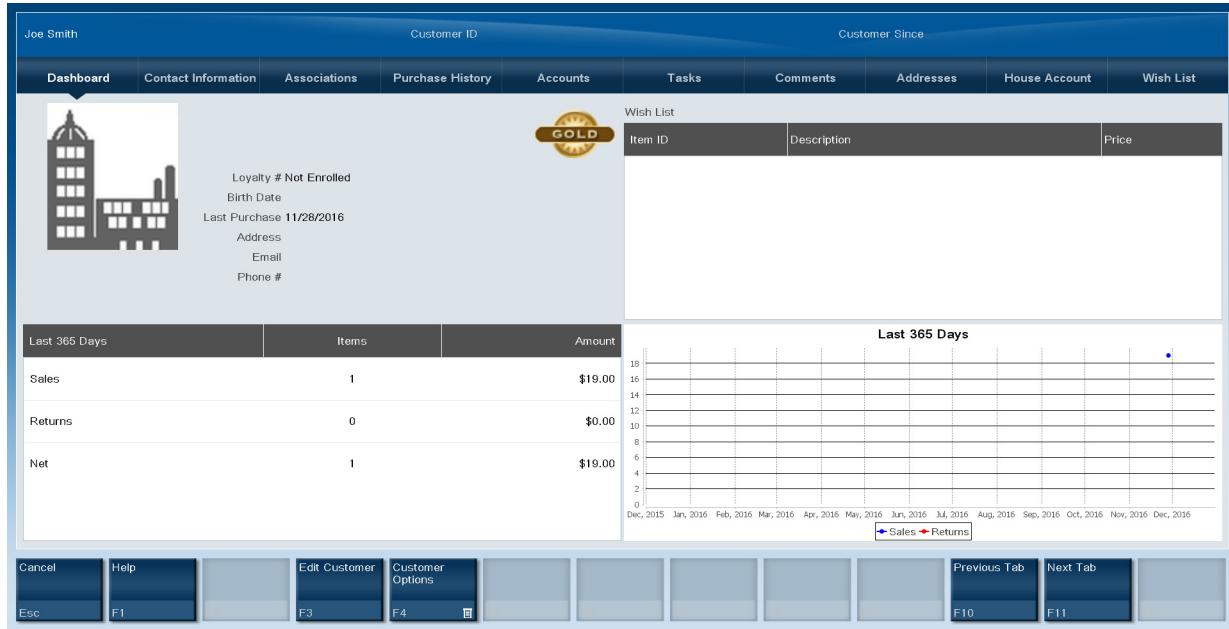


Figure 5-10: Customer Dashboard

This tab contains the following information:

- **Loyalty Information:** Displays the customer's loyalty level, loyalty card number, customer birthdate, primary address, primary email, and primary phone number.
- **Recent Transaction Counts:** Shows the number of items and total amount of all sales, returns, and net sales by the customer over the last 365.
- **Wish List:** Displays items in the customer's wish list.
- **Recent Transaction Graph:** Graphs the transactions for the customer over the last 365 days.

Contact Information Tab

This tab shows the customer name, address, phone and email information, and contact preferences. Your store may be configured to display anniversary, birthday, and loyalty expiration messages.

Note: To edit information, select *Edit Customer* and see [Edit Customer](#).

Viewing a Customer Record

The screenshot shows the Oracle Retail Xstore Point of Service interface. At the top, it displays the customer's name, James Forst, and the customer ID, C01012001000004. The title bar also includes tabs for Dashboard, Contact Information, Associations, Purchase History, Accounts, Tasks, Comments, Addresses, House Account, and Wish List. The Contact Information tab is currently selected. The main content area contains fields for basic contact information: First Name (James), Middle Name (empty), Last Name (Forst), Company (Grandhaven Supply), Address (30500 Bruce Road), Postal Code (44139), City (Solon), and State (OH - Ohio). Below these fields are sections for Contact Information and Personal Information. The Contact section includes fields for Home, Work, Mobile, and Email, all of which are currently empty. The Personal Information section includes fields for Contact (with four checkboxes), Anniversary Date, Birth Date, Gender, and Language, all of which are also empty. At the bottom of the screen, there are standard keyboard shortcut keys: Cancel (Esc), Help (F1), Edit Customer (F3), Customer Options (F4), Previous Tab (F10), and Next Tab (F11).

Figure 5-11: Contact Information

This tab contains the following information:

- **Address:** Basic identifying information about the customer.
- **Contact Information:** The customer's contact information and preferences for being contacted by the store. This includes whether or not we have permission to contact the customer.
 - **Contact:** The customer's preferred methods of contact.
 - **Email Receipts:** Yes indicates the customer would like to have email receipts as their default when purchasing items.
- **Personal Information:** Additional information beyond basic name and address. This information may be used as the store or organization determines. For example, a birthday card, gift, or discount coupon may be sent to the customer on his birthday. Your store may be configured so that the Birth Date field does not have a year associated with it.

Associations Tab

This tab lists any company-defined groups to which the customer belongs, and additional personal identifying information (party number and birth date, customer attributes, etc.).

Note: To edit information select *Edit Customer* and see [Edit Customer](#).

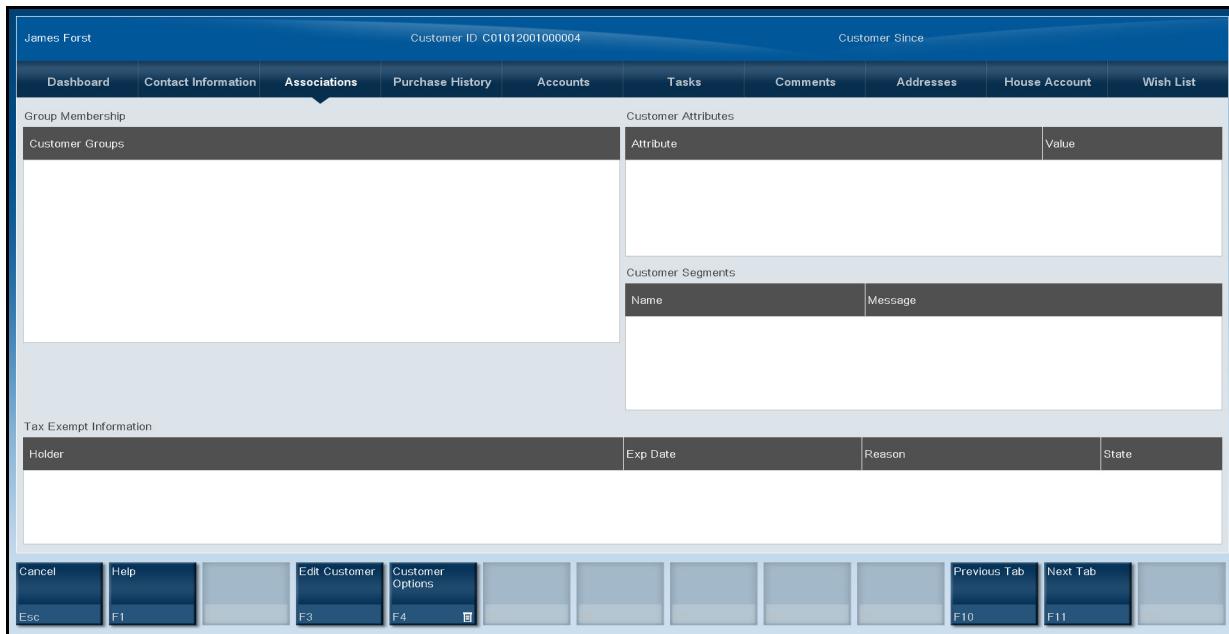


Figure 5-12: Associations Tab

The information categories on this screen include:

- **Group Membership:** Groups are defined by the store or home office and may be used for a variety of reasons. A customer may be associated with one or more groups. If groups are not defined, no customer groups are listed in this section.

Note: Your store may have banners such as Silver assigned to the various group memberships. These banners appear on the Customer Maintenance header as well as the Customer Loyalty Banner on sale screens.



- **Customer Attributes:** Attribute categories are defined by the home office and provide additional information about the customer.
- **Customer Segments:** 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. This section is not shown if your organization does not have a loyalty program.
- **Tax Exempt Information:** If a customer has a tax exemption, that information is displayed in this section. A customer may have one or more exemptions, and they may be updated as required.

Note: The amount of historical retail data displayed in the transaction detail and summary lists is determined by the home office and may not be 365 days as shown in this example.

Viewing a Customer Record

Purchase History Tab

This tab shows a detailed sales transaction listing for the customer for the last 365 days.

Note: To update the customer's tax exemption record, select the *Customer Options* menu option and choose *Tax Exemptions* from the customer options list. Refer to [To Add or Maintain a Customer's Tax Exemptions](#) for more information.

If available, a picture displays with item details in the INFO tab ([Figure 5-13](#)).

Tip: Touch-screen users swipe left to collapse and right to expand the transaction detail list. See [Purchase History Tab Navigation](#).

Date	Trans #	Location	Total
12/01/2016	50	101	\$10.62
	Item #: 330003	Blue L Tee Shirt	Qty: 1 Price: \$10.62
11/30/2016	43	101	\$31.87
	Item #: 330003	Blue L Tee Shirt	Qty: 1 Price: \$10.63
	Item #: 330004	Blue XL Tee Shirt	Qty: 1 Price: \$10.62
	Item #: 330005	Blue XXL Tee Shirt	Qty: 1 Price: \$10.62
11/28/2016	35	101	\$19.00
	Item #: 1030	Signature Red Shirt	Qty: 1 Price: \$19.00

Figure 5-13: Purchase History Information

- Transaction Detail - Last 365 Days:** This is a listing of all of the customer's transactions in which the customer was assigned to a sale transaction in the last 365 days. Data shown here includes the transaction date, the transaction Id, the location where the item was purchased, the transaction total, the type of transaction, the item Id and description, the item quantity, and the item price.

Note: The amount of historical retail data displayed in the transaction detail and summary lists is determined by the home office and may not be 365 days as shown in this example.

- Item Information:** Displays information about the item and, if available a picture of the item.

Customer Account Tab

Your system's configuration determines the kind of information displayed on this tab. 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. See [No Loyalty Program](#).

However, if your system is configured to use a loyalty program, only the customer's loyalty information is displayed, as seen in the following example.

The screenshot shows a software interface for viewing a customer record. At the top, there are tabs for Dashboard, Contact Information, Associations, Purchase History, Accounts (which is the active tab), Tasks, Comments, Addresses, House Account, and Wish List. Below the tabs, there are two main sections: 'Loyalty Cards' and 'Current Awards'. The 'Loyalty Cards' section has columns for Card #, Expires, Loyalty Account, Points, Award Account, and Awards. The 'Current Awards' section has columns for Card #, Coupon ID, Expires, and Amount. At the bottom, there are several buttons: Cancel, Help, Edit Customer, Customer Options, View Loyalty History, Print Balance Receipt, Print Loyalty History, Previous Tab, Next Tab, and keyboard shortcuts Esc, F1 through F11. The 'Accounts' tab is highlighted with a blue arrow pointing to it.

Figure 5-14: Customer Account Information

There are two information sections on this screen:

- **Loyalty Cards:** This area shows a list of all the loyalty cards assigned to the customer.
- **Current Awards:** This area shows a list of the customer's current awards. For each award, the card number, the coupon ID (if applicable), amount of the award, and the expiration date are shown.

Note: If the customer has more than 4 active awards, the first 3 awards display and the 4th row displays a message to print the balance receipt for full award listing. See page 146 for more information about printing the balance receipt.

- **Customer Account History:** This area lists updates to the customer's loyalty and award accounts. Information shown here includes:
 - **Account Type** - Type of loyalty account.
 - **Account ID** - ID of the loyalty account.
 - **Activity** - The type of activity:

- * Activated (Loyalty & Awards)
- * Deactivated (Loyalty & Awards)

- * Inquiry
- * Account Merge

Viewing a Customer Record

- | | |
|-------------------------------------|----------------------------------|
| * Issue Points (Loyalty) | * Change Earn Date |
| * Return Points (Loyalty) | * Void Award Transaction (Award) |
| * Void Points (Loyalty) | * Automatic Redeem Award (Award) |
| * Issue Award (Loyalty) | * Redeem Award (Award) |
| * Points Recovery (Loyalty) | * Issue Coupon (Award) |
| * Earn Points (Loyalty) | * Issue Birthday Coupon (Award) |
| * Points Balance Transfer (Loyalty) | * Issue Signup Coupon (Award) |
| * Change Level (Loyalty) | * Award Expiration (Award) |

- **Date** - The date and time when the transaction took place.
 - **Amount** - Amount of the transaction.
-

Note: About the list of accounts...

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

If there are too many records to display, the list view displays the account name and a message indicating the loyalty/award account history request attempted to retrieve too many records.

Customer Account Tab Menu Options

- **Print Balance Receipt** - This option prints a balance receipt on the receipt printer. Information on the receipt includes:
 - **Award Amount** - The amount, in currency, of the award.
 - **Expires** - The date when this award expires.
 - **Loyalty #** - The card number: all but the last four digits are masked.
 - **Program Name** - The name of the loyalty program.
 - **Program Level** - The level of the loyalty program.
 - **Total Escrow Points** - The total number of Escrow Points currently contained within the customer account.
 - **Total Earned Points** - The total number of points earned as reported by the CRM server.
- **Print Account History** - This option 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 Program

In the next example showing the Customer Account tab, the system is not configured for a loyalty program and the tab shows information about other types of accounts.

Customer Account Detail - This area 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.

Tasks Tab

The Tasks tab displays all tasks associated with the customer.

Tip: Select a heading (*Priority (P)*, *Date*, *Start Time*, etc.) to sort information by ascending or descending order.

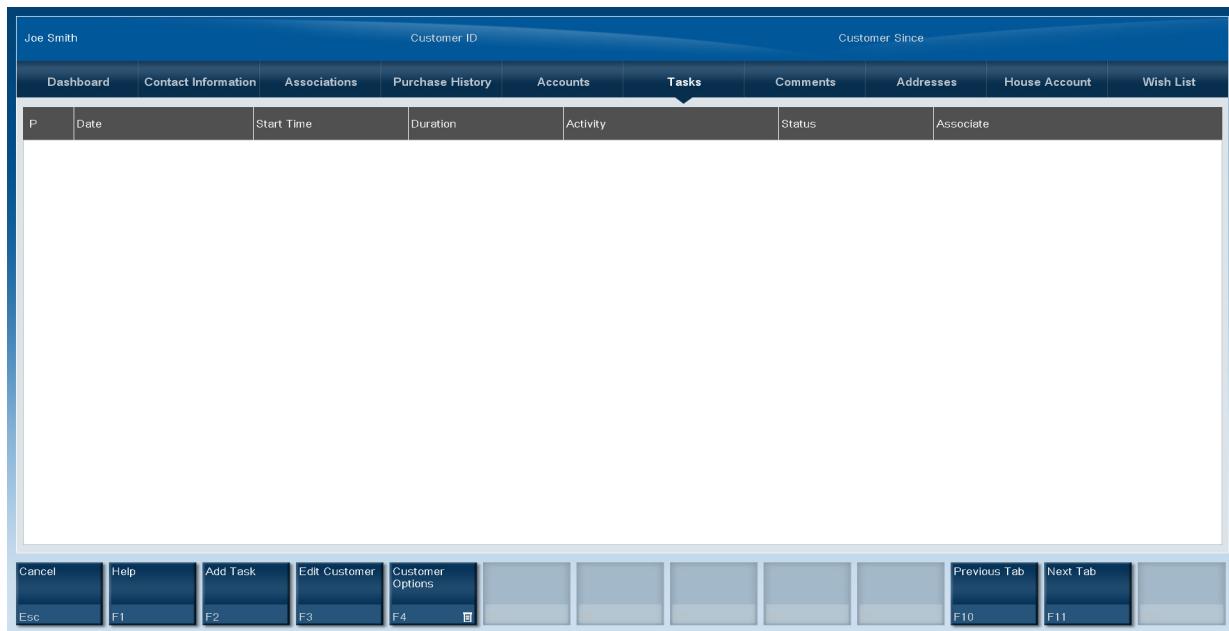


Figure 5-15: Tasks Tab Information

The Task tab displays the following:

Table 5-3: Task Tab Fields

Field	Description
Priority (P)	The Importance of the task (High (), Medium (none), or Low ().
Date	The date the task should be started.
Start Time	The time the task should begin.
Duration	The length of time for the task.
Activity	Type of task.

Viewing a Customer Record

Table 5-3: Task Tab Fields

Field	Description
Status	Indicates the progress of the task: Open - The appointment is open, but not started. In Progress - The appointment has been started, but not completed. Cancelled - The appointment has been cancelled and cannot be reopened or edited. Closed - The appointment has been completed and cannot be reopened or edited.
Associate	The employee or employee group responsible for completing the task.

To view the information and further refine your list, see [Viewing Task Information](#). Instructions for maintaining tasks are the same as using the My Task screen. Refer to the following:

- [Adding a Task](#)
- [Adding Notes](#)
- [Editing a Task](#)

Important: You cannot update the status of a task from the Customer Maintenance screen, you must use the My Tasks screen. See [Updating Task Progress](#).

Comments Tab

The Comments tab shows any comments associated with this customer.

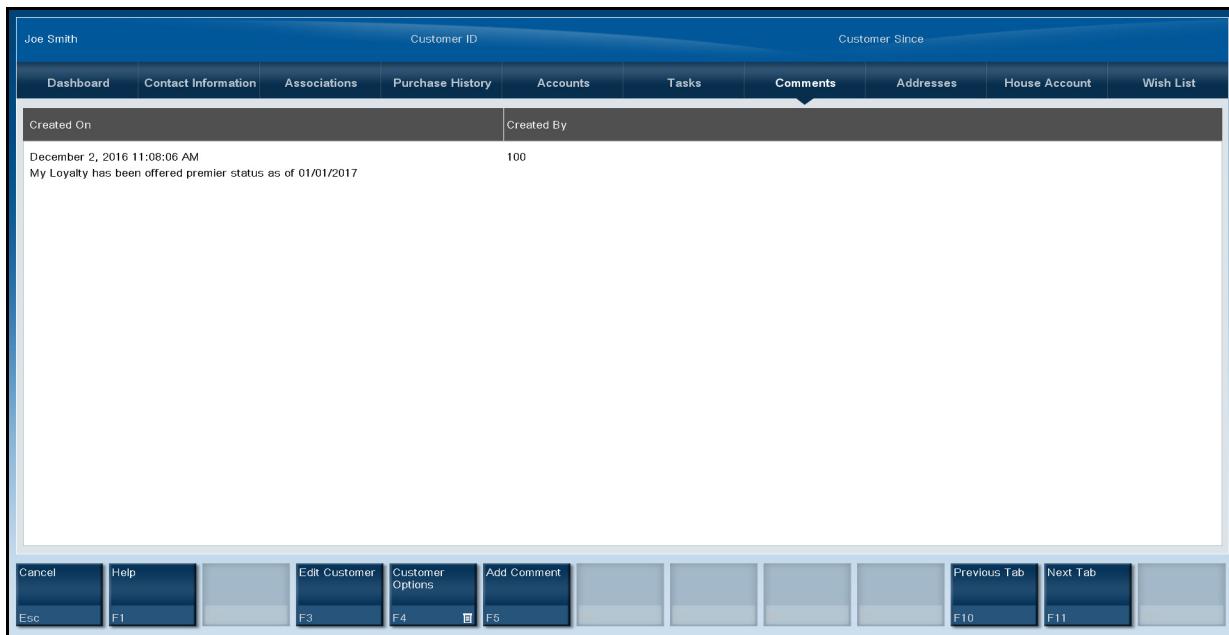


Figure 5-16: Comments Tab (Edit Mode)

Note: Select the *Add Comment* menu button option to add a new comment for this customer.

If the *Add Comment* button is not available, you may be entering a new customer. Save Changes first and then add the comment.

Viewing a Customer Record

Addresses Tab

This tab shows multiple addresses for the customer, and provides the ability to add new addresses as needed; for example, a work location or vacation home address. See [Adding/Maintaining Multiple Customer Addresses](#) for more information about the options available for adding/editing the address information.

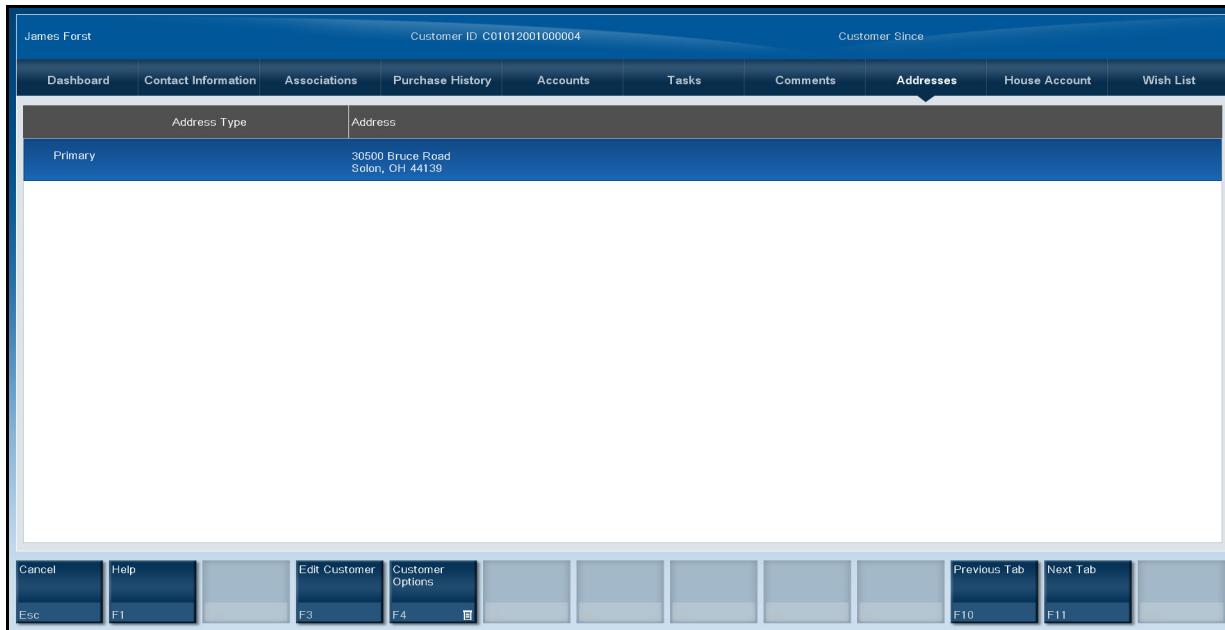


Figure 5-17: Addresses Tab

House Account Tab

This tab shows information about a customer's House Account. This information is only available for customers who have set up a valid house account. To set up a House Account, if allowed per your store policy, see [To Create a House Account](#).

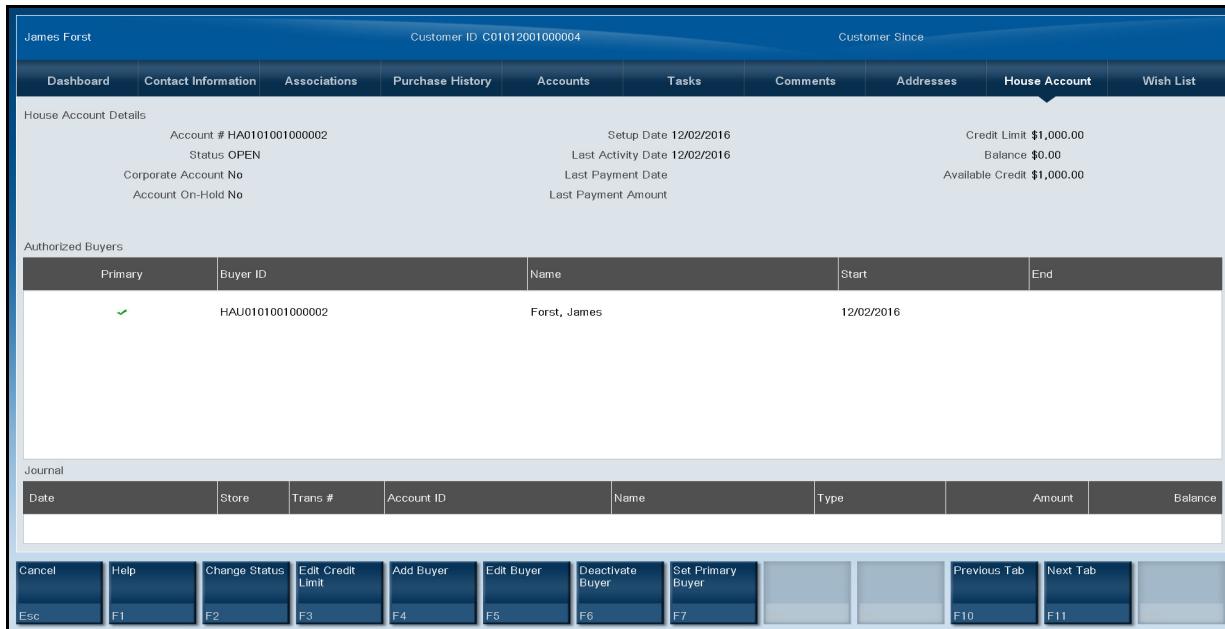


Figure 5-18: House Account Tab

The information categories on this screen include:

- **House Account Details**
 - **Account #** - The House Account number.
 - **Status** - The status of the Account; OPEN, HOLD, CLOSED.
 - * If HOLD or CLOSED, the account cannot be used for purchases.
 - * If HOLD, payments may be made to the account.
 - * If CLOSED, no payments may be made to the account
 - **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** - The date the account was created.
 - **Last Activity Date** - The date of the most-recent activity on the account.
 - **Last Payment Date** - The date of the most-recent payment on the account.
 - **Last Payment Amount** - The most-recent payment amount on the account.
 - **Credit Limit** - The credit limit on the account.
 - **Balance** - The balance amount on the account.
 - **Available Credit** - The difference between the credit limit and the outstanding balance on the account that is available for purchases.
- **Authorized Buyers** - The names of the people authorized to use the House Account and the effective date the buyer can begin using the account. If applicable, the end date when the buyer no longer has access to the House Account is also shown. The green check mark indicates the primary authorized buyer for the account.
- **Journal** - A record of all the House Account transactions.

See [To Create a House Account](#) for more information about creating a new House Account.

Wish List Tab

If you are using Customer Engagement, this tab displays any items the customer has added to a personal wish list.

The Wish List displays the following information:

- **Item ID** - The item number.
- **Description** - The item description.
- **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).

To view additional information about the selected item, select **Item Info**.

Adding Wish List Items

Note: If you are creating a new customer record, you must save the newly added customer before adding to the wish list. The Add Items button will not display until you save.

If you attempt to add an item to a wish list that already exists, the system prompts with the following message "Sorry this item is already on the wish list, please select another item."

To add items to a wish list:

1. From the Customer Maintenance Wish List tab:
 - Scan the item.
 - <OR>
 - Select **Add Items**.
 - 1) Enter your search criteria.
 - 2) Select **Process**.

The screenshot shows a software application window titled 'ITEM LOOKUP' with a sub-instruction 'Enter search criteria.' A magnifying glass icon is positioned above the search fields. The form contains several input fields and dropdown menus:

- 'Item ID' input field
- 'Department' dropdown menu set to '<All Departments>' with a downward arrow
- 'Subdepartment' dropdown menu set to '<All Subdepartments>' with a downward arrow
- 'Class' dropdown menu set to '<All Classes>' with a downward arrow
- 'Subclass' dropdown menu set to '<All Subclasses>' with a downward arrow
- 'Style ID' input field
- 'Description' input field

At the bottom of the form are three buttons: 'Back' (Esc), 'Help' (F1), and 'Process' (F8). The entire window has a blue header bar and a light gray background.

Figure 5-19: Item Lookup Form

- 3) If several items match the criteria you entered, use the up and down arrow keys to highlight an item from the list. Select **Add Item**.

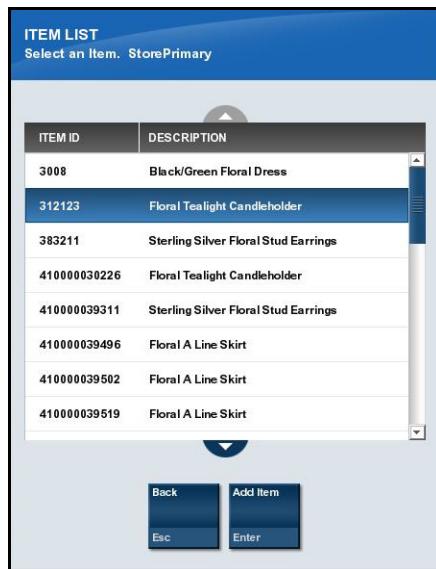


Figure 5-20: Item List - Add Item

2. Verify the added item displays on the wish list. The newly added item will appear at the top of the list:

Removing Wish List Items

1. Select **Remove Items**.

Oracle Retail Xstore Point of Service displays a list of items in the digital cart.

2. Select the items to remove by doing one of the following:
 - Select the **Select All** button to select all items.
 - Select individual items to remove, then select the **Remove Items** button.
3. The system displays a confirmation message.
 - * Select **Yes** to remove the item from the customer's wish list.
 - * Select **No** to return the customer to the wish list screen.



Figure 5-21: Remove Wish List Item Confirmation

Printing a Wish List

From the Customer Maintenance Wish List tab, select **Print List**.

The Customer Wish List Report displays:

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

Digital Cart Tab

If you are using Retail Extension Module (RXM), this tab displays any items the customer has in their digital shopping cart.

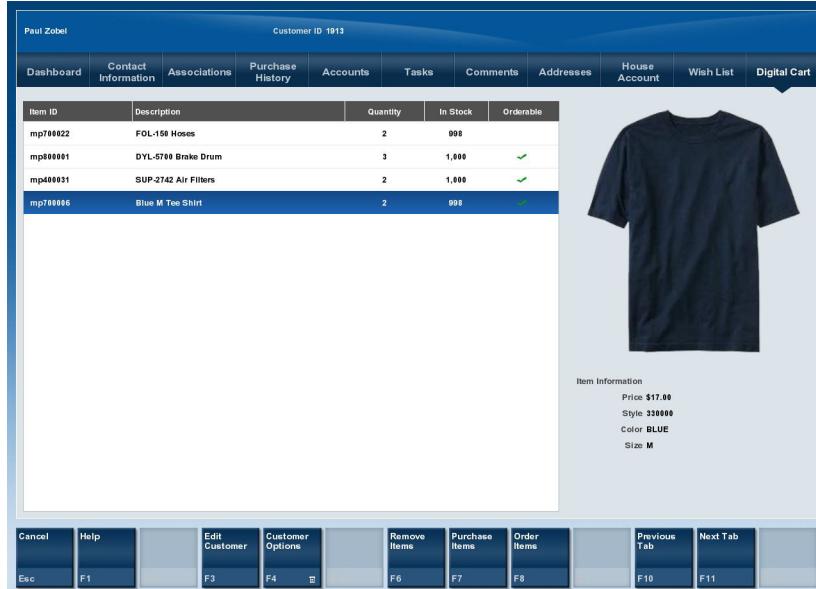


Figure 5-22: Digital Cart Tab

The Digital Cart displays the following information:

- **Item ID** - The item number.
- **Description** - The item description.
- **Quantity** - Number of items desired in the digital cart.
- **In Stock** - Number of the item in stock.
- **Orderable** - Indicates whether the item can be ordered.
- **Image** - A picture of the item (if available).

Removing Digital Cart Items

1. Select **Remove Items**.

Oracle Retail Xstore Point of Service displays a list of items in the digital cart.

2. Select the items to remove by doing one of the following:

- Select the **Select All** button to select all items.
- Select individual items to remove, then select the **Remove Items** button.

3. The system displays a confirmation message.

- * Select **Yes** to remove the item from the customer's wish list.
- * Select **No** to return the customer to the wish list screen.

Edit Customer

To edit a customer from the Customer Maintenance screen:

1. Select **Edit Customer** to activate the fields on the window.
2. Select the field you want to change and replace the old entry by typing over it with the new information. Use the Previous Tab and Next Tab options to navigate to other tabs if needed.

Note: Once you are in the edit mode (selected *Edit Customer*), you can select other tabs and edit information. The non-editable tabs are *Purchase History* and *Customer Account*.

Important: Any field that requires an entry is marked with a red triangle in the upper left corner of the field.

Any field that has a selectable list of options displays a down arrow on the right side of the field.

3. Select **Save Changes** to save the information to the database. Select the **Undo Changes** option if you decide not to keep the changes you made.

Additional Customer Options

Select the **Customer Options** menu option (see [Figure 5-3](#)) to perform the activities described in this section. The system displays a list of customer maintenance options:

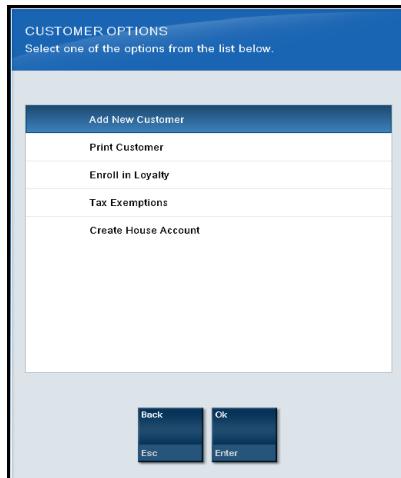


Figure 5-23: Customer Options List

To Add a New Customer

From the **Customer Options** menu, select **Add New Customer** to add a new customer record to the customer database. See [Adding a New Customer Record](#), step 2 for procedural information.

To Print a Customer Record

From the **Customer Options** menu, select **Print Customer** to print the customer record to a report printer.

To Enroll the Customer in a Loyalty program

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.

Some loyalty programs provide cards to their members and others do not. Oracle Retail Xstore Point of Service may be configured to handle either situation. If cards are provided, the card's number may be scanned or read with a device. Without a card, the system may be configured to automatically provide a loyalty number and associate it with the customer's record.

1. From the **Customer Options** menu, select **Enroll in Loyalty** ([Figure 5-23](#)) to enroll the customer in the loyalty program.

Note: The prompt that displays next depends upon your system's configuration.

If you do not provide a physical card, the loyalty card number is automatically generated by the system and associated with the customer after you respond to the prompt.

If your store provides a physical card, the system prompts you to swipe the card in a device so that the number can be read, or to enter the loyalty number that is on the card.

2. The system prompts you to ask the customer about enrollment:
 - If the customer decides *not* to enroll now, select **Not Now**.
 - If the customer indicates no intention to enroll at any time, select **Never**.
 - If the customer decides to enroll in a loyalty program:
 - * Select **Yes** if your store does *not* provide a physical card.
<OR>
 - * Swipe the loyalty card or enter the loyalty number found on the card and select **Process** if your store does give the customer a physical card.
3. Select the **Save Changes** option to save the loyalty card information to the customer's record.

About Loyalty programs

Loyalty values are accumulated according to the rules for each individual program. Rules for assigning points and awards are defined in 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.

To Add or Maintain a Customer's Tax Exemptions

1. From the **Customer Options** menu, select **Tax Exemptions** ([Figure 5-23](#)) to manage the customer's tax exemptions.
 - If the customer has a tax exemption record on file, the system displays a list of the customer's tax exemptions:
 - * To **edit** a tax exemption, select it in the list and press **[Enter]**. The system displays the tax exemption record information. Make changes as needed and then select **Save Changes**. You can review the changes in the **Tax Exempt Information** area on the **Groups & Personal** tab.
 - * To **remove** this tax exemption, select **Delete**. The record is removed and will no longer be available for transactions.

SELECT EXEMPTION Select the tax exemption to edit.		
HOLDER	REASON	EXP DATE
Grange PTA 25588558	Non-government Organization	8/8/2016

Back Esc Select & Continue Enter New F8 Delete

Important: Make sure you have selected the correct record before selecting the **Delete** option. There is no confirmation prompt associated with this action.

- * To **add** a new tax exemption, select **New** and go to step 2 below.
2. Oracle Retail Xstore Point of Service displays a form for entering the required information for the tax exemption. Complete the fields as required and select **Save Changes**.

CUSTOMER TAX EXEMPT
Enter Tax Exempt Information

Certificate #	<input type="text"/>
Certificate Holder	<input type="text"/>
State	<input type="text"/>
Expiration Date	<input type="text"/>

Back Esc Help F1 Save Changes F8

Figure 5-24: Customer Tax Exempt Form

Additional Customer Options

3. When prompted, select the tax exempt reason from the list and press [Enter].

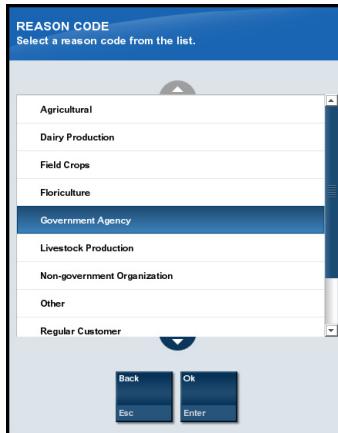


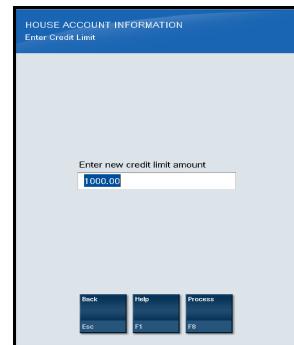
Figure 5-25: List of Reasons for a New Tax Exemption

The new tax exemption is added to the customer's record and is listed in the **Tax Exempt Information** area on the **Groups & Personal** tab.

To Create a House Account

Note: The House Account tab is disabled if the customer does not have a House Account.

1. From the **Customer Options** menu, select **Create House Account** ([Figure 5-23](#)) to set up a House Account for the customer.
2. The House Account Credit Limit prompt defaults to the pre-defined limit based on the corporate policy. Modify the amount if needed and select **Process**.



Select the House Account tab to view the House Account information.

Note: By default, the customer is added as the Primary authorized buyer.

Customer records always open in a read-only mode and cannot be edited unless you change to the editing mode. Use the **Edit Customer** option to make changes to the House Account as needed.

Important: Corporate House Accounts cannot be modified.

1. Select **Edit Customer** and navigate to the House Account tab to view the edit options available for House Accounts.
2. Select an option from the menu to edit the House Account.

House Account edit options include:

- Changing the house account status. See [To Change the Account Status](#).
- Changing the limit on the account. See [To Change the Account Limit](#).
- Adding a new authorized buyer, removing an authorized buyer, changing the primary authorized buyer, and editing authorized buyer information. See [To Update Authorized Buyer Information](#).

To Change the Account Status

1. At the House Account tab, select **Edit Status**.
2. Select a new status from the Change Account Status list, then press [**Enter**] to save the change:

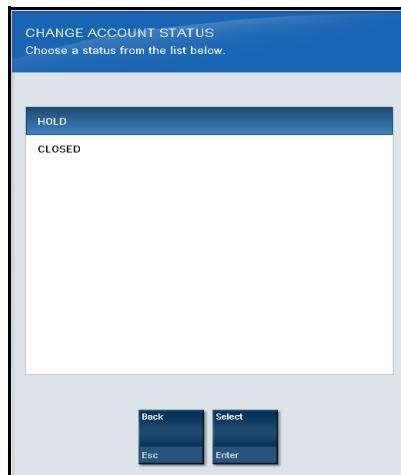


Figure 5-26: Change Account Status List (Currently in OPEN status)

Note: The options available in this list will vary, depending on the current status of the House 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.

Additional Customer Options

To Change the Account Limit

1. At the House Account tab, select **Edit Credit Limit**.
2. Enter the new credit limit amount, then select **Process** to save the change.

Note: The prompt defaults to the current credit limit amount.

3. To view the updated credit limit, select the House Account tab.

To Update Authorized Buyer Information

Adding a new authorized buyer

1. At the House Account tab, select **Add Buyer**.
2. Enter the new authorized buyer's information, then select **Process**.

Note: First name, last name, and start date are required. End date is optional and determines when the buyer is no longer able to use this house account.

The new authorized buyer's name is listed in the Authorized Buyers section of the screen.

LOYALTY & AWARDS	COMMENTS	ADDRESSES	HOUSE ACCOUNT	WISH LIST
Authorized Buyers				
PRIMARY	BUYER ID	NAME	START	END
<input checked="" type="checkbox"/>	HAU19730010005	Houser, John	08/19/2013	
	HAU19730010006	Myers, Jack	08/19/2013	01/01/2014

Editing an authorized buyer

1. At the House Account tab, select **Edit Buyer**.
2. Select an authorized buyer from the list, then press [**Enter**].

The screenshot shows a software interface titled "EDIT BUYER" with a sub-instruction "Select a Buyer to edit from list". Below this is a table with four columns: PRIMARY, NAME, START DATE, and END DATE. The first row has a checked "PRIMARY" checkbox, the name "Houser, John", and dates "08/19/2013" and "01/01/2014". The second row has an unchecked "PRIMARY" checkbox, the name "Myers, Jack", and dates "08/19/2013" and "01/01/2014". At the bottom are "Back" and "Ok" buttons, with "Esc" and "Enter" keys mapped to them.

PRIMARY	NAME	START DATE	END DATE
<input checked="" type="checkbox"/>	Houser, John	08/19/2013	01/01/2014
<input type="checkbox"/>	Myers, Jack	08/19/2013	01/01/2014

Figure 5-27: Authorized Buyer List

3. When prompted, edit the authorized buyer's information as needed, then select **Process**.

The screenshot shows the same software interface as Figure 5-27, but with the "Edit Buyer" title and a sub-instruction "Enter the buyer's information below.". The table now shows the edited information: First Name "Jack", Last Name "Myers", Start Date "08/19/2013", and End Date "01/01/2014". The "Process" button is highlighted. At the bottom are "Back", "Help", and "Process" buttons, with "Esc", "F1", and "F8" keys mapped to them.

First Name:	Jack
Last Name:	Myers
Start Date:	08/19/2013
End Date:	01/01/2014

Figure 5-28: Edit Buyer Form

The updated authorized buyer's information is shown in the Authorized Buyers section of the screen.

Additional Customer Options

Deactivating an authorized buyer

1. At the House Account tab, select **Deactivate Buyer**.
2. Select an authorized buyer from the list, then press [Enter].

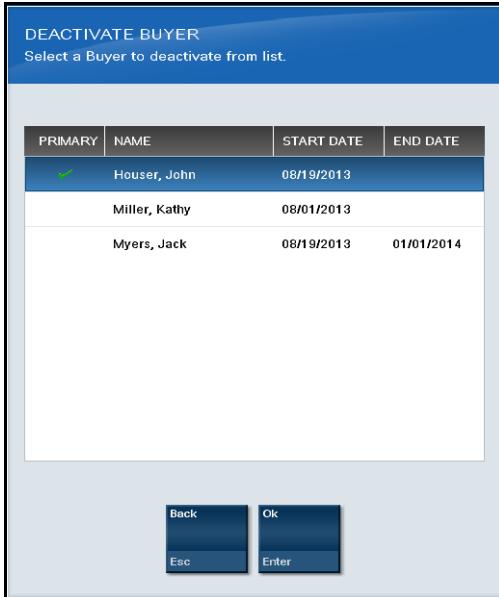
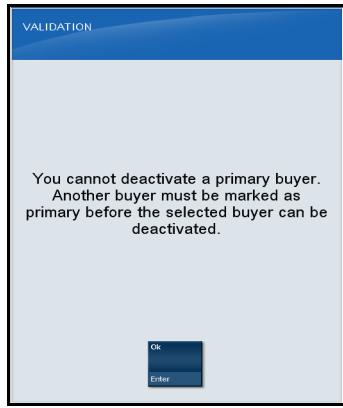


Figure 5-29: Deactivate Buyer List

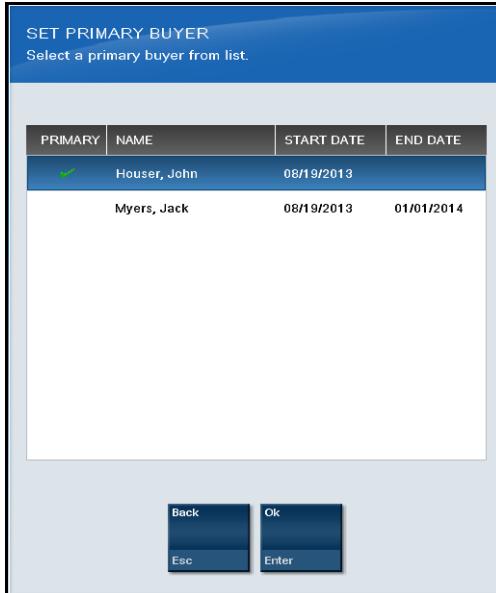
The end date for the deactivated buyer is set to today's date and shown in the Authorized Buyers section of the screen.

Note: You cannot deactivate the current primary buyer. To deactivate the primary buyer, you must first designate a new primary buyer. See [Designating the primary buyer](#) for procedural information.



Designating the primary buyer

1. At the House Account tab, select **Set Primary Buyer**.
2. Select an authorized buyer from the list, then press [**Enter**].

**Figure 5-30: Set Primary Buyer List**

Note: At the House Account tab, the authorized buyer you selected is moved to the top of the Authorized Buyers list and shown with a green check mark. The list is resorted alphabetically below the primary buyer's name.

Adding/Maintaining Multiple Customer Addresses

Use the Addresses tab to add multiple addresses for a customer, and to designate a primary address to be used as the default address for the customer. The address added on the contact information tab defaults to the primary address.

1. At the Addresses tab, select **Edit Customer** to activate the menu options.
2. Edit the address information as needed:
 - To add an address, see [Adding a new address](#).
 - To edit an address, see [Editing an address](#).
 - To define the primary address, see [Designating an address as the primary address](#).
 - To delete an address, see [Deleting an address](#).

Adding a new address

1. At the Addresses tab, select the **Add Address** menu option.
2. If necessary, change the country for the customer.

The country address component defaults to the country where the store is located. If needed, select the *Change Country* menu option to select another country.



3. Enter the customer's address:
 - Complete the fields as required on the Add Customer Address form:

A screenshot of the "ADD CUSTOMER ADDRESS" form. It has fields for Address (4567 Kelly Drive), Zip (17403), State (PA - Pennsylvania), City (York), and Type (Vacation). There are also buttons for Back, Help, Change Country, Process, Esc, F1, F5, and F8.

Figure 5-31: Add Customer Address Form

- Depending upon the configuration of your system, you may have a **First line of address, or postal code** field.
 - 1) Enter address information into this field to quickly look up an address.
 - 2) Select the address from a list of results to automatically populate the customer address fields.
- 4. Select the address type from the list.

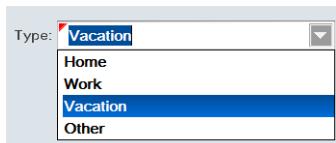


Figure 5-32: Add Customer Address Form - Address Type List

5. Select **Process** to add the new address to the customer's record.
6. Select **Save Changes** to save the address information to the database.

Editing an address

1. At the Addresses tab, select the address from the list of customer addresses on file.
2. Select the **Edit Address** menu option to display the Edit Customer Address form. The form is populated with the current address information.
3. Make your changes and select **Process** to add the updated address to the customer's record.
4. Select **Save Changes** to save the address information to the database.

Designating an address as the primary address

Note: Only one address may be designated as the primary address.

1. At the Addresses tab, select the address from the list of customer addresses on file.
2. Select the **Set Primary Address** menu option.
3. When prompted, select **Yes** to confirm you want to designate the address as primary.

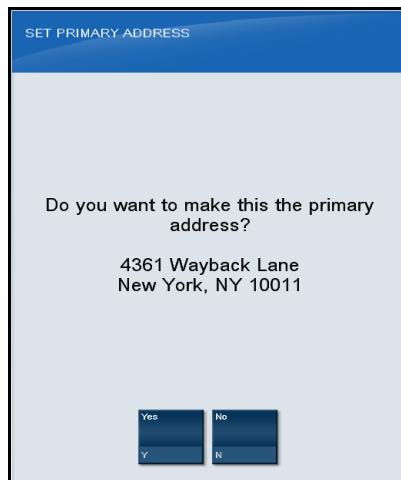


Figure 5-33: Primary Address Confirmation Prompt

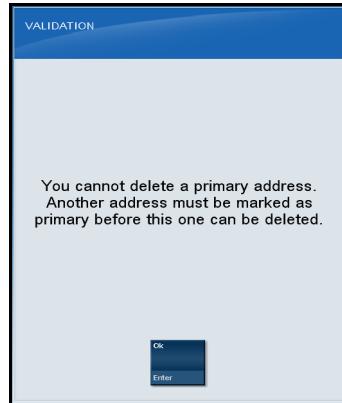
Note: Select **No** if this is not the correct address. You will be returned to the list of customer addresses.

The Primary label is now associated with the address and is shown at the top of the list of addresses.

4. Select **Save Changes** to save the address information to the database.

Deleting an address

Note: You cannot delete a primary address.



-
1. At the Addresses tab, select the address from the list of customer addresses on file.
 2. Select the **Delete Address** menu option.
 3. When prompted, select **Yes** to confirm you want to delete the address.
-

Note: Select **No** if this is not the correct address. You will be returned to the list of customer addresses.

The address is no longer shown in the list of customer addresses.

4. Select **Save Changes** to remove the address information from the database.

6

Searching for Items

During a transaction you may need to search for a particular item.

- To search your store inventory, see [Searching for Items Using Item Lookup](#) below.
- To search other stores, see [Locating Items: Inventory Lookup](#).
- To print a Rain Check, see [Printing a Rain Check](#).
- Touch-screen or mouse users can search their store inventory using the [Searching for Items Using the Item Matrix](#).

Searching for Items Using Item Lookup

Use the item lookup function to search for an item based on many criteria (SKU, style, department, etc.) and retrieve detailed information about the item. For kits, you can use item lookup to view the component items that make up the kit. 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.

1. At the Register Sale screen, select the Find Item button from the Register Sale menu.

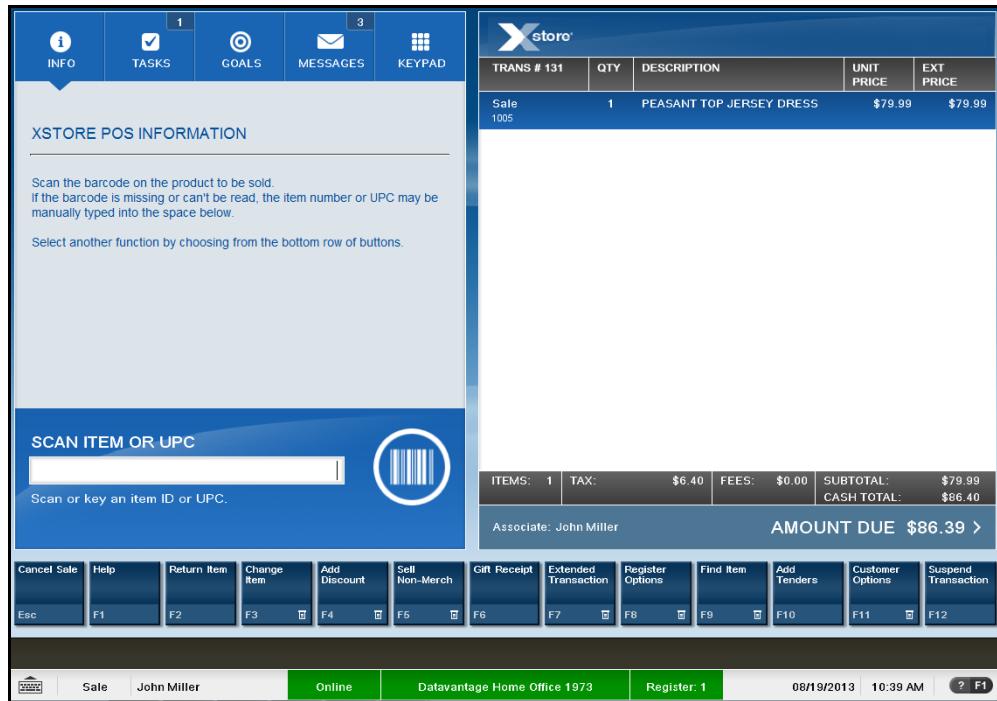


Figure 6-1: Register Sale Screen

Searching for Items Using Item Lookup

2. At the Item Finder menu, select **Item Lookup**.

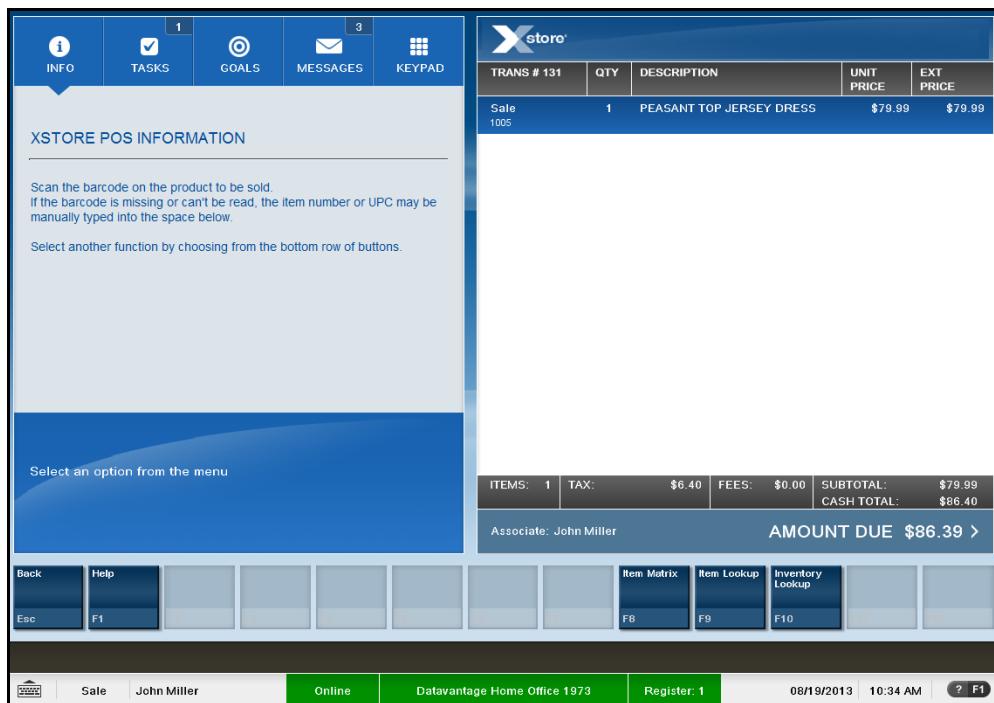


Figure 6-2: Item Finder Menu

The Item Lookup form displays.

This screenshot shows the basic 'ITEM LOOKUP' form. It features a search bar at the top with the placeholder 'Enter search criteria.' and a magnifying glass icon. Below the search bar are several dropdown menus and input fields:

- Item ID:** An input field with a placeholder.
- Department:** A dropdown menu set to '<All Departments>'.
- Subdepartment:** A dropdown menu set to '<All Subdepartments>'.
- Class:** A dropdown menu set to '<All Classes>'.
- Subclass:** A dropdown menu set to '<All Subclasses>'.
- Style ID:** An input field with a placeholder.
- Description:** An input field with a placeholder.

At the bottom of the form are three buttons: 'Back', 'Help', and 'Process'. Below these buttons are function keys: Esc, F1, and F8.

Figure 6-3: Item Lookup Form

Note: Your store may be configured with advanced lookup options which provide the ability to specify Custom Groups and Details to further define your search criteria.

Select the exclude box to not include an item in your search.

This screenshot shows the advanced 'ITEM LOOKUP' form. It includes all the fields from the basic form plus additional filtering options on the right side:

- Item ID:** An input field with a placeholder.
- Department:** A dropdown menu set to '<ALL>'.
- Subdepartment:** A dropdown menu set to '<ALL>'.
- Class:** A dropdown menu set to '<ALL>'.
- Subclass:** A dropdown menu set to '<ALL>'.
- Style ID:** An input field with a placeholder.
- Description:** An input field with a placeholder.
- Gender:** A dropdown menu set to '<ALL>' with an 'Exclude' checkbox.
- Season:** A dropdown menu set to '<ALL>' with an 'Exclude' checkbox.
- Material:** A dropdown menu set to '<ALL>' with an 'Exclude' checkbox.
- Line:** A dropdown menu set to '<ALL>' with an 'Exclude' checkbox.
- Shoe:** A dropdown menu set to '<ALL>' with an 'Exclude' checkbox.
- Use Type:** A dropdown menu set to '<ALL>' with an 'Exclude' checkbox.

At the bottom of the form are three buttons: 'Back', 'Help', and 'Process'. Below these buttons are function keys: Esc, F1, and F8. The status bar at the bottom shows: **Sale John Miller**, **Online**, **Datavantage Home Office 1973**, **Register: 1**, **08/19/2013 10:54 AM**, and **[? F1]**.

3. Enter your search criteria for an item: Item ID, Department, Subdepartment, Class, Subclass, Style ID, or Description. Press [Enter] or [Tab] to move between the fields.

Tip: To move to a previous field on the form, press and hold the [Shift] key as you press [Tab].

Searching for Items Using Item Lookup

4. After you have entered your search criteria, select **Process** to continue.

Tip: If you enter only a few lookup criteria, the result will be a longer list of items. Entering more criteria narrows the scope of the search and results in fewer items being listed. You do not have to make an entry in every criteria field.

5. If several items match the criteria you entered, use the up and down arrow keys to select an item from the list and press [**Enter**] to continue.

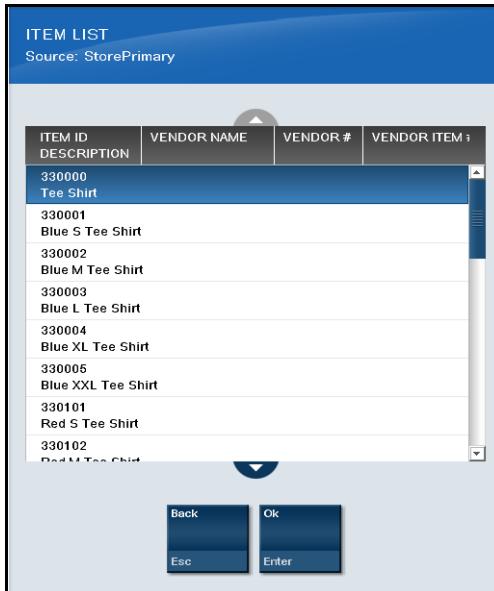


Figure 6-4: Item Selection

6. Oracle Retail Xstore Point of Service displays detailed information about the selected item with the Product Information tab defaulted.

Note: The static information area shows the item number, style number, color, and size. It also indicates how many are in stock ([Figure 6-5](#) shows 0 in stock).

Product Information Tab

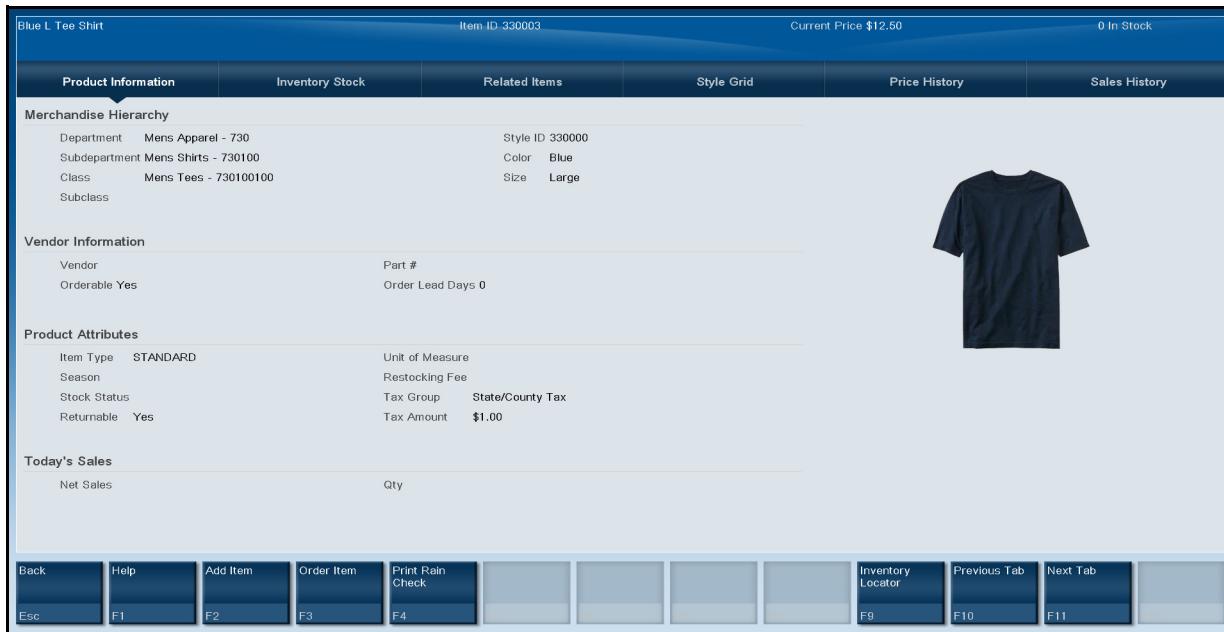


Figure 6-5: Item Detail Screen- Product Information Tab

Additional functions at this screen may include the following:

- **Add Item** - You can add the displayed item to the current sale in progress. This option is only available if item lookup was accessed from a sale transaction.
- **Order Item** - You can place an order for the displayed item. This option is only available for items that can be ordered and if item lookup was accessed from a sale transaction. See [Order Transactions via Order Broker](#) for more information.
- **Print Rain Check** - If available, you can print a rain check to purchase out of stock items for the same price at a later date. See [Printing a Rain Check](#).
- **Special Order** - You can place a special order for the displayed item. This option is only available for items that can be special ordered and if item lookup was accessed from a sale transaction.
- **Layaway Item** - You can create a layaway account for the displayed item or place it on an existing account. This option is only available for items that are eligible for layaways and if item lookup was accessed from a sale transaction.
- **Inventory Locator** - You can search for stores with the item in stock:
 - a. Select **Inventory Locator** to open the Inventory Locator Lookup window.
 - b. Select the **Distance** from the store and the **Quantity** for which you are searching. Oracle Retail Xstore Point of Service displays a list of stores and the quantities they have available. Only stores with quantities greater than or equal to the entered Quantity will be displayed.
 - c. Select **OK** to return to the Inventory Stock tab.
- **Additional Information Available** - Depending upon the configuration of your system, a link may be displayed under the item image. Select this link to view additional, extended information about the item.

Searching for Items Using Item Lookup

7. When finished viewing the item's information, press [Esc] to return to the Item Lookup form.
8. To exit the Item Lookup form, press [Esc] to return to the Sale screen and continue the transaction.

Inventory Stock Tab

The Inventory Stock tab shows the quantity and type of inventory.

The screenshot shows the Oracle Retail Xstore Point of Service User Guide interface. At the top, it displays "Blue L Tee Shirt" and "Item ID: 330003". Below this, the "Inventory Stock" tab is selected, showing the following data:

Stock Ledger	Kit Component Items				
Inventory Bucket	Location	Quantity	Item ID	Description	Quantity
On Hand	Default	(2)			

Below this, the "Serial Inventory" section is shown:

Inventory Bucket	Location	Serial #

At the bottom, there is a row of function keys:

Back	Help	Add Item	Order Item	Print Rain Check				Inventory Locator	Previous Tab	Next Tab	
Esc	F1	F2	F3	F4				F9	F10	F11	

Figure 6-6: Inventory Stock Tab

If there are any kit components they will display in the **Kit Component Items** section of the screen.

KIT COMPONENT ITEMS		
ITEM ID	DESCRIPTION	QUANTITY
6013	Houndstooth Sport Coat	1
6016	White Dress Shirt	1
6017	Black Slack	1

If the item is serialized, the information is shown in the **Serial Inventory** section of the screen. No quantity is shown because it is assumed a serialized item has a quantity of one.

SERIAL INVENTORY		
INVENTORY TYPE	LOCATION	SERIAL #
On Hand	Default	1111111111
On Hand	Default	2222222222

Related Items Tab

The **In this Style** section of this tab shows items of the same style but with different characteristics (e.g. size, color, width) for the selected item. The list displays the item number, dimensions, and the number on hand for the related item.

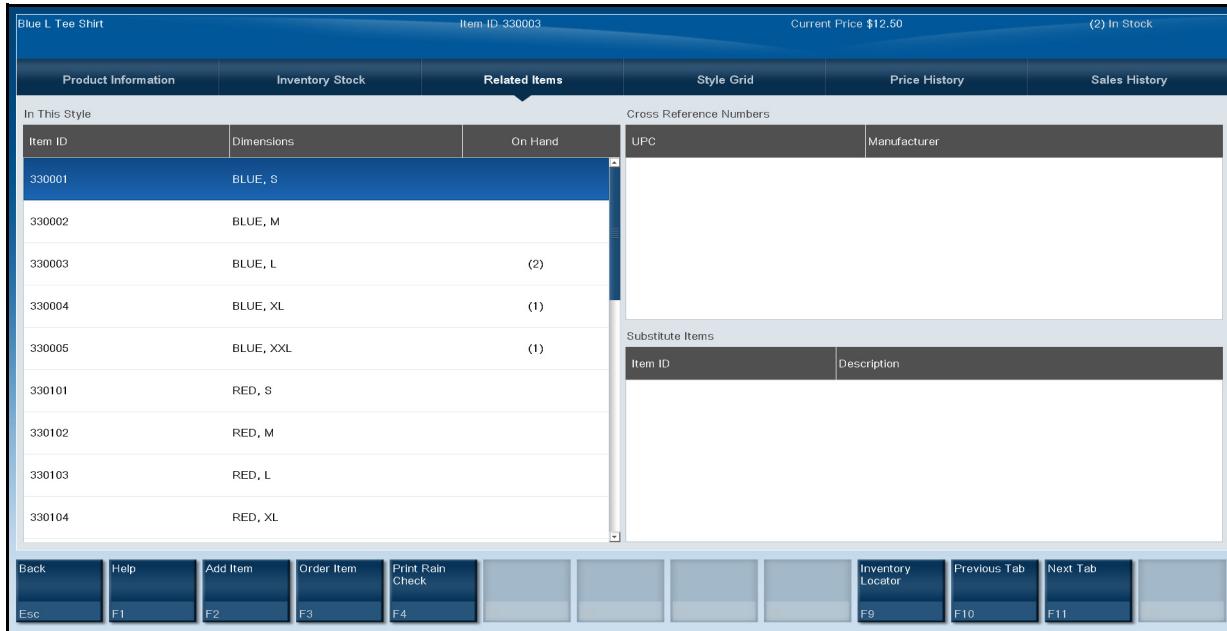


Figure 6-7: Related Items Tab

- **In This Style** shows all the items having the same style as the searched-for item.
- **Cross Reference Numbers** shows the UPC and Manufacturer cross-referenced to the selected item when applicable.
- **Substitute Items** shows the item ID and description for items cross-referenced to the selected item when applicable. (For example, this feature may be used to show alternate items for discontinued items).

Searching for Items Using Item Lookup

Style Grid Tab

The Style Grid tab shows inventory information in a grid format and includes the on-hand quantities for the item with the specified characteristics. This is a view-only screen.

Product Information		Inventory Stock		Related Items		Style Grid		Price History		Sales History	
DEFAULT: N/A		Small		Medium		Large		X-Large		XX-Large	
Blue		0		0		(2)		(1)		(1)	
Red		0		0		0		0		0	
Green		0		0		0		0		0	
Grey		0		0		0		0		0	
Black		0		0		0		0		0	

Figure 6-8: Style Grid Tab

Price History Tab

The price history tab shows a list of the previous prices for the item, including the effective date and expiration date of each price.

Product Information		Inventory Stock		Related Items		Style Grid		Price History		Sales History							
Effective Date		Expiration Date				Price											
11/01/2016						\$12.50											
Back	Help	Add Item	Order Item	Print Rain Check				Inventory Locator	Previous Tab	Next Tab							
Esc	F1	F2	F3	F4				F9	F10	F11							

Figure 6-9: Price Information Tab

Sales History Tab

The Sales History tab shows the past several weeks of sales in a graphic form and as a list under Sales History.

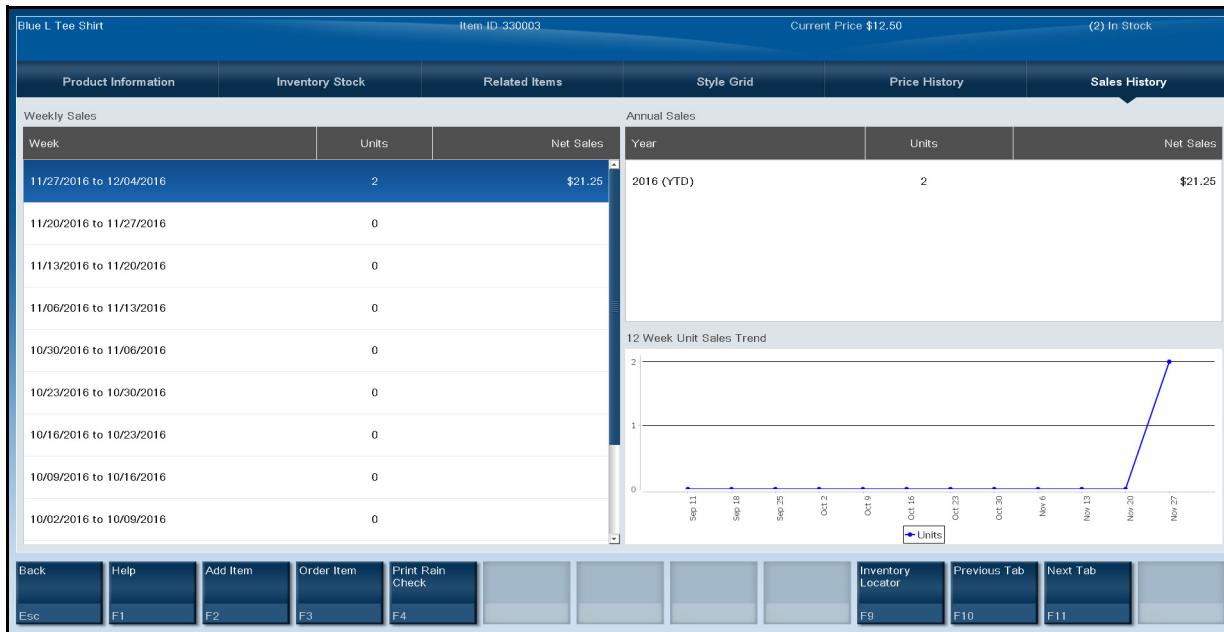


Figure 6-10: Sales History Tab

- **Sales History** lists the number of units sold in recent weeks, where the week at the top of the list is the current week.
- **Annual Sales** shows the number of units sold this year compared to the number of units sold in previous years, when applicable. This is a rolling year calculation.
- **Recent Weeks Unit Sales Trend** displays a graph of sales data for the same period of time as the Sales History list. The number of weeks in this graph will depend upon the configuration of your system.

Locating Items: 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.

1. At the Register Sale screen, select the **Find Item** button from the Register Sale menu ([Figure 6-1](#)).
2. At the Item Finder menu, select **Inventory Lookup** ([Figure 6-2](#)). The system prompts for the Inventory Locator criteria.
3. Enter the information as needed and select **Process** to perform the inventory locator search:

Figure 6-11: Inventory Locator Lookup Form

REQUIRED Information:

- **Item ID or Style ID** - You must enter either an item ID or a style ID.

OPTIONAL Information:

- **Distance** - Select the distance from your store (for example, all locations with this item in stock within 25 miles of the current store).
- **Quantity** - Enter the minimum quantity of the item that the target store has in stock. For example, you may use this option if the customer needs a specific quantity of this item.

- Oracle Retail Xstore Point of Service returns a list of locations matching the search criteria.

INVENTORY LOOKUP RESULTS			
1005 - PEASANT TOP JERSEY DRESS			
Count	Location	Phone	Distance
1,000	Corner Market, 101 30500 Bruce Industrial Pkwy Solon, OH 44139	440-498-4414	0 mi
0	Cleveland Outlet, 103 34310 Aurora Rd. Solon, OH 44139	440-498-4419	1.4 mi
0	EP1-Rochester (RS) (B&M), 1291 34182 Aurora Rd Solon, OH 44139	440-123-4567	1.4 mi
0	EP1-MPLS (MSP) (B&M), 4241 2728 East Aurora Road Twinsburg, OH 44087	330-562-2000	4.8 mi

Figure 6-12: Inventory Locator Results

This list includes the quantity of this item in stock at each store, the address and telephone number for the store, and the distance from this store to each target location.

- Select OK to close the Inventory Locator.

Printing 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:

- From the Item Lookup Product Information tab (see [Product Information Tab](#)), select **Print Rain Check**.

-
- If the Print Rain Check button is grayed out, rain checks are not allowed to be printed for that item.
 - You cannot print multiple items on one rain check.
 - Rain Checks cannot be printed for non-merchandise items.
-

Searching for Items Using the Item Matrix

2. A confirmation prompt displays. Select **Yes** to print the rain check. Select **No** to return to the Sale screen.

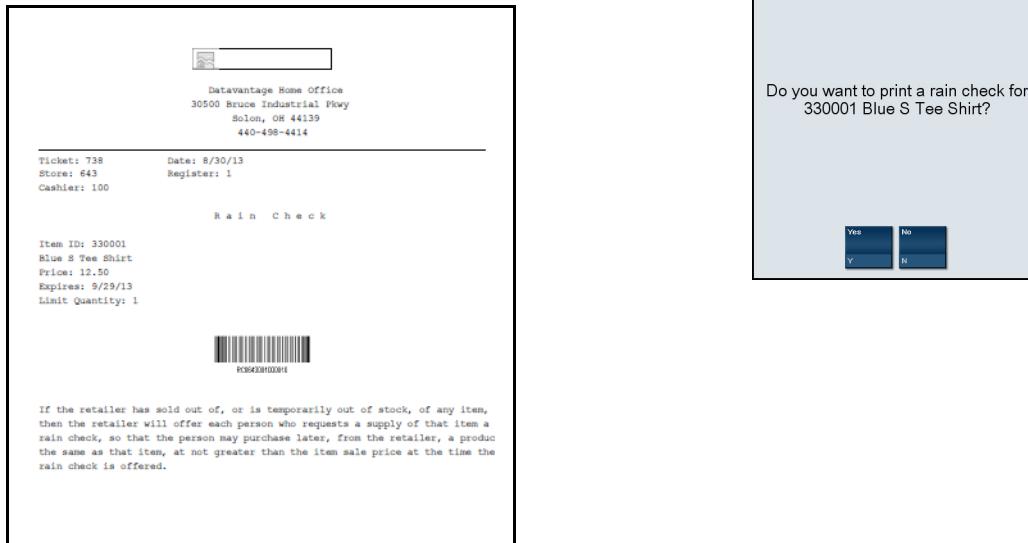


Figure 6-13: Printed Rain Check Example

Note: The bar code contains the Rain Check ID.

Searching for Items Using the Item Matrix

Note: To use the optional item matrix function you must have a touch-screen or a mouse.

Use the item matrix to select a department (or the highest level in your merchandise hierarchy) from the item grid and then drill down through the merchandise hierarchy to locate a specific item. The merchandise hierarchy levels are color-coded to help you navigate through the different levels. When the item is located, it is added to the sale transaction.

1. At the Sale screen, select the **Find Item** button from the Register Sale menu ([Figure 6-1](#)).
2. At the Item Finder menu, select **Item Matrix** ([Figure 6-2](#)).

Note: Touch-screen users select the bar code icon to invoke the Item Matrix.

3. The Item Matrix screen at the Department Level shows the departments in your store. Select the department where the item is located.



Figure 6-14: Item Matrix Screen - Department Level

4. Continue drilling down through the merchandise hierarchy until you find the item you want to sell. Select the item and it is added to the transaction.

Tip: Select the bread crumbs at the top of the Item Matrix to look at previous screens.



Figure 6-15: Item Matrix Screen - Item Level

5. Once the item is added to the transaction, the same item edit options that are available when you add an item by scanning, entering an item Id, or adding an item from item lookup can be used to modify the item as needed.

Searching for Items Using the Item Matrix

Discounts and Awards

Overview

You can apply a discount to a single line item, multiple line items, or entire transactions. You can also apply an award to the 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 (e.g. \$5.00 off) or percentages (e.g. 10% off) for both item and transaction discounts.

Adding a Discount/Award to an Item or Transaction

1. After adding an item or items at the Register Sale screen, select the **Add Discount** option on the Register Sale menu.
Oracle Retail Xstore Point of Service prompts you for the discount type: Item, Transaction, Group, or Award.

Adding a Discount/Award to an Item or Transaction

2. Select the discount type and press [Enter], or press the number on the keyboard associated with the option:

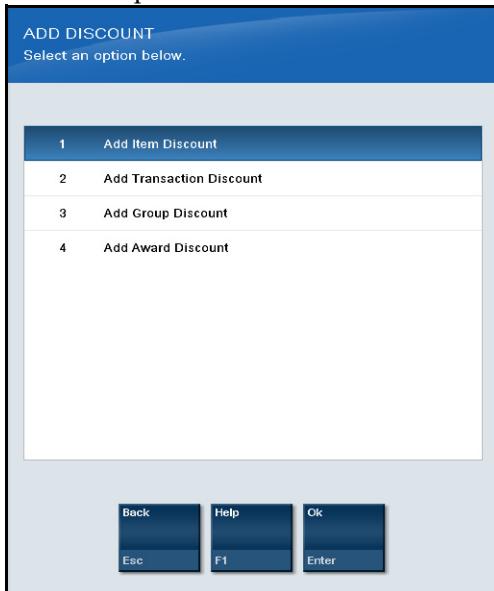


Figure 7-1: Discount Type Options

Note: Because each Oracle Retail Xstore Point of Service menu is configurable, the discount options shown on your system may be different than the options shown here.

- If you chose an item discount, continue with [Item Level Discounts](#), step 1.
- If you chose a transaction discount, continue with [Transaction Level Discounts](#), step 1.
- If you chose a group discount, continue with [Group Discounts](#), step 1.
- If you chose to apply an award, continue with [Award Discounts](#), step 1.

Item Level Discounts

...continued from step 2

1. If there are multiple items in the transaction, Oracle Retail Xstore Point of Service prompts you to select the item to be discounted. If there is only one item in the transaction, skip to step 3 below.
2. If prompted, select the item to be modified and press [Enter] to display the list of item discount options.

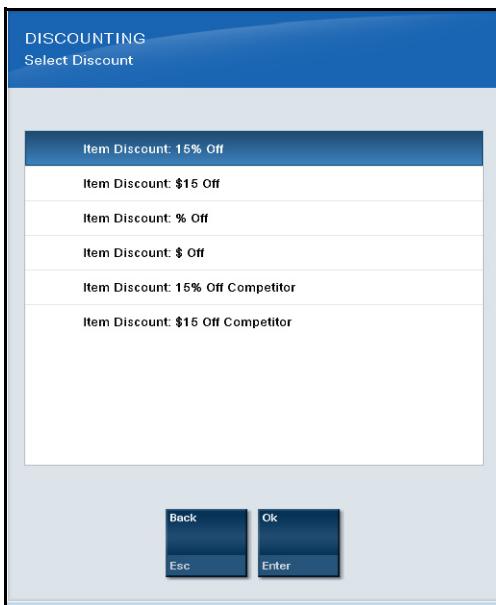


Figure 7-2: Item Discount Options

3. Select the discount to be applied to the selected item and press [Enter] to continue.

Adding a Discount/Award to an Item or Transaction

4. If prompted, select a reason for the discount and press [Enter] to continue.

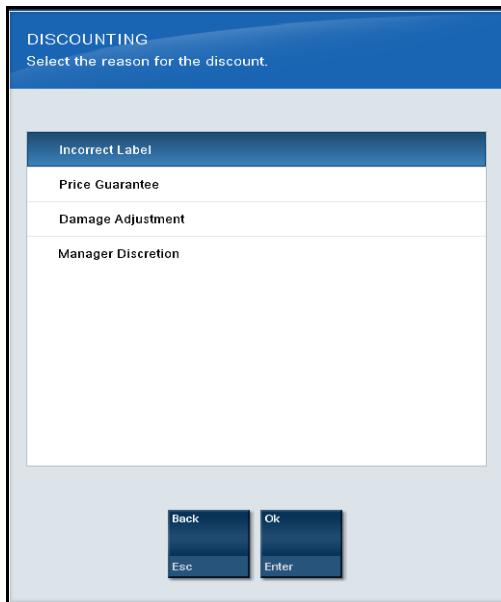


Figure 7-3: Discount Reason List

Additional Discount Prompts

Depending upon the discount option and/or reason you chose, you may be prompted for additional information or provided with additional information about the discount. Some examples are shown below:

- You may be prompted for the discount amount or percent. For a percentage, enter a number to represent the discount percentage. Do not enter a decimal point or percent sign. For example, 50 = 50% off and 25 = 25% off.
- If you choose to discount the item based on a competitor's price you may be prompted to enter the price quoted by the other retailer.
- You may be prompted with a message indicating the selected discount cannot be applied to the item. You must select **Ok** to continue.
- You may be prompted with a message to confirm that the discount type you selected was added. You must select **Ok** to continue.

This screenshot shows a "Discounting" prompt with a text input field containing "Enter discount percent" and a downward arrow icon. It also shows a "Competitive Price" prompt with a text input field containing "Enter price quoted by the competitor" and a downward arrow icon.

5. Enter the required information and press [Enter] to discount the selected item.

6. The item discount information is displayed on the View Port.

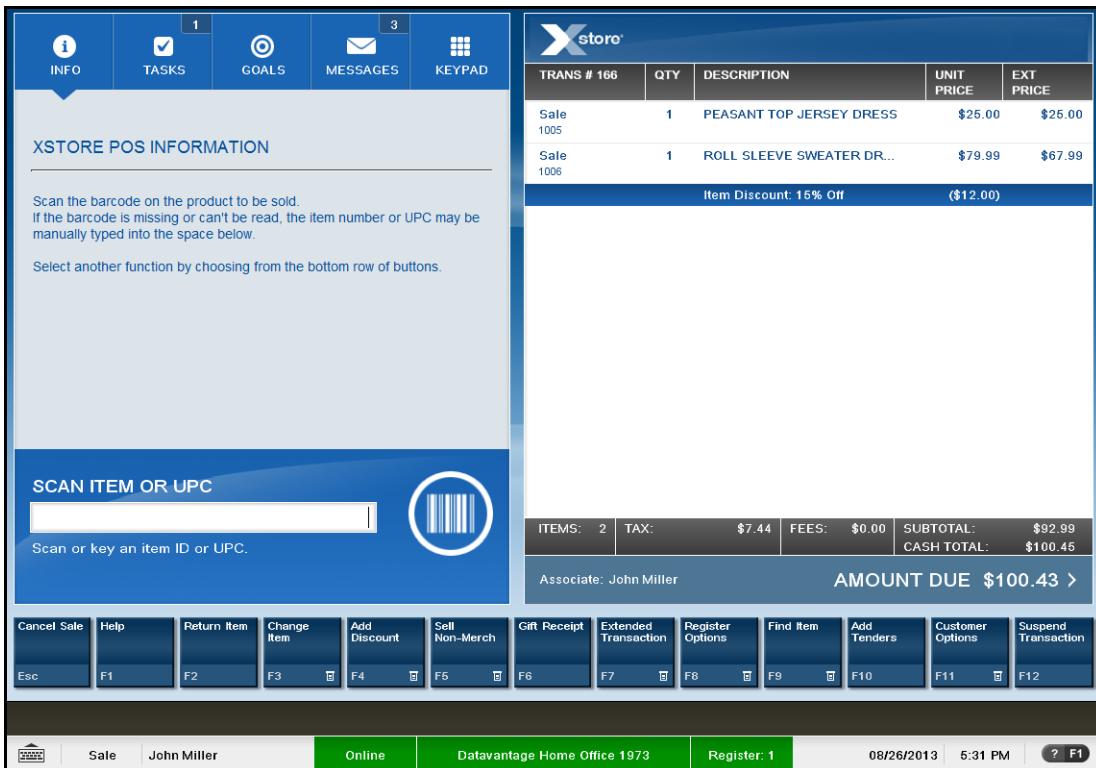


Figure 7-4: Sale Screen with Line Item Discount

Note: To remove a line item discount, you must void the discount. See "Voiding an Item" for more information.

Transaction Level Discounts

...continued from step 2

- For transaction-level discounts, Oracle Retail Xstore Point of Service displays a list of transaction discount options.

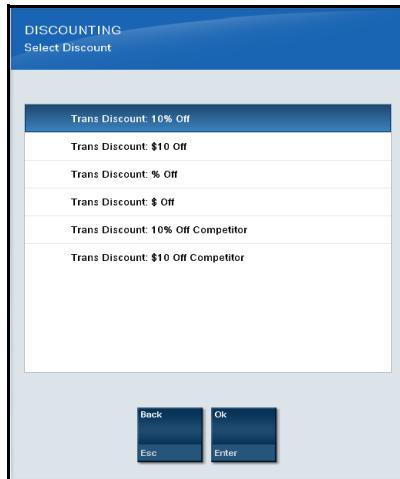


Figure 7-5: Transaction Discount Options

- Select the discount to be applied to the transaction and press [Enter] to continue.
- If prompted, select a reason for the discount and press [Enter] to continue.
- Depending upon the discount option and /or reason you chose, you may be prompted for additional information as shown in [Additional Discount Prompts](#). Enter the required information and press [Enter] to discount the sale transaction.
- The transaction discount information is displayed on the View Port. In the example below a \$20 total discount has been distributed across the 3 items.

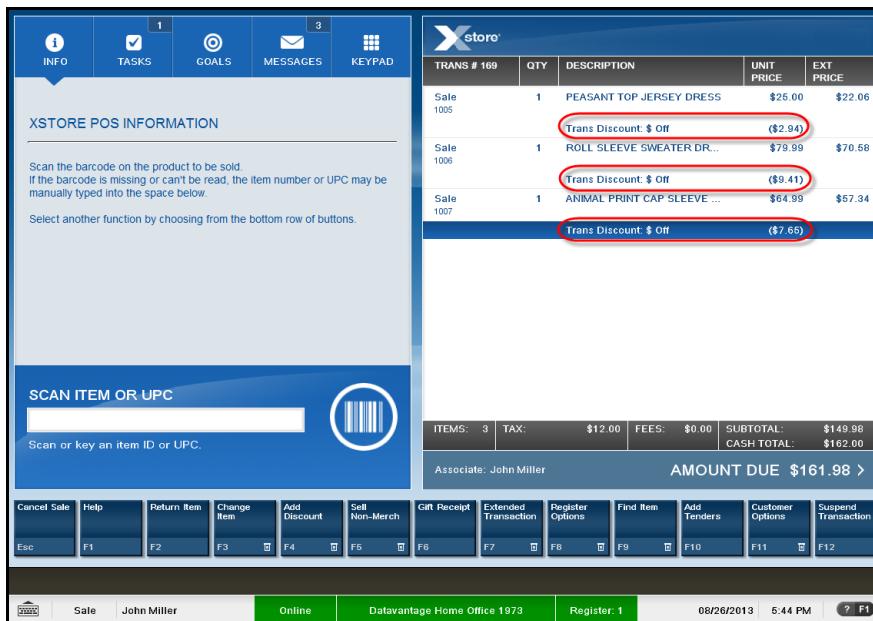


Figure 7-6: Sales Screen with Transaction Level Discount

Group Discounts

...continued from step 2

A Group Discount can be applied to a group of selected items in a transaction. The customer purchases these grouped items and receives a price that is less than the retail price of the items if they were sold singly.

- For group-level discounts, Oracle Retail Xstore Point of Service displays a list of group discount options as defined by your store:

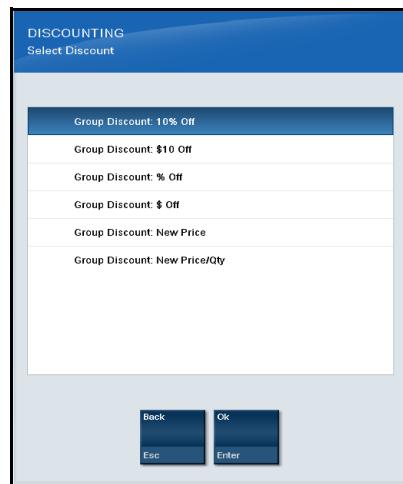


Figure 7-7: Group Discount Options

- Select the discount to be applied to the item group and press [Enter] to continue.
- Oracle Retail Xstore Point of Service displays a list of the items on the transaction that are eligible for a group discount.

DISCOUNT GROUP ITEMS		
Press the spacebar to select items for the group discount.		
ITEM ID	DESCRIPTION	EXT PRICE
230004	Black Shoe 10 Wide	\$79.99
330403	Black L Tee Shirt	\$12.50
430005	54 Peyton Hillis Jersey	\$89.99
6008	Birkenstock Sheridan	\$99.99

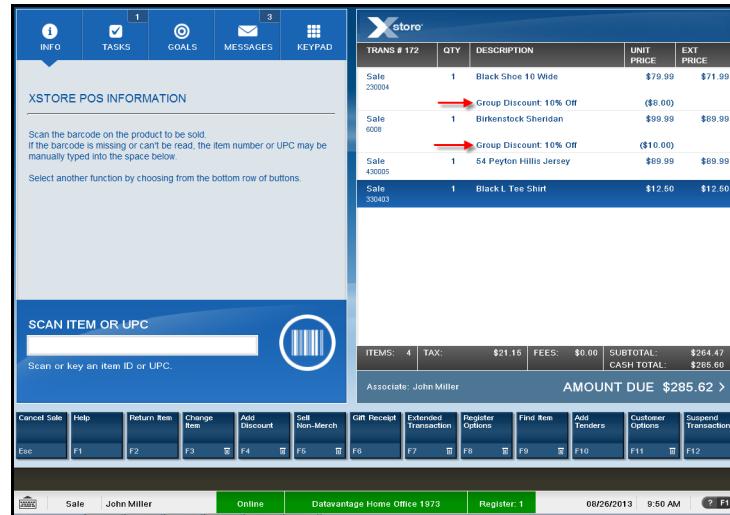
Figure 7-8: Items Eligible For Group Discount

- Select each item to be included in the group discount.

Adding a Discount/Award to an Item or Transaction

5. When you have selected all the items for the group discount, press [Enter] to continue.
6. If prompted, select a reason for the discount and press [Enter] to continue.
7. Depending upon the discount option and/or reason you chose, you may be prompted for additional information as shown in [Additional Discount Prompts](#).
8. Enter the required information and press [Enter] to apply the discount to the selected items in the group.

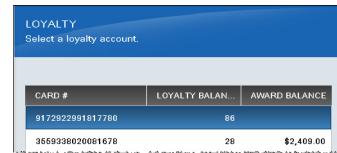
The item discount information is displayed on the View Port. In this example, the shoes were eligible for the 10% group discount, and the shirts were not part of the discount group.



Award Discounts

...continued from step 2

Note: If the customer that you assign to the transaction is already in a loyalty program and has multiple accounts, you may be prompted to select a loyalty account for the sale transaction.



The View Port displays any points or awards that have been earned to date. If the customer wishes to redeem any awards, select the **Add Award Discount** option to discount the transaction using the customer's award value.

Adding a Discount/Award to an Item or Transaction

1. For award discounts, enter the award amount to be applied to the transaction and press [Enter].

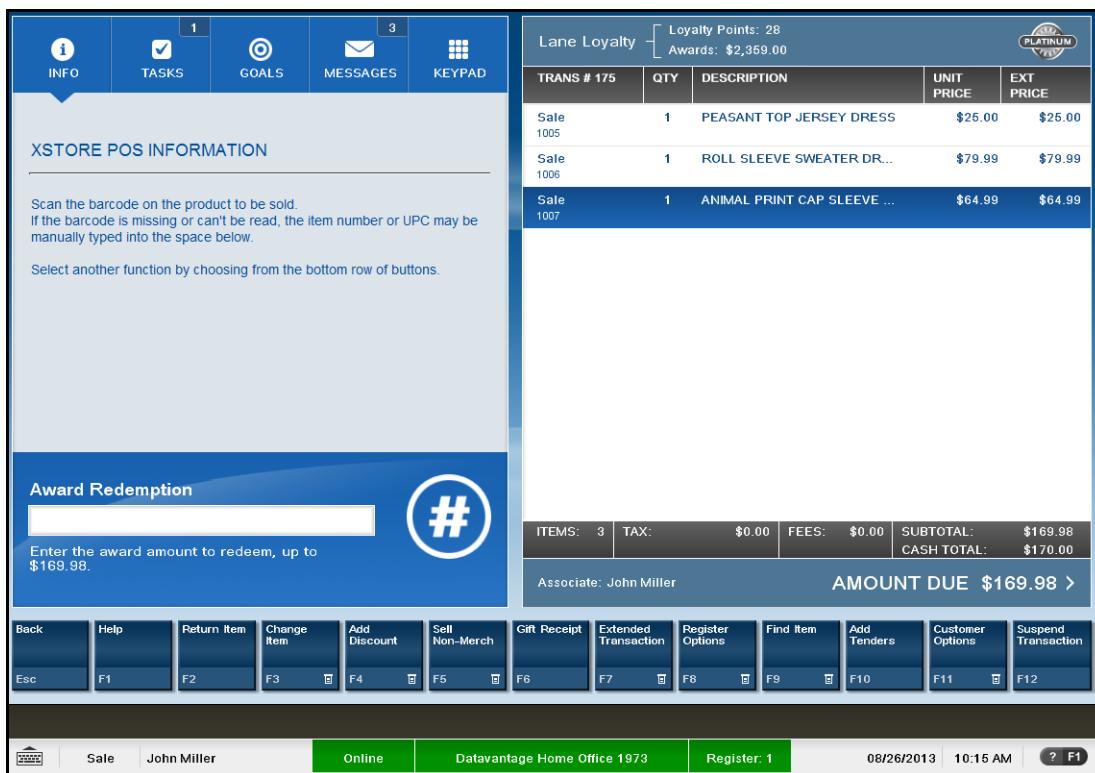


Figure 7-9: Redeem Award Prompt

Adding a Discount/Award to an Item or Transaction

2. The discount information is displayed on the View Port and the Coupon tab. The example below shows a \$100 award discount distributed across the 3 items. The customer's award totals have been adjusted accordingly:

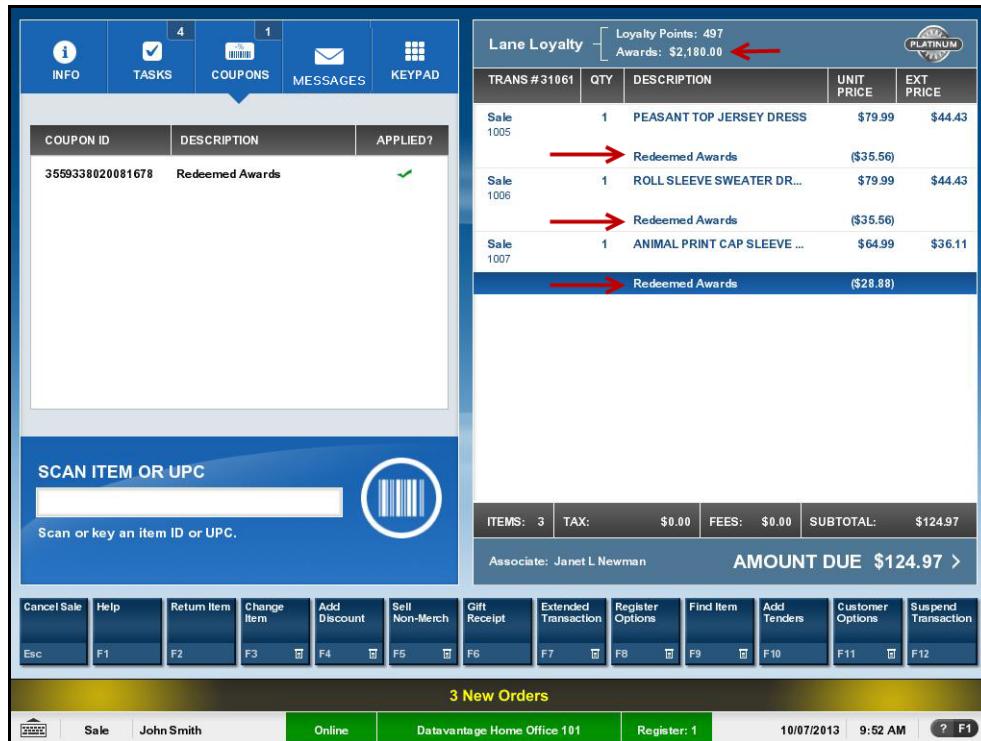


Figure 7-10: Transaction with Award Applied

Note: Depending upon your system's configuration, the customer's awards may be displayed as shown in [Figure 7-9](#), or the awards may be displayed in the form of coupons that may be individually selected from a list.

If prompted with a coupon list:

Use the up and down arrow keys to navigate among the coupons.

Press the [Spacebar] to select and deselect a coupon.

You may select more than one coupon to apply to the transaction.

About the Award Coupon List

If your system displays customer awards in the form of a coupon list, you may select one or more coupons from which the awards are applied to the transaction. The system may be configured two ways:

- **If you allow partial awards**

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.

- **If you do not allow partial awards**

- * 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 one.

Deal Pricing Discounts

Deal pricing discounts are automatically applied to items that have been scanned and are included in the discount. No user interaction is required to apply a deal to a transaction. Once the trigger items are added to the sale, Oracle Retail 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.

Adding a Discount/Award to an Item or Transaction

[Figure 7-11](#) shows deal item (Spend $\geq \$250$ Get 1 Item 6002 For \$99.99) displayed in the View Port.

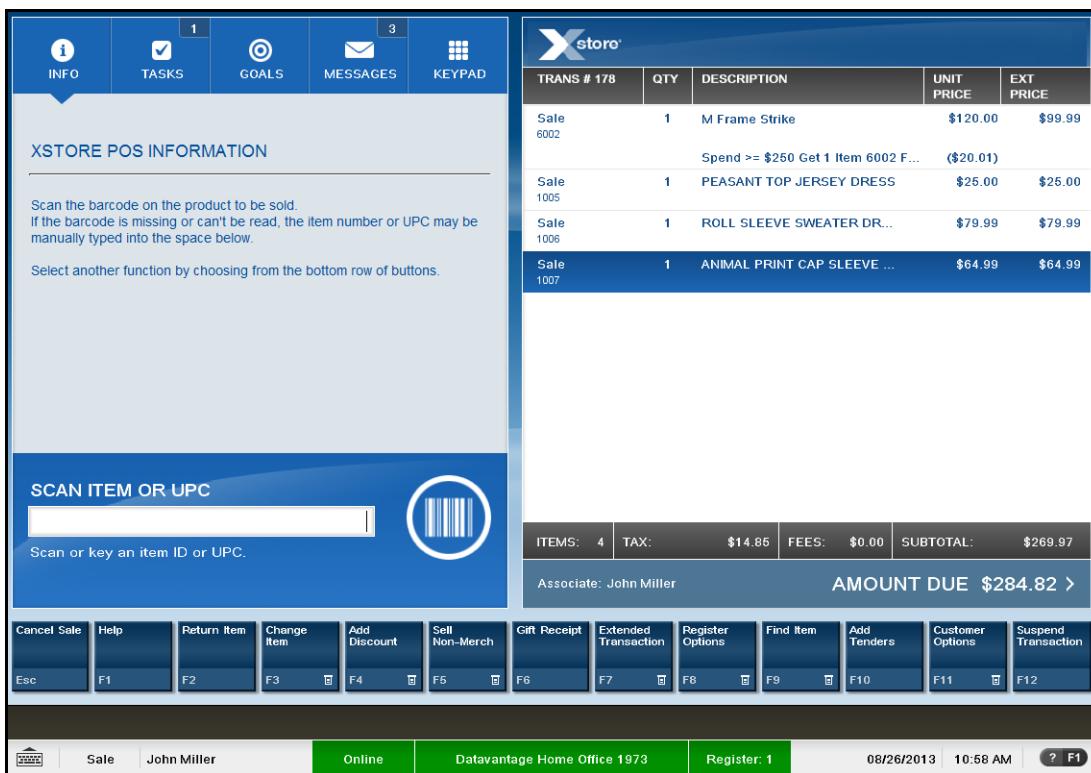


Figure 7-11: Spend $\geq \$250$ Get 1 Item 6002 For \$99.99 Example

In the figure example above, spend \$250 or more and get a pair of M Frame Strike sunglasses (item 6002) for \$99.99, regularly \$120.

- The *trigger* = spend \$250 or more
- The *deal* = get Item 6002 for \$99.99

Modifying a Sale Transaction

Overview

During a transaction you may need to make modifications prior to tendering the sale. This chapter explains:

- [Adding Non-Merchandise Items to the Sale](#)
- [Modifying Customer Information](#)
- [Modifying Line Items in a Sale](#)
 - [Changing the Item Quantity](#)
 - [Changing the Item Price](#)
 - [Voiding an Item](#)
 - [Changing the Commissioned Associate](#)
 - [Adding/Editing a Line Item Comment](#)
 - [Changing Item Taxes](#)
- [Changing Transaction Taxes](#)
- [Suspending/Resuming a Transaction](#)
- [Cancelling a Sale](#)

Adding Non-Merchandise Items to the Sale

- At the Sale screen, select the **Sell Non-Merch** option from the Sale menu to display the list of non-merchandise items.

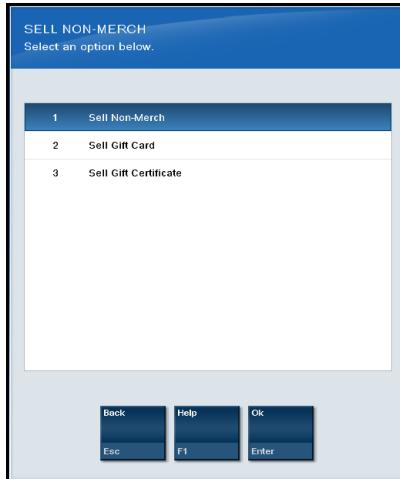


Figure 8-1: List of Non-Merchandise Options

Note: Because each Oracle Retail Xstore Point of Service menu is configurable, the non-merchandise items shown on your system may be different than the options shown in this guide. Depending upon your item choice, you may be prompted for additional information (such as a price) on the focus bar.

- Use the up and down arrow keys to select an item from the list and press [Enter] to continue.
- If prompted, use the up and down arrow keys to select a non-merchandise item from the list and press [Enter] to add the item to the sale.

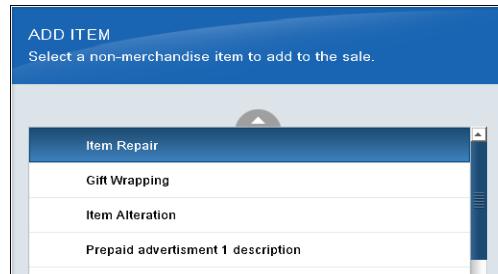


Figure 8-2: List of Non-Merchandise Items

4. Depending upon your item choice, you may be prompted for additional information. If prompted, enter the information as required and press [Enter] to continue.

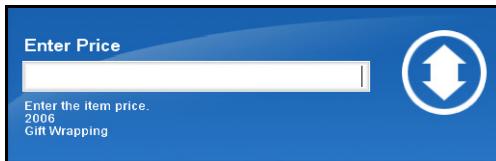


Figure 8-3: Prompt For Price

As you enter required information, Oracle Retail Xstore Point of Service adds the non-merchandise item to the sale and the non-merchandise information is shown on the View Port.

Modifying Customer Information

Perform the following steps to remove the customer from a transaction:

Tip: If you have a touch-screen monitor and wish to remove a customer from the transaction:

- From the *Customer Loyalty Banner*, completely swipe from left to right. An *Unassign* button displays.
- Tap the *Unassign* button to remove the customer.
- Tap anywhere else to cancel the remove process.

If the *Unassign* button is not accessed within a few seconds, the button no longer displays automatically.

1. From the sale menu, select **Customer Options**.
2. Select **Remove Customer**. The transaction sale screen displays with the customer removed.

Note: To add a different customer to the transaction, select Customer Options --> Assign Customer.

Tip: Touch-screen users, tap the *Customer Loyalty Banner* to search for and add a different customer. Once the customer is assigned, tap the *Customer Loyalty Banner* to view the Customer Maintenance Screen if needed.

Modifying Line Items in a Sale

1. From the sale menu, select **Change Item** to change or modify a line item (if you have proper security).
2. Select an option from the Change Item menu.

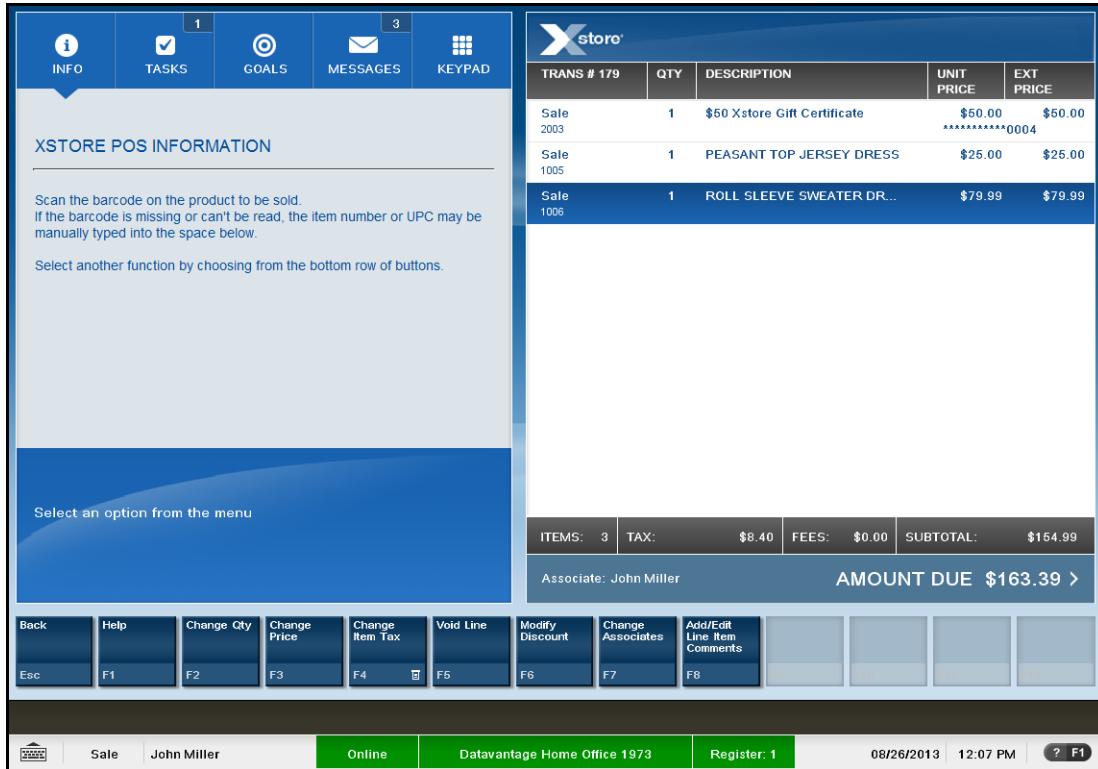


Figure 8-4: Change Item Menu Options

The following options are available:

- Change the item quantity — See [Changing the Item Quantity](#).
- Change the item price — See [Changing the Item Price](#).
- Change the item tax — See [Changing Item Taxes](#).
- Void a line item — See [Voiding an Item](#).
- Change the commissioned associate — See [Changing the Commissioned Associate](#).
- Add/Edit line item comments — See [Adding/Editing a Line Item Comment](#).
- Modify Discount — This option is only available when a discount is on the transaction. After selecting this option you are prompted to select the discount you want to change. See [Adding a Discount/Award to an Item or Transaction](#).

Changing the Item Quantity

Large quantities of items can be quickly entered into the system by using the change quantity function.

Tip: Touch-screen users tap the quantity area of an item and go to step 4. Your store may be configured to make an audio sound when you tap the quantity area.

1. Once an item has been added to a sale transaction, the item information is displayed in the View Port area. Select the **Change Item** option from the Sale menu.
2. Select the **Change Quantity** option from the Change Item menu.
3. If there are multiple items in the transaction, Oracle Retail Xstore Point of Service prompts you to select the item to be modified. Select the item to be modified and press **[Enter]** to display the Enter Quantity prompt.

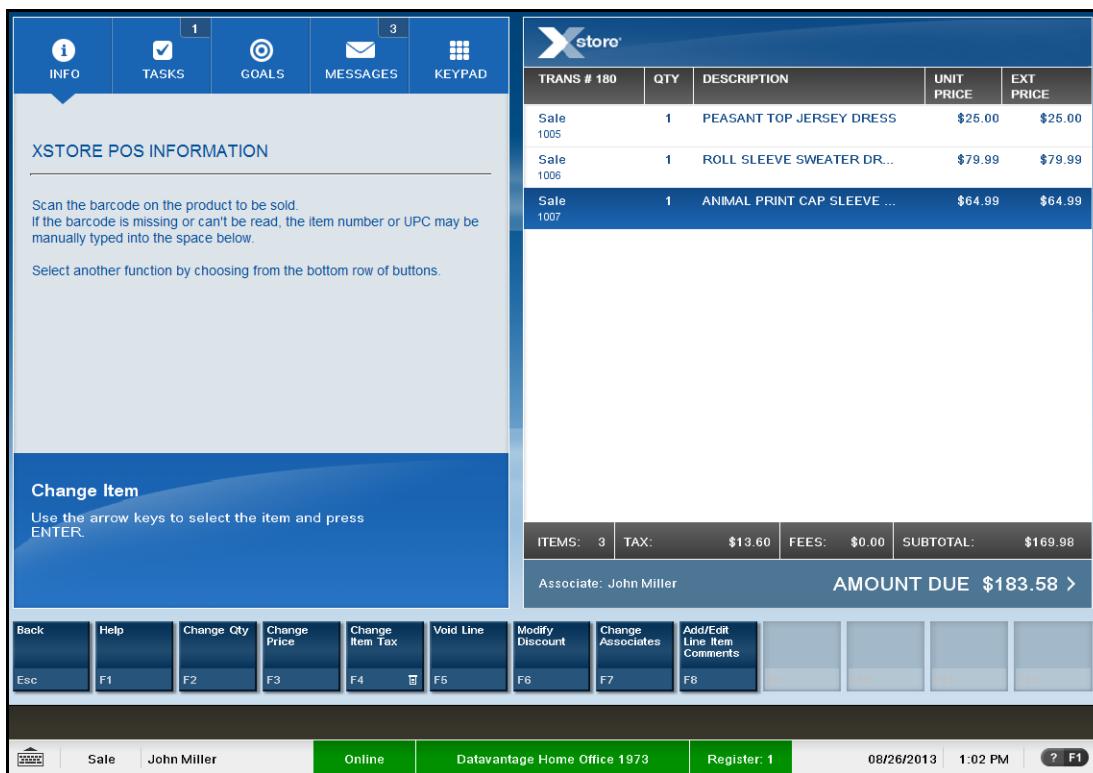


Figure 8-5: Select Item to Modify Prompt

Modifying Line Items in a Sale

4. Enter the new item quantity and press [Enter]. Oracle Retail Xstore Point of Service updates the item quantity and amount on the View Port.



Figure 8-6: Enter Quantity Prompt

Note: Check to be sure that the Enter Quantity prompt correctly identifies the item that you want to change.

5. Continue processing the transaction at the Sale screen.

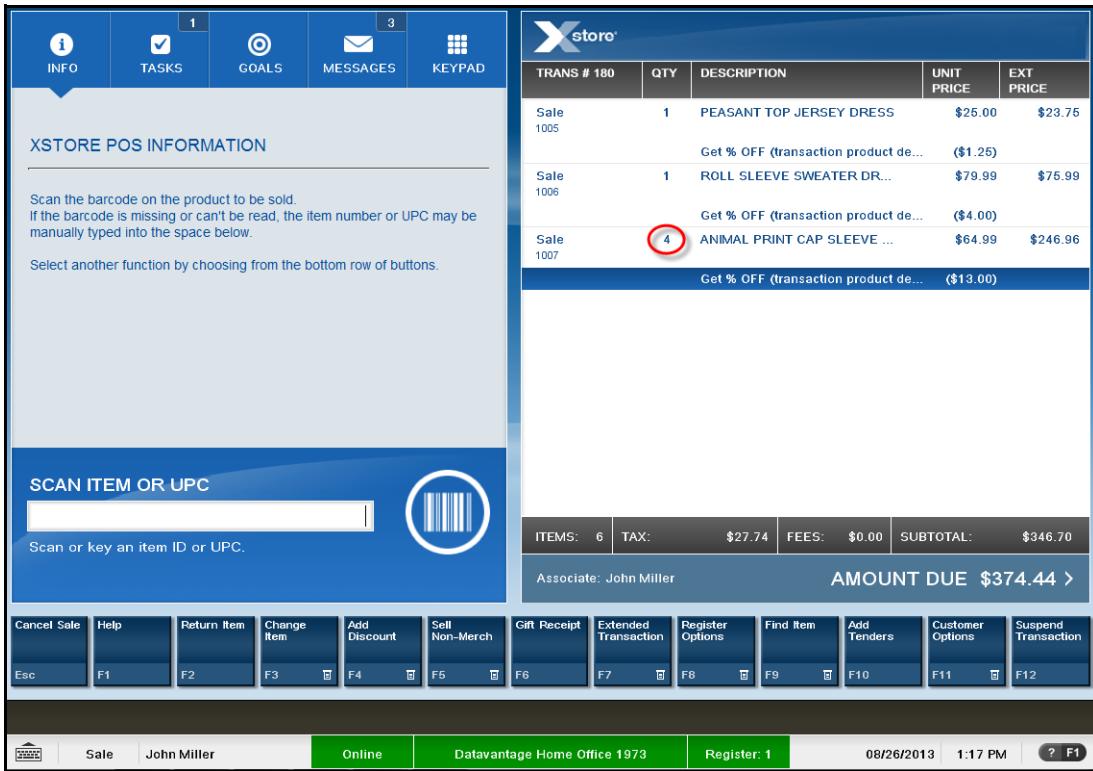


Figure 8-7: Sale Screen (With Changed Item Quantity)

Changing the Item Price

Tip: Touch-screen users tap the item price area and go to step 4.

1. Once an item has been added to a sale transaction, the item information is displayed in the View Port area. Select the **Change Item** option from the Sale menu.
2. Select the **Change Price** option from the Change Item menu.
3. If there are multiple items in the transaction, Oracle Retail Xstore Point of Service prompts you to select the item to be modified. Select the item to be modified and press **[Enter]**.

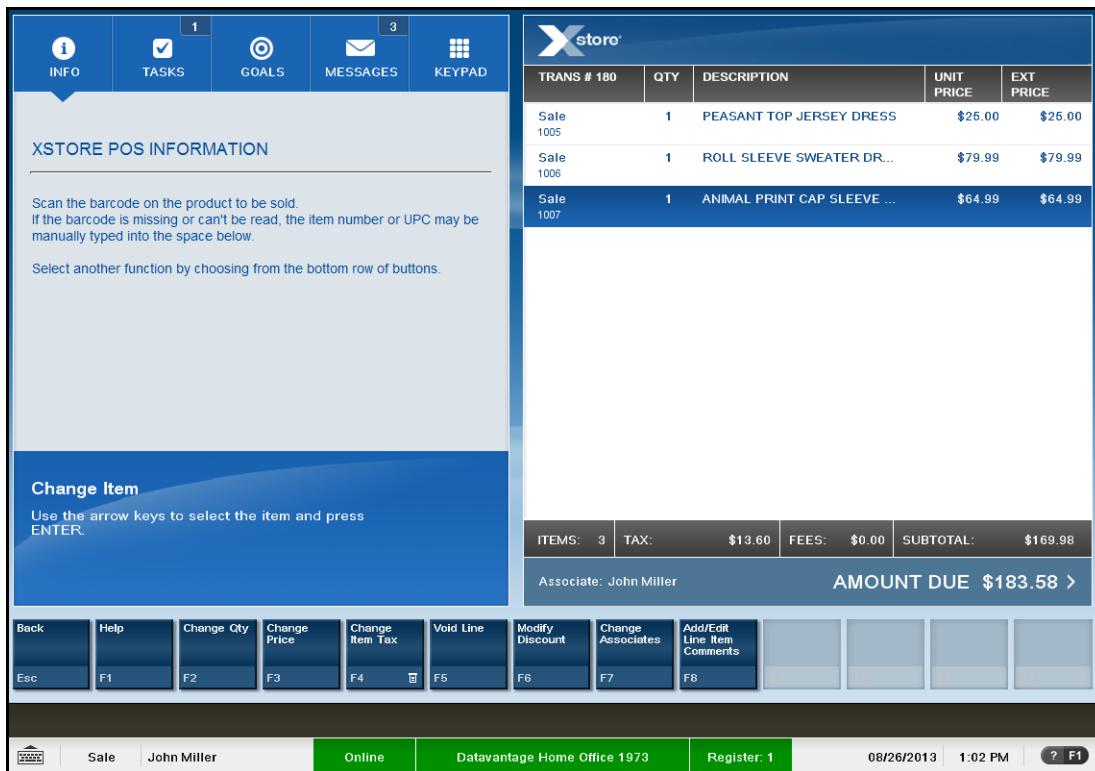


Figure 8-8: Select Item to Modify Prompt

4. When prompted, enter the new price for the item and press **[Enter]** to continue.

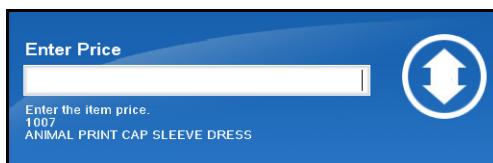


Figure 8-9: Enter Price Prompt

Note: Check to be sure that the item you selected is identified in the *Enter Price* prompt.

Modifying Line Items in a Sale

5. If prompted, select a reason for the price change from the list and press [Enter] to continue. Oracle Retail Xstore Point of Service updates the item's price on the View Port.

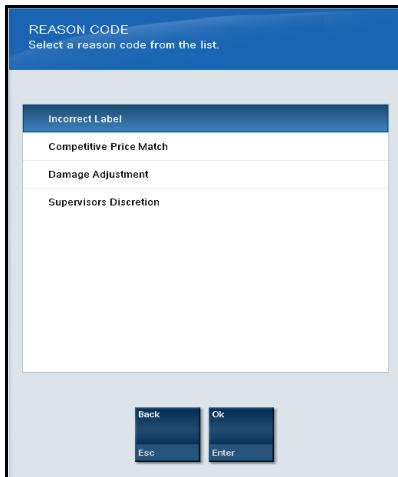


Figure 8-10: Price Change Reason List

6. Continue processing the transaction at the Sale screen.

Voiding an Item

Once an item is entered and displays on the View Port it can be removed only by performing a line void. The line void function removes the selected item from the sale transaction. This process also applies to removing discounts and other line items from the sale.

Tip: Touch-screen users:

Completely swipe the item you wish to void from left to right. A void button displays.

Tap the Void button to remove the line item.

- *To cancel the void, tap anywhere within the transaction screen, other than the void button. The void button no longer displays.*
- *If the void button is not used within a few seconds, it no longer displays.*
- *If the void button is visible, but you swipe a different item (to void a different item) the void button that was originally called no longer displays, and the newly called void button should appear.*

If prompted, type the reason for the void and select **Ok**.

1. Once an item has been added to a sale transaction, the item information is displayed in the View Port area. Select the **Change Item** option from the Sale menu.
2. Select the **Void Line** option from the Change Item menu.

3. If there are multiple items in the transaction, Oracle Retail Xstore Point of Service prompts you to select the item to be modified. Select the item to be voided and press [Enter].

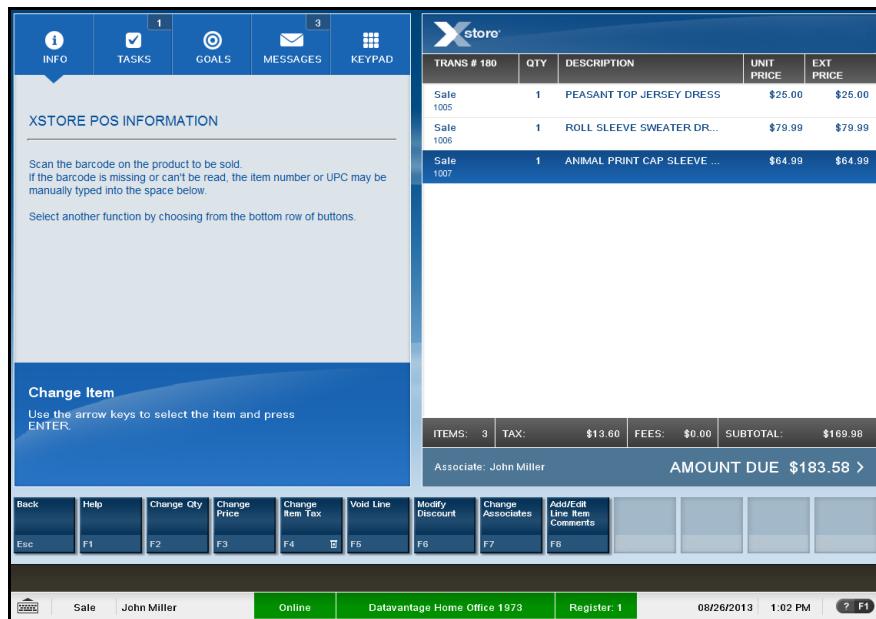


Figure 8-11: Select Item to Modify Prompt

4. If prompted, select the reason you are voiding the line item and press [Enter] to continue. Oracle Retail Xstore Point of Service removes the item from the View Port.

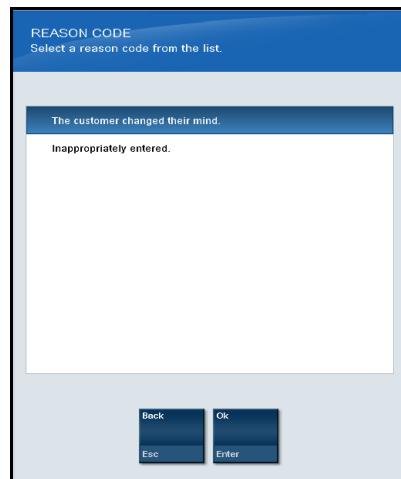


Figure 8-12: Void Item Reasons

Modifying Line Items in a Sale

Note: Your system may be set up to display voided line items with cross-through lines (as shown in the figure here) rather than removing the item from the View Port.

Xstore					
TRANS #	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE	
Sale 1005	1	PEASANT TOP JERSEY DRESS	\$25.00	\$25.00	
Sale 1006	1	ROLL SLEEVE SWEATER DR...	\$79.99	\$79.99	
Sale 1007	1	ANIMAL PRINT CAP SLEEVE ...	\$64.99	\$64.99	

-
5. Continue processing the transaction at the Sale screen.

Changing the Commissioned Associate

The Change Associates function allows you to change the commissioned employee ID during a transaction. This allows items sold by multiple sales associates to be rung up on the same receipt, thereby giving credit for commissions and goal tracking to the appropriate associates.

Tip: Touch-screen users tap the associate area in the transaction View Port and go to step 4.

1. Once an item has been added to a sale transaction, the item information is displayed in the View Port area. Select the **Change Item** option from the Sale menu.
2. Select the **Change Associates** option from the Change Item menu.
3. If there are multiple items in the transaction, Oracle Retail Xstore Point of Service prompts you to select the item to be modified. Select the item to be modified and press **[Enter]**.

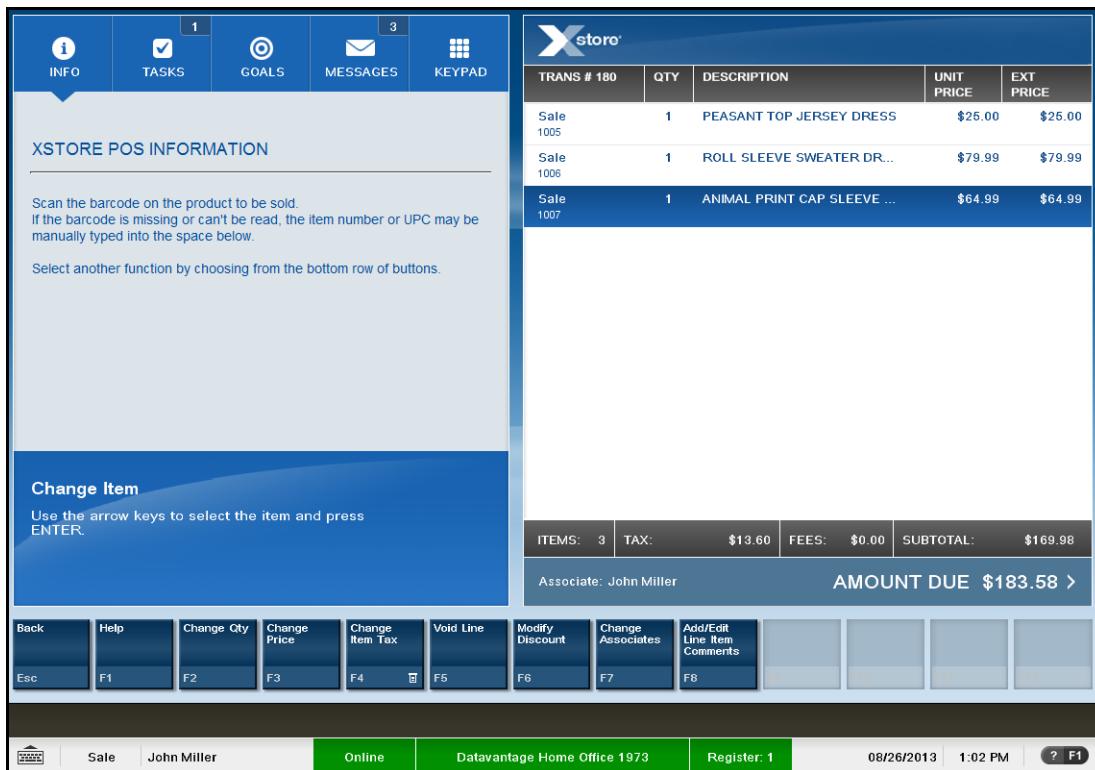


Figure 8-13: Select Item to Modify Prompt

Modifying Line Items in a Sale

4. Oracle Retail Xstore Point of Service displays a list of associates:
- Use the up and down arrow keys to select the name of the commissioned associate and press the [Spacebar] to add the associate(s) to the sale. Press [Enter] to continue.

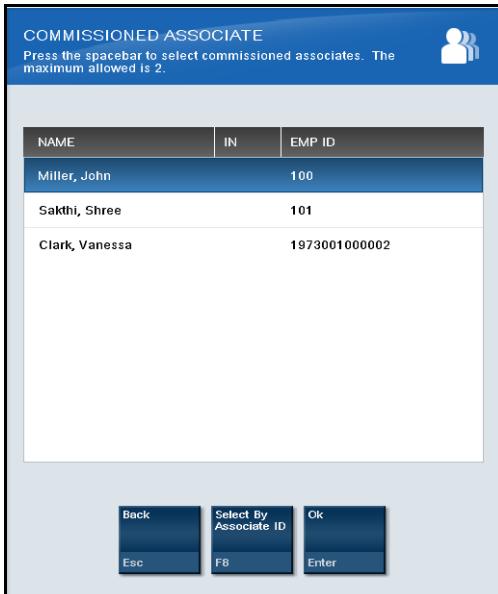


Figure 8-14: Commissioned Associate List

<OR>

- Select the **Select By Associate ID** option to scan or enter the commissioned associate's ID and press [Enter].



Figure 8-15: Commissioned Associate Prompt

Note: Depending upon your store policy, you may select or enter one or more commissioned associates to be associated with the selected line item.

5. Press [Enter] to return to the Sale screen and continue the transaction. The name of the newly-applied commissioned associate(s) is associated with this item.

Note: To view the commissioned associate or associates who are associated with each line item on the transaction, select the item. With an item selected, the names are displayed in the View Port.

Example: Trans # 191, Cashier is



In [Figure 8-16](#) below, there are two commissioned associates for the selected line item (item 1006).

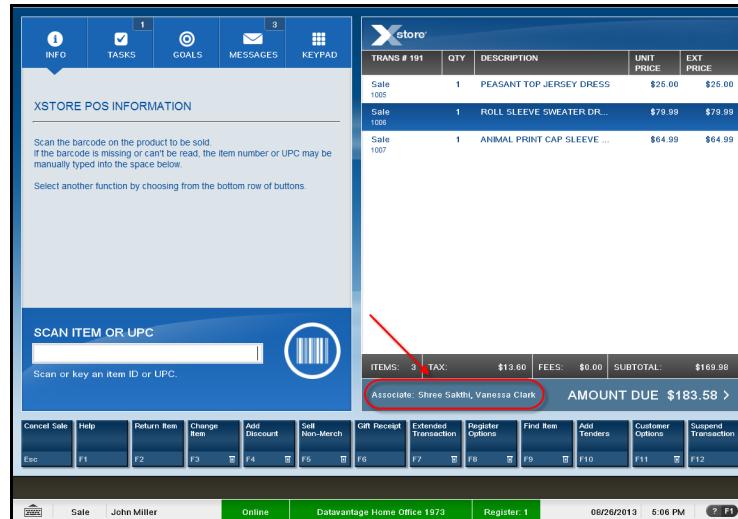


Figure 8-16: Trans# 191, Item 1006 Selected

In [Figure 8-17](#) below, there is one commissioned associate for the selected line item (1007).

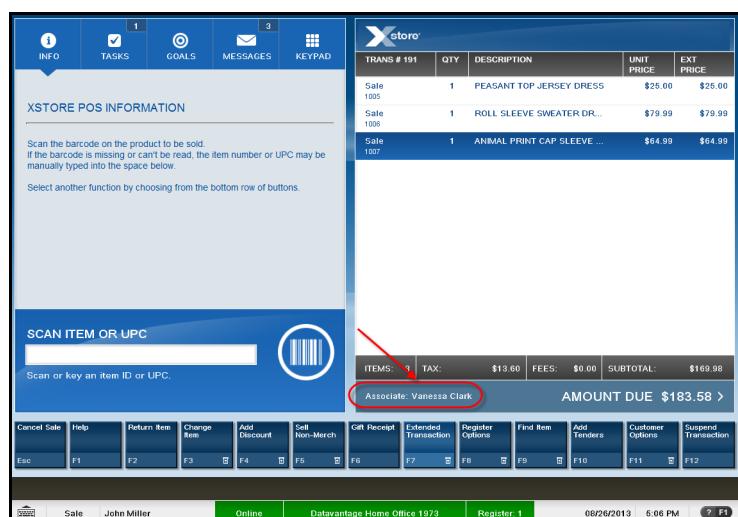


Figure 8-17: Trans# 191, Item 1007 Selected

Adding/Editing a Line Item Comment

Use the **Add/Edit Line Item Comments** function to associate a comment with a specific item in a transaction.

- Once an item has been added to a sale transaction, the item information is displayed in the View Port area. Select the **Change Item** option from the Sale menu.
- Select the **Add/Edit Line Item Comments** option from the Change Item menu.
- If there are multiple items in the transaction, Oracle Retail Xstore Point of Service prompts you to select the item to be modified. Select the item to be modified and press **[Enter]**.

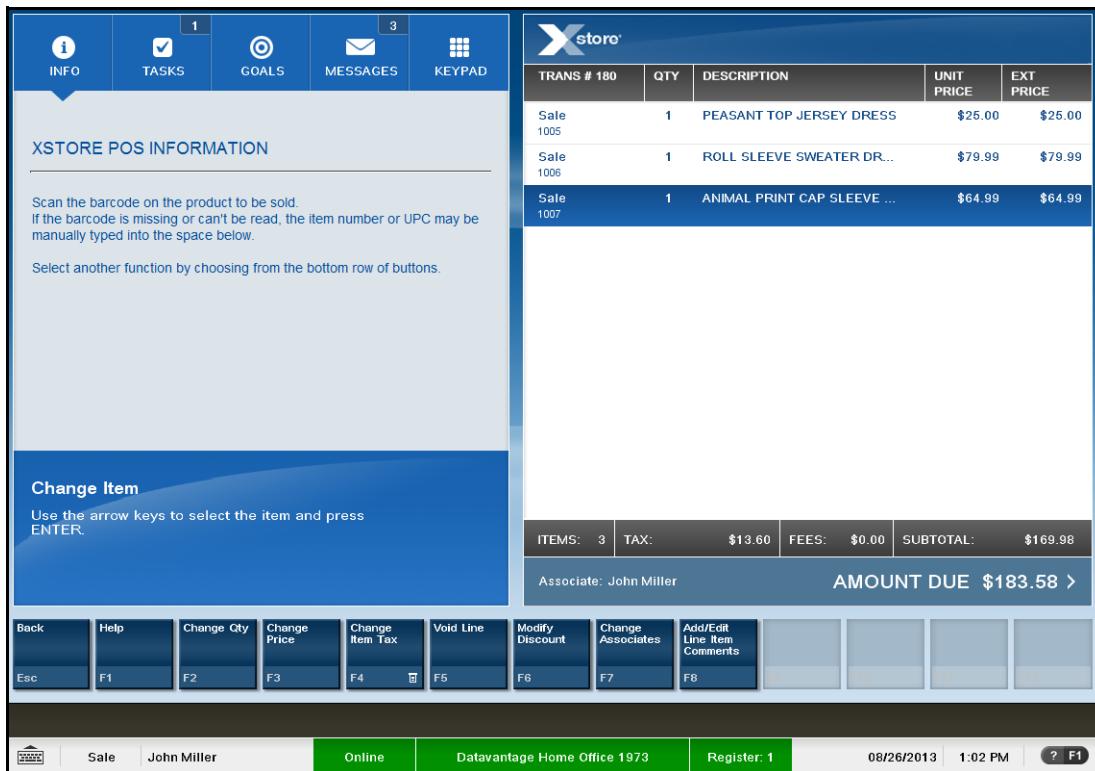


Figure 8-18: Select Item to Modify Prompt

- Oracle Retail Xstore Point of Service displays a comment form where you can type a new comment, or edit an existing comment to be associated with the selected item. Type or edit a comment and press **[Enter]** to continue.

Note: If you are editing an existing comment, you must select the comment line on the View Port rather than the item with which it is associated.

TRANS #	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	\$25.00	\$25.00
Sale 1006	1	ROLL SLEEVE SWEATER DR...	\$79.99	\$79.99
Sale 1007	1	ANIMAL PRINT CAP SLEEVE ...	\$64.99	\$64.99

The customer will be returning to the store to schedule alterations on this garment.

- The system returns to the Sale screen and the comment is associated with the item.

Changing Item Taxes

Note: 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.

Taxes can be modified for the entire transaction or for any individual item in the transaction. This section provides information about changing the tax at the item level. Use the **Change Item** option to modify the tax status of just the selected item, for example, to change it from taxed to tax-exempt.

Important: Item taxes cannot be changed for Order Broker items.

1. Once an item has been added to a sale transaction, the item information is displayed in the View Port area. Select the **Change Item** option from the Sale menu.
2. Select the **Change Item Tax** option from the Change Item menu.
3. Select an option from the Item Tax menu:

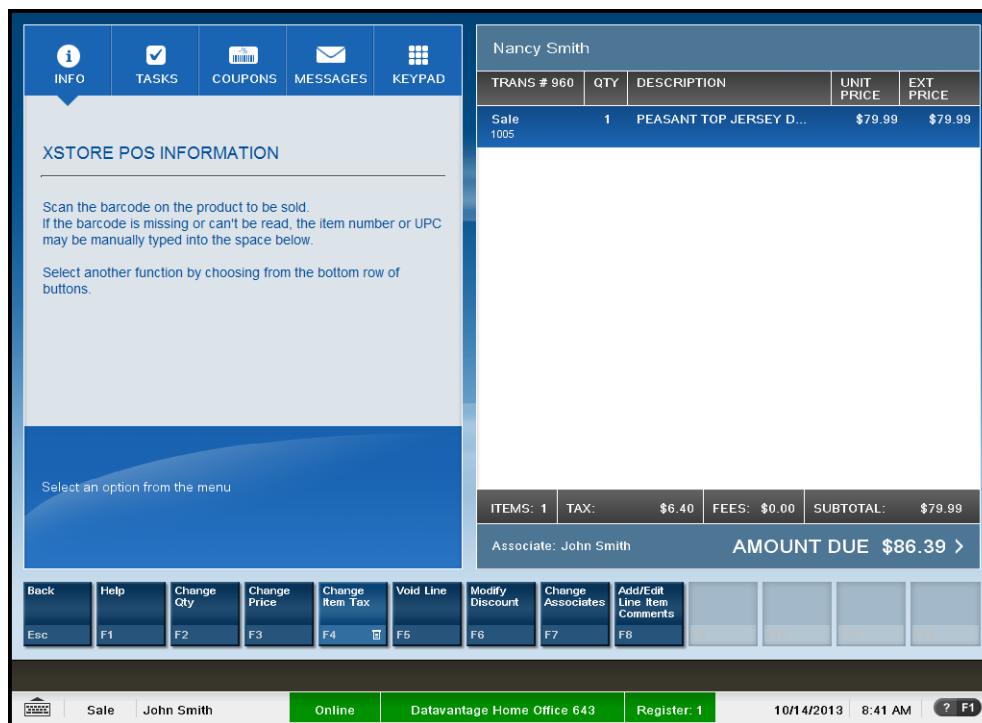


Figure 8-19: Item Tax Menu Options

- **Change Item Tax Location**—See [Changing the Item Tax Location](#).
- **Exempt Item Tax**—See [Changing the Item to Tax Exempt](#).
- **Change Item Tax Dollars**—See [Changing the Item Tax Dollar Amount](#).
- **Change Trans Tax Percent**—See [Changing the Item Tax Percentage](#).

Changing the Item Tax Location

...continued from step 3 above.

1. Select the **Change Item Tax Location** option from the Item Tax menu ([Figure 8-19](#)).
2. If there are multiple items in the transaction, Oracle Retail Xstore Point of Service prompts you to select the item to be modified. Select the item to be modified and press **[Enter]**.
3. Oracle Retail Xstore Point of Service prompts for the postal code of the new tax location. Enter the postal code and press **[Enter]**.



Figure 8-20: Postal Code Prompt

Note: If the postal code entered here is not on file, the taxes for the current location are used.

4. If prompted for a specific tax location, use the up and down arrow keys to select the tax location to be modified and press **[Enter]**.
5. Oracle Retail Xstore Point of Service prompts you to select the reason for the tax location change. Use the up and down arrow keys to select the reason and press **[Enter]** to continue.

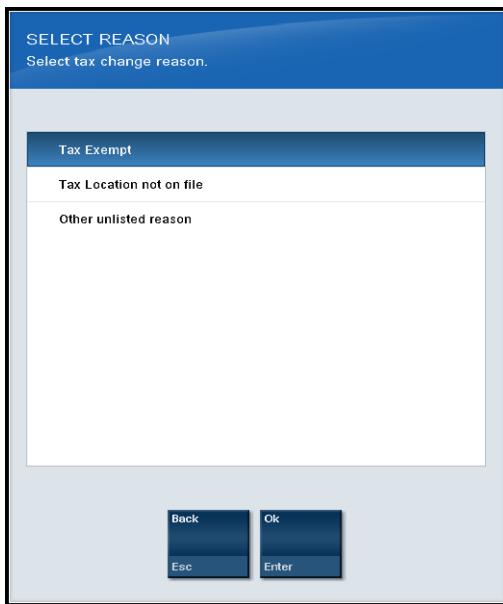


Figure 8-21: List of Tax Change Reasons

6. The system returns to the Sale screen. Continue processing the transaction and after all items have been added, select **Add Tenders** to complete the sale.

- When the transaction is complete, the system prints receipts as required.

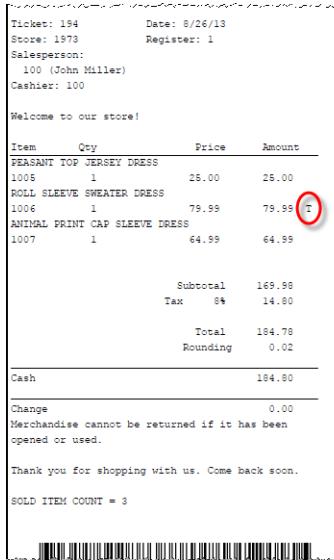


Figure 8-22: Sample Receipt with Modified Item Tax

Tip: On a printed receipt, the letter "T" next to an item signifies that the tax for that item has been changed.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Email Receipt Options](#) for more information about sending email receipts.

Changing the Item to Tax Exempt

...continued from step 3.

- Select the **Exempt Item Tax** option from the Item Tax menu ([Figure 8-19](#)).
- If there are multiple items in the transaction, Oracle Retail Xstore Point of Service prompts you to select the item to be modified. Select the item to be modified and press **[Enter]**.
- If applicable, Oracle Retail Xstore Point of Service displays a list of the current taxes on the item and prompts you to select the tax to change. Use the up and down arrow keys to select a tax to change and press **[Enter]**.

Modifying Line Items in a Sale

4. Customer association is required:
 - If a customer has not been associated with the sale, enter the customer information when prompted. Continue with step 5.
 - If a customer is associated with the sale, but does not have a current tax exempt form on file, continue with step 5 below.
 - If a customer is associated with the sale and has a current tax exempt form on file, you are prompted to select the tax exempt identifier from the list of exemptions on file for this customer. Skip to step 7.
5. If prompted, select the reason for the item tax exemption.

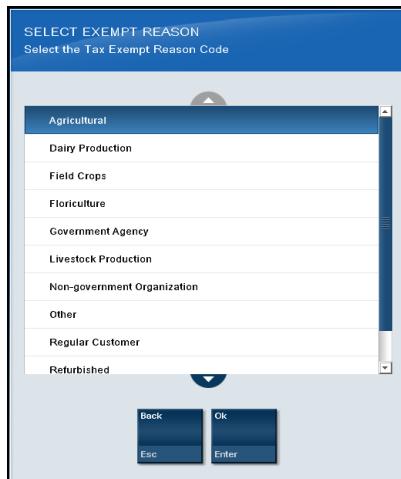


Figure 8-23: Tax Exempt Reasons

6. If the customer does not have a current tax exempt form on file, Oracle Retail Xstore Point of Service displays the Customer Tax Exempt form. Enter the customer's tax exempt information in all fields as required and select **Save Changes**. Skip to step 8.

Figure 8-24: Customer Tax Exempt Form

7. If the customer has at least one current tax exempt form on file, Oracle Retail Xstore Point of Service displays a list of the tax exemptions on file for this customer.

The screenshot shows a software interface titled "SELECT EXEMPTION" with the sub-instruction "Select the tax exemption to apply." Below this is a table with three columns: "HOLDER", "REASON", and "EXP DATE". A single row is displayed, showing "King Industries" in the Holder column, "Agricultural" in the Reason column, and "124676B" in the Exp Date column. At the bottom of the screen are four buttons: "Back" (Esc), "Select & Continue" (Enter), "Select & View" (F5), and "New" (F6).

HOLDER	REASON	EXP DATE
King Industries 124676B	Agricultural	

Back Esc Select & Continue Enter Select & View F5 New F6

Figure 8-25: List of Tax Exemptions On File for Customer

- * Select a Tax Exemption from the list and press [Enter] to apply the selected tax exemption to the item. Continue with step 8.
<OR>
 - * Select the **Select & View** option to review the tax exemption details. You can edit the information here as needed. You may make changes if the current information is incorrect. Select **Save Changes**. The system applies the selected tax exemption to the item and returns to the Sale screen. Continue with step 8 below.
<OR>
 - * Select the **New** option to create a new tax exemption record for this customer. Go back to step 5.
8. Continue processing the transaction at the Sale screen. Tender the sale after all items have been added to complete the transaction.

Modifying Line Items in a Sale

- When the transaction is complete, the system prints receipts as required.



Figure 8-26: Tax Exempt Receipt Example

Tip: The letter "E" printed next to the item indicates that this item has been exempted from the tax.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Email Receipt Options](#) for more information about sending email receipts.

Changing the Item Tax Dollar Amount

...continued from step 3.

- Select the Change Item Tax \$ option from the Item Tax menu ([Figure 8-19](#)).
- If there are multiple items in the transaction, Oracle Retail Xstore Point of Service prompts you to select the item to be modified. Select the item to be modified and press [Enter].
- If applicable, Oracle Retail Xstore Point of Service displays a list of the current taxes on the item and prompts you to select the tax to change. Use the up and down arrow keys to select the tax to change and press [Enter].
- Oracle Retail Xstore Point of Service prompts you to enter the new tax dollar amount for the selected item. Enter the amount and press [Enter] to continue.

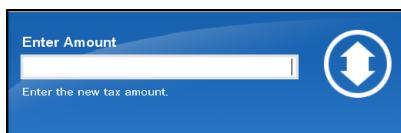


Figure 8-27: Tax Amount Prompt

5. Depending upon your store policy, you may be prompted for a reason for the tax change. Use the up and down arrow keys to select a reason for the tax change and press [Enter].

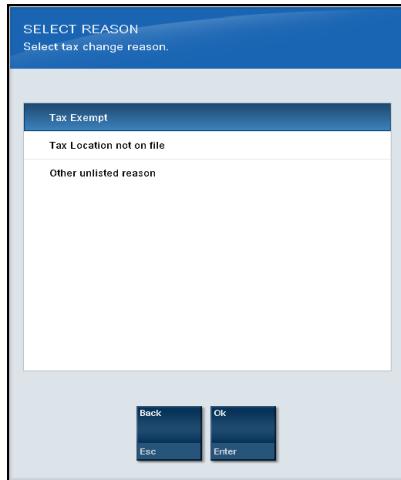


Figure 8-28: List of Tax Change Reasons

6. The system returns to the Sale screen and you may continue processing the transaction. Select **Add Tenders** after all items have been added and you are ready to complete the transaction.

On the receipt, the letter "T" next to an item signifies that the tax for that item has been changed. See [Figure 8-22](#).

Changing the Item Tax Percentage

...continued from step 3.

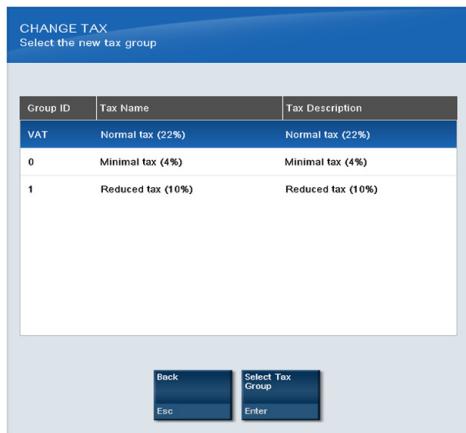
1. Select the **Change Item Tax %** option from the Item Tax menu ([Figure 8-19](#)).
2. If there are multiple items in the transaction, Oracle Retail Xstore Point of Service prompts you to select the item to be modified. Select the item to be modified and press [Enter].
3. If applicable, Oracle Retail Xstore Point of Service displays a list of the current taxes on the item and prompts you to select the tax to change. Use the up and down arrow keys to select the tax to change and press [Enter].
4. Depending upon the configuration of your system:
 - Oracle Retail Xstore Point of Service prompts you to enter the new tax rate as a percentage for the selected item. Enter the percentage and press [Enter] to continue.



Figure 8-29: Tax Percentage Prompt

Changing Transaction Taxes

- Oracle Retail Xstore Point of Service prompts you to select a new tax group to apply to the item. Select the new tax group and press [Enter] to continue.



5. Depending upon your store policy, you may be prompted for a reason for the tax change. Use the up and down arrow keys to select a reason for the tax change and press [Enter].

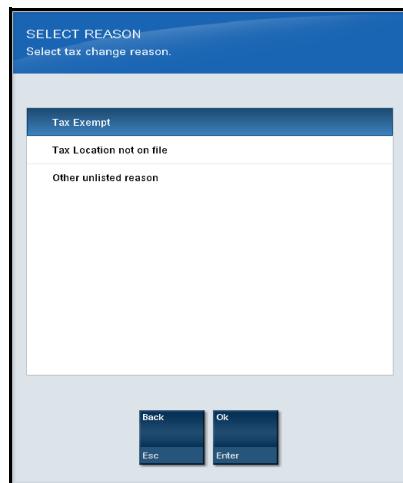


Figure 8-30: List of Tax Change Reasons

6. The system returns to the Sale screen and you may continue processing the transaction. Select **Add Tenders** after all items have been added and you are ready to complete the transaction.

On the receipt, the letter "T" next to an item signifies that the tax for that item has been changed. See [Figure 8-22](#).

Changing Transaction Taxes

Note: 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.

Use the **Change Transaction Tax** option to modify the tax status of the entire transaction; for example, from taxed to tax exempt or vice versa.

- After an item has been added to a sale transaction, the item information is displayed in the View Port area. Select **Register Options** from the Sale screen menu.

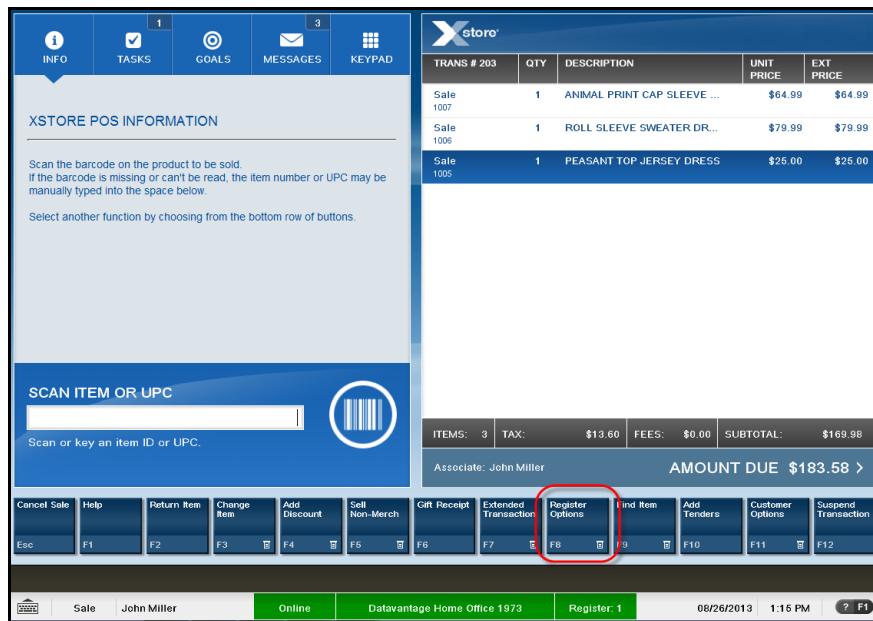


Figure 8-31: Sale Screen Menu - Register Options Button

- Select the **Change Trans Tax** option from the Register Options menu.

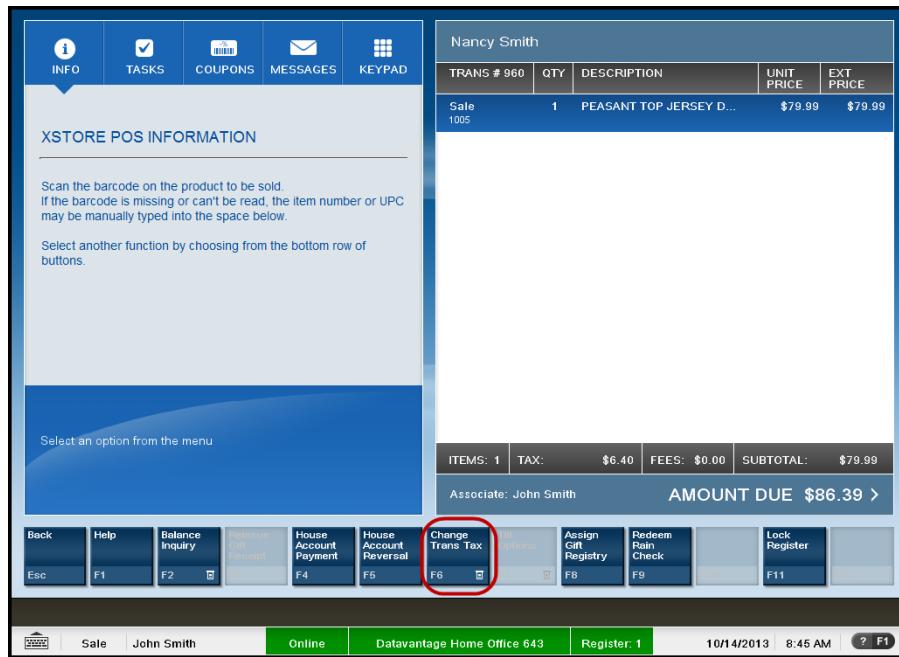


Figure 8-32: Register Options- Change Trans Tax Option

Changing Transaction Taxes

3. Select an option from the Transaction Tax menu:

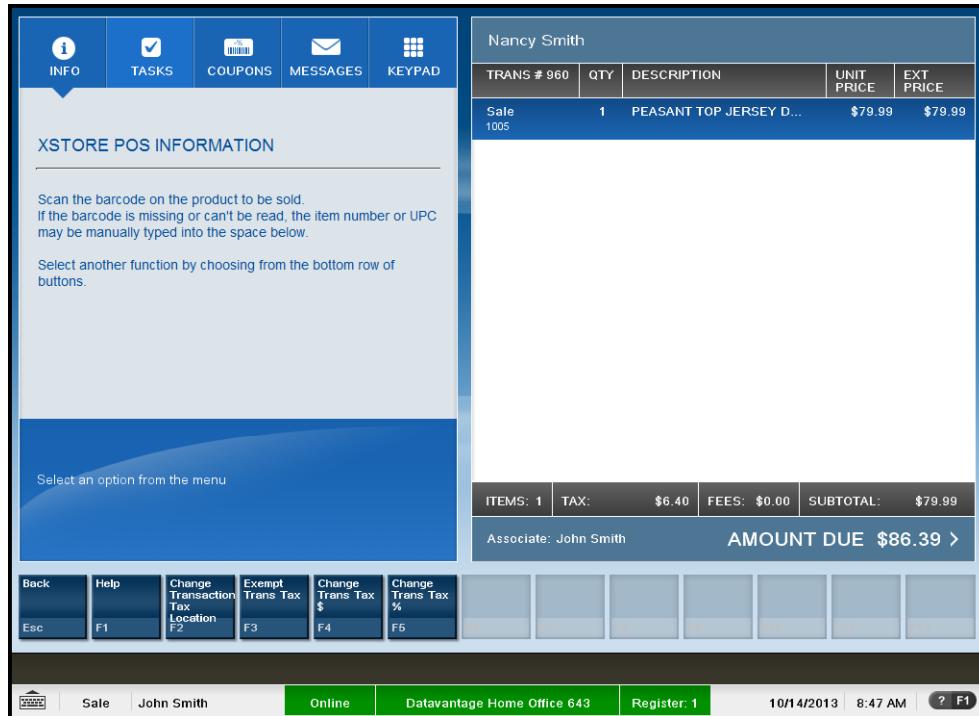


Figure 8-33: Transaction Tax Menu Options

- **Change Transaction Tax Location** — See [Changing the Transaction Tax Location](#) below.
- **Exempt Trans Tax** — See [Changing the Transaction to Tax Exempt](#).
- **Change Transaction Tax \$** — See [Changing the Transaction Tax Dollar Amount](#).
- **Change Transaction Tax %** — See [Changing the Transaction Tax Percent](#).

Changing the Transaction Tax Location

...continued from step 3.

1. Select the **Change Transaction Tax Location** option from the Transaction Tax menu ([Figure 8-33](#)).
2. Oracle Retail Xstore Point of Service prompts for the postal code of the new tax location. Enter the postal code and press [Enter].

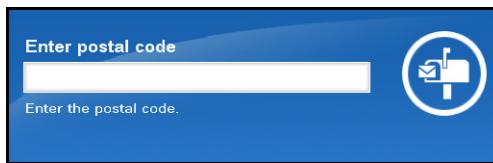


Figure 8-34: Postal Code Prompt

Note: If the postal code entered here is not on file, the taxes for the current location are used.

3. If prompted for a specific tax location, use the up and down arrow keys to select the tax location to be modified and press [Enter].
4. Oracle Retail Xstore Point of Service prompts you to select the reason for the tax location change. Use the up and down arrow keys to select the reason and press [Enter] to continue.

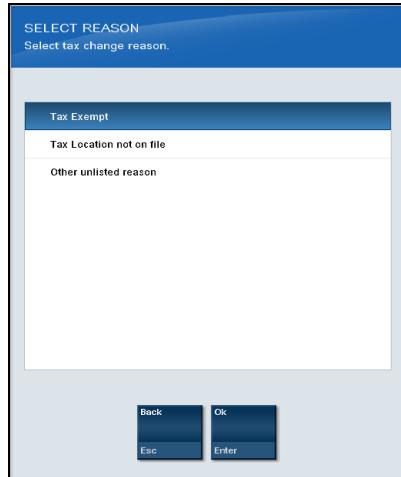


Figure 8-35: List of Tax Change Reasons

5. Press [Esc] to return to the Sale Options menu. Press [Esc] again to return to the Sale screen and continue processing the transaction.
6. When the transaction is complete, the system prints receipts as required.

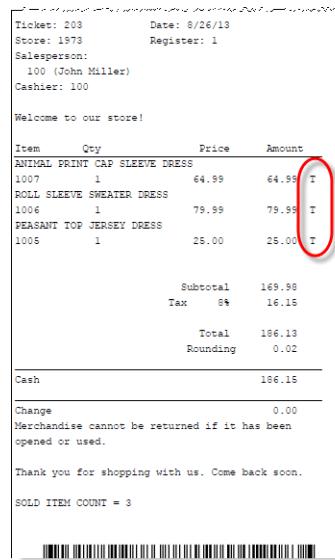


Figure 8-36: Sample Receipt, Transaction Tax Changed

Tip: The printed receipts show a letter "T" next to all items indicating that the tax has been changed for all items in this transaction.

Changing the Transaction to Tax Exempt

...continued from step 3.

Changing Transaction Taxes

1. Select the **Exempt Trans Tax** option from the Transaction Tax menu ([Figure 8-33](#)).
2. Customer association is required:
 - If a customer has not been associated with the sale, enter the customer information when prompted. Continue with step 3 below.
 - If a customer is associated with the sale, but does not have a current tax exempt form on file, continue with step 3 below.
 - If a customer is associated with the sale and has a current tax exempt form on file, you are prompted to select the tax exempt identifier from the list of exemptions on file for this customer. Skip to step 5.
3. If prompted, select the reason for the tax exemption.

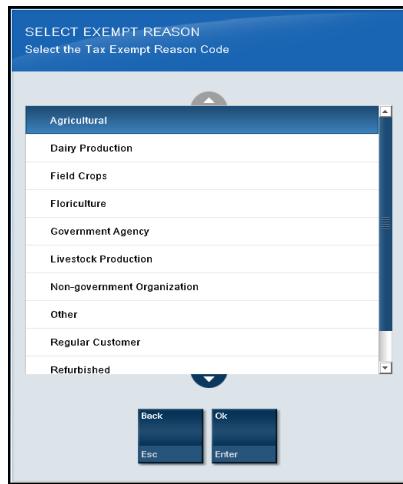


Figure 8-37: Tax Exempt Reasons

4. If the customer does not have a current tax exempt form on file, Oracle Retail Xstore Point of Service displays the Customer Tax Exempt form. Enter the customer's tax exempt information in all fields as required and select **Save Changes**. Skip to step 6.

Figure 8-38: Customer Tax Exempt Form

5. If the customer has at least one current tax exempt form on file, Oracle Retail Xstore Point of Service displays a list of the tax exemptions on file for this customer.

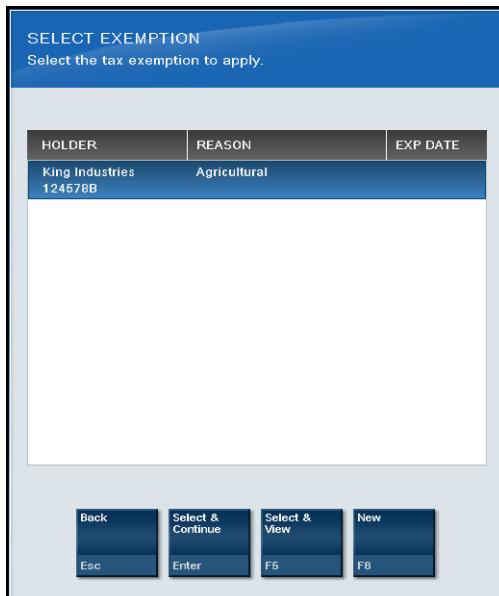


Figure 8-39: List of Tax Exemptions On File for Customer

- * Select a Tax Exemption from the list and press [Enter] to apply the selected tax exemption to the item. Continue with step 6.
<OR>
 - * Select the **Select & View** option to review the tax exemption details. You can edit the information here as needed. You may make changes if the current information is incorrect. Select **Save Changes**. The system applies the selected tax exemption to the item and returns to the Sale screen. Continue with step 6 below.
<OR>
 - * Select the **New** option to create a new tax exemption record for this customer. Go back to step 3.
6. When you have applied the tax exemption to the transaction, press [Esc] to return to the Register Options menu and press [Esc] again to return to the Sale screen and continue processing the transaction.

Tip: To confirm that the tax exemption has been applied to the transaction, the View Port displays the letter "E" next to the item price.

Changing Transaction Taxes

- When the transaction is complete, the system prints receipts as required.

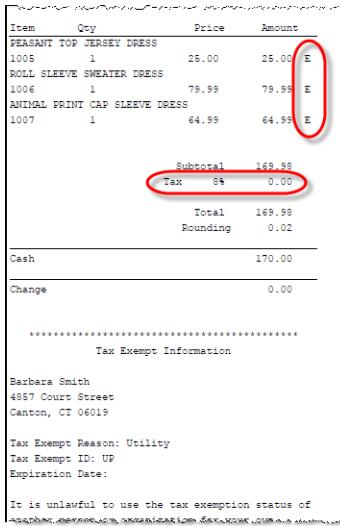


Figure 8-40: Tax Exempt Transaction Receipt Example

Tip: The “E” printed next to all items indicates that each item in this transaction has been exempted from the tax.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Email Receipt Options](#) for more information about sending email receipts.

Changing the Transaction Tax Dollar Amount

...continued from step 3.

- Select the **Change Trans Tax \$** option from the Transaction Tax menu ([Figure 8-33](#)).
- If applicable, Oracle Retail Xstore Point of Service displays a list of the current taxes on the transaction and prompts you to select the tax to change. Use the up and down arrow keys to select the tax to change and press [Enter].
- Oracle Retail Xstore Point of Service prompts you to enter the new tax dollar amount. Enter the amount and press [Enter] to continue.

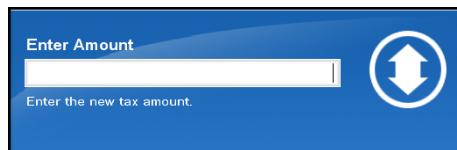


Figure 8-41: Tax Amount Prompt

4. Depending upon your store policy, you may be prompted for a reason for the tax change. Use the up and down arrow keys to select a reason for the tax change and press [Enter].

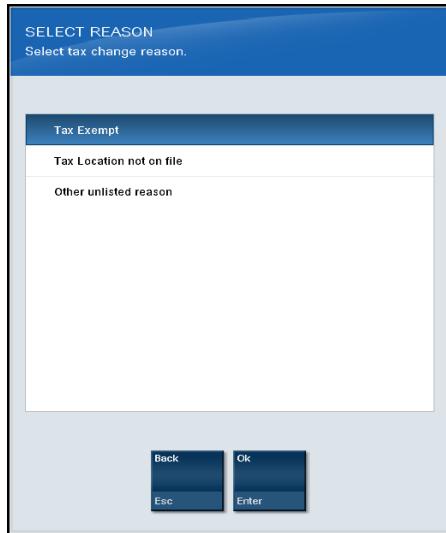


Figure 8-42: List of Tax Change Reasons

5. Press [Esc] to return to the Register Options menu. Press [Esc] again to return to the Sale screen and continue processing the transaction.
6. When the transaction is complete, the system prints receipts as required by your store policy. The printed receipts show a "T" next to each item in the transaction indicating the tax has been modified for all items. See [Figure 8-36](#).

Important: If your store issues email receipts, additional/different prompts display. Refer to [Email Receipt Options](#) for more information about sending email receipts.

Changing the Transaction Tax Percent

...continued from step 3.

1. Select the **Change Trans Tax %** option from the Transaction Tax menu ([Figure 8-33](#)).
2. If applicable, Oracle Retail Xstore Point of Service displays a list of the current taxes on the transaction and prompts you to select the tax to change. Use the up and down arrow keys to select the tax to change and press [Enter].
3. Oracle Retail Xstore Point of Service prompts you to enter the new tax rate as a percentage. Enter the percentage and press [Enter] to continue.



Figure 8-43: Tax Percentage Prompt

Suspending/Resuming a Transaction

4. Depending upon your store policy, you may be prompted for a reason for the tax change. Use the up and down arrow keys to select a reason for the tax change and press [Enter].

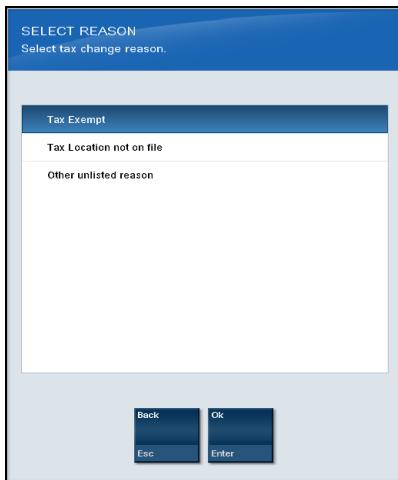


Figure 8-44: List of Tax Change Reasons

5. Press [Esc] to return to the Sale Options menu and press [Esc] again to return to the Sale screen and continue processing the transaction.
6. When the transaction is complete, the system prints receipts as required by your store policy. The printed receipts show a "T" next to each item in the transaction indicating the tax has been modified for all items. See [Figure 8-36](#).

Important: If your store issues email receipts, additional/different prompts display. Refer to [Email Receipt Options](#) for more information about sending email receipts.

Suspending/Resuming a Transaction

Note: 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.

During the course of conducting a transaction you may need to temporarily cancel, or suspend, any further processing until later the same day. You can do this by using the **Suspend** option on the Register Options menu before you have added any tenders to the transaction. When you are ready to continue processing the transaction, use the **Resume** option to complete it. Resuming a transaction creates a new transaction number for it.

Suspending a Transaction

- Select the **Suspend Transaction** option at the Register Sale screen at any time before tendering.

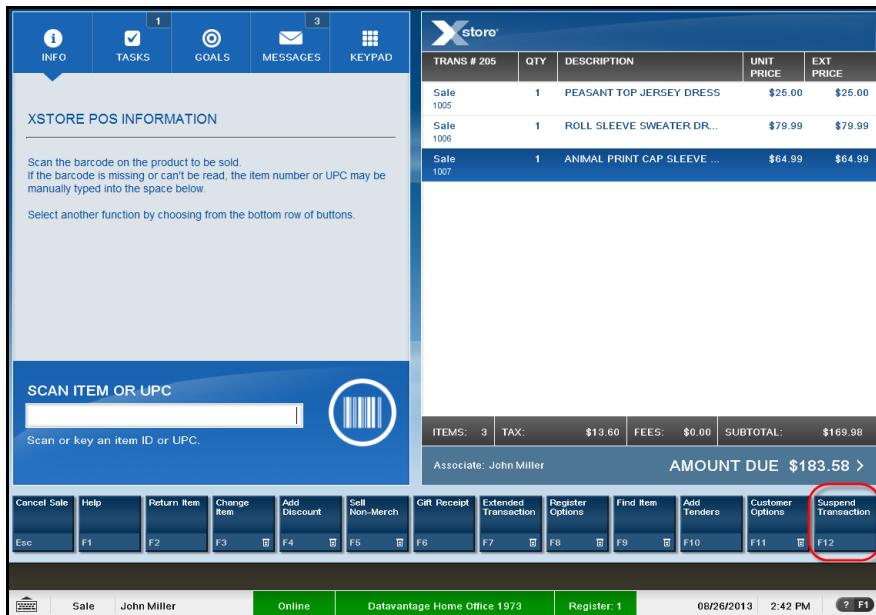


Figure 8-45: Suspend Transaction Option

The system may print a receipt for the suspended transaction. This receipt is clearly labeled as a Suspended Transaction and can be used when the customer returns to continue with this transaction. The barcode on the receipt may be scanned to resume the transaction.

- After saving the information from the suspended transaction, the system returns to the Sale menu. You can enter new transactions and perform other menu options.

Resuming a Transaction

- When you are ready to continue processing a suspended transaction, select the **Resume Transaction** option at the Register Sale screen. The **Resume Transaction** menu option is available before you add any items in a new transaction.

The system displays a list of transactions that are currently suspended.

- Select the transaction you want to resume and press [Enter] to continue.

Tip: If you have the customer's Suspended Transaction receipt, you can scan the barcode to retrieve the transaction from the database.

- If the transaction is performed at an airside location, a prompt opens, asking for the boarding pass information. Scan the boarding pass or enter the boarding pass information.
 - If the boarding pass matches the information associated with the transaction, the transaction continues.
 - If the boarding pass does not match the information associated with the transaction, a warning prompt opens. Select **OK** to return to the window for entering boarding pass information.

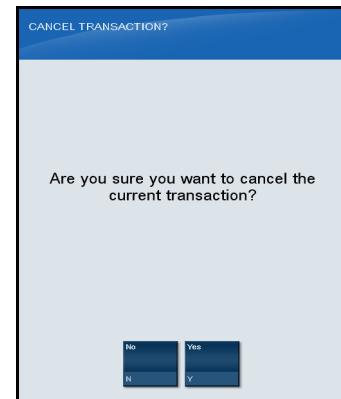
Cancelling a Sale

4. The system returns to the Sale screen and you may continue processing the resumed transaction.

Cancelling a Sale

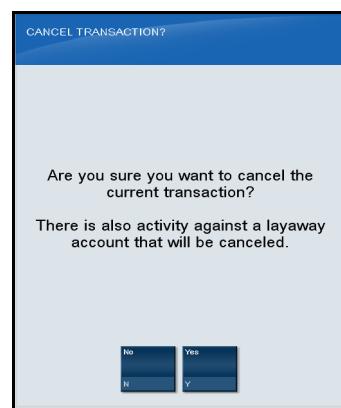
At any time before a sale has been tendered you can cancel the entire sale.

1. During the sale, press [Esc] until you have returned to the initial Sale screen. At the Register Sale screen select **Cancel Sale**, or press [Esc]. Oracle Retail Xstore Point of Service prompts to confirm that you want to cancel the sale if there are any items on the transaction.



2. Press [Y] for **Yes** to verify that you want to cancel the current transaction.

Note: If other transaction types are associated with this sale (for example, a layaway setup), you are notified that cancelling the current transaction also cancels the associated account setup or activity.



3. Your store policy may require that you select a reason for cancelling the transaction. If prompted, use the up and down arrow keys to select a reason and press [Enter] to continue.

Oracle Retail Xstore Point of Service is now ready to begin a new sale transaction.

Send Sale Transactions

Overview

A send sale item is an item that must be shipped to a customer-specified offsite 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 special order can be set up if an item is not available in the store's inventory when the purchase is made. A special order may allow a flexible payment structure between the time of purchase and receipt of the merchandise, but a send sale item must be paid in full when it is purchased.

An order can be set up if an item is not available in the store's inventory when the purchase is made; however, the item must be available at another location within the store chain or warehouse.

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, and no further action is required in Oracle Retail Xstore Point of Service once 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 completing the shipping document in the Back Office for two-step processing.

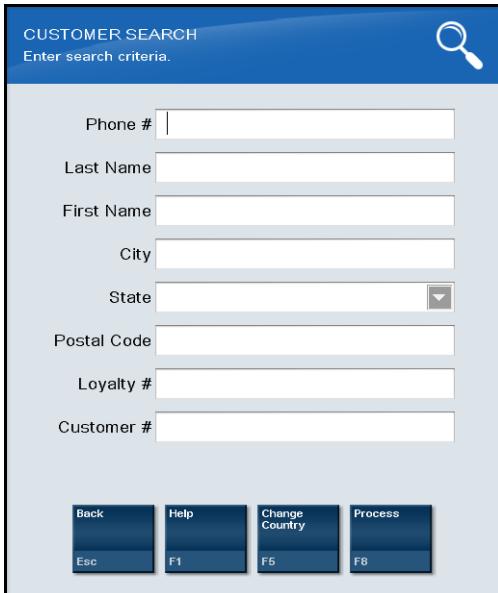
Adding Send Sale Items to a Sale

1. At the Sale screen, select the **Extended Transaction** menu option.
2. From the Extended Transaction menu, select the **Send Sale** option. You must have security privileges to add a send sale to a transaction.
3. Select the **New Send Sale** option.

Adding Send Sale Items to a Sale

4. Create a new send sale:

- If a customer is not assigned to the sale, the Customer Search form displays so that you can search for a customer to assign to the transaction.



The Customer Search form has a blue header bar with the title 'CUSTOMER SEARCH' and a magnifying glass icon. Below the header, a message says 'Enter search criteria.' There are seven input fields: 'Phone #' (with a dropdown arrow), 'Last Name', 'First Name', 'City', 'State' (with a dropdown arrow), 'Postal Code', and 'Loyalty #'. At the bottom are four buttons: 'Back' (labeled 'Esc'), 'Help' (labeled 'F1'), 'Change Country' (labeled 'F5'), and 'Process' (labeled 'F8').

Figure 9-1: Customer Search Form - Sale Customer

Enter your search criteria on the form and select **Process** to find a customer to associate with the transaction and continue with the send sale process.

This Customer Search information applies to the customer purchasing the items, not necessarily the send sale recipient. However, the customer purchasing the item may also be the recipient. Continue with step 5.

If a customer is assigned to the sale, the shipping destination prompt is displayed. Continue with step 5.

If the customer associated with the transaction has shipped items using the send sale process previously, a list of past recipients is displayed.



The 'SEND SALE' screen has a blue header bar with the title 'SEND SALE' and the sub-instruction 'Select a send sale recipient from the list.' Below the header is a table with three columns: 'NAME', 'CITY', and 'STATE'. A single row is shown, listing 'Maryiou Kast' in the NAME column, 'CLEVELAND OH' in the CITY column, and 'OH' in the STATE column.

- If the recipient of the items in this new send sale is listed, select the name from the list and press **[Enter]**.
- If the recipient is not listed, select **Skip**.

Continue with step 5.

5. By default, the system may display the address information for the customer assigned to the current transaction on the shipping destination form. This allows you to quickly associate the purchasing customer's shipping address with the send sale item. If no customer is associated with the transaction, the shipping destination form fields will be blank.

The screenshot shows a software interface for entering shipping destination information. The title bar says "SHIPPING DESTINATION" and "Enter shipping destination information.". The form includes fields for a phone number (216-662-4587), recipient name (Marylou Kast), address (12345 DAVIS DRIVE), zip code (44126), state (OH - Ohio), city (CLEVELAND), and apartment number (210). A dropdown menu for "Ship Via" is also present. At the bottom are five buttons: "Back" (Esc), "Help" (F1), "Ship To Customer Search" (F4), "Change Country" (F5), and "Accept" (F8).

Figure 9-2: Shipping Destination Information Form - Auto-populated Customer Info

6. You have the following options on this form:
 - You can edit any of the address fields on the shipping destination form and then select the **Accept** option.
 - Depending upon the configuration of your system, you may have a **First line of address, or postal code** field.
 - 1) Enter address information into this field to quickly look up an address.
 - 2) Select the address from a list of results to automatically populate the customer address fields.
 - You can accept the information without making changes by selecting the **Accept** option.
 - You can search for another send sale recipient by selecting the **Ship To Customer Search** option.

Note: If the **Address Lookup** button is enabled, the **Ship To Customer Search** button will not be displayed.

- Depending upon your store policy, you may be required to enter additional shipping information:
 - * If your system is set up for enhanced send sale processing, you are required to select a **Ship Via** shipper.
 - * If your system is not set up for enhanced send sale processing, the **Ship Via** field will not be active.

Adding Send Sale Items to a Sale

Note: A red triangle in the upper left corner of a field indicates a required entry.

When applicable, the Change Country menu option provides the ability to search for customers from countries other than the country where the store is located. For example, if you change the country to Canada, the State form field lists Canadian provinces, and if Mexico is selected as the country, then the State form field lists Mexican states.

- When the system returns to the item-entry screen, enter or scan an item ID.

Note: To add Wish List item(s) to the Send Sale, select *View Customer* and then select the *Wish List* tab (see [Purchasing Wish List Item\(s\)](#)).

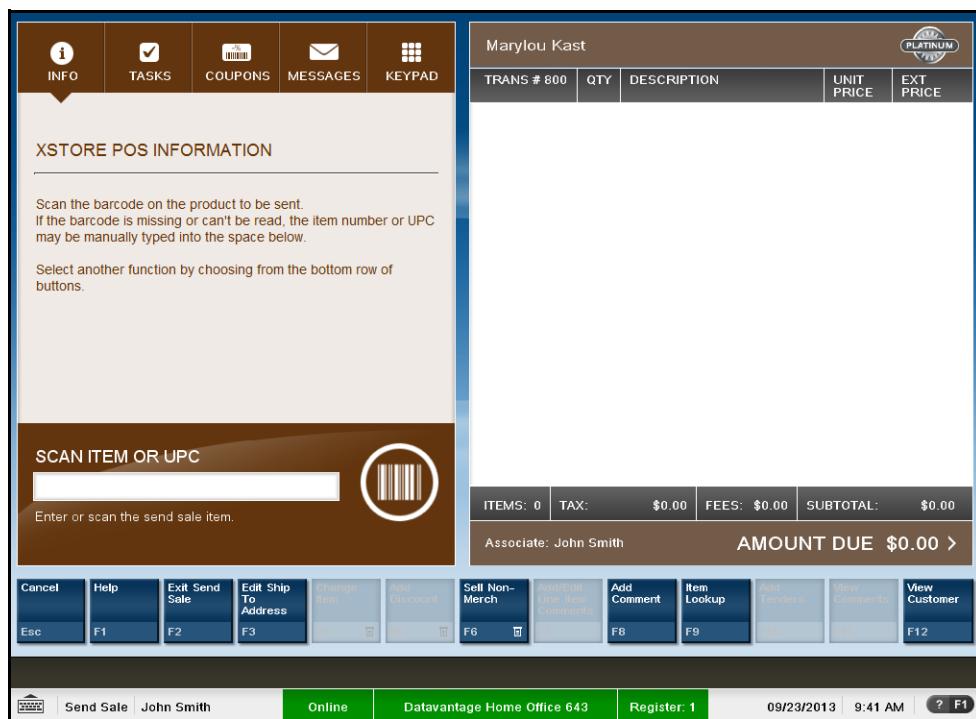


Figure 9-3: Send Sale Item Entry Screen

- The system validates every item to ensure that it meets the requirements for send sale items. Continue until you have added all the send sale items to the transaction.
- Depending on your store policy, you may be prompted for an originating inventory location. If prompted, select the inventory location from which the

item originated, or leave the inventory location blank to leave the location pending. Select the **Process** option.

Note: Send Sale Item Menu Options

- Select **Item Lookup** to look up items or styles if you do not know the item ID.
 - Select the **Change Item** option if you want to change any of the information (quantity, price, tax, etc.) about an item after you have added it.
 - Select the **Add Discount** option to add a discount to an item.
 - Select the **Add/Edit Line Item Comments** option to associate a comment with a send sale item. Be sure to select the correct item that has the comment.
 - Select the **Add Comment** option to associate a comment with the send sale account.
 - Select the **Sell Non Merch** option to add non merchandise items to the send sale.
-

Tip: The procedures for each send sale menu option shown above can be found in [“Modifying a Sale Transaction”](#). The graphics contain different background colors but the screens are essentially the same.

8. Verify that the information on the screen is correct before proceeding. Check to see that any item comments are associated with the correct item in the View Port.
At this point you may still edit the recipient and shipping address information by selecting the **Edit Ship To Address** option.
 - If everything is correct and the send sale is complete, continue with step 10.
 - If the customer would like to set up a send sale to a different recipient, continue with step 9 below.
9. In this current sale transaction you can also create another send sale to send items to a **different** recipient:
 - a. Select the **Exit Send Sale** menu option. You are returned to the Register Sale screen where you can begin the send sale process again for a new recipient.
 - b. Select **Extended Transaction --> Send Sale --> Edit Send Sale**.

Adding Send Sale Items to a Sale

The Account Selection list displays showing the current send sale accounts on the transaction.

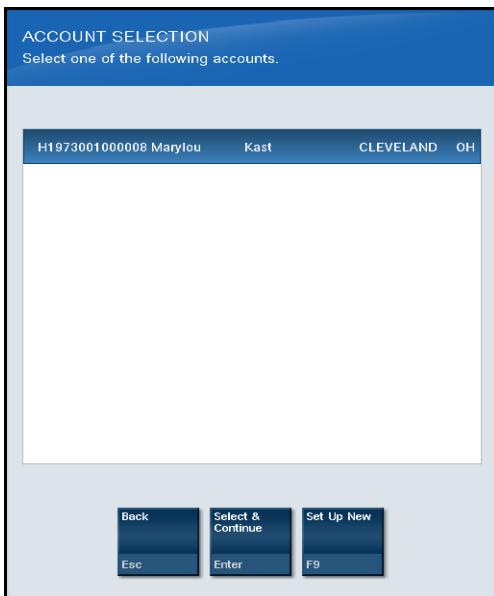


Figure 9-4: Account Selection List

- c. Select the **Set Up New** option.
 - d. The Shipping Destination Information form displays. Complete the form as required and select **Accept**.
 - e. Enter the send sale items for this recipient.
 - f. The system creates separate send sale accounts for each recipient.
10. When you are finished adding send sale items, you have the following options to complete the transaction:
- Select the **Add Tenders** option or press [**Enter**] to tender and complete the sale.
 - Select the **Exit Send Sale** option to return to the Register Sale screen where you can continue selling items.
11. The system automatically performs several actions:
- Calculates the tax to apply to each item and add it to the sale.
 - Calculates any fees that apply to an item and adds them to the sale.
 - Updates the inventory status of the item.

When the transaction is complete, the system creates send sale receipts as determined by your store policy.

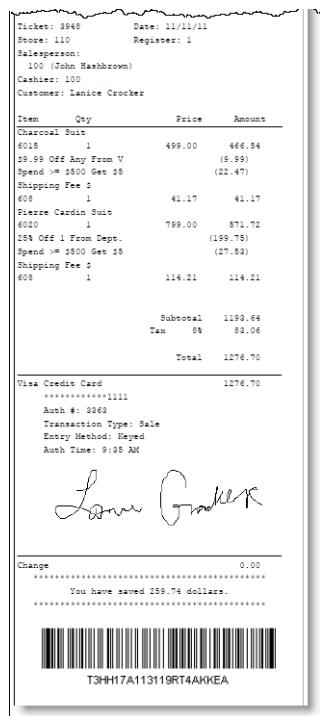


Figure 9-5: Customer Receipt Sample

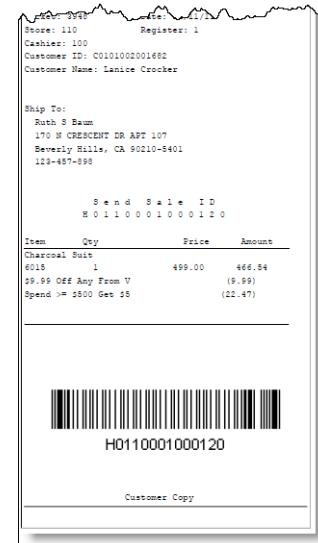


Figure 9-6: Customer Send Sale Receipt Sample

Editing a Send Sale

Before tendering a transaction that includes a send sale, you have the option to edit the send sale information.

1. At the Sale screen, select **Extended Transaction --> Send Sale --> Edit Send Sale**.
2. The Account Selection list displays showing the current send sale accounts on the transaction. Select the send sale you want to change and press [Enter].

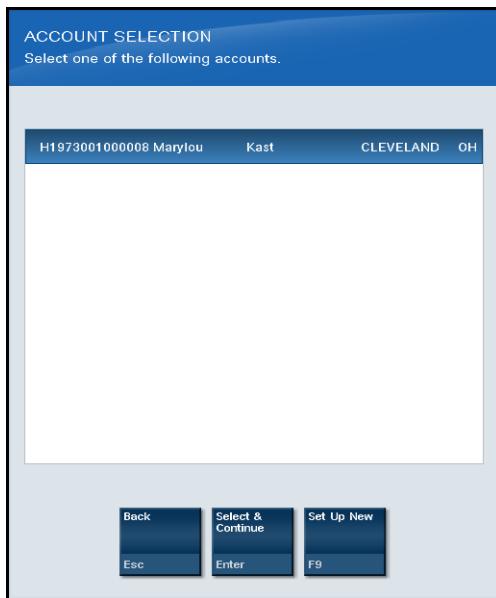


Figure 9-7: Send Sale Account List

3. You can add an item to this send sale, edit the address information, and edit item information for the selected account as needed. Refer to step 7.

10

Layaway Transactions

Overview

A layaway item is a sale item that cannot be taken from a store when it is purchased because the customer does 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.

Layaway Transaction Processing

The system allows either Single or Multiple layaway accounts to be created. 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: 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.

1. From the Sale screen, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Layaway** option.
3. If a customer has been associated with this transaction, the system may automatically search the database to locate any open layaway accounts for this customer.
 - a. If no open layaway account is found, Oracle Retail Xstore Point of Service provides options to set up a new layaway or to perform another search.

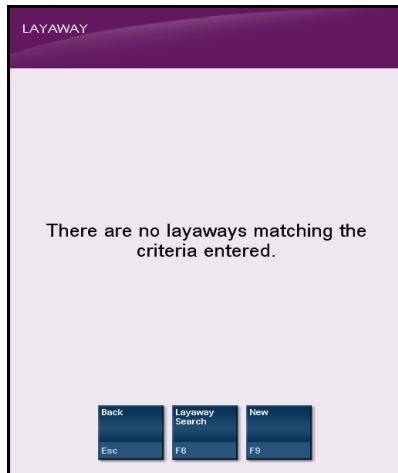


Figure 10-1: No Layaways Found Message

- * To set up a new layaway, select the **New** option and continue with [Layaway Setup](#).
- * To search the database for an existing layaway account, select the **Layaway Search** option and enter the search criteria in the Layaway Search form.

- b. If the customer has at least one open layaway account, Oracle Retail Xstore Point of Service displays a list of the open layaway accounts for this customer.

The screenshot shows a software interface titled "LAYAWAY SEARCH" with a purple header. Below the header, a message reads "Select one of the following layaway accounts." A table displays a single row of account information:

NAME ACCOUNT ID	SETUP DATE STATUS	BALANCE
Layaway, Laura L1973001000003	08/26/2013 Open	\$181.76

At the bottom of the screen are four blue buttons labeled "Back Esc", "Select & Continue Enter", "Make Payment F6", and "Set Up New F9".

Figure 10-2: Customer's Open Layaway Accounts

- * To view layaway account information, select the **Select & Continue** option and continue with [Additional Options for Layaway Accounts](#).
 - * To make a payment on the account, select the **Make Payment** option and continue with [Layaway Payment](#).
 - * To set up a new account for this customer, select the **Set Up New** option and continue with [Layaway Setup](#).
4. If a customer has not been associated with the sale at this point, you are prompted to enter layaway search information.

The screenshot shows a software interface titled "LAYAWAY SEARCH" with a purple header. Below the header, a message reads "Enter search criteria." There are five input fields for search criteria:

- Layaway ID
- Last Name
- First Name
- Customer ID
- Phone #

On the right side of the search bar is a magnifying glass icon. At the bottom of the screen are four blue buttons labeled "Back Esc", "Help F1", "Process F8", and "Set Up New F9".

Figure 10-3: Layaway Search Form

Note: When a customer has not been assigned to the sale, and the system is set up for Single Layaway Accounts, you must select or create a customer before proceeding. Layaway accounts require customer association. Refer to ["Customer Maintenance"](#) for information about searching for and creating customer records.

Layaway Setup

- * To set up a new layaway, select the **Set Up New** option and continue with [Layaway Setup](#).
- * To search for a layaway account, enter the search criteria information and select **Process**.

Layaway Setup

1. Once a customer is associated with the layaway, the system prompts for the item ID to be added to the new layaway. Enter or scan the item to be added to the layaway.

Note: To add Wish List item(s) to the Layaway, select *View Customer* and then select the *Wish List* tab (see [Purchasing Wish List Item\(s\)](#)).

You may need to select the *More...* menu button prior to selecting *View Customer*.

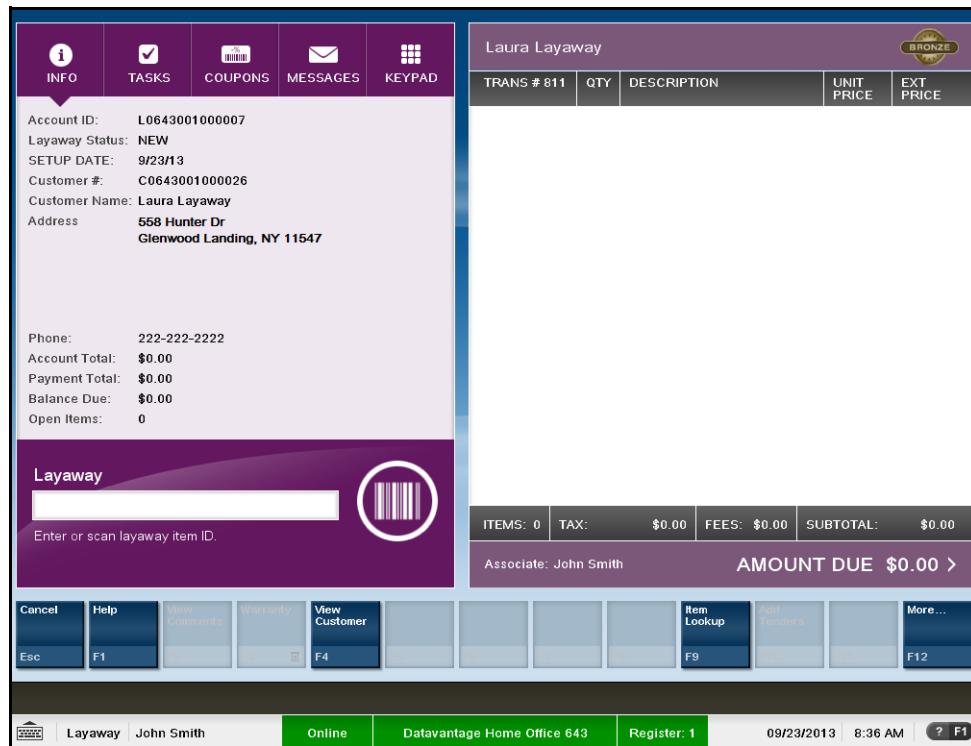


Figure 10-4: Layaway Item Entry Screen

Note: If an item cannot be added to a layaway, the system prompts with a message or reason the item is ineligible.

2. Depending on your store policy, you may be prompted for an originating inventory location. If prompted, select the inventory location from which the item originated, or leave the inventory location blank to leave the location pending. Select the **Process** option.

3. All items entered subsequently are also entered as layaway items as long as you remain in the layaway mode. Only layaway items and related layaway information are shown on the View Port.

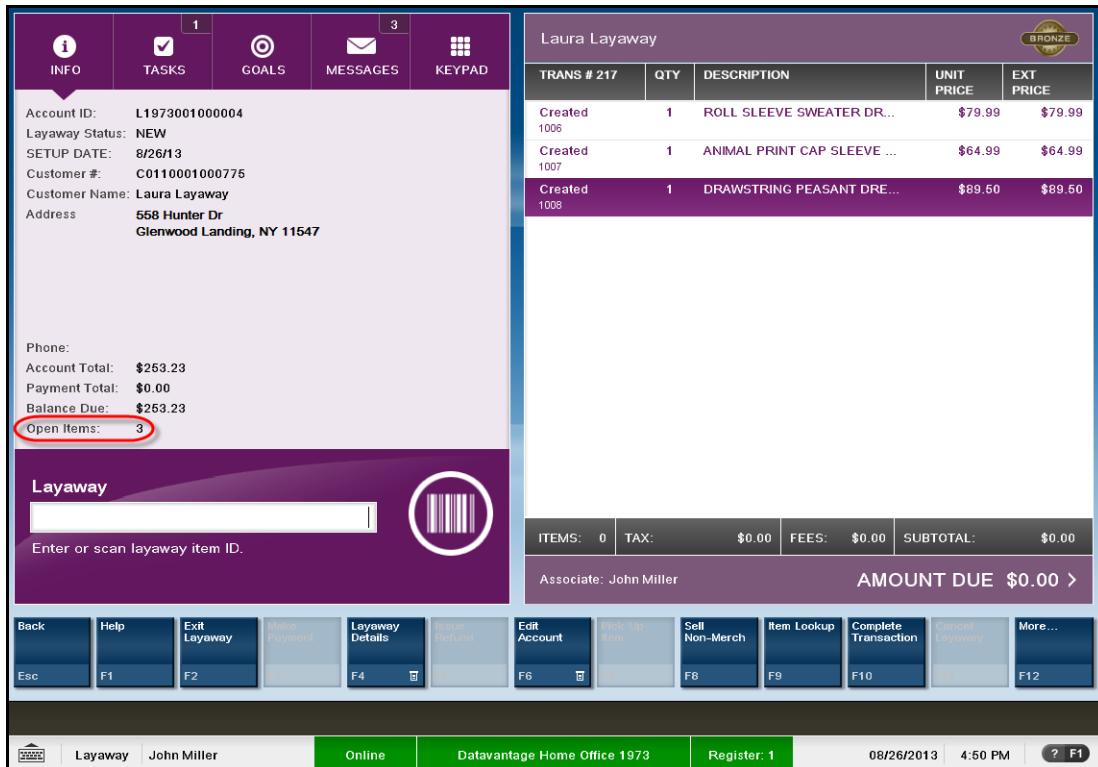


Figure 10-5: Layaway Items

Note: The system displays a running total of the number of items added and the total amount in the information area of the screen.

If your store policy only allows a predetermined number of items on a Layaway Account, you are prompted when the maximum number of items you are adding exceeds this number. Press [Enter] to close the prompt.

4. After you have entered all of the layaway items, select **Complete Transaction** or **Exit Layaway**:
 - Select the **Exit Layaway** option if this customer is purchasing other items to take out of the store. When the layaway transaction is complete, the system returns to the sale screen.

Layaway Setup

- Select the **Complete Transaction** or **Add Tenders** option if this customer is not purchasing other items to take out of the store. When the layaway transaction is complete, the system automatically prompts for tender information.
- 5. Regardless of the action you chose in step 4 above, you are prompted to enter a deposit amount. The deposit amount may be entered and changed only when you are in the layaway mode.

Note: The change amount function available for regular sale items is not available for layaway items.

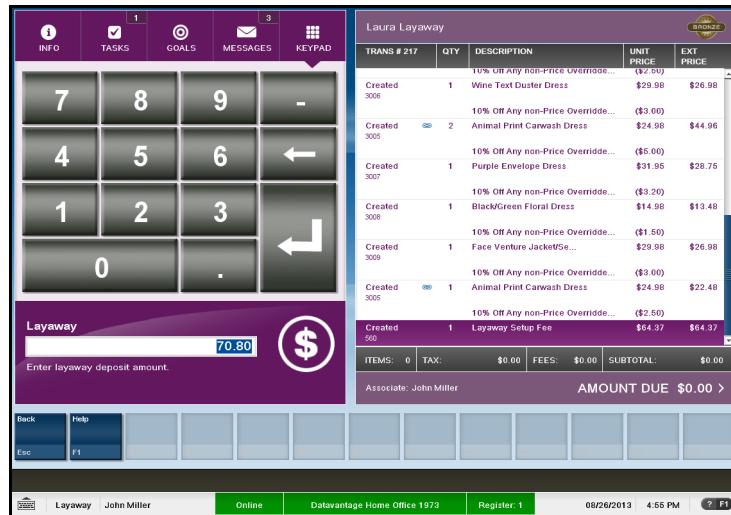


Figure 10-6: Deposit Amount Prompt

The system automatically does the following things:

- Checks the overall price of the items placed on layaway to ensure that it does not exceed the allowable total as determined by your store policy.
- Checks the number of items placed on layaway to ensure that it does not exceed the allowable item count as determined by your store policy.
- Assesses a layaway setup fee if required by your store policy.
- Prompts you to confirm the recommended deposit amount including any setup fee.
- 6. Enter or confirm the layaway deposit amount and press [Enter].

- If you enter less than the recommended amount but more than the minimum amount, the system prompts you to confirm the deposit amount.

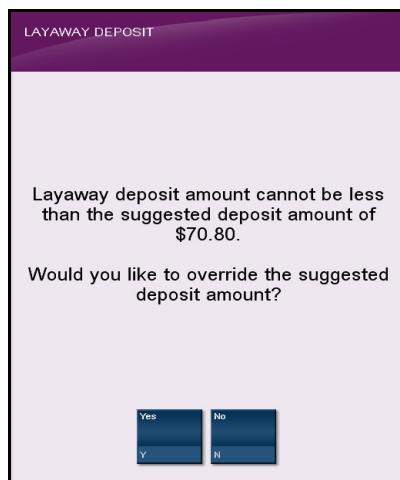


Figure 10-7: Prompt to Confirm Override of Suggested Deposit Amount

- * Press [Y] to override the suggested deposit amount and to accept the deposit amount you entered.
- * Press [N] to return to the deposit amount prompt and reenter the amount for the deposit.

Important: If you enter less than the minimum amount required by your store policy, you must reenter a deposit amount.

Tip: If you do not have sufficient security privileges to override the suggested amount, a manager may need to do it for you.

- If the system prompts for the number of days in the payment period, enter a number and press [Enter]. The number may not exceed the maximum number of days allowed by your layaway policy.

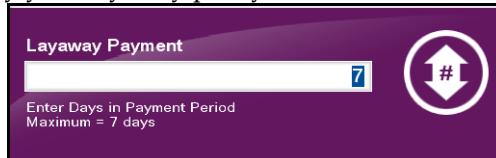


Figure 10-8: Number of Days in Payment Period Prompt

- If the system prompts for the number of payment periods, enter the number of payments and press [Enter]. The number may not exceed the number of payment periods allowed by your layaway policy.

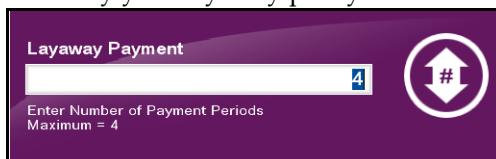


Figure 10-9: Number of Payment Periods Prompt

Layaway Setup

10. The new layaway account setup is now complete:

- If you chose the **Exit Layaway** option in step 4, the system returns to sale mode. You may continue the sale by adding regular sale items to the transaction, or you may tender and complete the sale.

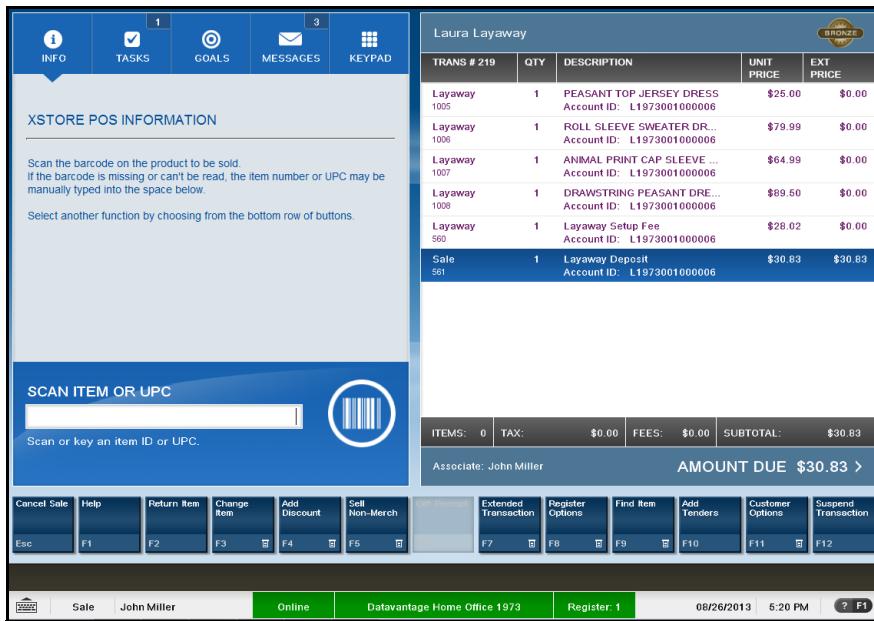


Figure 10-10: Layaway Items Display on Selling Screen

- If you chose the **Complete Transaction** (or **Add Tenders**) option in step 4, the system automatically prompts for tender information.

11. Select a tender from the list and press [Enter].

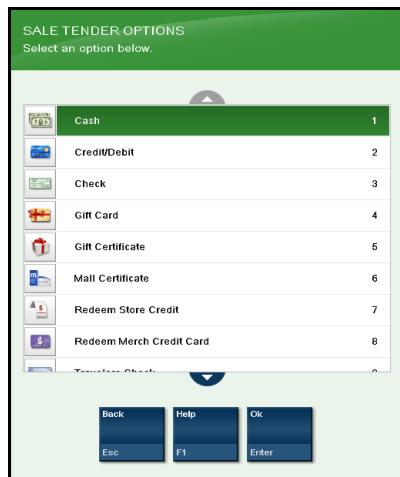


Figure 10-11: Tender List

Note: Refer to "[Processing Tenders](#)" for more information about tendering the transaction.

12. Enter a tender amount, select a Quick Cash button, or press [Enter] to accept the default balance due, if displayed.

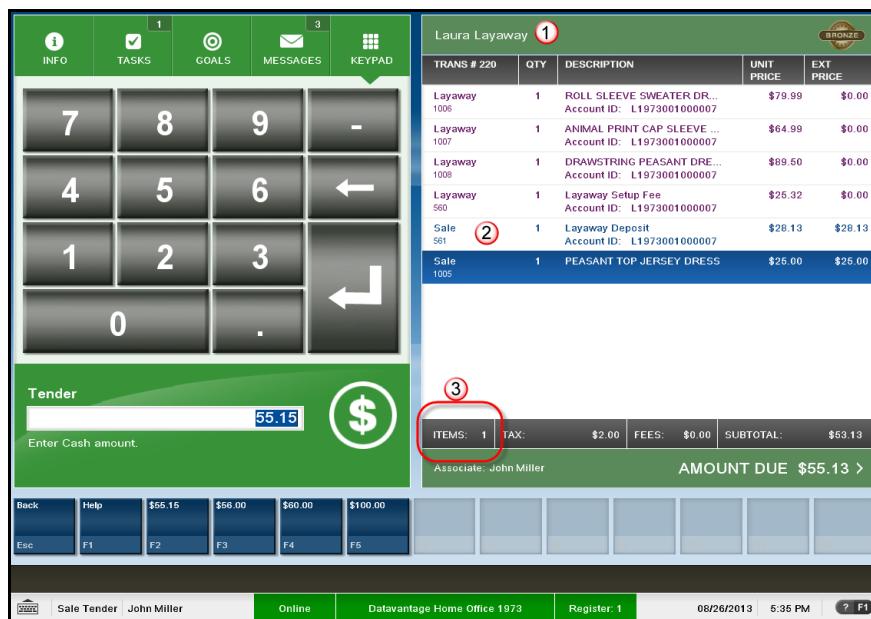


Figure 10-12: Prompt for Tender Amount - Cash Example

The sale transaction is now complete and the system updates inventory. Receipts with layaway information are printed as required by your store's policy.

Note: About this screen:

1 The customer information that was entered for the layaway is assigned to the sale.

2 The deposit amount is shown as a sale on the View Port.

3 The Sold Items section of the View Port shows an item count of one.

This item count is used for items the customer is physically removing from the store. In this scenario, the customer has placed 3 items on layaway and purchased one other item to take home.

Layaway Payment

Note: 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.

- From the Sale screen, select **Extended Transaction**.
- At the Extended Transaction menu, select the **Layaway** option.

Layaway Payment

3. When the system displays the Layaway Search form, enter your search criteria and select **Process**, or scan the barcode on the customer's layaway receipt. The search may be based on these fields:
 - * Layaway ID
 - * Customer Last Name and First Name
 - * Customer ID
 - * Customer Phone Number

LAYAWAY SEARCH
Enter search criteria.

Layaway ID

Last Name

First Name

Customer ID

Phone #

Back Esc Help F1 Process F8 Set Up New F9

Figure 10-13: Layaway Search Form

Note: If a customer is associated with the sale and has at least one open layaway account, the system may automatically display a list of open accounts for this customer.

The system displays a list of all layaways that match the criteria you entered, including the status of each.

Layaway SEARCH Select one of the following layaway accounts.		
NAME ACCOUNT ID	SETUP DATE	BALANCE
Layaway, Laura L1973001000007	08/26/2013 Open	\$260.42
Layaway, Laura L1973001000005	08/26/2013 Open	\$395.07
Layaway, Laura L1973001000004	08/26/2013 Open	\$668.06
Layaway, Laura L1973001000003	08/26/2013 Open	\$181.75

Back Esc Select & Continue Enter Make Payment F6 Set Up New F9

Figure 10-14: Layaway Accounts List

4. Use the up and down arrow keys to highlight the layaway account you want to select from the list and select the **Make Payment** option.

Note: Since layaways MUST have a customer assigned at setup, the system assigns the layaway customer information to the sale automatically at this point if no customer was assigned at the start of this transaction.

5. When the system prompts for the payment amount, enter the amount and press **[Enter]**.
6. The system validates the payment against the minimum and recommended amounts. The payment amount must be greater than or equal to the recommended amount.
 - * If you enter less than the recommended amount, the system prompts you to confirm the payment amount.
 - * If the amount you entered was less than the minimum, you must reenter a payment amount.

Note: You must have the proper security level to override a payment amount.

7. When the payment amount is accepted, the system returns to the options available for a regular sale. You may change the layaway payment amount only by entering layaway edit mode. The **Change Amount** function that is available for regular sale items is not available for layaway items.

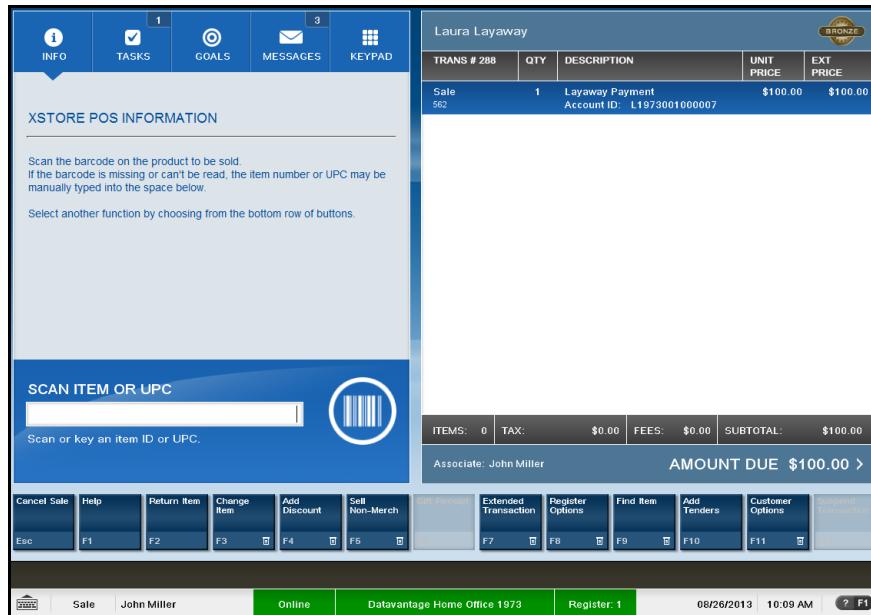


Figure 10-15: Layaway Payment - Sale View Port

You may now continue selling regular items or tender the sale.

Note: If you try to modify a layaway line item in sale mode, the system prompts that all changes to layaway items must be done in layaway mode. You must select the Layaway menu option to return to the layaway mode.

8. When you are ready to tender the transaction, select the **Add Tenders** option or press **[Enter]** without adding any more items.
9. Choose a payment tender from the tender list and select **Ok**.
10. Enter the tender amount and press **[Enter]**.
11. The system prints receipts as required.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Email Receipt Options](#) for more information about sending email receipts.

The receipts for the sale include the layaway information. Payment is shown on the receipt, along with the layaway account number. Other layaway information (payment schedule, terms, amount left to pay, next payment due date and amount, etc.) may also be included on the receipt, depending on your system's configuration.

Layaway Pickup

1. From the Sale screen, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Layaway** option.
3. When the system displays the Layaway Search form, enter your search criteria and select **Process** or scan the customer's layaway receipt barcode. The search may be based on these fields:
 - * Layaway ID
 - * Customer name
 - * Customer ID

* Customer phone number

Figure 10-16: Layaway Search Form

Note: If a customer is associated with the sale and has at least one open layaway account, the system may automatically display a list of open accounts for this customer.

The system displays a list of all layaways that match the criteria you entered, including the status of each.

4. Use the up and down arrow keys to highlight the layaway account you want to select from the list and select the **Select & Continue** option to view the layaway account information.

NAME ACCOUNT ID	SETUP DATE	BALANCE
Layaway, Laura L1973001000007	08/2/6/2013	\$250.42
Layaway, Laura L1973001000006	08/2/6/2013	\$395.07
Layaway, Laura L1973001000004	08/2/6/2013	\$658.05
Layaway, Laura L1973001000003	08/2/6/2013	\$181.75

Note: Since layaways MUST have a customer assigned at setup, the system assigns the layaway customer information to the sale automatically at this point if no customer was assigned at the start of this transaction.

Layaway Pickup

- Select the Pick Up Item option.

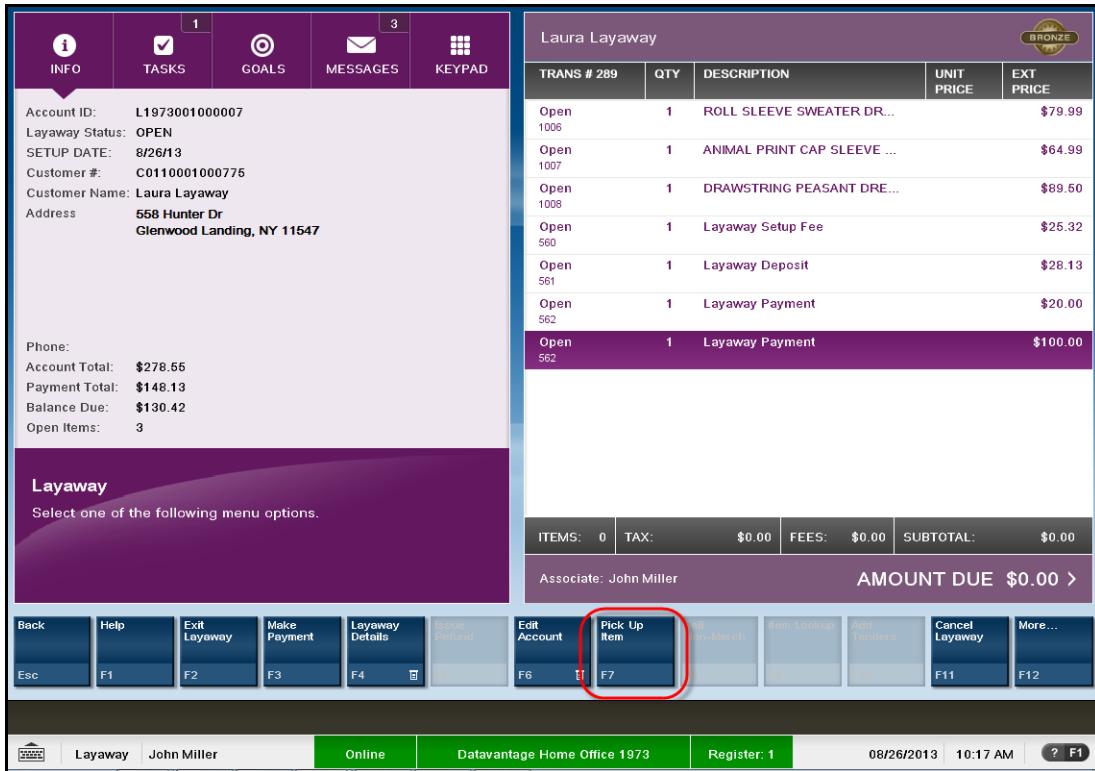


Figure 10-17: Pick Up Layaway Item

- The system displays the layaway items. Select item(s) for pickup. You can select all items in the list at once by selecting the Pick Up All option.

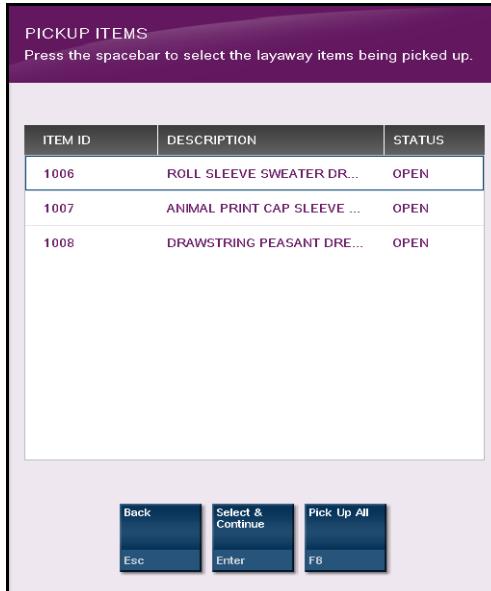


Figure 10-18: Pickup Items List

- After you have selected all of the items to be picked up, press [Enter].

Note: If you select an ineligible item, the system displays a message explaining why the item cannot be picked up. Items with Cancelled, Closed, or Picked status cannot be picked up.

The system updates the item status on the screen to Picked Up as each item is selected for pickup. The status is permanently updated only when the transaction is successfully completed.

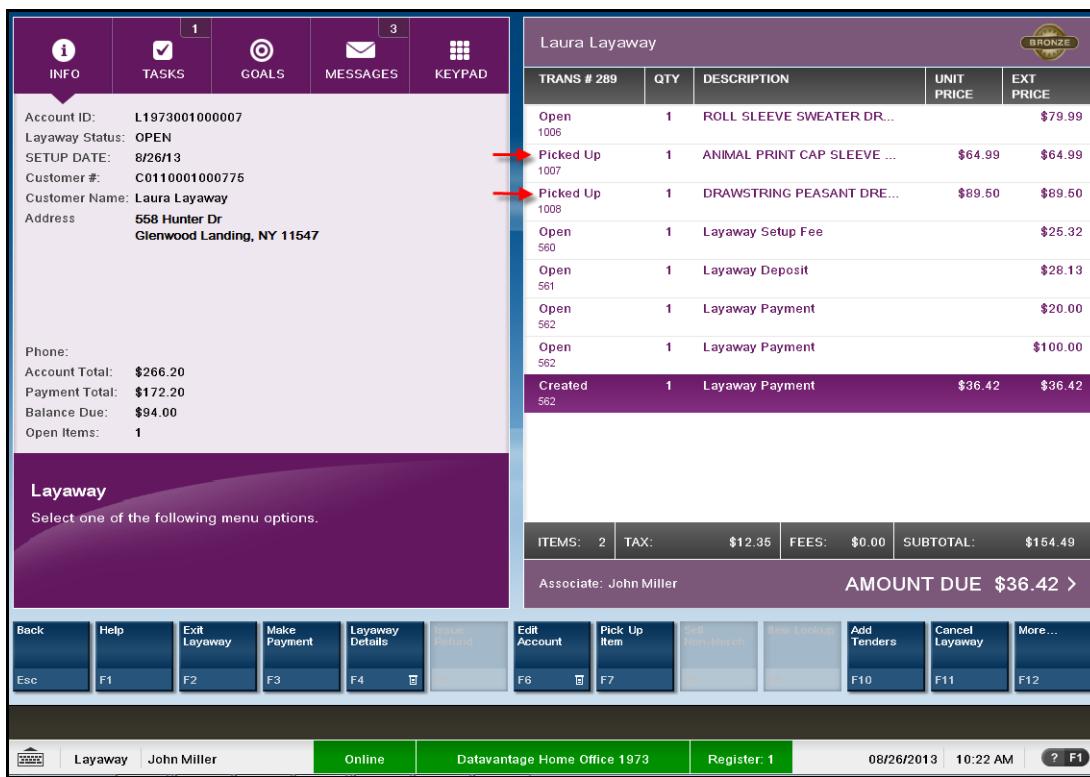


Figure 10-19: Layaway Items Marked for Pickup

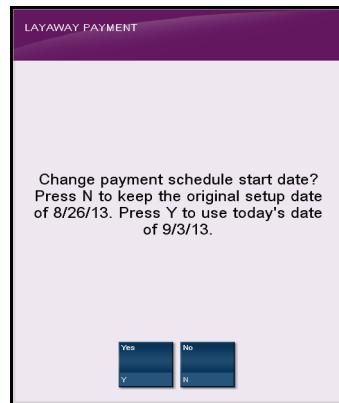
In the example shown in Figure 10-19 above, there are three items available for pickup and the customer has chosen to pick up two items. In this scenario, the two items for pickup are marked with Picked Up status, and the other item is marked with Open status.

Note: Based on your store policy, item prices may be changed to match current sale prices. Any credits may be applied to other items on layaway or refunded if there are no other layaway items.

Layaway Pickup

8. After you have selected all of the layaway pickup items, select **Add Tenders or Exit Layaway**:
 - Select the **Exit Layaway** option if this customer wants to purchase other items to take out of the store. When the layaway transaction is complete, the system returns to the sale screen where you can continue selling items.
 - Select the **Add Tenders** option if this customer is not purchasing other items to take out of the store. When the layaway transaction is complete, the system automatically prompts for tender information.

Note: If there are any open items remaining in the layaway, you may be prompted to set up a new layaway schedule for the open items. If prompted, enter the information as required. When prompted to change the schedule start date, you may keep the scheduled payment dates as currently set up, or you can change the scheduled payment dates.



9. The system displays any remaining amount due to pick up the selected items. Select a tender from the tender list and choose **Ok**.

Note: The minimum amount due is the balance for the items being picked up plus a specified percentage of any items remaining on layaway.

10. Enter the tender payment amount and press **[Enter]**. The system creates receipts for the transaction as required by your store policy.

Additional Options for Layaway Accounts

A layaway account may be modified during the initial creation of the layaway account until the setup has been completed.

Editing Items on a Layaway Account

Note: The edit options shown here may differ from the options you have available due to system configuration and your store policy.

While you are in the layaway mode during the setup of a new layaway account, select the **Edit Account** option.

Options for editing a layaway include adding a discount, adding a coupon, adding or editing a line item comment, and some additional options as shown on the Change Item menu.

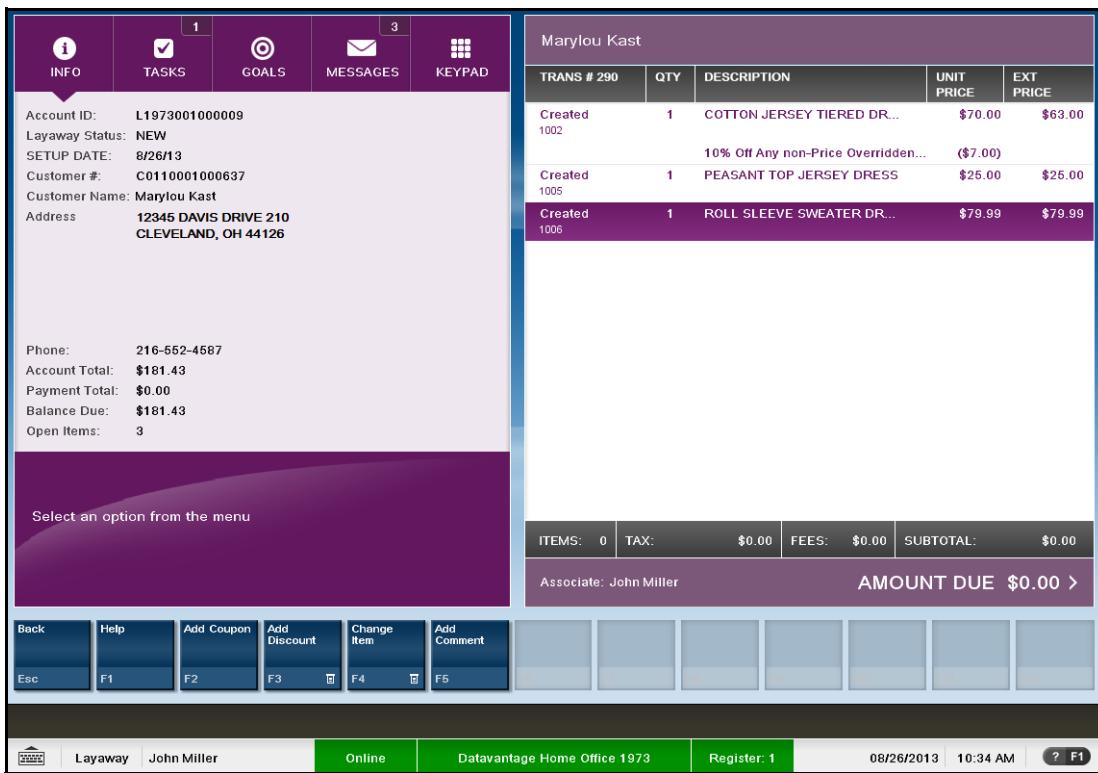


Figure 10-20: Edit Account Menu Options

Add Coupon

To add a coupon to a layaway account:

1. From the Edit Account Menu Options, select **Add Coupon**.
2. Enter or Scan the Coupon ID. The system validates the coupon and if available, deducts the amount in the View Port.



Add Discount

To add a discount:

1. From the Edit Account Menu Options, select **Add Discount**.
2. Select **Add Item Discount** or **Add Group Discount**.

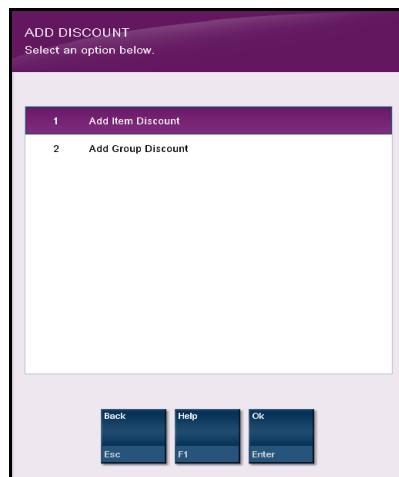


Figure 10-21: Discount List

- For Item Discount see [Item Level Discounts](#).
- For Group Discount see [Group Discounts](#).

Note: When you go to the reference pages for Item and Group discounts the graphics show a different background color, but the steps are the same as adding discounts to a sale.

Change Item

To change a layaway item:

1. From the Edit Account Menu Options, select **Change Item**.
2. Select any of these options on the Change Item menu:

Back	Help	Change Qty	Change Price	Change Item Tax	Void Line	Modify Discount	Void Discount	Change Associates	Add/Edit Line Item Comments			
Esc	F1	F2	F3	F4	F5	F6	F7	F8	F9			

Figure 10-22: Change Item Menu Options

- Change Quantity
- Change Price
- Change Tax Rate/Tax Amount
- Void Line
- Add/Modify/Delete (Void) Discounts
- Change Commissioned Associates
- Add or Edit Line Item Comments

See [Modifying Line Items in a Sale](#) for procedural details about editing items.

Note: The instructions for modifying Line Items in a Sale contain graphics with a different background color than the Layaway screens. Although the colors are different, the instructions are the same.

Add and View Layaway Comments

You may add a comment to a layaway account.

Note: This differs from a line item comment which pertains only to a specific item on the layaway.

1. First, select the account for which you want to enter a comment. At the Register Sale screen, select **Extended Transaction** and **Layaway**. When the system displays the Layaway Search form, enter your criteria and select **Process**.
2. Select the **Edit Account** option.

Additional Options for Layaway Accounts

- At the Edit Account menu, select the Add Comment option.

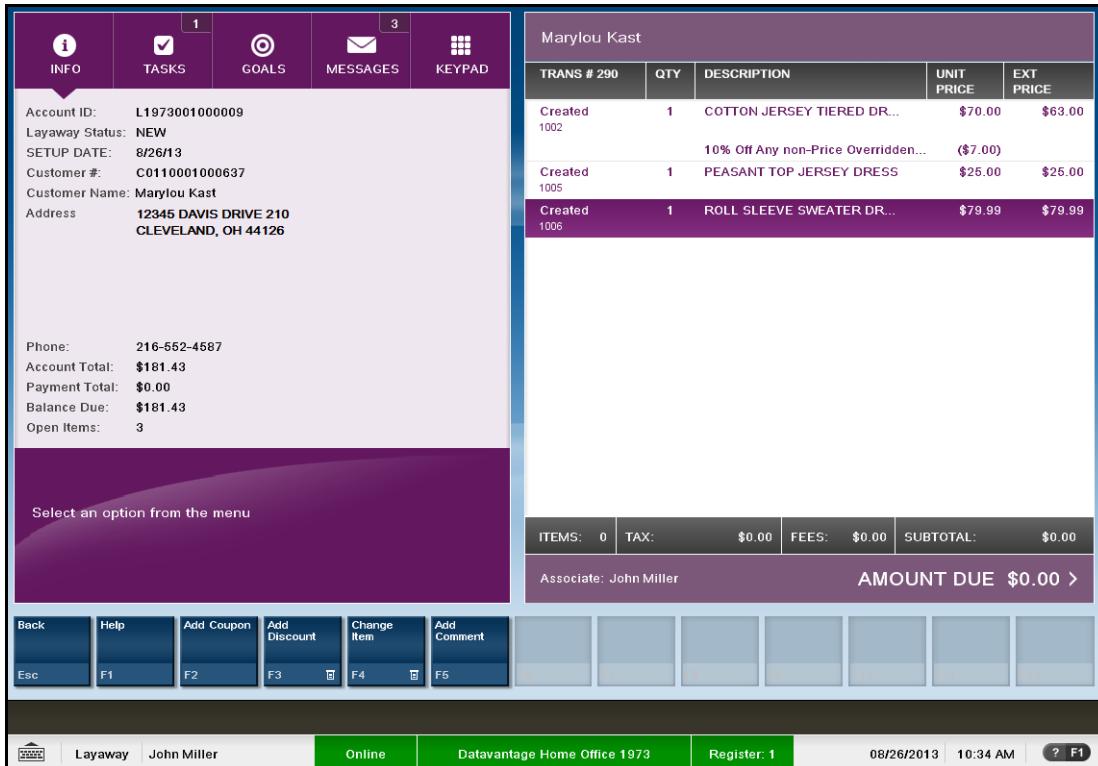


Figure 10-23: Edit Account Menu Options

- Enter the text of the comment and press [Enter].

LAYAWAY
Enter a comment for the layaway account.

Customer's daughter will be making the payments. See Diane for more information.

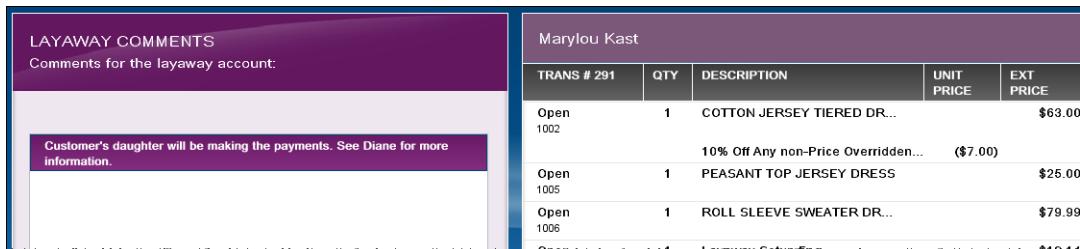
Back Ok
Esc Enter

Figure 10-24: Layaway Account Comment Entry Form

Comments are associated with the date they were entered, the employee number of the person entering comments, and the text of the comment. Previous comments cannot be changed. This detail information is also available in Layaway Maintenance (Back Office processing).

5. To view comments about the layaway account, select the **More** option on the Layaway Menu, and select the **View Comments** option.

Note: The View Comments option is only active if a comment exists for the account you are viewing.



The screenshot shows a POS interface. On the left, a purple header reads "LAYAWAY COMMENTS" and "Comments for the layaway account:". Below this is a message: "Customer's daughter will be making the payments. See Diane for more information." On the right, a transaction list for "Marylou Kast" is displayed in a grid format:

TRANS #	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Open 1002	1	COTTON JERSEY TIERED DR...		\$63.00
		10% Off Any non-Price Overridden...	(\$7.00)	
Open 1005	1	PEASANT TOP JERSEY DRESS		\$25.00
Open 1006	1	ROLL SLEEVE SWEATER DR...		\$79.99

Figure 10-25: Layaway Comments

Add Items To An Existing Layaway

Note: This is a configurable option and may not be allowed according to your store policy. If your store does not allow additional items to be added to an existing account at a later time, you must set up a new layaway account for the customer.

You may add additional items to an existing layaway account as long as you do not exceed the total number of items allowed on the account. If your layaway policy allows a customer to have multiple open layaway accounts, the system enforces this rule against the current layaway account being created or maintained.

The system displays a message when you attempt to exceed the number of items that are allowed on a layaway account.

Note: You may not add a layaway item if the associated customer's account is delinquent.

1. At the Register Sale screen, select **Extended Transaction** and **Layaway**. When the system displays the Layaway Search form, enter your criteria and select **Process**.
2. If necessary, use the up and down arrow keys to scroll through the list of accounts. Select an open layaway account from the list, then choose the **Select & Continue** option.
3. Enter or scan an item ID and press [Enter].



Figure 10-26: Enter New Item ID to the Layaway

The system adds the item and displays it in the View Port.

Additional Options for Layaway Accounts

The system validates each item, including its suitability for inclusion in a layaway, and returns the description, price, and tax information.

4. Continue processing the layaway account as usual.

Gift Receipts for Layaway Items

Gift receipts are available for all **picked up** layaway items. See [Printing a Gift Receipt](#) for more details.

Cancel a Layaway Account

Note: 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.

1. At the Register Sale screen, select **Extended Transaction** and **Layaway**. When the system displays the Layaway Search form, enter your criteria and select Process.

Note: If you associated a customer with the sales transaction, Oracle Retail Xstore Point of Service retrieves any layaway accounts for that customer. You do not need to conduct a search.

2. If necessary, use the up and down arrow keys to scroll through the list of accounts. Select an open layaway account from the list, then choose the **Select & Continue** option.
3. With the layaway account information displayed, select the **Cancel Layaway** option from the menu.
4. The system prompts you to confirm whether or not the customer is present at the time of cancellation. Select [Y] for Yes or [N] for No.

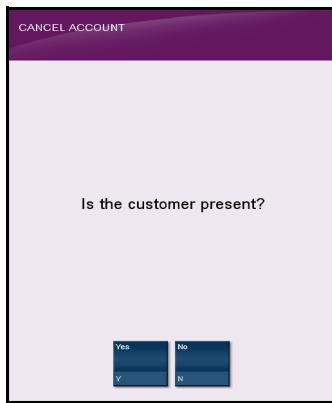
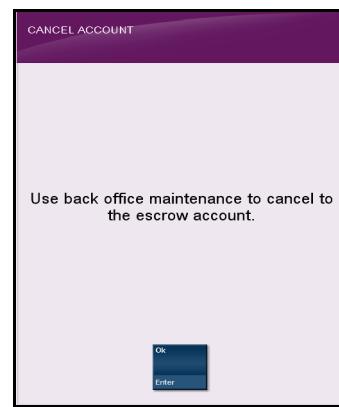


Figure 10-27: Customer Present Prompt

Note: If the customer is not present, the system requires that the account be closed by using the Layaway Accounts Maintenance function in the Back Office. Press [Enter] to close the message prompt.



5. If the customer is present, the system displays a confirmation prompt. Select **Yes** to confirm the cancellation of the account.

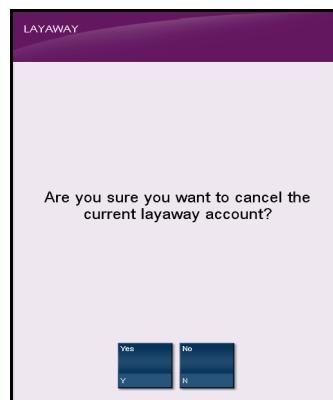


Figure 10-28: Prompt to Confirm Cancellation of Layaway Account

Additional Options for Layaway Accounts

When you exit from the layaway, the refund amount is displayed on the Register Sale screen.

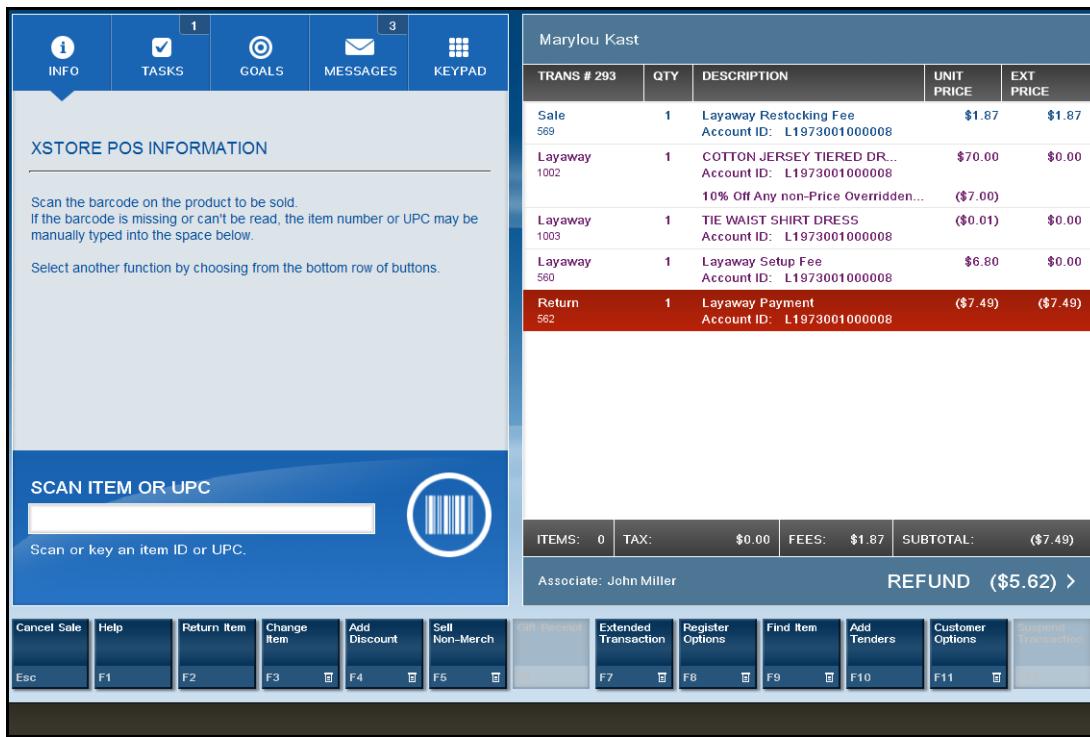


Figure 10-29: Cancellation of Layaway

6. Complete the transaction by selecting a refund tender from the list.

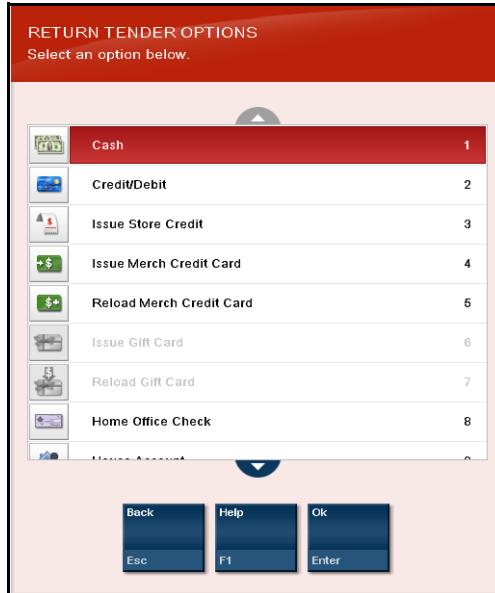


Figure 10-30: Refund Tender List

Note: Additional prompts may display depending on the tender type selected. For example, if the *Home Office Check* option is selected, the customer's address information is displayed and may be edited. The tender list is restricted to only those tender types permitted as refunds for cancellation of a layaway account.

Receipts are created which contain the canceled layaway information.

Automatic Prompting: Accounts Requiring Attention

When you associate a customer with a sale transaction, the system may automatically determine that the customer has a layaway account that requires attention. In this case, the system may display a prompt similar to those shown and listed below, depending upon the reason that attention is needed.

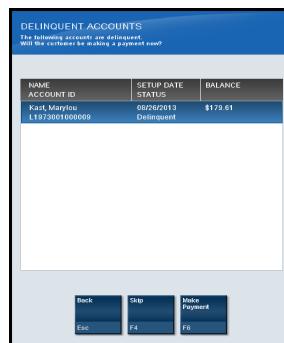
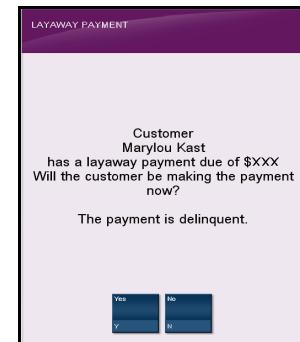


Figure 10-31: Sale Prompt - Customer With Delinquent Account

Layaway mode prompts you may see:

- * **If a Layaway payment is due, the prompt indicates:**
"As of date, this customer has a Layaway payment due of \$x. Would the customer like to make the payment now?"
- * **If a payment is overdue, the prompt indicates:**
"This customer has an overdue Layaway balance of \$x. An overdue penalty of \$y has also been applied, making the total balance due \$z. Would the customer like to pay the overdue balance now?"
- * **If the Layaway contains items that can be picked up, the prompt indicates:**
"This customer has Layaway items that are ready for pickup. Would the customer like to pick up these items now?"



Take any action on the account as determined by your store policy.

Additional Options for Layaway Accounts

View Layaway Payment History

Note: 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.

1. At the Sale screen, select **Extended Transaction** and **Layaway**. When the system displays the Layaway Search form, enter your criteria and select **Process**.
2. Select the account for which you want to view payment history.
3. With the account information displayed, select the **Layaway Details** option.
4. At the Layaway Details menu, select the **View Payment History** option.

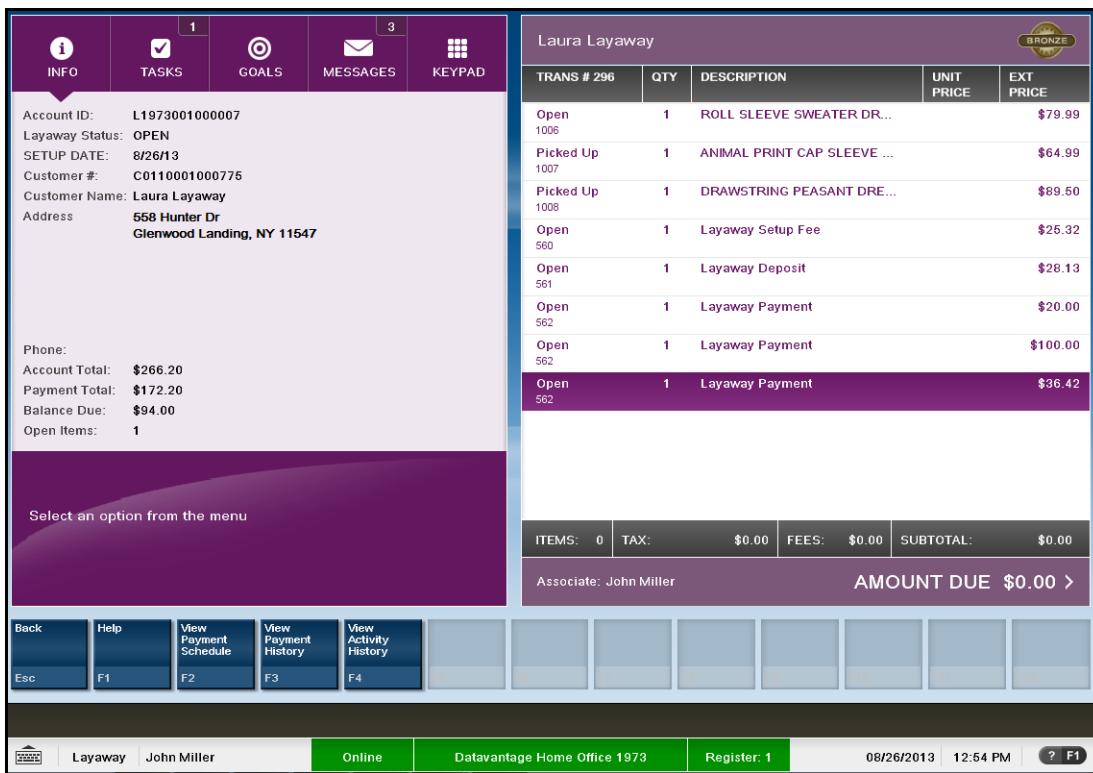


Figure 10-32: Layaway Details Menu

5. The system displays the payment information for this account.

LAYAWAY ACTIVITY				
Payment history for the layaway account:				
DATE STATUS	TYPE ITEM ID	AMOUNT	STORE REG	TRAN SEQ
08/26/2013 OPEN	DEPOSIT 561	\$19.96	1973	290
08/26/2013 OPEN	PAYMENT 562	\$30.00	1973	297

Back
Esc

Figure 10-33: Layaway Payment History

The information shown here includes the payment date, status, payment type and payment type item Id (initial deposit and payments), payment amount, store ID, register ID, and transaction sequence ID.

View Layaway Payment Schedule

1. At the Sale screen, select **Extended Transaction** and **Layaway**. When the system displays the Layaway Search form, enter your criteria and select **Process**.
2. Select the account for which you want to view payment schedule information.
3. With the account information displayed, select the **Layaway Details** option.
4. At the Layaway Details menu, select the **View Payment Schedule** option ([Figure 10-32](#)).

Additional Options for Layaway Accounts

The system displays the payment schedule information for this account.

LAYAWAY SCHEDULE	
Suggested payment schedule for the layaway account:	
PAYMENT DATE	SUGGESTED AMOUNT
09/02/2013	\$164.51
09/09/2013	\$164.51
09/16/2013	\$164.51
09/23/2013	\$164.52

Back
Esc

Figure 10-34: Layaway Payment Schedule

The information shown here includes the dates when payments are due and the suggested payment amount on each date.

Note: Only one set of payment terms is retained by the system.

View Layaway Activity History

1. At the Sale screen, select **Extended Transaction** and **Layaway**. When the system displays the Layaway Search form, enter your criteria and select **Process**.
2. Select the account for which you want to view layaway activity information.
3. With the account information displayed, select the **Layaway Details** option.
4. At the Layaway Details menu, select the **View Activity History** option ([Figure 10-32](#)).

The system displays the activity history information for this account.

LAYAWAY ACTIVITY Activity history for the layaway account:				
DATE STATUS	TYPE ITEM ID	AMOUNT	STORE REG	TRAN ID
8/26/13 OPEN	ITEM 1006	\$79.99	1973	217
8/26/13 OPEN	ITEM 1007	\$64.99	1973	217
8/26/13 OPEN	ITEM 1008	\$89.50	1973	217
8/26/13 OPEN	ITEM 3002	\$45.00	1973	217
8/26/13 OPEN	ITEM 3003	\$44.98	1973	217
8/26/13 OPEN	ITEM 3005	\$44.96	1973	217
8/26/13 OPEN	ITEM 3004	\$17.98	1973	217
8/26/13 OPEN	ITEM 3005	\$22.48	1973	217

Figure 10-35: Layaway Activity History

The information shown here includes the activity date, status, activity type, item ID, activity amount, store ID, register ID, and transaction sequence ID. Depending on how active the account has been, you may need to use the scroll bar in the window to see additional information.

Searching for Detailed Layaway Account Information

For more information about Layaway Maintenance and other Back Office maintenance functions, refer to the *Oracle Retail Xstore Point of Service Manager's Guide*.

Additional Options for Layaway Accounts

Special Order Transactions

Overview

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.

Setting Up a New Special Order

Note: 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.

1. At the Sale screen, select **Extended Transaction**.
2. Select the **Special Order** option from the Extended Transaction menu.

Setting Up a New Special Order

3. Set up the order:

- If no customer is associated with the transaction, select the **Set Up New** option at the Special Order Search form. Go to step 4.

The form is titled "SPECIAL ORDER SEARCH" with the sub-instruction "Enter search criteria." It contains five input fields: "Special Order ID", "Last Name", "First Name", "Customer ID", and "Phone #". Below the fields are four function keys: "Back" (Esc), "Help" (F1), "Process" (F8), and "Set Up New" (F9). A magnifying glass icon is located in the top right corner.

Figure 11-1: Special Order Search Form

- If a customer is associated with the transaction, select **New** at the No Special Order found prompt. Skip to step 5.

The screen is titled "SPECIAL ORDER" and displays the message "There are no special orders matching the criteria entered." At the bottom are three function keys: "Back" (Esc), "Special Order Search" (F8), and "New" (F9).

Figure 11-2: No Special Order Found prompt

Tip: To search for an existing special order account, enter the search criteria information at the Special Order Search form and select **Process**. There must be an entry in at least one field. You may type a partial entry, such as the first few letters of the customer's last name in the Last Name field to find all accounts where the owner's last name begins with the letters you entered.

- If a customer has not been associated with this sale, Oracle Retail Xstore Point of Service prompts for customer information. Enter the information and press [**Enter**] to continue.

The form is titled "CUSTOMER SEARCH" with the sub-instruction "Enter search criteria." It contains eight input fields: "Phone #", "Last Name", "First Name", "City", "State" (with a dropdown arrow), "Postal Code", "Loyalty #", and "Customer #". Below the fields are four function keys: "Back" (Esc), "Help" (F1), "Change Country" (F6), and "Process" (F8). A magnifying glass icon is located in the top right corner.

Figure 11-3: Customer Search Form

When the customer's record has been located, or information added to the database, the customer's record is associated with this transaction.

Note: For more information about the *Change Country* option, see [Search Form](#).

5. At the Special Order Ship Options form, select where the special order is to be shipped:

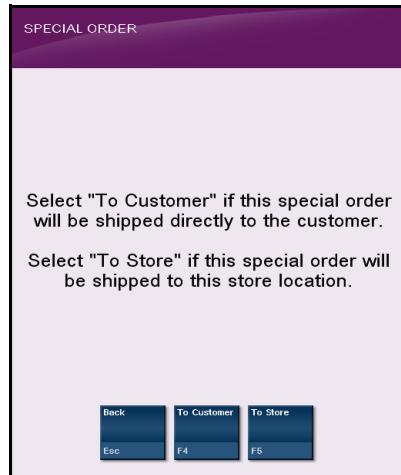


Figure 11-4: Shipping/Pick Up Options

- If the customer is going to return to the store to pick up the item, select the **To Store** option.
- If the customer would like to have the item shipped directly to another location, select the **To Customer** option.

Depending upon the option chosen above, proceed as follows:

Table 11-1: Shipping Options

If you chose...	Then...
Ship to Store	Continue with Shipping a Special Order Item to the Store .
Ship to Customer	Continue with Shipping Special Order Items to the Customer .

Shipping a Special Order Item to the Store

...continued from step 5

1. At the Special Order screen, scan or enter the item ID for the special order. All items are entered as special order items in this mode.

Note: To add Wish List item(s) to the Special Order, select *View Customer* and then select the *Wish List* tab (see [Purchasing Wish List Item\(s\)](#)).

Setting Up a New Special Order

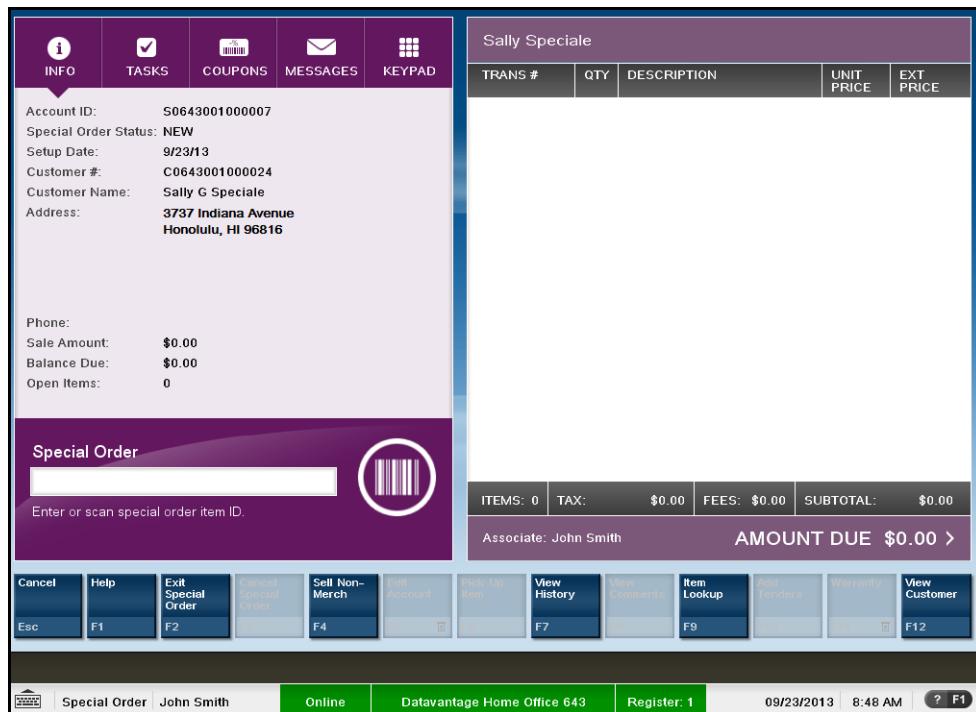


Figure 11-5: Special Order Screen

Note: When entering items for a special order, you may be notified that the item is in stock. You can choose to special order the item anyway, or return to the sale to sell the item from stock merchandise. If an item cannot be added to a special order, you are prompted with a message indicating that the item is ineligible for a special order.

2. Depending upon your store policy, you may be prompted to enter the date you expect to receive the item at the store. If prompted, enter the date you expect to receive the item and press [Enter].



Figure 11-6: Expected Receipt Date Prompt

3. When finished entering special order items, select one of the following options from the Special Order screen to continue:
 - Select the **Exit Special Order** option to return to the Register Sale screen to continue selling regular items.
 - Select the **Complete Transaction** option to complete the transaction and begin the tendering process.

- At the prompt for the special order deposit, enter the dollar amount (without a decimal point) that the customer wants to apply to the special order, and press [Enter].



Figure 11-7: Special Order Deposit Prompt

Note: This option is only available for items shipped to the store for pickup. When items are shipped directly to the customer, they must be paid in full.

- If you chose to continue selling regular items (**Exit Special Order** menu option), the Register Sale screen displays. The special order items are shown on the View Port along with the regular items in the sale as shown in [Figure 11-8](#) below. Any fees for the special order are shown as sale items.

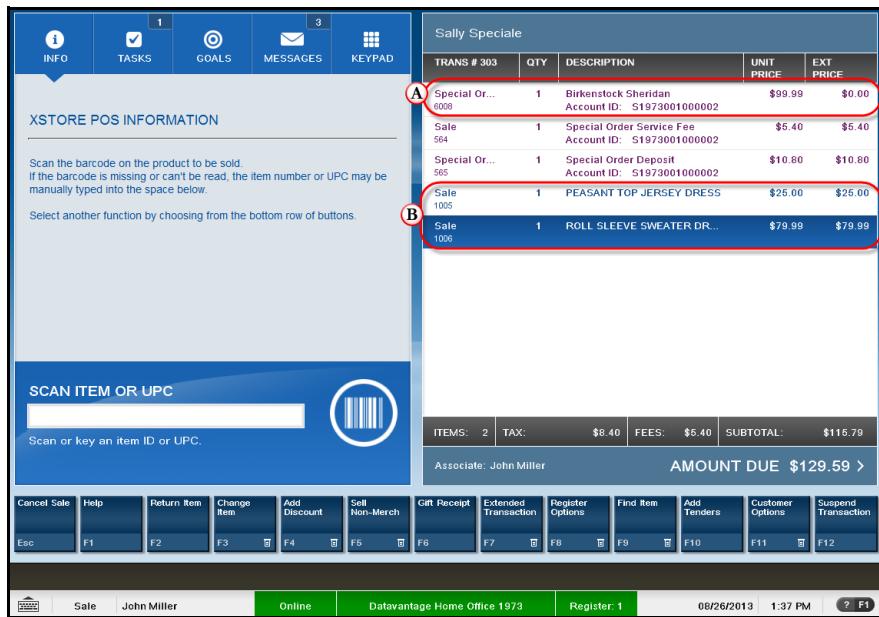


Figure 11-8: Register Sale with Special Order Item

- A) - Special Order Item
- B) - Regular Sale Items

Note: Your store policy determines whether or not a Special Order may be mixed with other types of sales in the same transaction.

Setting Up a New Special Order

6. If you chose to tender the sale, the tender list is displayed. Tender the sale using the normal procedure. When the transaction is complete, the system creates receipts as required by your store policy.

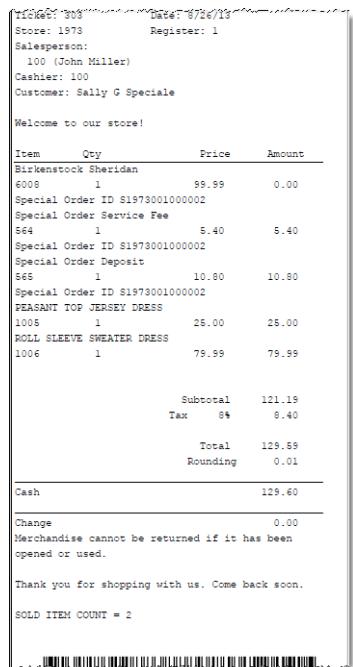


Figure 11-9: Sample Sale Transaction Receipt (with special order item)



Figure 11-10: Sample Special Order Receipt

Note: About the Sale Transaction Receipt

In this example, the sold item count is 2 indicating that the customer is taking two items from the store at this time. The special order item is not included in this count.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Email Receipt Options](#) for more information about sending email receipts.

Shipping Special Order Items to the Customer

...continued from step 5

- At the prompt for shipping destination information, enter/verify the customer and address information for this special order and select the **Save Changes** option.

Figure 11-11: Shipping Destination Address Form

Note: For more information about the *Change Country* option, see [Search Form](#).

- Depending upon the configuration of your system, you may have a **First line of address, or postal code** field.
 - Enter address information into this field to quickly look up an address.
 - Select the address from a list of results to automatically populate the customer address fields.
- At the Special Order screen, scan or enter the item ID to be special ordered. All items are entered as special order items ([Figure 11-5](#)).

Note: When entering items for a special order you may be notified that the item is in stock. You can choose to special order the item anyway, or return to the sale to sell the item from stock merchandise. If an item cannot be added to a special order, Oracle Retail Xstore Point of Service prompts you with a message indicating the item is ineligible for a special order.

Setting Up a New Special Order

3. Depending upon your store policy, you may be prompted to enter the date you expect to receive the item at the store. Enter the date you expect to receive the item and press [Enter].



4. When finished entering special order items, select one of the following options to continue:
 - Select the **Exit Special Order** option to return to the Register Sale screen to continue selling regular items (if your store policy permits this).
 - Select the **Complete Transaction** option to complete the transaction and begin the tendering process.
5. Depending upon your system's configuration, you may be prompted that a shipping fee has been automatically added to the special order. If prompted, press [Enter] to acknowledge this prompt.
6. If you chose to exit the special order to sell more regular items, the Register Sale screen displays. The special order items are shown on the View Port along with the regular items in the sale.
7. If you chose to tender the sale, the tender list is displayed. Tender the sale using the normal tendering process.

When the transaction is complete, the system creates receipts as required by your store policy.

Note: The special order must be paid in full for items shipped directly to the customer.

Important: If your store issues email receipts, additional/different prompts display. Refer to [Email Receipt Options](#) for more information about sending email receipts.

Special Order Setup/Maintenance Options

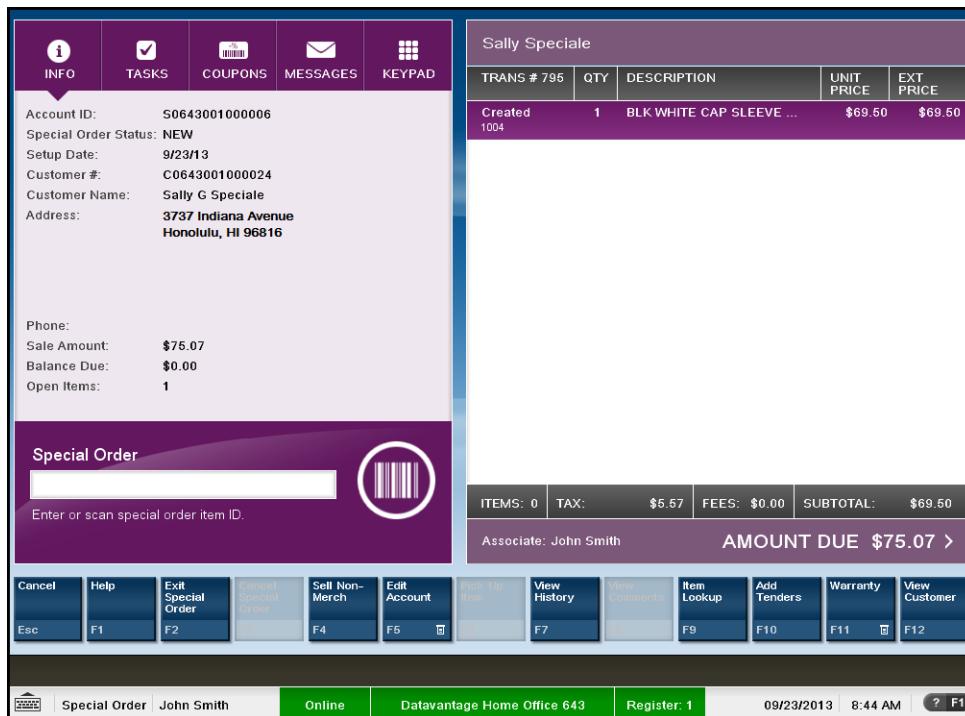


Figure 11-12: Special Order Menu Options

Note: The View comments option on the Special Order menu will only be active when a comment is associated with this special order account.

During a special order setup transaction you can also perform the following activities before tendering the sale:

- If you can sell non-merchandise items that are eligible for special order, refer to [Adding Non-Merchandise Items to the Sale](#) for more information.
- If you do not know the item number and cannot scan the item, use the “Item Lookup” option to find the item number. When you look up an item while in a special order transaction, choose the **Add Item** menu option on the item lookup results screen to add the item to the special order. Refer to [Searching for Items Using Item Lookup](#) for more information.
- To view the special order history, refer to [Viewing Special Order History](#).
- To add a warranty to an item, see [Adding a Warranty to a Special Order Item](#).
- To modify the special order account, select the **Edit Account** option from the Special Order screen menu.

Viewing Special Order History

Using these edit account options you can add a coupon, add a discount, add a comment about the account, and change a line item. Refer to ["Modifying a Sale Transaction"](#) for more information about these options.



Figure 11-13: Special Order Edit Account Menu Options

About changing an item

Line item changes (**Change Item** menu option) include options such as changing the item quantity, changing the item price, changing the item tax, voiding a line, modifying and voiding a discount, changing the commissioned associate, changing the expected date for the item, and adding/editing line item comments.

Note: If you modify a line item in the special order sale, the entire special order is recalculated. If an additional deposit must be made, you are prompted to enter the deposit amount. If the change makes the special order over-paid, a refund is issued.

Refer to [Modifying Line Items in a Sale](#) for more information about these options.

Important: All changes to special order items must be done at the Special Order screen. You cannot change special order items at the sale screen.



- To change item quantities, refer to [Changing the Item Quantity](#).
- To override a price, refer to [Changing the Item Price](#).
- To change the tax rate/amount, refer to [Changing Item Taxes](#).
- To void an item, refer to [Voiding an Item](#).
- To add/change/delete discounts, refer to [Adding a Discount/Award to an Item or Transaction](#).
- To special order gift registry items, refer to [Selling Gift Registry items](#).
- To change the commissioned sale associate for the sale, refer to [Changing the Commissioned Associate](#).
- To change the expected arrival date for an item, refer to [Changing the Item Expected Date](#).
- To add/edit a line item comment, refer to [Adding/Editing a Line Item Comment](#).

Viewing Special Order History

1. From the Special Order screen menu (Figure 11-12), select the **View History** option.

Oracle Retail Xstore Point of Service displays the Special Order account information, including the status of each item.

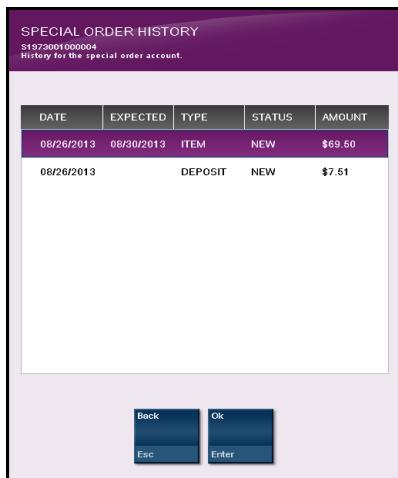


Figure 11-14: Special Order History Screen

2. Press [Enter] to close the Special Order History screen.

Adding a Warranty to a Special Order Item

If an item on the special order is eligible for a warranty, the **Warranty** option on the Special Order menu is active. If no items on the special order are eligible for a warranty, this option is not available.

1. From the Special Order screen menu, select the **Warranty** option.
2. Follow the prompts to add a warranty to an item or to change the warranty owner. Refer to [Warranty and Service Plan Transactions](#) for more information about warranties.

Changing the Item Expected Date

1. Select **Edit Account** ([Figure 11-12](#)).
2. Select **Change Item** ([Figure 11-13](#)).
3. Select the **Change Expected Date** option from the Special Order Change Item menu.

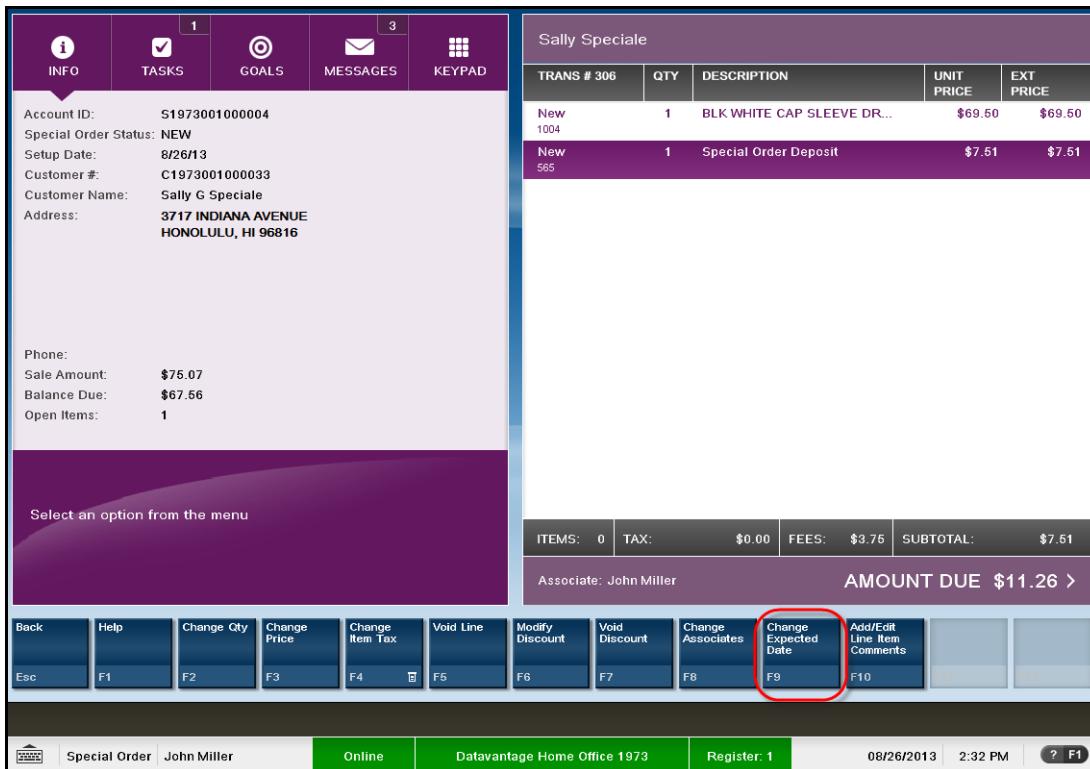


Figure 11-15: Special Order Change Item Menu - Change Expected Date Option

4. Use the up and down arrow keys to select the item and press [Enter] to continue.
5. Enter the expected arrival date for the item in the Special Order Expected Date prompt and press [Enter] to continue.

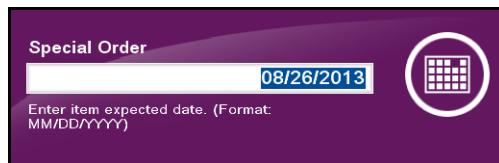


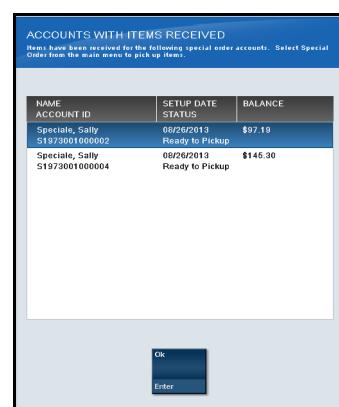
Figure 11-16: Special Order Expected Date Prompt

The new expected arrival date is assigned to the item.

Picking Up a Special Order

If the customer had the special order item(s) delivered to the store, use the following procedure for picking up the item(s).

Note: If you enter the customer's information at the beginning of a sale and the customer's special order item has been received at the store, a message displays indicating the order has been received and is ready for pickup. Press [Enter] to acknowledge the message and continue with step 1 below.



- At the Register Sale screen, select **Extended Transaction --> Special Order** from the Extended Transaction menu.

Note: If the customer has already been associated with the special order, select the special order account from the list of accounts as shown in step 3.

- At the Special Order Search form, enter/scan the required search criteria and select the **Process** option.
- If multiple special orders match the entered criteria, select the appropriate special order from the list and press **[Enter]** to continue.

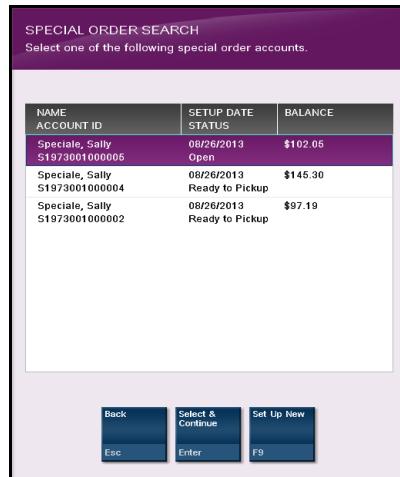


Figure 11-17: List of Special Orders

Picking Up a Special Order

Note: A special order with a CLOSED status cannot be accessed. If you select a closed account, the system notifies you that the account is closed.

- At the Special Order Account screen, select the **Pick Up Item** option to continue.

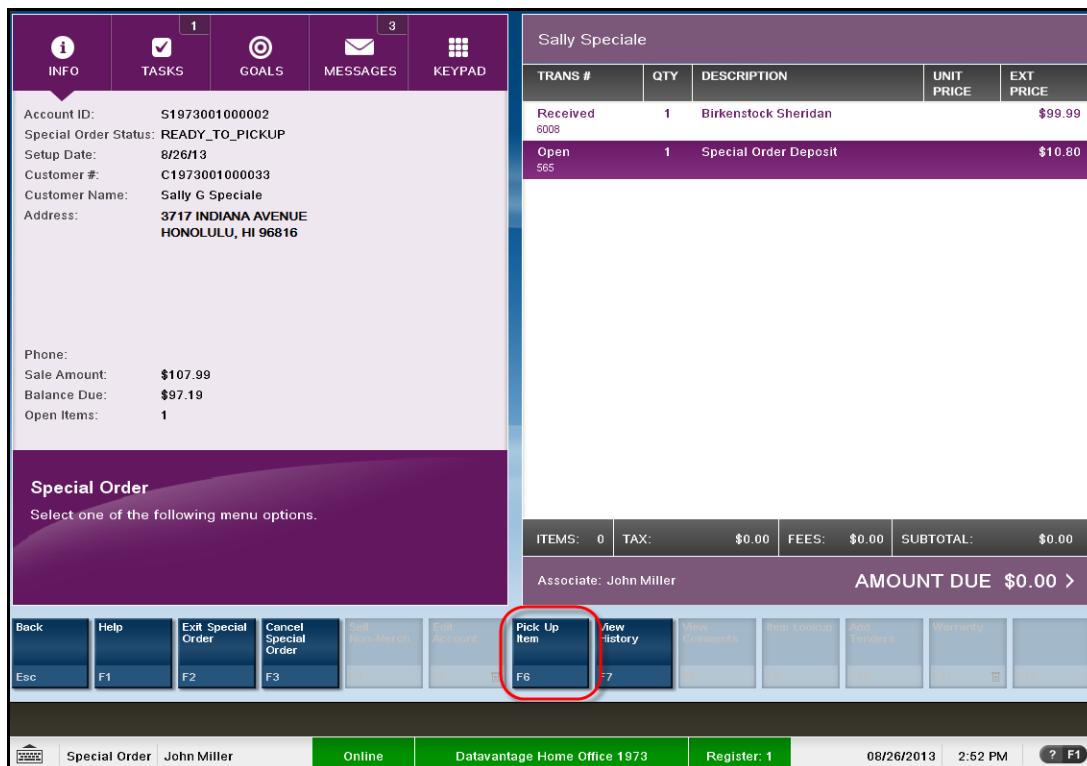


Figure 11-18: Special Order Account Screen

Note: The *Pick Up Item* option is only active if at least one item on the account has been received.

- To select a single item from the list, use the up and down arrow keys to highlight it, press the [Spacebar] and press [Enter]. To pick up all of the items that are ready, select the **Pickup All** option.

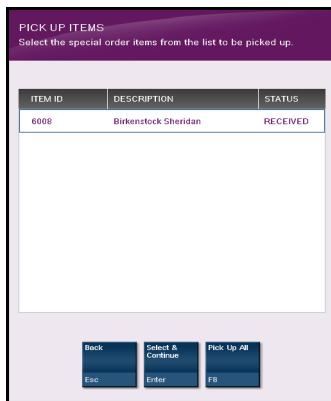


Figure 11-19: List of Special Order Items Ready for Pickup

The item status is changed from **Received** to **Picked Up** on the View Port as shown below.

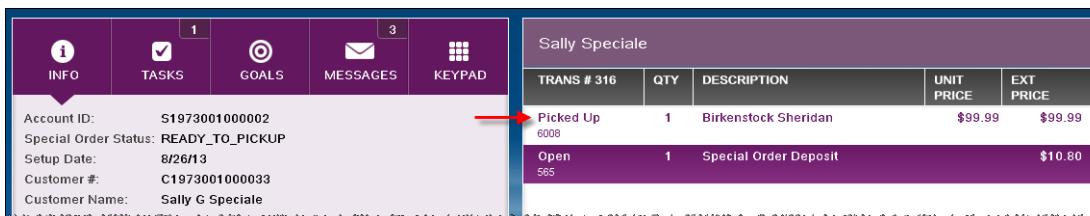


Figure 11-20: View Port Status - After Pickup

- When finished selecting the special order pickup items, choose one of the following options to continue:
 - Select the **Exit Special Order** option to return to the Register Sale screen to continue selling regular items. The Register Sale screen displays and the special order items are shown on the View Port along with the regular items in the sale.
<OR>
 - Select the **Add Tenders** option or press **[Enter]** to complete the transaction. The tender list is displayed and you can tender the sale using the normal tendering process.

Special Order Pickup Options

During a special order pickup transaction, you can also perform the following activities *before* tendering the sale:

- To add or view comments about the transaction, refer to [Special Order Setup/Maintenance Options](#).
- To view the special order history, refer to [Viewing Special Order History](#).
- To cancel the special order, refer to [Canceling a Special Order](#).

Editing Special Order Pickup Items

If allowed by your store policy, you can use the following options to modify a line item in the special order pickup transaction.

- To change the commissioned sale associate for the sale, refer to [Changing the Commissioned Associate](#) for more information.
- To change the tax rate/amount, refer to [Changing Item Taxes](#) for more information.
- To add/change/delete discounts, refer to [Item Level Discounts](#) for more information.
- To remove an item from the special order, refer to [Voiding an Item](#) for more information.

Canceling a Special Order

If the customer had the special order item(s) delivered to the store, use the following procedure for canceling the item(s). To cancel a gift registry order, be sure to assign the gift registry prior to canceling the order (see [Selling Gift Registry items](#)).

1. At the Sale screen, select **Extended Transaction**.
2. Select the **Special Order** option from the Extended Transaction menu.

Note: If the customer has already been associated with the special order, select the special order account from the list of accounts as shown in step 4 below.

3. At the Special Order Search form, enter/scan the required search criteria and select the **Process** option.

4. If multiple special orders match the entered criteria, select the appropriate special order from the list and press [Enter] to continue.

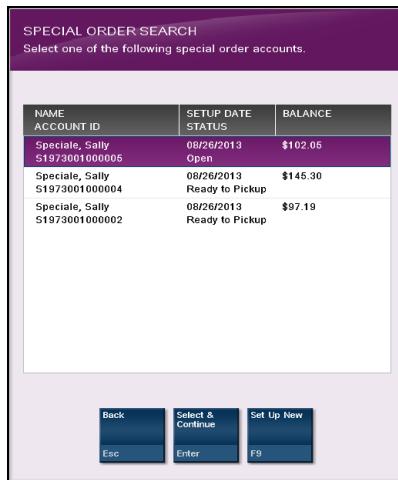


Figure 11-21: List of Special Orders

Note: A special order with a CLOSED status cannot be accessed. If you select a closed account, the system notifies you that the account is closed.

5. At the Special Order Account screen, select the **Cancel Special Order** option to continue.

INFO **TASKS** **GOALS** **MESSAGES** **KEYPAD**

Account ID: S197300100004
Special Order Status: READY_TO_PICKUP
Setup Date: 8/26/13
Customer #: C1973001000033
Customer Name: Sally G Speciale
Address: 3717 INDIANA AVENUE HONOLULU, HI 96816

Phone:
Sale Amount: \$161.44
Balance Due: \$145.30
Open Items: 2

Sally Speciale

TRANS #	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Received 1004	1	BLK WHITE CAP SLEEVE DR...		\$69.50
Open 565	1	Special Order Deposit		\$16.14
Received 1005	1	ROLL SLEEVE SWEATER DR...		\$79.99

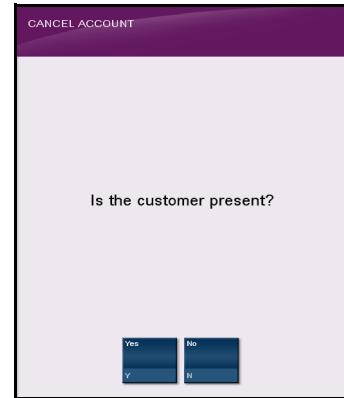
Special Order
Select one of the following menu options.

ITEMS: 0	TAX: \$0.00	FEES: \$0.00	SUBTOTAL: \$0.00
Associate: John Miller AMOUNT DUE \$0.00 >			
Back	Help	Exit Special Order	Cancel Special Order
Esc	F1	F2	F3

Figure 11-22: Special Order Account Screen

Canceling a Special Order

6. When prompted, answer whether or not the customer is present:



- Select **No** if the customer is not present. When the customer is not present, you must use the Back Office escrow process to cancel the special order.
 - a. Press [Enter] to close the message prompt. The system returns to the Special Order screen.

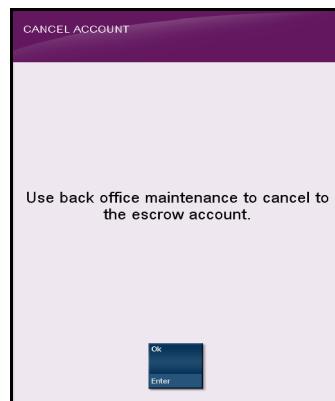


Figure 11-23: Use Back Office Prompt

- b. Select **Exit Special Order** to return to sale mode. For more information about handling escrow accounts, refer to the *Oracle Retail Xstore Point of Service Manager's Guide*.

- Select **Yes** if the customer is present.
- a. When prompted, select **Yes** to confirm you want to cancel the special order. The system returns to the sale screen and the refund amount is show on the View Port.

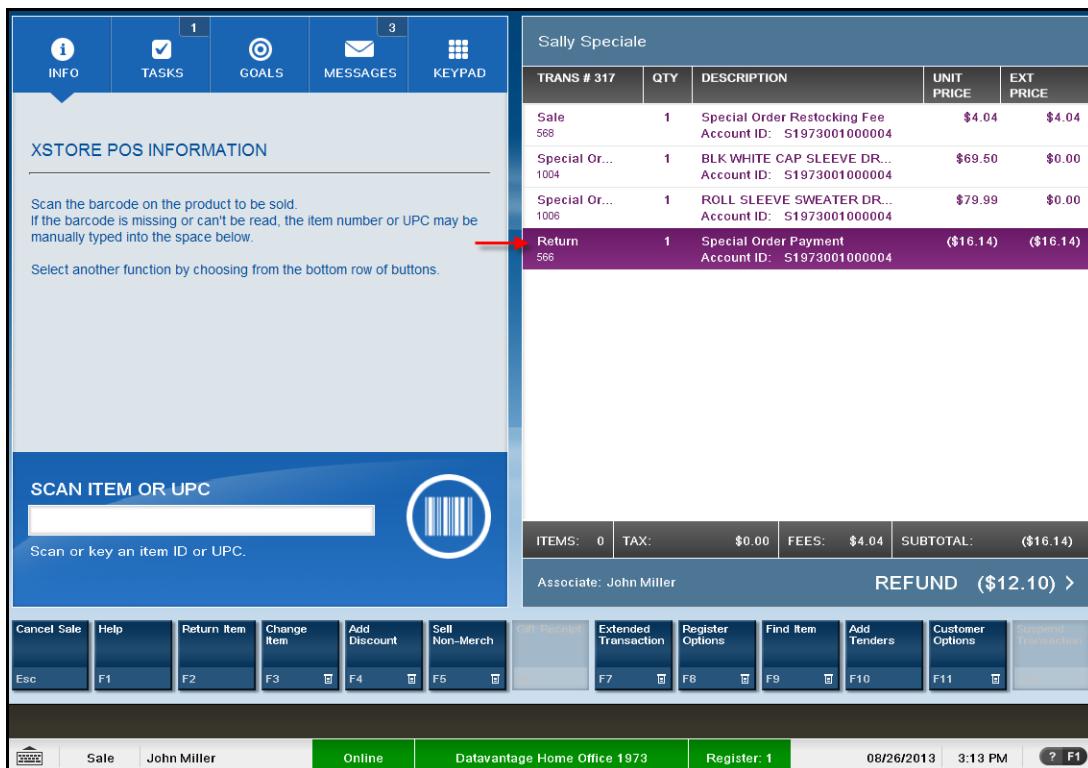


Figure 11-24: Sale Screen With Refund

- b. Tender the refund and return any amount due back to the customer.
- c. The system creates receipts as needed.

Canceling a Special Order

12

Work Order Transactions

Overview

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.

Creating a New Work Order

Note: 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.

A work order must be associated with a regular sale transaction and a customer name.

1. At the Sale screen, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Work Order** option.

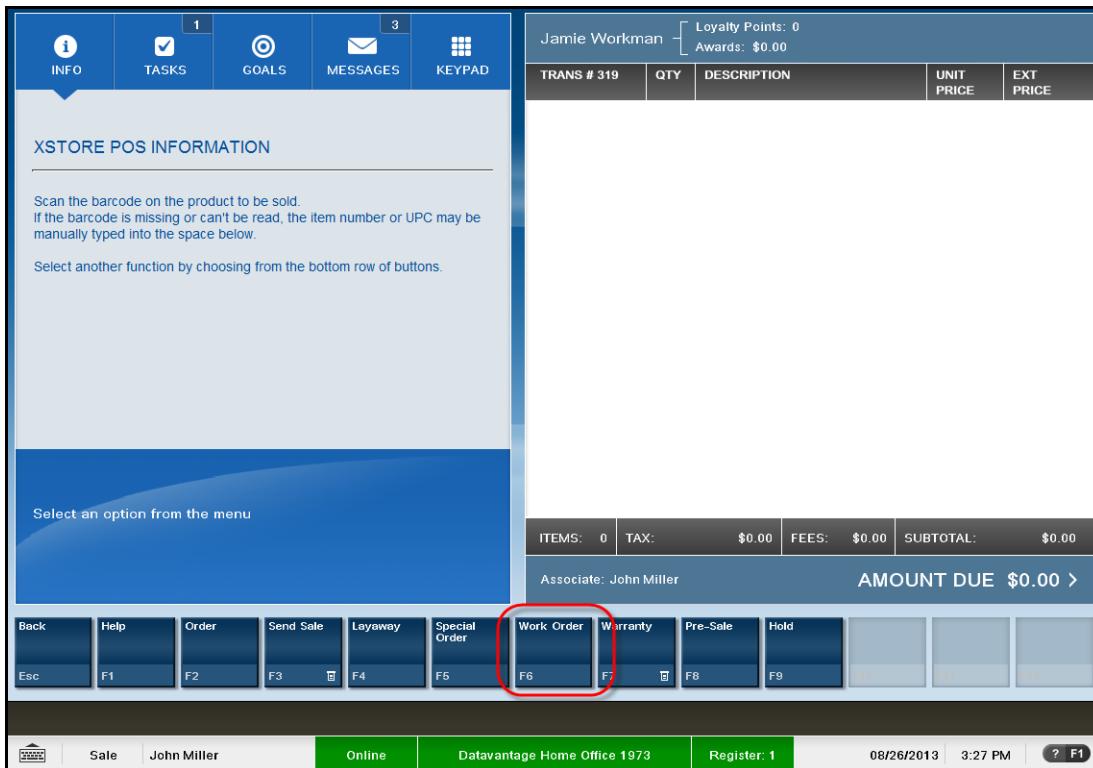


Figure 12-1: Extended Transaction Menu

Note: The system does not allow you to create a work order unless you have the required security privileges.

3. The next steps depend upon whether or not a customer has been associated with the sale transaction:

If no customer is associated with the transaction

- 1) If no customer is associated with the transaction, the system displays the Work Order Search form shown here.

The Work Order Search form is titled "WORK ORDER SEARCH" and includes a sub-instruction "Enter search criteria." It features five input fields: "Work Order ID" (with a placeholder "#"), "Last Name", "First Name", "Customer ID", and "Phone #". Below the input fields are four blue buttons labeled "Back", "Help", "Process", and "Set Up New". Underneath these buttons are function keys: "Esc", "F1", "F8", and "F9".

Figure 12-2: Work Order Search Form

- 1) Select **Set Up New**.

Note: To search for an existing work order, enter your search criteria and select the **Process** option.

- 2) The system displays the Customer Search form. Enter search criteria and select **Process**.

The Customer Search form is titled "CUSTOMER SEARCH" and includes a sub-instruction "Enter search criteria." It features eight input fields: "Phone #", "Last Name", "First Name", "City", "State" (with a dropdown arrow), "Postal Code", "Loyalty #", and "Customer #". Below the input fields are four blue buttons labeled "Back", "Help", "Change Country", and "Process". Underneath these buttons are function keys: "Esc", "F1", "F8", and "F9".

Figure 12-3: Customer Search Form

- a) Select a customer to associate with the transaction.
- b) When customer association is complete, go to step 4.

Creating a New Work Order

If a customer is associated with the transaction

If a customer is associated with the transaction, the system automatically searches for work orders for the customer.

- If an established work order is not found, the message shown here displays.

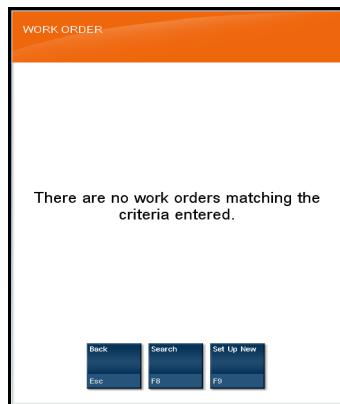


Figure 12-4: No Matching Work Orders Message

- a) Select **Set Up New** to create a new work order.
- b) Go to step 4.
- If an established work order is found, the work order accounts are shown in a list.

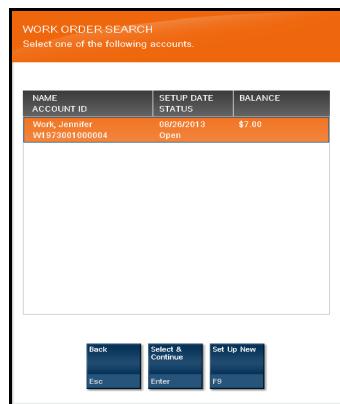


Figure 12-5: Work Order Accounts List

- a) Select **Set Up New** to create a new work order.
- b) Go to step 4 below.

4. The system prompts for the source of information about the item that is referenced in the work order.

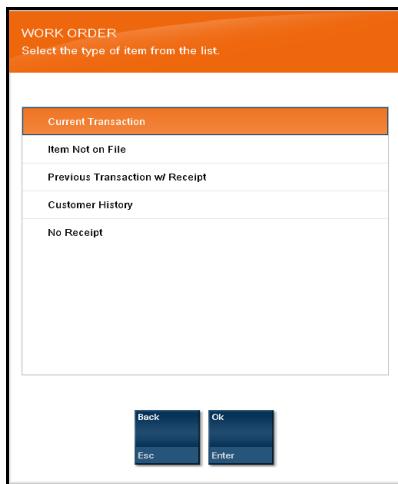


Figure 12-6: Work Order Item Source Prompt

5. Select one of the following options and press [Enter]:
 - **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. See [Work Order Item — In the Current Sale Transaction](#).
 - **Item Not on File:** The item requiring work is not in the system. See [Work Order Item — Item Not on File](#).
 - **Previous Transaction with Receipt:** The item is identified on the receipt from a previous transaction. See [Work Order Item — Using Original Transaction Receipt](#).
 - **Customer History:** Find the item by searching the customer's previous purchase transaction history. See [Work Order Item — Customer History](#).
 - **No Receipt:** The item has no receipt available or is not referenced on a receipt. See [Work Order Item — No Receipt; Manual Item Entry](#).
 - **Customer History:** Find the item by searching the customer's previous purchase transaction history. See [Work Order Item — Customer History](#).

Work Order Item — In the Current Sale Transaction

...continued from step 5

- The system displays a list of items that are eligible for a work order in the current transaction.

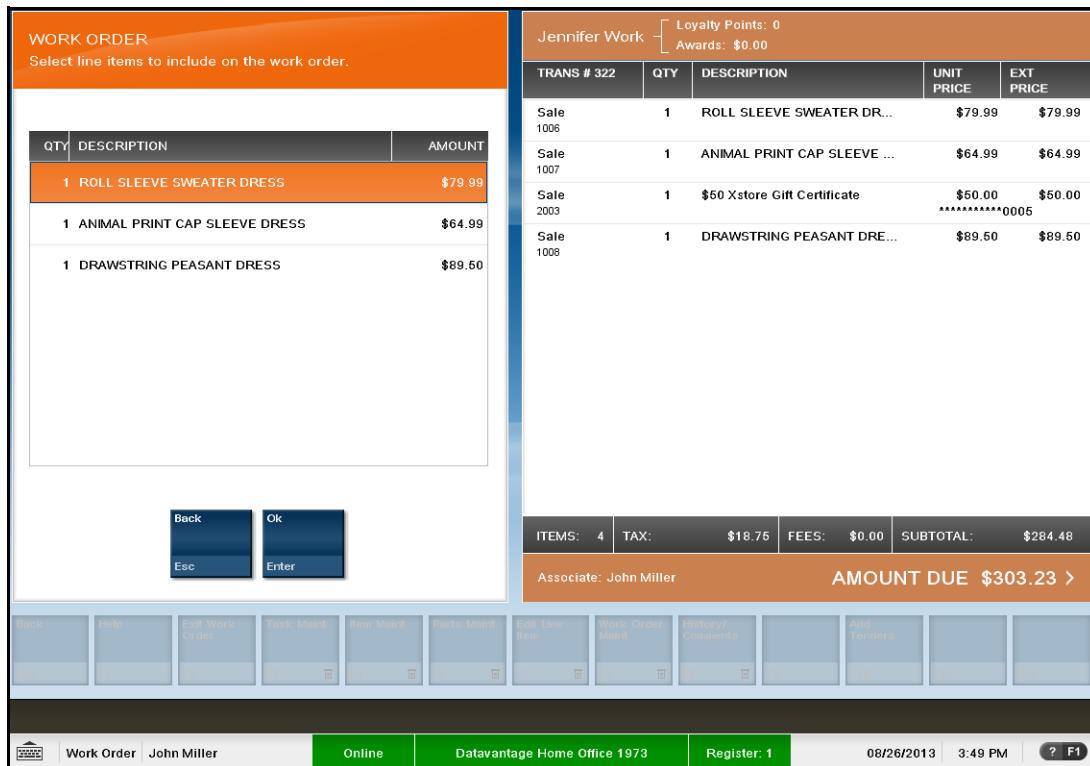


Figure 12-7: Items Eligible For Work Order

Tip: Some merchandise or non-merchandise items (for example, loyalty cards, gift cards, gift certificates and warranties) are not included in the list of items eligible for work order processing.

- Use the up and down arrow keys to highlight an item from the current sale that is to be included in the work order and press [Enter]. You can select multiple items from the list by pressing the [Spacebar] to select and add each item to the work order. The system adds the selected item(s) to the work order.

- The system prompts you to specify if there is another item to be added to the work order:

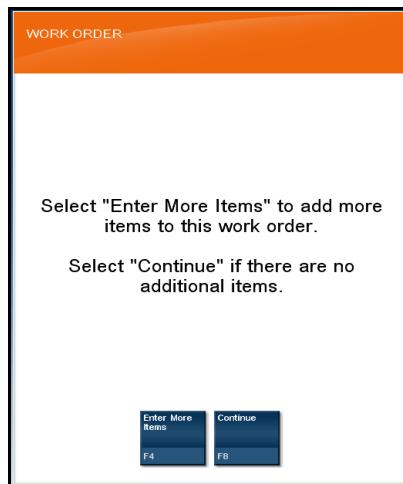


Figure 12-8: Prompt for Additional Work Order Items

- If you need to add additional items to this work order, select the **Enter More Items** option. The system returns to the prompt for work order item source. See [Figure 12-6](#).
- <OR>
- If there are no more items for this work order, select the **Continue** option. The system displays the work order categories.
- The next step in the process is to select a work order category. Continue with [Work Order Categories](#).

Work Order Item — Using Original Transaction Receipt

...continued from step 5

- The system prompts you to enter information from the original transaction receipt. You may indicate whether or not the receipt is a gift receipt by selecting Yes or No in the Gift Receipt drop-down list.

ORIGINAL TRANSACTION INFORMATION
Enter the original transaction information to find items for the work order.

Gift Receipt? No

Trans Barcode

OR

Orig Ticket ID

Orig Trans Date (MM/DD/YYYY)

Orig Store ID

Orig Register ID

OR

Credit Card #

OR

Serial Number

Back Esc Help F1 Process F8

Figure 12-9: Original Transaction Search Form

Creating a New Work Order

2. Scan the original receipt barcode from the receipt, or enter the receipt information manually and select **Process**.
3. The system displays a list of eligible items from the original transaction and prompts you to select the item(s) for the work order.

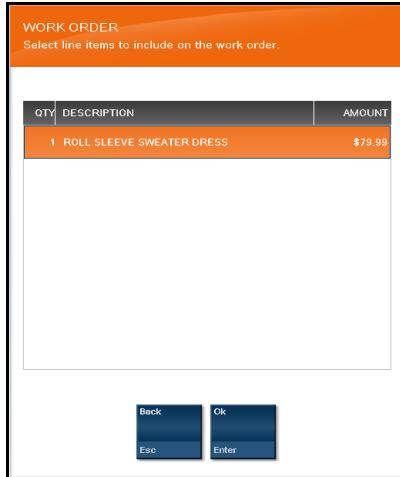


Figure 12-10: Previous Transaction Item List

Note: If applicable, you can select multiple items from the list by pressing the [Spacebar] to select and add each item to the work order. If no items in the original transaction are eligible for a work order, or if the original transaction cannot be found, the system displays a message notifying you that there are no eligible items available for a work order.

4. Select the item and press **[Enter]**. The system adds the item to the work order.
5. The system prompts you to specify if there is another item to be added to the work order:

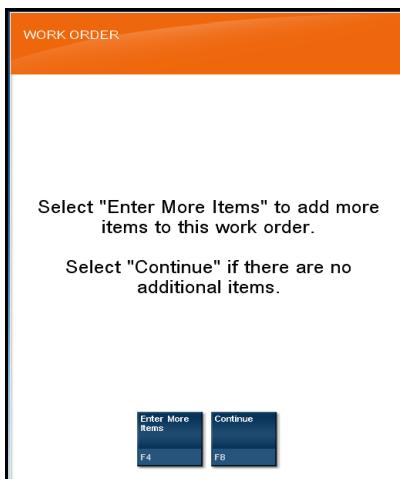


Figure 12-11: Additional Work Order Items Prompt

- If you need to add additional items to this work order, select the **Enter More Items** option. The system returns to the prompt for work order item source. See [Figure 12-6](#).
- <OR>
- If there are no more items for this work order, select the **Continue** option. The system displays the work order categories.
6. The next step in the process is to select a work order category. Continue with [Work Order Categories](#).

Work Order Item — No Receipt; Manual Item Entry

...continued from step 5

1. At the prompt for an item ID, enter the Item ID and press **[Enter]**, or scan the item.



Figure 12-12: Item ID Prompt

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 the item's value has not been determined by the item selection (value is zero), enter the value and press **[Enter]**.
3. If prompted, enter a text description for the item and press **[Enter]**.
4. The system prompts you to specify if there is another item to be added to the work order:

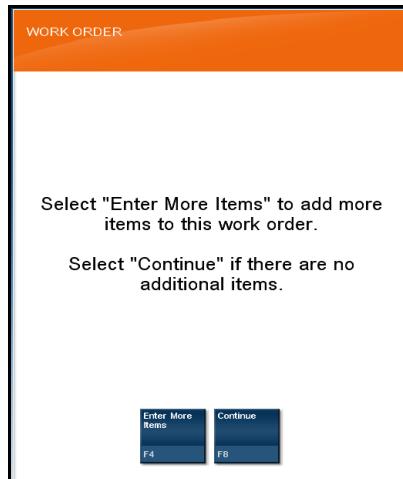


Figure 12-13: Additional Work Order Items Prompt

Creating a New Work Order

- If you need to add additional items to this work order, select the **Enter More Items** option. The system returns to the prompt for work order item source. See [Figure 12-6](#).
- <OR>
- If there are no more items for this work order, select the **Continue** option. The system displays the work order categories.
5. The next step in the process is to select a work order category. Continue with [Work Order Categories](#).

Work Order Item — Customer History

...continued from step 5

1. The system displays a list of items the customer has purchased previously.

The screenshot shows a software interface titled "WORK ORDER" with the sub-instruction "Select line items to include on the work order". Below this is a table listing three items:

DATE	QTY	DESCRIPTION	AMOUNT
8/26/13	1	BLK WHITE CAP SLEEVE DRESS	\$69.00
8/26/13	1	ROLL SLEEVE SWEATER DRESS	\$79.99
8/26/13	1	Timeless Black Leather Watch	\$315.00

At the bottom of the screen are two buttons: "Back" and "Ok". Underneath "Back" is "Esc" and underneath "Ok" is "Enter".

Figure 12-14: Customer History-Previous Items Purchased

2. Use the up and down arrow keys to scroll through the list and find the item(s) for the work order. Select the item(s) and press [Enter]. The system adds the selected item(s) to the work order.

Note: You can select multiple items from the item list by pressing the [Spacebar] to select and add each item to the work order.

3. The system prompts you to specify if there is another item to be added to the work order:

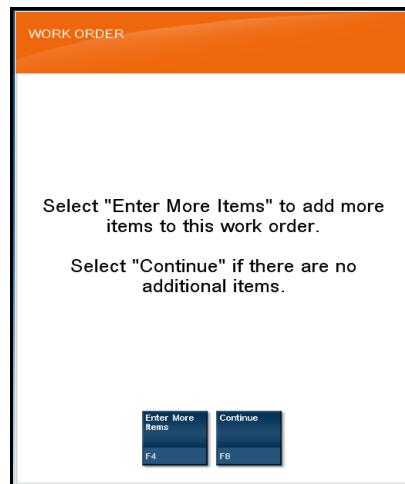


Figure 12-15: Additional Work Order Items Prompt

- If you need to add additional items to this work order, select the **Enter More Items** option. The system returns to the prompt for work order item source. See [Figure 12-6](#).
- <OR>
- If there are no more items for this work order, select the **Continue** option. The system displays the work order categories.
4. The next step in the process is to select a work order category. Continue with [Work Order Categories](#).

Work Order Item — Item Not on File

...continued from step 5

1. At the prompt for an item description, enter a text description for the item and press [Enter].

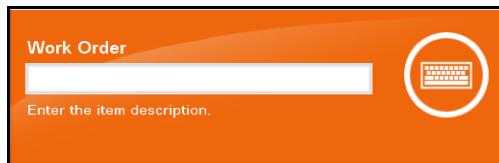


Figure 12-16: Item Description Prompt

2. At the prompt for item value, enter the item's value and press [Enter].



Figure 12-17: Item Value Prompt

Work Order Categories

3. The system prompts you to specify if there is another item to be added to the work order:

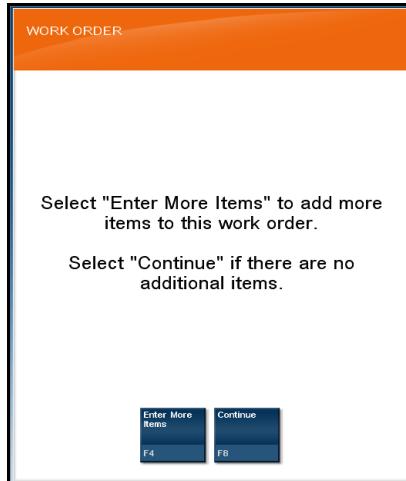


Figure 12-18: Additional Work Order Items Prompt

- If you need to add additional items to this work order, select the **Enter More Items** option. The system returns to the prompt for work order item source. See [Figure 12-6](#).
- <OR>
- If there are no more items for this work order, select the **Continue** option. The system displays the work order categories.
4. The next step in the process is to select a work order category. 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. The system displays the list of work order categories. Use the up and down arrow keys to choose a category and press [Enter].

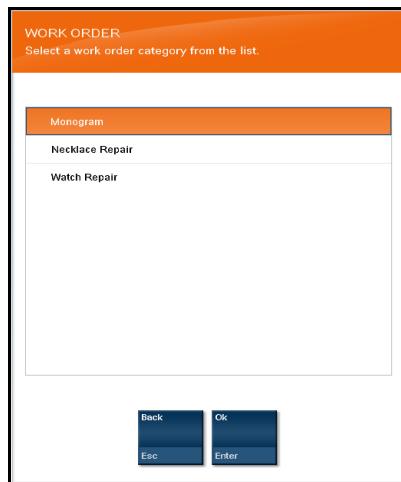


Figure 12-19: Work Order Categories

Note: The Home Office defines the Work Order Alteration and Repair categories.

2. Depending upon your system's configuration, additional prompts for information may be displayed based on the work order category you selected. For example:
 - * **Pricing category** - Examples include No Charge, Warranty, and Chargeable.

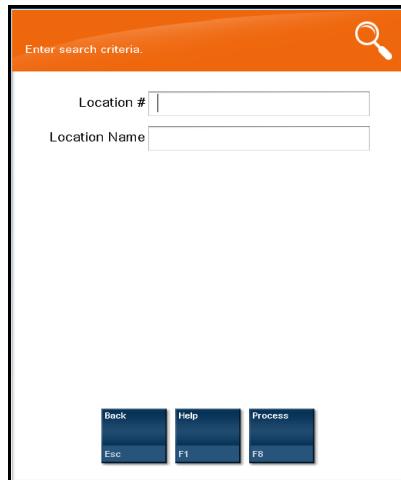


- * **Warranty Contract Number** - The system prompts for the Warranty Plan Number.



Work Order Categories

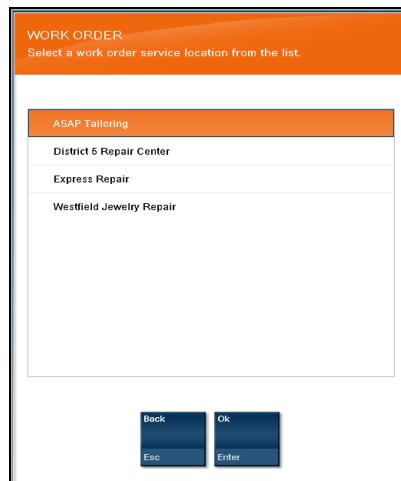
3. You may be prompted to search for a location where the work will be performed. If you don't know a location, leave the fields blank and select **Process** to show all available vendors.



The screenshot shows a search interface titled "Enter search criteria." It features two input fields: "Location #" and "Location Name," both currently empty. A magnifying glass icon is positioned above the input fields. At the bottom, there are three buttons: "Back" (Esc), "Help" (F1), and "Process".

Figure 12-20: Work Order Location Search Form

4. The system displays a list of service locations. Select a location and press [Enter].



The screenshot shows a list of service locations under the heading "WORK ORDER" and the instruction "Select a work order service location from the list." The list includes: ASAP Tailoring (highlighted in orange), District 5 Repair Center, Express Repair, and Westfield Jewelry Repair. At the bottom, there are two buttons: "Back" (Esc) and "Ok" (Enter).

Figure 12-21: Work Order Vendor List

Note: To accommodate in-house work orders or a single location where work orders are performed, the system may be configured to skip the location selection.

5. The system displays the tasks that can be performed on the item, based upon the service location that you selected.

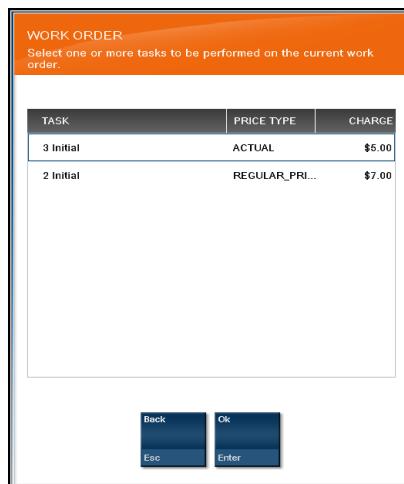


Figure 12-22: Work Order Tasks List

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. Add a task activity to the work order by using the up and down arrow keys to select the task and press [Enter].

The system displays the summary information for the work order.

Jennifer Work					
TRANS #	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE	
CREATED	1	3 Initial	\$5.00	REGULAR_PRICE	

Select an option from the menu

ITEMS: 0	TAX: \$0.00	FEES: \$0.00	SUBTOTAL: \$0.00	
Associate: John Smith AMOUNT DUE \$0.00 >				

Figure 12-23: Work Order Summary Information

Work Order Categories

7. You can modify the work order or complete the transaction:

Note: You cannot order off of a Wish List when creating a Work Order. You can, however, add and remove wish list items by selecting *View Customer* and then the *Wish List* tab (see [Purchasing Wish List Item\(s\)](#)).

To **modify** the work order and add additional information, select from the following options as needed:



Refer to [Modifying a Work Order](#) for detailed information about each of the options shown here.

- To **complete** this work order setup process, select one the following options:
 - * Select the **Add Tender** option or the **Complete Transaction** option to complete and tender the transaction. If prompted for a work order deposit, enter a deposit amount or accept the default amount and tender the transaction.

<OR>
 - * Select the **Exit Work Order** option to return to the sale if the customer would like to continue purchasing additional items. If prompted for a work order deposit, enter a deposit amount or accept the default amount and continue selling items at the Sale screen.

Note: Your store policy determines if the Work Order transaction can be mixed with the sale of other items on the Sale screen.

The system displays the work order information that you entered during the setup process.

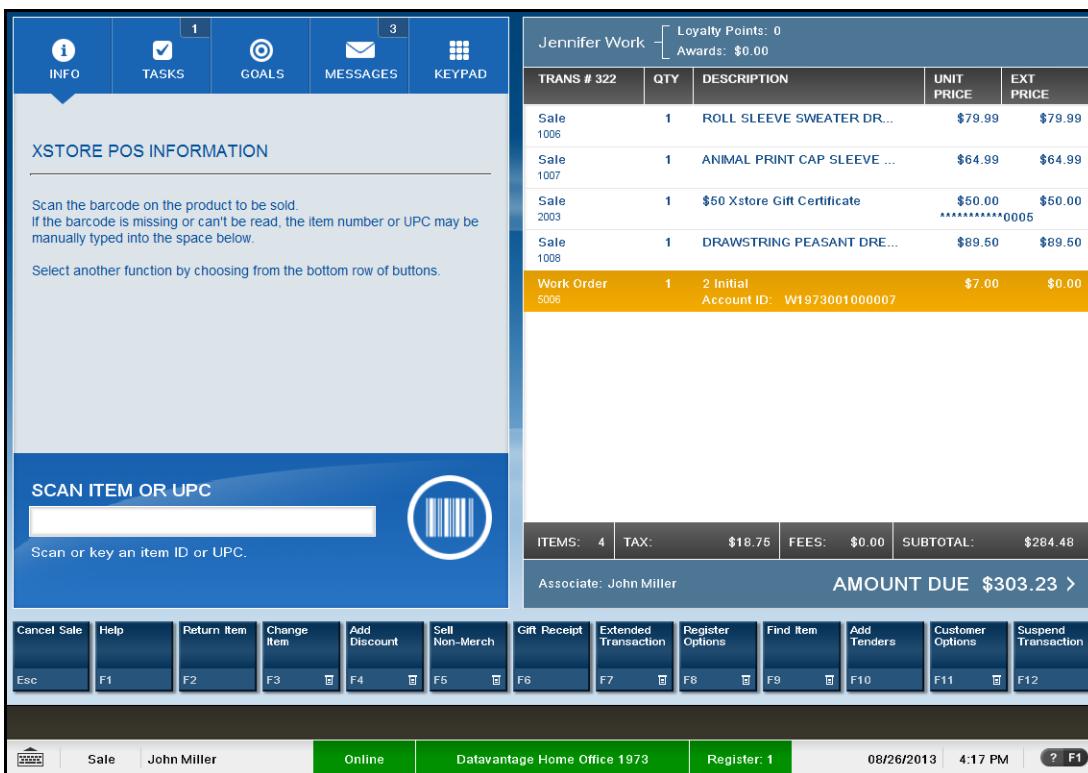


Figure 12-24: Sale Screen - Work Order Setup Account Information

When you tender the transaction, the system creates receipts as required by your store's policy.

Note: If the location requires a shipper or a receiver, the system will create a shipping document. Once the item(s) are shipped, the system will create a receiving document. The documents created for work order shipping and receiving are managed in the Back Office Work Order module. Refer to the *Oracle Retail Xstore Point of Service Manager's Guide* for more information.

Work Order Categories

Receipt Samples:

Customer Sale Receipt Sample

Solon, OH 44139 440-498-4414			
Ticket: 98	Date: 3/1/06		
Store: 301	Register: 1		
Salesperson: 1 (System USER)			
Cashier: 1 Customer: Jackie Keller			
Item	Oty	Price	Amount
Work Order Task3			
573	1	50.00	0.00
Work Order Deposit			
576	1	5.00	5.00
Subtotal 5.00			
Tax 0.00% 0.00			
Total 5.00			
<hr/> Cash 5.00 <hr/>			
Change 0.00			
 Customer Copy			

Work Order Receipt, Customer Copy Sample

Ticket: 98	Date: 3/1/06	
Cashier: 1	Register: 1	
Customer ID: C03010001000015		
Customer Name: Jackie Keller		
W o r k O r d e r I D		
W 0 3 0 1 0 0 0 1 0 0 0 0 2 9		
Expected Completion Date: 3/11/06		
Work Item	Value	
RED/BLK ANML PRT CARWASH DRESS	500.00	
<hr/> Total Value: 500.00		
Work Activity	Type	Amount
Work Order Task3	ACTUAL	50.00
<hr/> Work Order Total: 50.00		
Deposit/Payment: 5.00		
Balance Due: 45.00		
<p>This store is not liable for loss, theft or damage to these item(s) while in our possession.</p> <p>Customer agrees to pick up merchandise at the prescribed time or within 14 days of being notified the merchandise is available.</p> <p>Customer agrees to pay in full at the time of pickup.</p>  Customer Copy		

Work Order Receipt, Store Copy Sample

Ticket: 98	Date: 3/1/06	
Cashier: 1	Register: 1	
Customer ID: C03010001000015		
Customer Name: Jackie Keller		
W o r k O r d e r I D		
W 0 3 0 1 0 0 0 1 0 0 0 0 2 9		
Expected Completion Date: 3/11/06		
<u>Work Item</u>	<u>Value</u>	
RED/BLK ANML PRT CARWASH DRESS	500.00	
Total Value: 500.00		
<u>Work Activity</u>	<u>Type</u>	<u>Amount</u>
Work Order Task3	ACTUAL	50.00
Work Order Total: 50.00		
Deposit/Payment: 5.00		
Balance Due: 45.00		
Customer ID: C03010001000015		
Jackie Keller		
8874 Lakeview Drive		
Leland, MI 49654		
9873365478		
<u>x</u>		
Jackie Keller		
Store Copy		

Work Order Receipt, Vendor Copy Sample

30500 Bruce Industrial Pkwy	
Solon, OH 44139	
440-498-4414	
W o r k O r d e r I D	
W 0 3 0 1 0 0 0 1 0 0 0 0 2 9	
Expected Completion Date: 3/11/06	
<u>Work Item</u>	<u>Value</u>
RED/BLK ANML PRT CARWASH DRESS	500.00
<u>Work Activity</u>	
Work Order Task3	
Customer ID: C03010001000015	
Jackie Keller	
8874 Lakeview Drive	
Leland, MI 49654	
9873365478	
	
Vendor Copy	

Modifying a Work Order

One or more tasks may be associated with a work order, and they can be modified during or after its creation. If the work order is still being created, select the **Task Maint** option while in the Work Orders mode.

If the transaction in which the work order was created has been completed:

1. Create a new sale transaction.
2. At the Sale screen, select **Extended Transaction**.
3. At the Extended Transaction menu, select **Work Orders**. If a customer is associated with the transaction, Oracle Retail Xstore Point of Service displays a list of work orders for the customer. If a customer is not associated with the transaction, enter the work order search criteria to locate the work order.
4. Select the work order that includes the task you want to edit and the work order is displayed.
5. From the Work Order menu, select the **Task Maint** option.

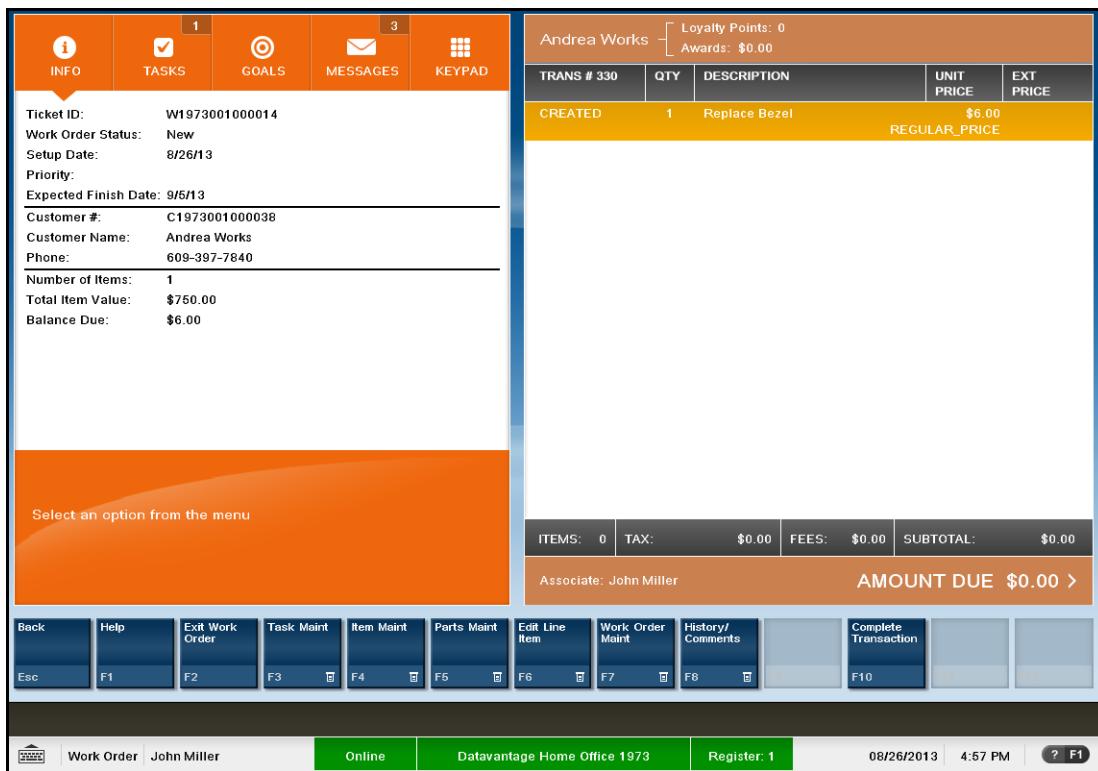


Figure 12-25: Work Order Menu

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 12-26: Task Maintenance Menu

Note: The status of the work order (shipped, received, etc.) determines the options available here.

The following **Task Maintenance** options are available:

- **Add Task** - Select this option to create an additional task on the work order.
 - a. The system displays the work order tasks that are available for the work order service location.
 - b. Select a task from the list and press [Enter].
 - c. The system adds the new task to the work order.
- **Delete Task** - Select this option to remove a task from the work order.
 - a. The system displays a list of the tasks on the current work order.
 - b. Select the task to be deleted from the work order and press [Enter].
 - c. The system removes the task by voiding the line item and any associated information from the work order.
- **Add Discount** - Select this option to add a discount to the work order task.
 - a. The system displays a list of discounts that may be applied to the work order task.
 - b. Select the type of discount to be applied to the work order task and press [Enter].
 - c. Select the task to be discounted and press [Enter].
 - d. Select the discount from the list of available discounts and press [Enter].
 - e. If prompted, select a reason for the discount, and enter any other information as needed when prompted.
 - f. The system applies the discount to the task (if permitted by store policy).
- **Convert Estimate** - Select this option to change 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

Modifying a Work Order

completed, the actual cost is known, and the estimate can be converted so that the final price can be calculated.

Note: The Convert Estimate option is only available when an estimated task is on the work order.

- a. The system displays a list of the tasks that have estimated costs on the current work order.
- b. Select the task to be converted to an actual cost amount and press [Enter].
- c. The system displays a list of the tasks with actual costs that are applicable to the work order category (repairs, alterations, etc.).

Note: For each task that has an estimated cost, there is a corresponding task with the actual cost. These were set up by the Home Office during the configuration process for your system.

- d. Select the most appropriate task and its actual cost for the work order and press [Enter].
 - e. The system replaces the estimated cost of the task with the converted, actual cost, on the work order.
- **Add Instruction** - Select this option to enter informational text instructions for the work order.
 - a. The system displays a list of the tasks on the current work order.
 - b. Select the task to be associated with the instructions and press [Enter].
 - c. The system displays a text entry form. You can add new information, change existing information, or delete any existing information. Press [Enter] after you enter your comment or instructions.
 - d. The system associates the comments or instructions with the task.

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. For more information about this, see step 5.

One or more items may be associated with a work order, and they can be modified during or after its creation. If the work order is still being created, select the **Item Maint** option while in the Work Orders mode.

If the transaction in which the work order was created has been completed:

1. Create a new sale transaction.
2. At the Sale screen, select **Extended Transaction**.
3. At the Extended Transaction menu, select **Work Orders**. If a customer is associated with the transaction, Oracle Retail Xstore Point of Service displays a list of work orders for the customer. If a customer is not associated with the transaction at this point, enter the work order search criteria to locate the work order.

4. Select the work order that includes the item you want to edit and the work order is displayed.
5. From the Work Order menu, choose the **Item Maint** option ([Figure 12-25](#)).

The following **Item Maintenance** options are available:



Figure 12-27: Item Maintenance Menu -Delete Not Available

- **Add Item** - Select this option to add additional items to the work order.
 - 1) The system prompts for the source of information about the new item to be referenced in the work order.
Refer to the work order process beginning with step 4 for more information.
 - 2) Enter all information for this new item when prompted. The system adds the item to the current work order.
- **Delete Item** - Select this option to remove an item from the work order.

Note: The Delete Item option is only available when there are two or more items on the work order.

- 1) The system displays a list of the items on the current work order.
- 2) Select the item to be deleted from the work order and press [Enter].
- 3) The system removes the item from the work order.
- **Edit Item Value** - Select this option to change the value of an item on the work order.
 - 1) The system displays a list of the items on the current work order.
 - 2) Select the item you want to change and press [Enter].
 - 3) The system prompts you to enter a new value for the selected item.
 - 4) Enter the new value and press [Enter].
 - 5) The system updates the value of the item on the work order.
- **Edit Item Description** - Select this option to change the text description of an item on the work order.
 - 1) The system displays a list of the items on the current work order.
 - 2) Select the item you want to change and press [Enter].
 - 3) The system prompts you to enter a new text description for the selected item.
 - 4) Enter the new description and press [Enter].

- 5) The system updates the description of the item on the work order.

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. If the work order is still being created, select the **Parts Maint** option while in Work Order mode. If the transaction in which the work order was created has been completed:

1. Create a new sale transaction.
2. At the Sale screen, select **Extended Transaction**.
3. At the Extended Transaction menu, select **Work Orders**. If a customer is associated with the transaction, Oracle Retail Xstore Point of Service displays a list of work orders for the customer. If a customer is not associated with the transaction at this point, enter the work order search criteria to locate the work order.
4. Select the work order that requires the addition or deletion of a part. The system displays the work order.
5. From the Work Order menu ([Figure 12-25](#)), choose the **Parts Maint** option.

The following **Parts Maintenance** options are available:



Figure 12-28: Parts Maintenance Menu

- **Add Parts** - Select this option to enter an item ID that must be purchased to complete the work order. It is included as part of the work order record.
 - a. The system prompts for the part identifier to be added to the work order.
 - b. Enter or scan the item ID or UPC and press **[Enter]**.
 - c. The system updates the work order with the information for the supplementary parts.
- **Delete Parts** - Select this option to remove a supplementary part from a work order.

Note: The *Delete Parts* option is only available when a part has been added to this account.

- a. The system displays a list of the supplementary parts on the current work order.
- b. Select the supplementary part to be deleted from the work order and press **[Enter]**.
- c. The system removes the supplementary part from the work order and updates the work order account information.

Edit 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.

If the transaction in which the work order was created has been completed:

1. Create a new sale transaction.
2. At the Sale screen, select **Extended Transaction**.
3. At the Extended Transaction menu, select **Work Orders**. If a customer is associated with the transaction, Oracle Retail Xstore Point of Service displays a list of work orders for the customer. If a customer is not associated with the transaction at this point, enter the work order search criteria to locate the work order.
4. Select the work order that includes the line item(s) to be edited. The system displays the work order.
5. From the Work Order menu ([Figure 12-25](#)), choose the **Edit Line Item** option.

The following **Edit Line Item** options are available:

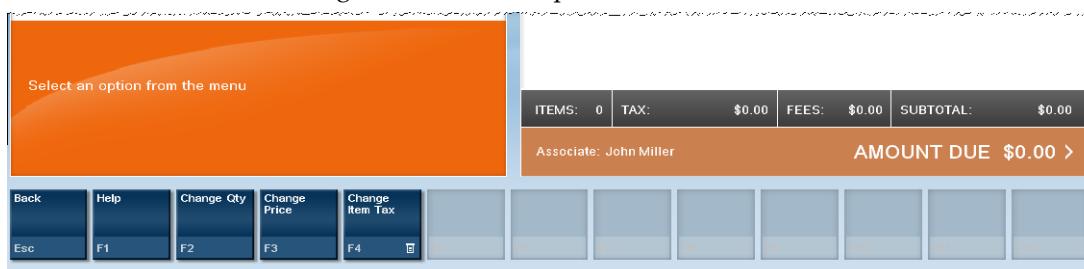


Figure 12-29: Edit Line Item Menu

- **Change Quantity** - Select this option to change the quantity of an item.
 - a. The system displays a list of the line items on the current work order.
 - b. Select the line item to be changed and press [Enter].
 - c. The system prompts you to enter a new quantity for the selected item.
 - d. Enter the new quantity and press [Enter].
 - e. The system updates the line item quantity on the work order.

Note: If the quantity you entered is not allowed for the line item, the system displays a message indicating the reason the quantity change is not allowed. You must acknowledge this message to continue.

- **Change Price** - Select this option to change the price of an item.
 - a. The system displays a list of the line items on the current work order.
 - b. Select the line item to be changed and press [Enter].
 - c. The system prompts you to enter a new price for the selected item.
 - d. Enter the new price and press [Enter].

Modifying a Work Order

- e. The system updates the line item price on the work order. If the price you entered is not allowed for the line item, the system displays a message indicating the reason the price change is not allowed. You must acknowledge this message to continue.
- **Change Tax** - Select this option to change the tax amount for an item. You can change the item's tax location, change the item to tax exempt, or change the item's tax amount or percent.
 - a. The system displays a list of the line items on the current work order.
 - b. Select the line item to be changed and press [Enter].
 - c. The system prompts you for specific information for the type of tax change based upon the tax change option you chose. Refer to [Changing Item Taxes](#) for procedural information.
 - d. Enter the information as required; the system updates the line item tax on the work order.

Work Order Maintenance

Work Order maintenance functions allow you to add, change, and maintain work orders.

A work order may be edited during or after its creation. If the work order is still being created, select the **Work Order Maint** option while in the Work Orders mode.

If the transaction in which the work order was created has been completed:

1. Create a new sale transaction.
2. At the Sale screen, select **Extended Transaction**.
3. At the Extended Transaction menu, select **Work Orders**. If a customer is associated with the transaction, Oracle Retail Xstore Point of Service displays a list of work orders for the customer. If a customer is not associated with the transaction at this point, enter the work order search criteria to locate the work order.
4. Select the work order that you want to edit. The system displays the work order.
5. From the Work Order menu [Figure 12-25](#), choose the **Work Order Maint** option.

The following **Work Order Maintenance** options are available:



Figure 12-30: Work Order Maintenance Menu

- **Cancel Work Order** - Select this option from the Work Order Maint menu to cancel an existing work order.
 - a. With the work order displayed, select the **Cancel Work Order** option.
 - b. At the prompt to confirm the work order cancellation, select **Yes**.
 - c. The system returns to the Sale screen where you can refund any money due to the customer.

- **Change Price Type** - Select this option from the Work Order Maint menu to change the price from **actual** to **estimated** or vice versa, 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**.

- a. The system displays the work order price code list.

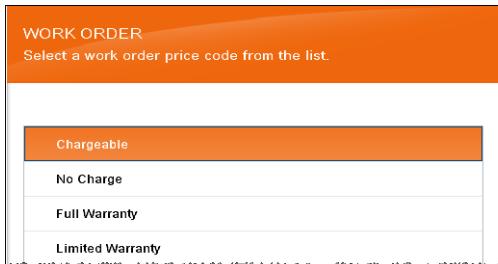


Figure 12-31: Work Order Price Code List

- b. Select a price code from the list and press [Enter].
 - c. The system updates the current work order charge to the new price.
- **Edit Approved Amount** - Select this option to change the amount that has been pre-approved by the customer for the repair or alteration.



Figure 12-32: Prompt for Customer-Approved Amount

- a. The system prompts for the amount approved by the customer for this work order. The amount currently approved by the customer displays by default. The new amount entered here must be greater than the amount for any tasks on the work order, if applicable.
 - b. Enter the amount above which the customer must be notified before actual work can be done to the item and press [Enter].
 - c. The system updates the current work order with the new amount.
- **Edit Priority** - Select this option to choose a different priority. The default priority is "Normal" when the work order is set up.
 - a. The system displays a list of priority levels for a work order. For example, Normal, Priority, and Urgent.

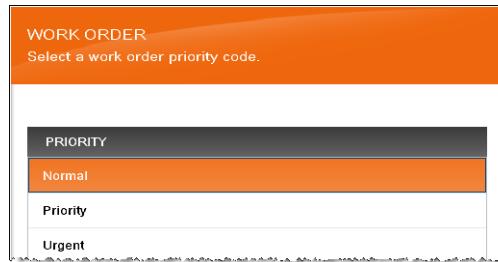


Figure 12-33: Priority Levels

Modifying a Work Order

- b. Select a new priority from the list and press [Enter].
 - c. The system updates the current work order with the new priority.
 - **Edit Notice Date** - Select this option to change the date that a notice was sent to the customer.
 - a. The system prompts for the date the customer was last notified about this work order.



Figure 12-34: Customer Notice Date Entry Prompt

- b. Enter the date the customer was most recently notified about this work order and press [Enter].
 - c. The system updates the current work order with the new customer notification date.
 - **Edit Finish Date** - Select this option to change the date the finished item has been promised to the customer. The date can be changed from the default date assigned when the work order was set up originally.
 - a. The system prompts for the new date the work order repair/alteration will be completed).

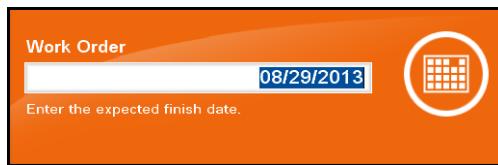


Figure 12-35: Prompt for a New Expected Finish Date

- b. Enter the date this work order will be finished and press [Enter]. This must be a future date.
 - c. The system updates the current work order with the new date the item repair/alteration will be completed.
 - **Edit Service Location** - Select this option to choose a different location where work will be performed.

- a. The system prompts for the new service location where the work will be performed. You may enter search criteria and select **Process** or just select **Process** to display all locations.

The form has an orange header bar with the text "Enter search criteria." and a magnifying glass icon. Below the header are two input fields: "Location #" and "Location Name". At the bottom are three buttons: "Back" (labeled "Esc"), "Help" (labeled "F1"), and "Process" (labeled "F8").

Figure 12-36: Service Location Search Form

- b. When the list of service locations displays, select a location and press [**Enter**].
- c. The system updates the current work order with the new service location.
- **Edit Contact Method** - Select this option to modify the method of communication used to contact a customer.
 - a. The system displays a list of customer contact methods. For example, Cell Phone, Home Phone, Email, etc.

The form has an orange header bar with the text "WORK ORDER" and "Select a work order contact method code.". Below the header is a table with three rows:

Home	440-488-3153
Work	440-336-5547
Mobile	440-397-3345

Figure 12-37: Contact Method List

- b. Select a contact method from the list and press [**Enter**].
- c. The system updates the current work order with the new customer contact method information.
- **Pickup Work Order** - Select this option when a completed work order is ready for customer pickup. This option is only available when the work order item is finished and ready for customer pickup. Refer to [Picking Up a Completed Work Order](#) for more information.
- **Edit Account Status** - Select this option to choose a different status for the work order.

Modifying a Work Order

- a. The system displays a list of work order status options. For example, Ready For Pickup, In Progress, Pending, etc.

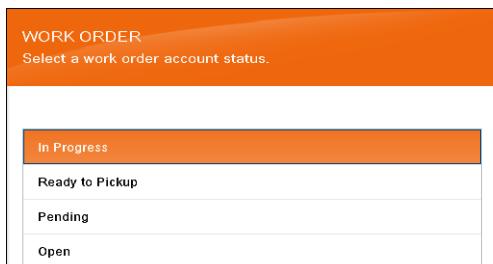


Figure 12-38: Account Status List

- b. Select a new work order status from the list and press [Enter].
- c. The system updates the status of the current work order.

Note: If you try to change the status of the work order to Ready For Pickup, the system notifies you if there are any tasks with estimated prices on the work order. You must convert estimated prices to actual prices before you can continue. Acknowledge this prompt and convert all estimated prices to actual prices. Refer to [Task Maintenance](#) for the procedure to make the conversion.

Work Order History

Work Order History and Comments functions allow you to view the history of the work order and add comments to it. If the work order is still being created, select the **History/Comments** option while in the Work Orders mode.

If the transaction in which the work order was created has been completed:

1. Create a new sale transaction.
2. At the Sale screen, select **Extended Transaction**.
3. At the Extended Transaction menu, select **Work Orders**. If a customer is associated with the transaction, Oracle Retail Xstore Point of Service displays a list of work orders for the customer. If a customer is not associated with the transaction at this point, enter the work order search criteria to locate the work order.
4. Select the work order that you want to edit. The system displays the work order.
5. From the Work Order menu [Figure 12-25](#), choose the **History/Comments** option.

The following **History/Comments** functions are available:



Figure 12-39: History/Comments Menu

- **View History** - Select this option to see the work order account history. The information shown here includes the account number, setup date, status, and balance due.
 - a. The system displays a form showing the work order account information. You may use the up and down arrow keys to scroll through the screen if there are more lines than can be displayed at once.

The screenshot shows a software interface for managing work orders. On the left, a large orange header bar reads "WORK ORDER" and "Work order history.". Below this, a smaller orange box displays the date "2013-08-20 14:25:48.367" and the work order number "W1973001000002". To the right, a table titled "Sandra Workman" lists a single transaction:

TRANS #	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
363	1	2 Initial	\$0.00	REGULAR PRICE

At the bottom of the screen, there are several buttons: "Back" and "Ok" (with "Esc" and "Enter" labels), and a row of small icons. The status bar at the bottom shows "Work Order John Miller", "Online", "Datavantage Home Office 1973", "Register: 1", the date "08/26/2013 | 10:46 AM", and a help key icon.

Figure 12-40: Work Order History Screen

- b. Press [Enter] to close the form and return to the Work Order Summary screen.

Picking Up a Completed Work Order

- **View Comments** - Select this option to see any comments associated with the work order.
 - a. The system displays any comments associated with this work order account. You may use the up and down arrow keys to scroll through the screen if there are more comments than can be displayed at once.

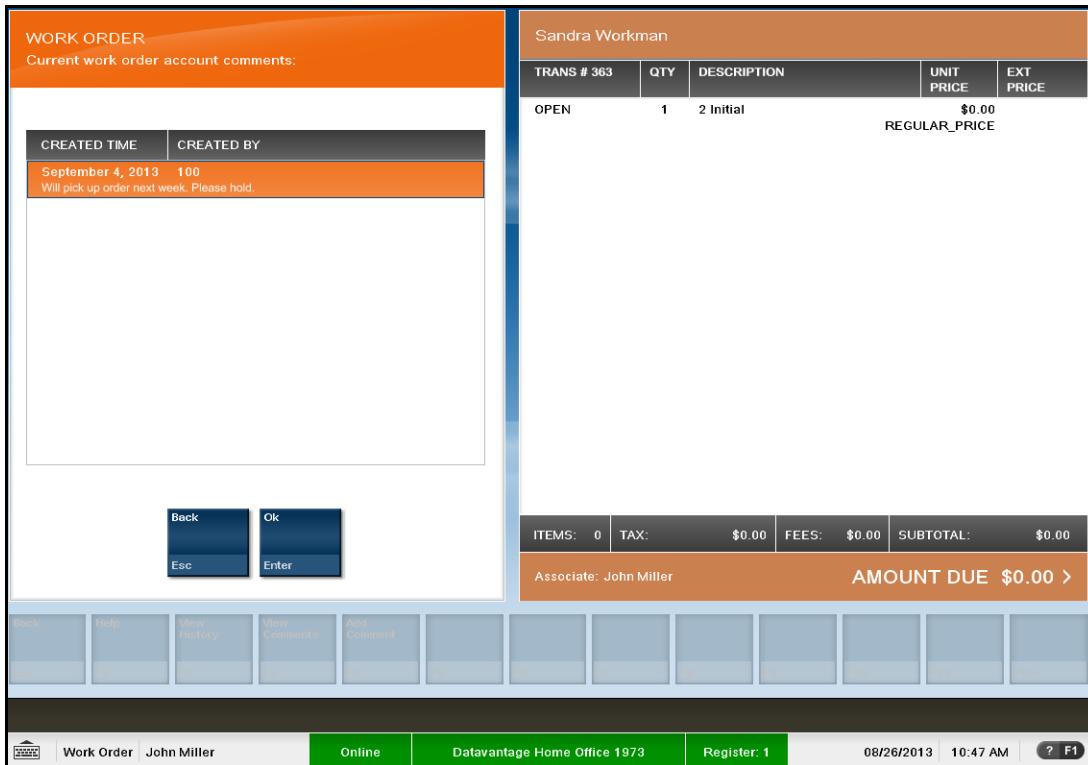


Figure 12-41: Work Order Comments Display

- b. Press [Enter] to close the comments form and return to the Work Order Summary screen.
- **Add Comment** - Select this option to add a comment to this work order.
 - a. The system displays a free-text comment form.

This is a screenshot of a comment entry form. The title bar says "WORK ORDER" and "Enter work order comment.". The main area contains a single text input field with the placeholder text "Ask if metalic thread is available for this item.".

Figure 12-42: Entry Form for Work Order Comments

- b. Type a comment to be associated with this work order account.
- c. Press [Enter] to close the comment entry form and return to the Work Order Summary screen.

Picking Up a Completed Work Order

When a customer is associated with a sale transaction, the system may automatically notify you if the customer has a work order that requires attention. For example, you

may be prompted if the customer's work order is ready for pickup. Press [Enter] to acknowledge this prompt.

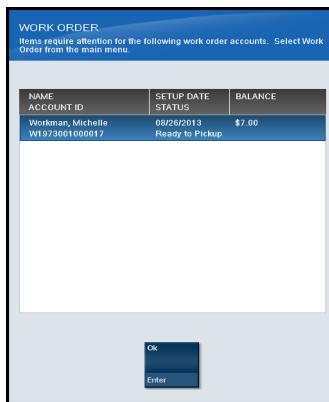


Figure 12-43: Work Order Requires Attention Prompt

1. At the Sale screen, select **Extended Transaction** and the **Work Order** option to pick up work order items or to view work order account information.
2. At the Work Order Search form, if prompted, select the work order account from the list and press [Enter]. If the work order is not listed, enter the search criteria for the work order, or scan the customer's work order receipt.
3. With the work order displayed, select the **Work Order Maintenance** option.

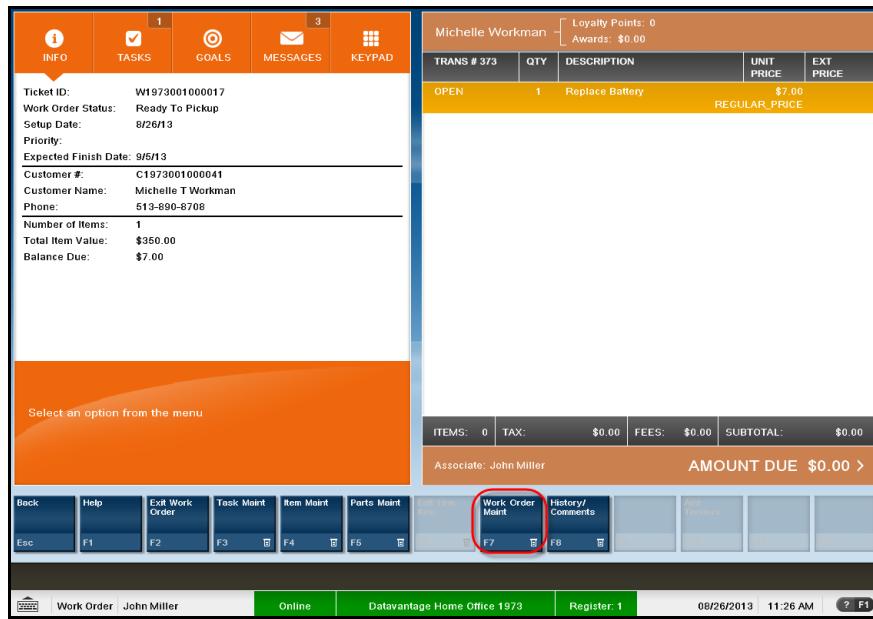


Figure 12-44: Work Order - Ready For Pickup Status

Picking Up a Completed Work Order

- From the Work Order Maintenance menu, select the **Pickup Work Order** menu button option.

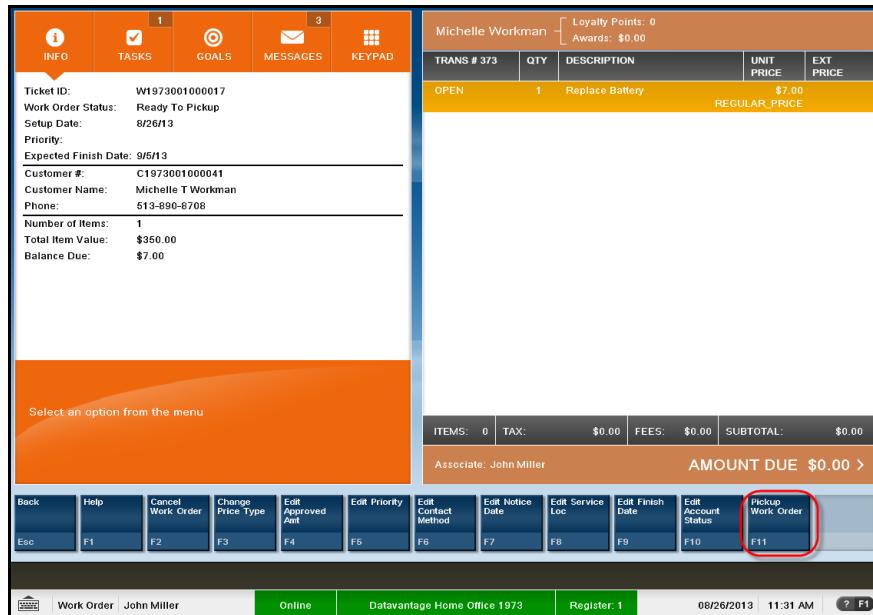


Figure 12-45: Work Order Ready For Pickup - Work Order Maintenance Menu

- The system adds the completed work order item to the Sale screen. Tender the transaction to complete the work order.

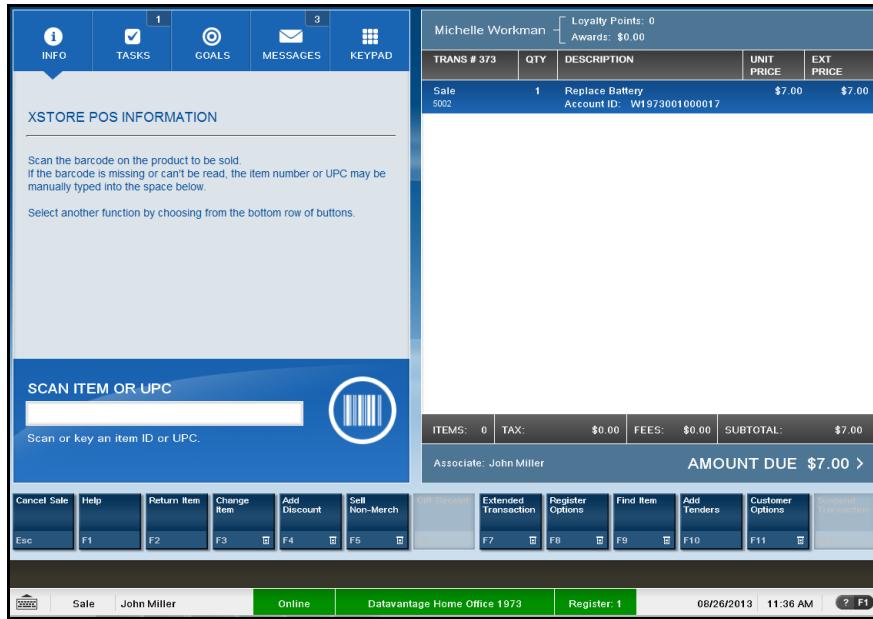


Figure 12-46: Work Order on the Sale Screen

Warranty and Service Plan Transactions

Overview

A warranty/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/service plan 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.

Warranty/service plan specifications are defined and downloaded from the home office.

Note: The terms warranty/service plan, warranty plan, warranty, and plan are used interchangeably in this guide.

Selling a Warranty/Service Plan

- When you sell an item that is eligible for a warranty or service plan, the system automatically displays a list of plans that are available for the specific item.

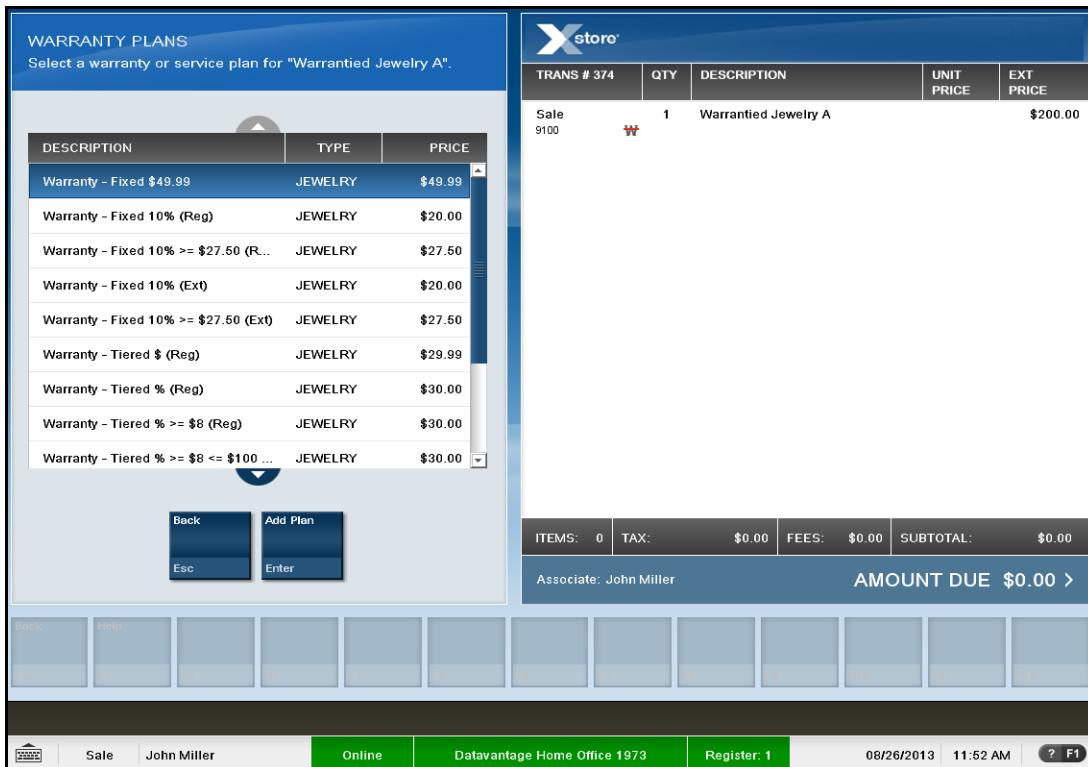


Figure 13-1: Warranty Plans

Tip: Items that are eligible for warranty plans but have not been associated with any plan show the No Warranty Purchased  symbol on the View Port.

Only warranty plans that apply to the item are shown in this list.

Table 13-1: Warranty Plans

If the customer...	then...
wants to purchase a warranty/service plan,	<ul style="list-style-type: none"> select a warranty plan from the list. See Figure 13-1. select the Add Plan option to add the warranty item (as a non-merchandise item) to the sale. go to step 2 below.
does not want to purchase a warranty/service plan,	<ul style="list-style-type: none"> press [Esc] to return to the sale and continue selling items. <p>Note: The “No Warranty Purchased” symbol  indicates that the warranty for this item was declined.</p> <ul style="list-style-type: none"> tender the transaction when the sale is complete.

Tip: If the customer decides to purchase the warranty after you escape from the warranty plan screen—but before tendering—you can add the warranty to the item from the *Extended Transaction* menu. Refer to [To Add a Warranty/Service Plan to an Item—In the Current Transaction](#) for the procedure.

- After the warranty item is added to the sale as a non-merchandise item, the system prompts for the customer to be associated with this warranty.

Note: Since a warranty/service plan must have an owner, you must associate a customer name with the plan. The plan owner may be a different person than the customer who purchases the item and the warranty/service plan. For example, the customer may purchase an item as a gift and also wants to assign the warranty to the person receiving the gift.

Selling a Warranty/Service Plan

If a customer is associated with this sale

- When a customer is associated with this sale, the system prompts you to verify that this current customer owns the warranty/service plan.

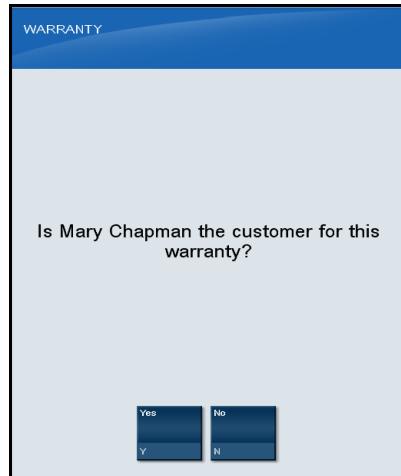


Figure 13-2: Warranty Customer Prompt

- Select **Yes** if the customer associated with the current sale is also the person to be named on the warranty/service plan. The system adds the warranty customer's name to the warranty plan.

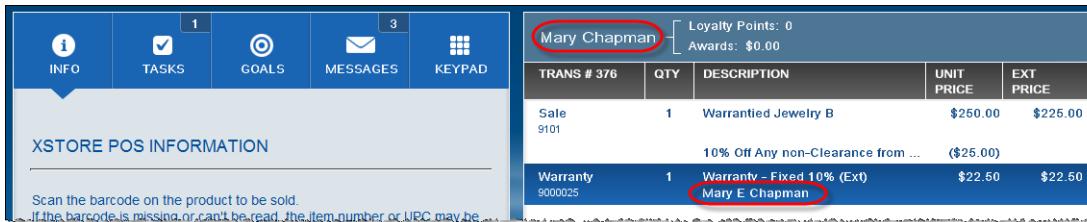


Figure 13-3: Sale Customer Same As Warranty Plan Owner

- Select **No** to associate a different customer with this warranty/service plan. The system prompts for customer information. Enter the **warranty** customer's information as required. The warranty customer's name is added to the warranty plan.

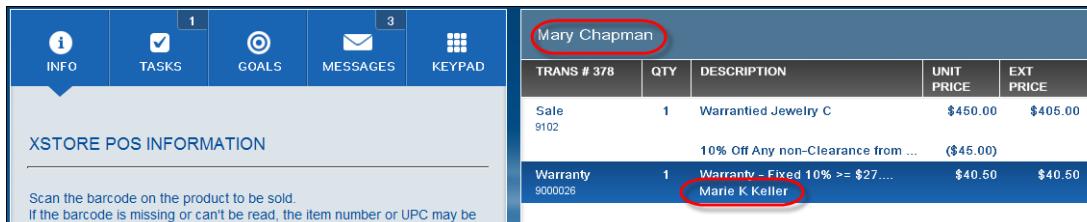


Figure 13-4: Sale Customer Different than the Warranty Plan Owner

If no customer is currently associated with this sale

- When no customer is associated with this sale, the system prompts for warranty customer information.

- Enter the customer's information as required.

- 2) The system prompts to confirm that this is the customer who will own the warranty plan.
- Select **Yes** if this is the customer to be named on the warranty/service plan. The system adds the warranty customer's name to the warranty plan.
 - Select **No** if this is not the correct warranty customer's name. The system re-prompts for a customer's name for the warranty plan.
3. When the sale transaction is tendered, the system creates receipts as required by your store's policy.

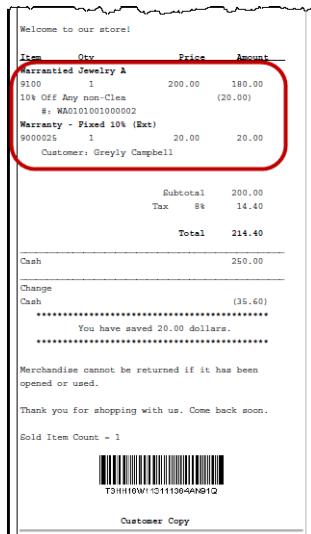


Figure 13-5: Customer Sale Receipt With Warranty Item Example

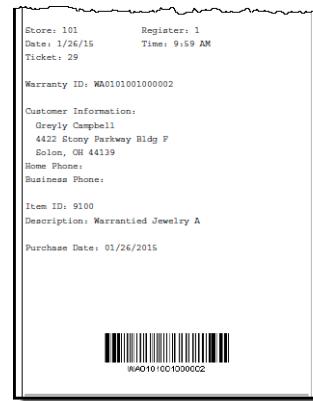


Figure 13-6: Warranty Receipt Example

Adding a Warranty/Service Plan After a Purchase

A customer may decide to purchase a warranty/service plan 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.

Note: Warranty/Service Plans are only available for designated items as determined by the home office.

1. In a sale transaction, select **Extended Transaction**.
2. Select the **Warranty** option to view the Warranty menu.

You have the following options on the Warranty menu:

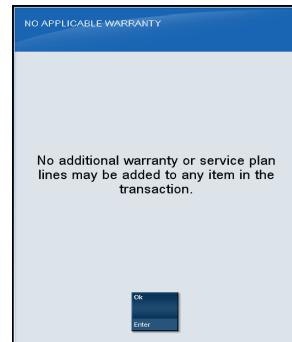


Figure 13-7: Warranty Menu

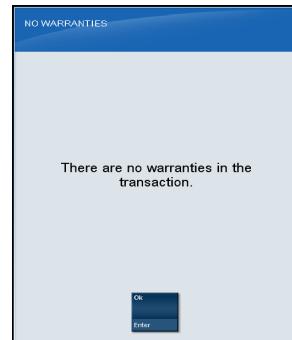
- **Add Warranty** - Select this option to add a warranty to a previously-purchased item. See [Adding a Warranty/Service Plan to an Item](#).
- **Change Customer** - Select this option to change the owner of the warranty when the warranty information is displayed on the View Port. See [Changing the Warranty/Service Plan Customer](#).

Note: Validation prompts you may see

If you try to add a warranty/service plan to ineligible items, Oracle Retail Xstore Point of Service displays a message indicating that there are no warranty-eligible items in the transaction. Acknowledge this message by pressing [Enter] or selecting **Ok** to continue.



Note: If you try to change warranty customer information in a transaction that does not include any warranties, Oracle Retail Xstore Point of Service displays a message indicating that there are no warranties in the transaction. Acknowledge this message by pressing [Enter] or selecting **Ok** to continue.



Adding a Warranty/Service Plan to an Item

...continued from step 2

1. Select the **Add Warranty** option from the Warranty menu. See [Figure 13-7](#).

The system prompts you to select a source for locating a previously-purchased item that will be covered by a warranty/service plan:

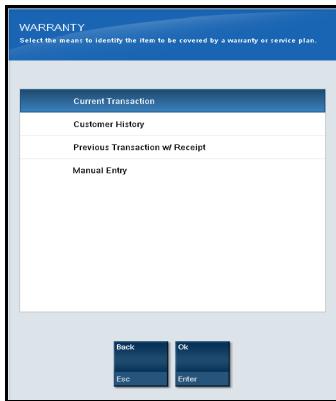


Figure 13-8: Add Item Warranty Options

- Select **Current Transaction** if the item is in the current transaction. Use this option for customers who originally decline the warranty/service plan but change their minds before the transaction is tendered. See [To Add a Warranty/Service Plan to an Item—In the Current Transaction](#).

Adding a Warranty/Service Plan After a Purchase

- Select **Customer History** to locate the item in the customer's purchase record. A customer must be associated with the transaction, otherwise, a message displays and indicates that no items are eligible for a warranty. Use this option if the customer does not have the original receipt, but the purchase record can be found in the purchase history for the customer. See [To Add a Warranty/Service Plan to an Item—Using Customer History Information](#).
- Select **Previous Transaction with Receipt** if the customer has the original receipt for the item. The system retrieves the item information from the original receipt. See [To Add a Warranty/Service Plan to an Item— Using the Customer's Original Sale Receipt](#).
- Select **Manual Entry** to enter the item information manually. Use this option if the customer does not have the original receipt and the purchase record cannot be found in the purchase history for the customer. See [To Add a Warranty/Service Plan to an Item— Manual Entry](#).

To Add a Warranty/Service Plan to an Item— In the Current Transaction

Use this option for customers who originally decline the warranty/service plan for an eligible item but change their minds before the transaction is tendered.

If the customer declined to purchase the warranty for an item in the current sale, the  No Warranty Purchased symbol displays next to the item information on the View Port.

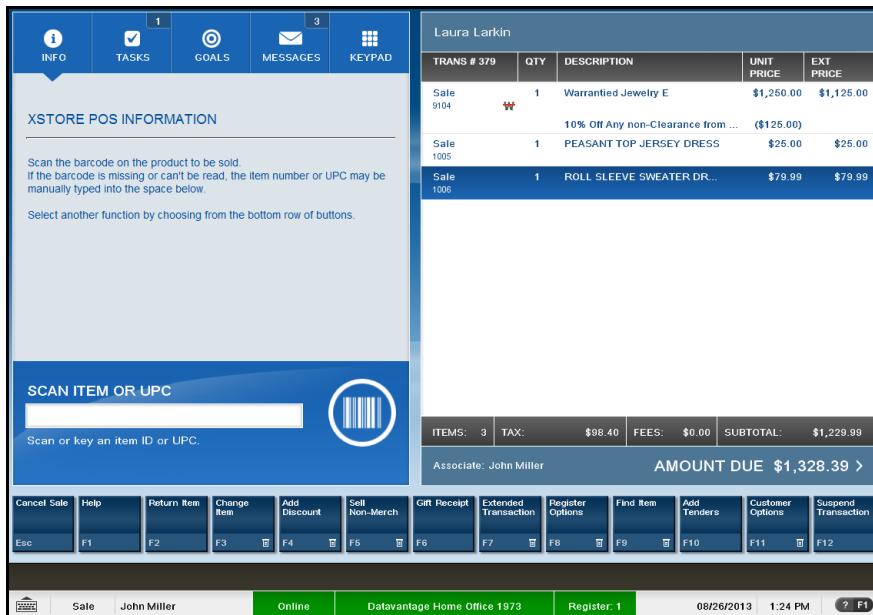


Figure 13-9: Sale With Declined Warranty Item

1. To purchase a warranty/service plan for this item, select Extended Transaction --> Warranty --> Add Warranty.

2. The system displays a list of sources for the item that will have the warranty. Select **Current Transaction** from the list of item sources.

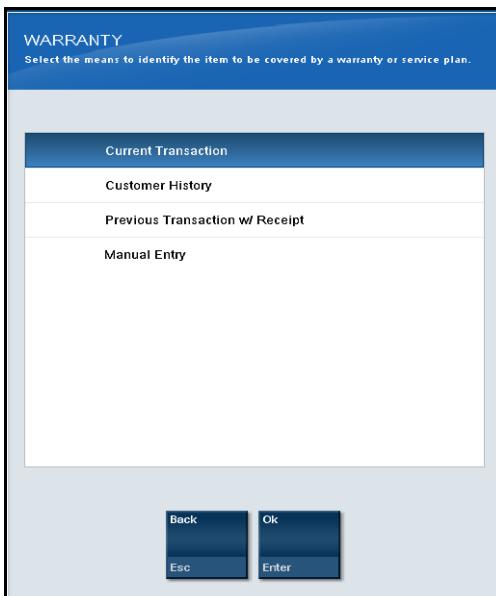


Figure 13-10: Locate Item for Warranty - Current Transaction Option

3. The system displays a list of warranty-eligible items in the transaction. Select the item that will be associated with the warranty and press [Enter].

WARRANTY		
Select the item to be covered by a warranty or service plan.		
QTY	DESCRIPTION	PRICE
1	Warrantied Jewelry E	\$1,125.00

Figure 13-11: List Of Items Eligible For A Warranty/Service Plan

Adding a Warranty/Service Plan After a Purchase

4. The system displays a list of warranty plans that can be associated with the item. Select the warranty plan option from the list and select the **Add Plan** option to add the warranty plan (as a non-merchandise item) to the sale.

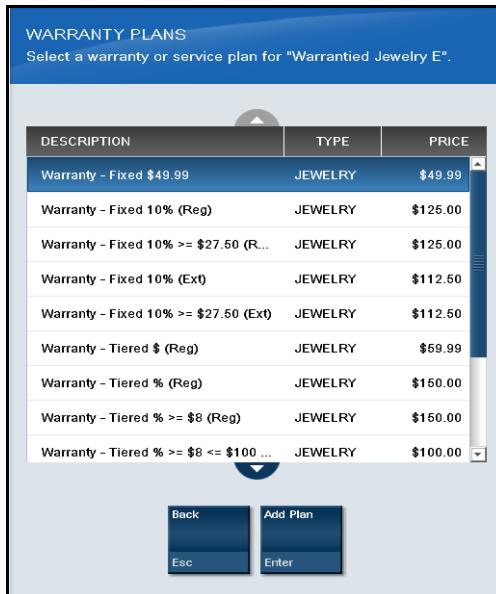


Figure 13-12: Warranty Plan Options for the Selected Item

5. The system prompts for the customer to be associated with this warranty. Refer to step 2 for more information about associating a customer with a warranty/service plan.

When you tender the sale transaction, the system creates a receipt with the warranty details.

**To Add a Warranty/Service Plan to an Item—
Using Customer History Information**

Use this option to locate the item in the customer's purchase history record.

1. In a sale transaction, select **Extended Transaction --> Warranty --> Add Warranty**.
2. Select the **Customer History** option from the list of sources and press **[Enter]**.

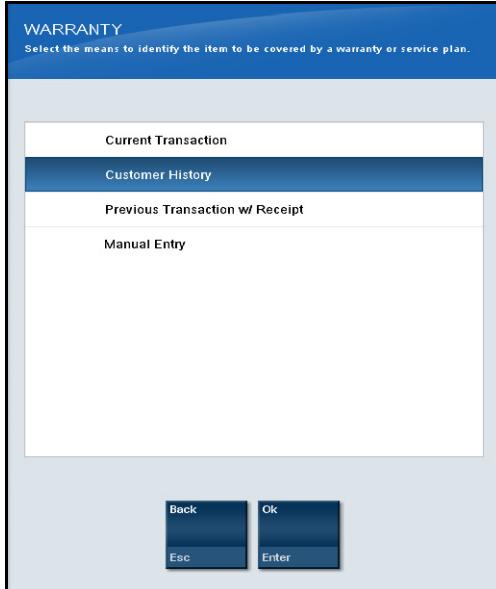


Figure 13-13: Locate Item - Customer History Option

3. The system displays a list of warranty-eligible items the customer has purchased. Select the item the customer would like to purchase a warranty plan for and press **[Enter]**.

WARRANTY		
Select the item to be covered by a warranty or service plan.		
QTY	DESCRIPTION	PRICE
1	Warrantied Jewelry E	\$1,125.00

Figure 13-14: Customer History-Previous Items Purchased

Adding a Warranty/Service Plan After a Purchase

4. The system displays a list of warranty plan options associated with this item. Select the warranty plan option from the list, and select the **Add Plan** option to add the warranty plan (as a non-merchandise item) to the sale.

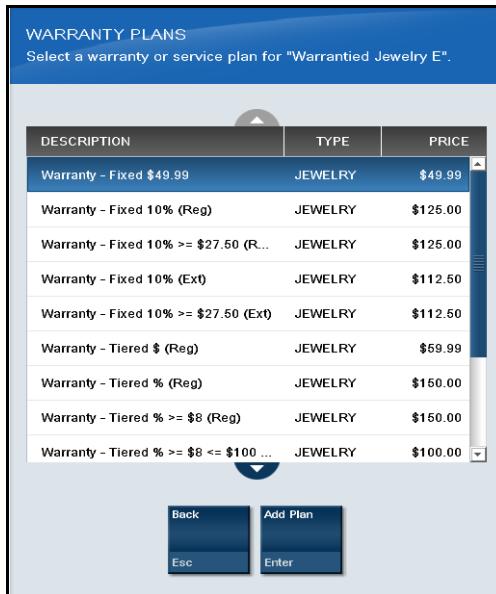


Figure 13-15: Warranty Plan Options for the Selected Item

5. The system prompts for the customer to be associated with this warranty. Refer to step 2 for more information about associating a customer with a warranty/service plan.

When you tender the sale transaction, the system creates a receipt with the warranty details.

**To Add a Warranty/Service Plan to an Item—
Using the Customer's Original Sale Receipt**

Use this option when the customer has the original receipt for the item. The system retrieves the item information from the original transaction receipt.

1. In a sale transaction, select Extended Transaction--> Warranty --> Add Warranty.
2. Select the **Previous Transaction With Receipt** option from the list of warranty item source and press [Enter].

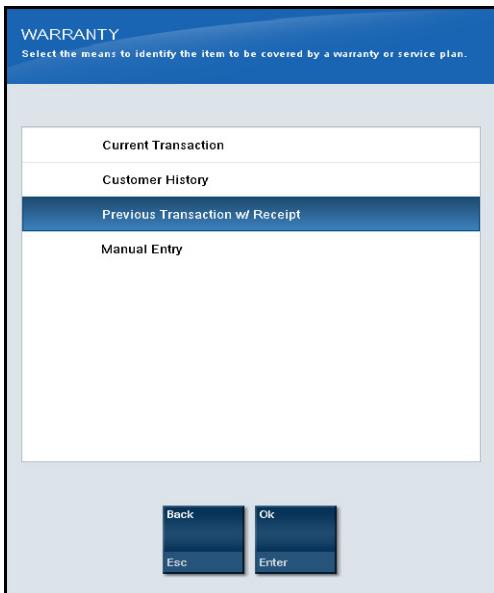


Figure 13-16: Locate Item - Previous Transaction With Receipt Option

3. At the prompt for original transaction information, scan the barcode from the original receipt, or enter the required original transaction information and select **Process** to continue.

The system finds the original transaction information in the database and displays a list of items found in the transaction that are eligible for a warranty plan.

WARRANTY		
Select the item to be covered by a warranty or service plan.		
QTY	DESCRIPTION	PRICE
1	Warrantied Jewelry E	\$1,125.00

Figure 13-17: Original Transaction Item(s) Eligible for a Warranty Plan

Note: Only warranty-eligible items are shown in this list.

4. Select the item to be covered by a warranty plan and press [Enter] to continue.

Adding a Warranty/Service Plan After a Purchase

The system displays a list of warranty plans that are applicable to this item.

DESCRIPTION	TYPE	PRICE
Warranty - Fixed \$49.99	JEWELRY	\$49.99
Warranty - Fixed 10% (Reg)	JEWELRY	\$125.00
Warranty - Fixed 10% >= \$27.50 (R...	JEWELRY	\$125.00
Warranty - Fixed 10% (Ext)	JEWELRY	\$112.50
Warranty - Fixed 10% >= \$27.50 (Ext)	JEWELRY	\$112.50
Warranty - Tiered \$ (Reg)	JEWELRY	\$69.99
Warranty - Tiered % (Reg)	JEWELRY	\$150.00
Warranty - Tiered % >= \$8 (Reg)	JEWELRY	\$150.00
Warranty - Tiered % >= \$8 <= \$100 ...	JEWELRY	\$100.00

Figure 13-18: Warranty Plan List

5. Select the warranty plan option from the list and select the **Add Plan** option to add the warranty item (as a non-merchandise item) to the sale.
6. The system prompts for the customer to be associated with this warranty. Refer to step 2 for more information about associating a customer with a warranty/service plan.

When you tender the sale transaction, the system creates a receipt with the warranty details.

To Add a Warranty/Service Plan to an Item— Manual Entry

Use this option if the customer does not have the original receipt and the purchase record cannot be found in the purchase history for the customer.

1. In a sale transaction, select **Extended Transaction --> Warranty --> Add Warranty**.
2. Select the **Manual Entry** option from the list of warranty sources and press **[Enter]**.

WARRANTY
Select the means to identify the item to be covered by a warranty or service plan.

Current Transaction
Customer History
Previous Transaction w/ Receipt
Manual Entry

Figure 13-19: Locate Item - Manual Entry Option

3. The system prompts for the warrantied item. Type the item ID and press [Enter], or scan the item barcode.



Figure 13-20: Warrantied Item ID Prompt

4. If prompted, enter the price of the warrantied item, without a decimal point, and press [Enter] to continue.

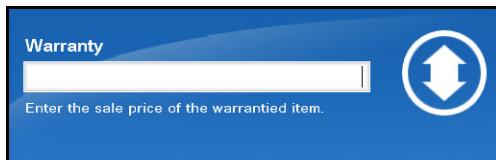


Figure 13-21: Warrantied Item Price Prompt

The system displays a list of plan options associated with this item.

WARRANTY PLANS Select a warranty or service plan for "Warrantied Jewelry E"		
DESCRIPTION	TYPE	PRICE
Warranty - Fixed \$49.99	JEWELRY	\$49.99
Warranty - Fixed 10% (Reg)	JEWELRY	\$125.00
Warranty - Fixed 10% >= \$27.50 (R...	JEWELRY	\$125.00
Warranty - Fixed 10% (Ext)	JEWELRY	\$112.50
Warranty - Fixed 10% >= \$27.50 (Ext)	JEWELRY	\$112.50
Warranty - Tiered \$ (Reg)	JEWELRY	\$69.99
Warranty - Tiered % (Reg)	JEWELRY	\$150.00
Warranty - Tiered % >= \$8 (Reg)	JEWELRY	\$150.00
Warranty - Tiered % >= \$8 <= \$100 ...	JEWELRY	\$100.00

Figure 13-22: Warranty Plans Associated with the Item

5. Select a warranty plan from the list. Choose the **Add Plan** option to include it (as a non-merchandise item) in the sale.
6. The system prompts for the customer to be associated with this warranty. Refer to step 2 for more information about associating a customer with a warranty/service plan.

When you tender the sale transaction, the system creates a receipt with the warranty details.

Changing the Warranty/Service Plan Customer

Use this process to change the owner of the warranty/service plan.

Changing the Warranty/Service Plan Customer

- At the Sale screen, with the warranty sale transaction displayed in the View Port, select Extended Transaction--> Warranty --> Change Customer.



Figure 13-23: Warranty Menu - Change Customer Option

- The system displays a list of the warranties on the current transaction. Select the warranty/service plan you want to update and press [Enter].

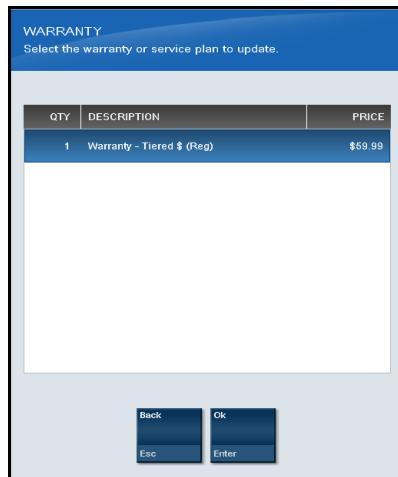


Figure 13-24: List Of Warranties on the Current Transaction

- The system prompts for customer information. Enter the information for the new warranty/service plan owner as required by your store's policy.

The system updates the warranty plan information with the new warranty customer's name and information.

Wally Warranty					
TRANS #	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE	
382 999992	1	Warranty - Tiered \$ (Reg) Marcus G Klein	\$69.99	\$69.99	

When the sale transaction is completed, the system creates a receipt with the warranty details.

Order Transactions via Order Broker

Overview

Oracle Retail Order Broker Cloud Service (formerly known as MICROS Retail Locate) is an optional module that can be interfaced with Oracle Retail 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.

Message Bar Alerts

Note: To view the message bar information here, you must have a touch-screen or a mouse. This additional information is view-only.

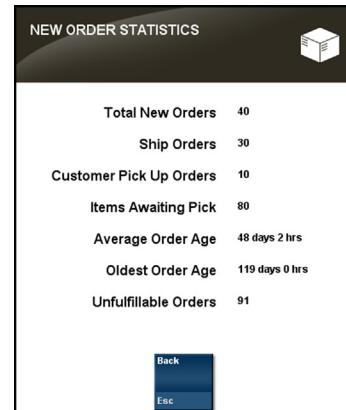
Click the message bar to view information about new orders that require your attention.

New Order Statistics:

- **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 items that cannot be filled. When an order is rejected, the status becomes unfulfillable.

Overview

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



Available Options for Orders

Pickup Other Store

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 Oracle Retail Xstore Point of Service system. Inventory comes out of the fulfilling store. In Oracle Retail 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 specified address). Order creation is done by the Oracle Retail Xstore Point of Service system. In this scenario, order fulfillment may be done by the Oracle Retail Xstore Point of Service system, or by an external system. Inventory comes out of the fulfilling location. In Oracle Retail Xstore Point of Service, this order type is defined as **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 Oracle Retail Xstore Point of Service store location. Inventory is sourced out of another location and shipped to the Oracle Retail Xstore Point of Service location. In Oracle Retail Xstore Point of Service, this order type is defined as **Transfer Pickup**.

Web/Phone Order (Fulfillment only)

If the customer uses another channel (for example, web, call center, etc.) to create an order for pickup at a selected Oracle Retail Xstore Point of Service store location, your store may be identified as the fulfilling location. In Oracle Retail Xstore Point of Service, this order type is defined as **Web Pickup**.

Note: Refer to the *Oracle Retail Xstore Point of Service Manager's Guide* for more information about fulfilling orders.

Order Status

The following table describes order and item status values:

Table 14-1: Order and Item Status Values

Order Status Value	Item Status Value
Open - If one of the items is in the following status: new order, polled, accepted, or in transit.	New - Indicates the item has been added to the order.
Note: It is possible for an open order to be under review and unable to be processed during this time. Refer to the <i>Oracle Retail Xstore Point of Service Manager's Guide</i> .	Polled - Indicates the source/fulfilling location got the item request.
Ready for Pick Up - All items are in reserved or received status (can also include cancelled item).	Accepted - Indicates the source location has confirmed it can satisfy the order request.
Ready to Ship - This is applicable only for customer delivery or delayed pickup (aka pickup from this store). All items must be reserved or cancelled.	Reserved - Indicates the item has been put aside for the customer at the source/fulfilling location.
Complete - The order has been completed.	In Transit - Indicates the item has been shipped.
Cancelled - All items are cancelled.	Received - Indicates the item has been received in the store.
Unfulfillable – All items are unfulfillable or a mix of unfulfillable and cancelled. Unfulfillable items are those that have been rejected either manually by the receiving store or automatically by the Order Broker.	Fulfilled - Indicates the item has been picked up/delivered.
	Cancelled - Indicates the item has been cancelled.
	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 Broker Order Processing

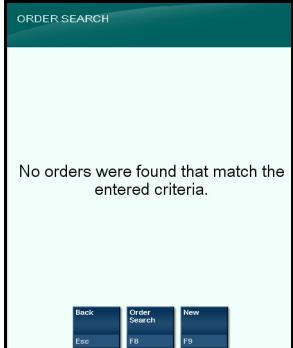
A customer is required for Order Broker orders. You must assign a customer to the transaction when you select the **Order** menu option if you did not do so at the beginning of the transaction. To associate a customer with the order, select **Customer Options**, **Assign Customer** options at the Sale screen.

If the customer is not in the database, the system displays a message indicating the customer was not found. You must select the **New** option to set up the customer before the order setup can continue. Refer to [Associating a Customer with the Sale](#) for more information about setting up a customer.

Searching for Order Broker Orders

1. From the Sale screen, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Order** option.

Based on whether or not a customer has been assigned determines Oracle Retail Xstore Point of Service behavior:

If	then						
A customer has been associated with this transaction.	<p>The system automatically searches the database to locate any open order accounts for this customer.</p> <p>If any orders are found, a notification prompt displays. Follow the instructions on the prompt to continue with the transaction.</p>  <table border="1" data-bbox="948 1051 1454 1157"> <thead> <tr> <th>Order Id Customer</th> <th>Order Type Primary Phone</th> <th>Status Order Date</th> </tr> </thead> <tbody> <tr> <td>1736001001269 Nancy Smith</td> <td>Delivery 330-330-3333</td> <td>Open 02/06/2013</td> </tr> </tbody> </table>	Order Id Customer	Order Type Primary Phone	Status Order Date	1736001001269 Nancy Smith	Delivery 330-330-3333	Open 02/06/2013
Order Id Customer	Order Type Primary Phone	Status Order Date					
1736001001269 Nancy Smith	Delivery 330-330-3333	Open 02/06/2013					
	<p>If no Order Broker order account is found, Oracle Retail Xstore Point of Service provides options to set up a new order (New) or to perform another search (Order Search).</p> <ul style="list-style-type: none"> • Select New to set up a new Order. Continue with Setting Up a New Order. • <OR> • Select Order Search to open the Order Search form to search for an existing order. 						
A customer has <i>not</i> been associated with this transaction.	<p>The system displays the Order Search form.</p> <ul style="list-style-type: none"> • Enter search criteria and select Process to search for an existing order. <OR> • Select New to enter customer information, then continue with Setting Up a New Order. 						

3. If multiple orders match the entered criteria, select the appropriate order from the list and press [Enter] to continue.

ORDER SEARCH Select an order.		
ORDER # CUSTOMER	ORDER TYPE PRIMARY PHONE	STATUS DATE
0438001002303 Nancy Smith	Transfer Pickup 338-330-3333	Open 09/24/2013
0438001002302 Nancy Smith	Delivery 338-330-3333	Open 09/24/2013
0438001002304 Nancy Smith	Delivery 338-330-3333	Open 09/24/2013

Back Ok New
Esc Enter F9

Setting Up a New Order

Once a customer has been assigned to the order, continue with order setup processing.

Select the type of order:

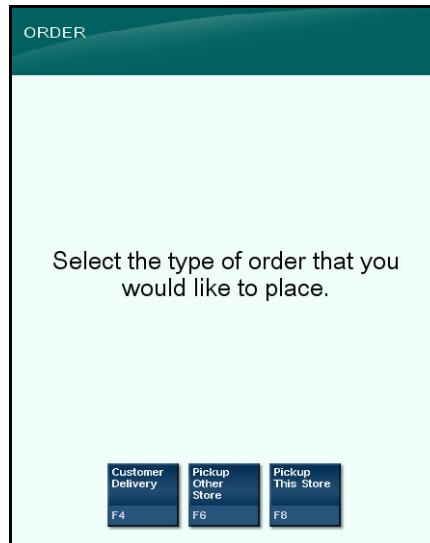


Figure 14-1: Order Type Menu Options

- **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 Oracle Retail Xstore Point of Service. Continue with [For Customer Delivery](#).
- **Pickup Other Store:** If an item is not available in your store, use this option to find another store location in which the item is currently available. The other store reserves the item, and holds it until the customer picks it up. This order type is defined as *Pickup* type in Oracle Retail Xstore Point of Service. Continue with [For 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 Oracle Retail Xstore Point of Service. Continue with [For Pickup This Store](#).

For Customer Delivery

...continued from **Customer Delivery**

1. Complete the Customer Order form for delivery information and select **Process**.

By default, the form is populated with the customer's address information, but may be changed. To ensure the customer receives email notification about the order status, verify the email address is correct.

The screenshot shows a software application window titled 'ORDER' with the sub-instruction 'Enter delivery information for this order.' Below this, there are two main sections: 'Contact Information' and 'Delivery Information'. In the 'Contact Information' section, the phone number is listed as '330-333-3333' and the email is 'lfox@micros-retail.com'. In the 'Delivery Information' section, the first name is 'Nancy', middle name is 'Lynn', and last name is 'Smith'. The address is listed as '1231 Sunshine Lane'. The state/zip is '44087 OH - Ohio'. The city/country is 'Twinsburg' and the country is 'US - UNITED STATES'. At the bottom of the form are four buttons: 'Beck' (Esc), 'Help' (F1), 'Change Country' (F5), and 'Process' (F6).

Figure 14-2: Customer Order Form

- Depending upon the configuration of your system, you may have a **First line of address, or postal code** field.
 - 1) Enter address information into this field to quickly look up an address.
 - 2) Select the address from a list of results to automatically populate the customer address fields.
- 2. At the Order screen, scan or enter the item Id.

Note: To add Wish List item(s) to the Order Broker Cloud Service order, select **View Customer** and then select the **Wish List** tab (see [Purchasing Wish List Item\(s\)](#)).

To add Digital Cart item(s) to the Order Broker Cloud Service order, select **View Customer** and then select the **Digital Cart** tab (see [Purchasing Digital Cart Item\(s\)](#)).

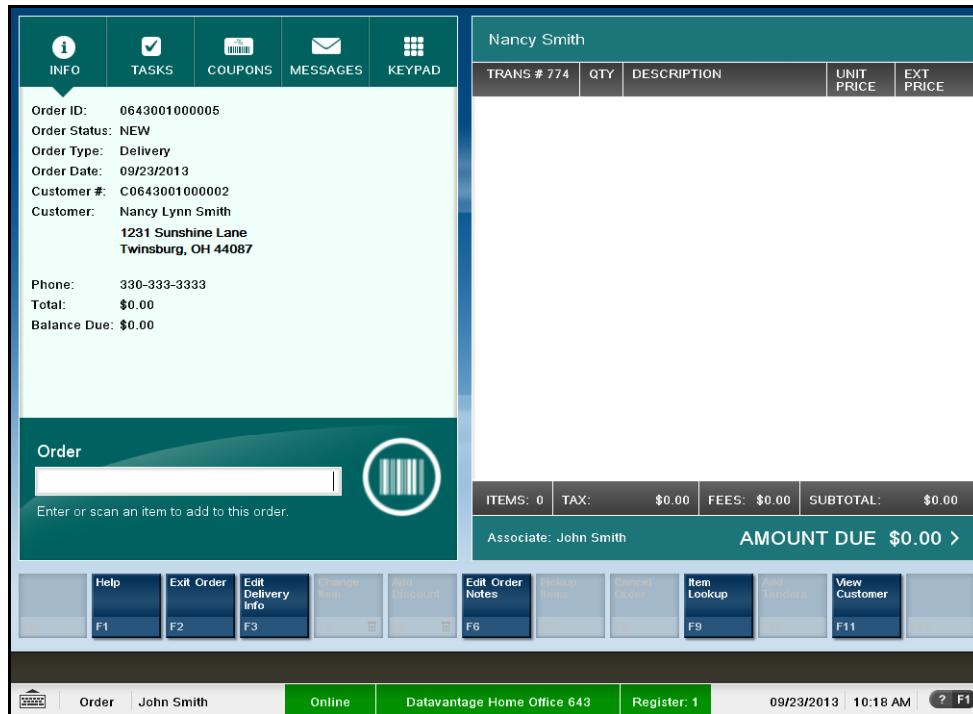


Figure 14-3: Order Screen - For Customer Delivery

- If you do not know the item number and cannot scan the item, use the **Item Lookup** option to find the item number.
- If system records indicate the item is available in your store, you are prompted whether or not to order the item anyway. Select **Yes** at the prompt to continue with order processing, select **No** to return to sale mode and sell the item from your current inventory.
- If the item is not on file, you are prompted with this message. Press **[Enter]** to close the message and return to the Order screen.

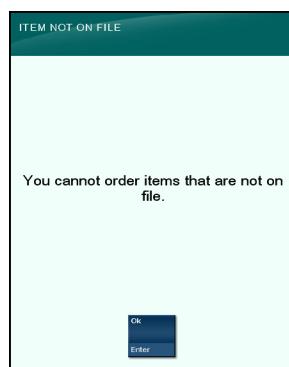


Figure 14-4: Not On File Prompt

Order Broker Order Processing

- If the item cannot be located, you are prompted with this message. Press [Enter] to close the message and return to the Order screen.

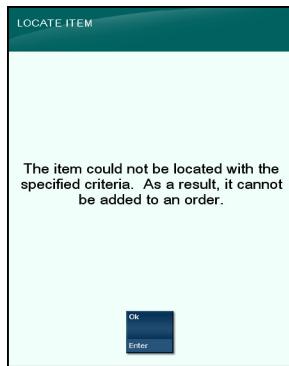


Figure 14-5: Could Not Be Located Prompt

- Depending on the configuration of your system, you may be prompted for a fulfilling location from a list of locations with the item available.
 - For delivery orders, the system automatically searches for fulfilling locations based on the delivery address, and returns a list of valid locations.
 - Information shown here includes the fulfilling location name and address, the distance between the fulfilling location and the delivery address, and the on-hand quantity at the fulfilling location.
 - If the quantity for a location is zero, the words "Drop Ship" display in the Quantity column.
 - If the quantity for a location is less than the requested quantity, the word "Backorder" displays in the Quantity column.

Press [Enter] to continue.

LOCATION	DISTANCE	QUANTI...
102 Seaside Outlet 30500 Bruce Ind Pkwy Solon, OH 44139 US	4.73 mi	99,826
101 Datavantage Home Office 494 Market St Perth Amboy, NJ 08862 US	4.73 mi	351
210 Clothing by Kris 30500 Bruce Industrial Pkwy Solon, OH 44139 US	4.73 mi	99,999
804 Base iStore Testing 30500 Bruce Industrial Pkwy Solon, OH 44139 US	4.73 mi	99,999
154 Nick's Test Store 30500 Bruce Ind Pkwy Solon, OH 44139	4.73 mi	99,998

Figure 14-6: Locate Item Results List - For Delivery Order

- Select the shipping delivery method from the Shipping Method options list and press [Enter].

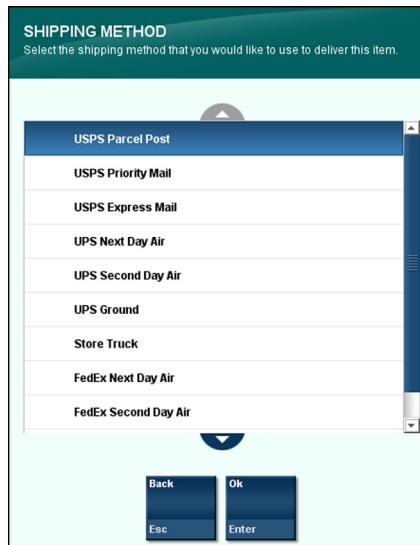


Figure 14-7: Shipping Method Options

The item is added to the order and shown on the View Port along with the fulfilling (source) location and delivery information.

- When you are finished adding order items, select **Add Tenders** or **Exit Order** to tender and complete the sale. Customer delivery orders must be paid in full.

TRANS #	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
1008901 3003	1	Taupe/Rose Sleeveless Dress	\$49.98	\$44.98
Source: 101 Datavantage Home Office				
Delivery to: Nancy Lynn Smith 1232 SUNSHINE LANE TWINSBURG, OH 44087 US				
Ship Via: USPS Parcel Post				
10% Off Any non-Price Overridden... (\$5.00)				
Shipping Fee \$6.95				

ITEMS: 0 TAX: \$0.00 FEES: \$6.95 SUBTOTAL: \$44.98

Associate: John Smith AMOUNT DUE \$51.93 >

Figure 14-8: Customer Delivery Order Screen

For Pickup Other Store

...continued from [Pickup Other Store](#)

- At the Order screen, scan or enter the item ID.

Note: To add Wish List item(s) to the Order Broker Cloud Service order, select *View Customer* and then select the *Wish List* tab (see [Purchasing Wish List Item\(s\)](#)).

To add Digital Cart item(s) to the Order Broker Cloud Service order, select *View Customer* and then select the *Digital Cart* tab (see [Purchasing Digital Cart Item\(s\)](#)).

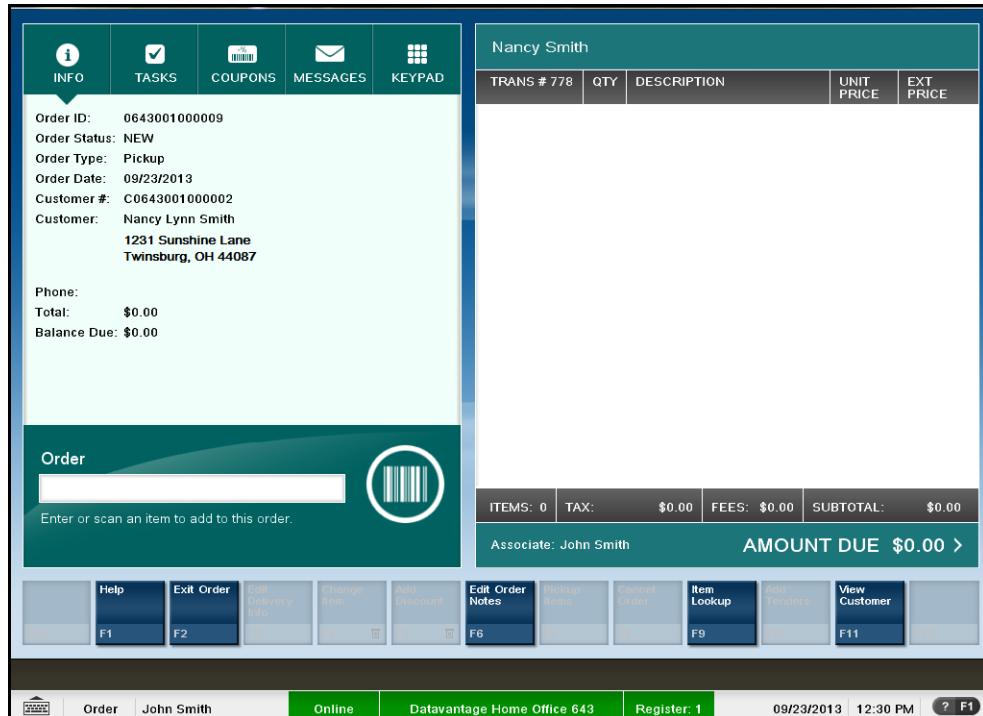
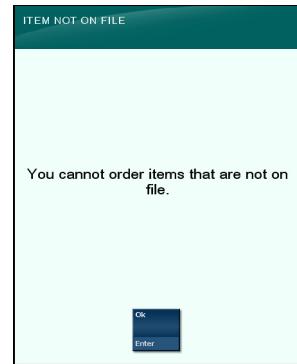


Figure 14-9: Order Screen - For Pickup Other Store

- If you do not know the item number and cannot scan the item, use the **Item Lookup** option to find the item number.
- If system records indicate the item is available in your store, you are prompted whether or not to order the item anyway. Select **Yes** at the prompt to continue with order processing, select **No** to return to sale mode and sell the item from your current inventory.

- If the item is not on file, you are prompted with this message. Press [Enter] to close the message and return to the Order screen.



- If the item cannot be located, you are prompted with this message. Press [Enter] to close the message and return to the Order screen.

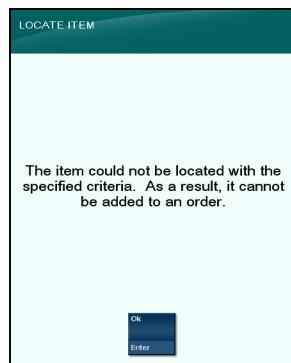


Figure 14-10: Cannot Be Located Prompt

- At the Locate Item form, enter the search criteria to find another store to pick up the order and select **Process**. The default information shown here is based on the customer's address, but can be changed.

The screenshot shows the "LOCATE ITEM" form. The title bar says "LOCATE ITEM" and "Enter criteria for locating item.". Below the title, there are five input fields: "City: TWINSBURG", "State: OH", "Postal Code: 44087", "Country: US - UNITED STATES" (with a dropdown arrow), and "Miles: 10" (with a dropdown arrow). At the bottom, there are several buttons: "Back", "Help", "Process" (highlighted in blue), "Esc", "F1", and "F8".

Figure 14-11: Locate Item Form - For Pickup Other Store

Note: You are prompted if the search for a fulfilling store is not successful with the specified criteria. Press [Enter] to close the prompt and you can re-enter the search criteria to try again.

Order Broker Order Processing

3. At the Locate Item results list, select the pickup location from the list of locations with the item available.
 - Information shown here includes the pickup location name and address, the distance between the pickup location and the address specified in the search, and the on hand quantity at the pickup location.
 - If the quantity for a location is zero, the words "Drop Ship" display in the Quantity column.
 - If the quantity for a location is less than the requested quantity, the word "Backorder" displays in the Quantity column.

Note: If you are performing multiple Pickup at Store orders, only those stores with inventory available and a previously selected store receiving shipped items will be displayed.

Press [Enter] to continue.

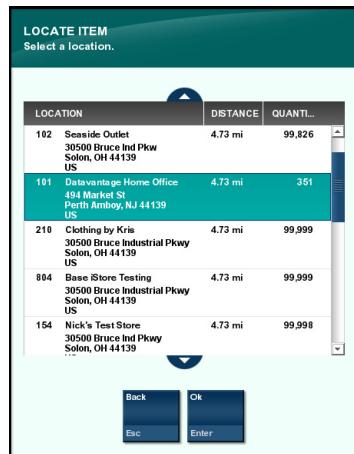


Figure 14-12: Locate Item Results List - Pickup Other Store Results

Important: The Locate Item Results List may not display on your screen depending on your store's configurations. If your store is configured for Group Shipment or Split Shipment, Order Broker will automatically assign a store to the order.

- The item is added to the order and shown on the View Port along with the location information:

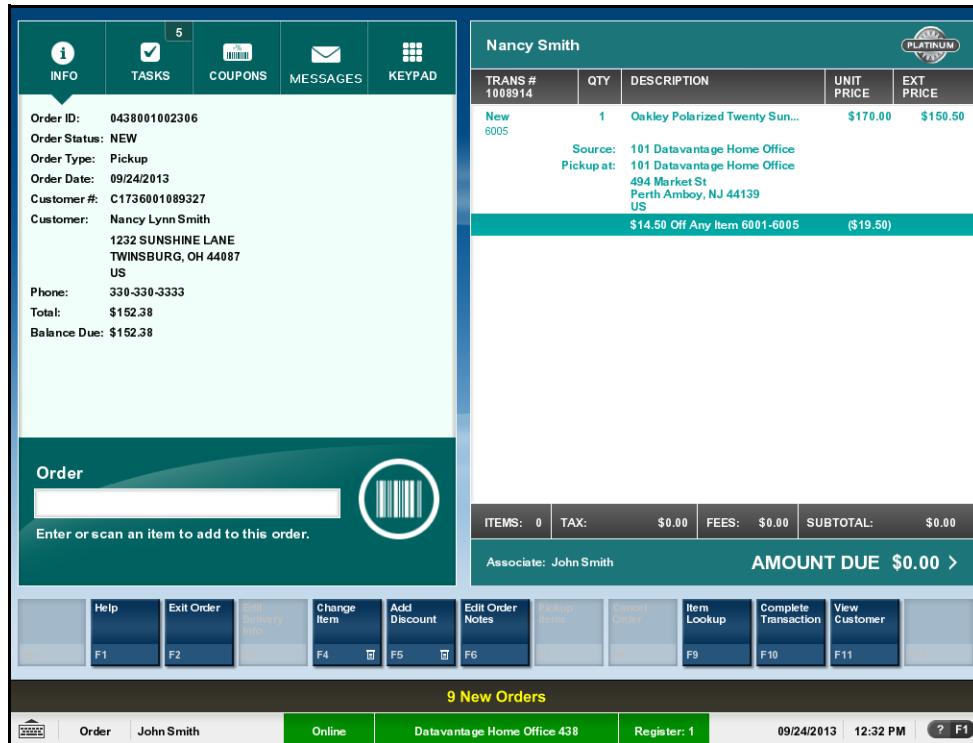


Figure 14-13: View Port - For Customer Pickup Other Store Order

- When you are finished adding items, select **Complete Transaction** or **Exit Order**.
- At the prompt for the order deposit, enter the dollar amount (without a decimal point) that the customer wants to apply to the order, and press **[Enter]**.
 - If you selected **Complete Transaction** the system displays the tender list.
 - If you selected **Exit Order** the system returns to Sale mode.
- Tender the order using the normal tendering process.

For Pickup This Store

...continued from **Pickup This Store**

- At the Order screen, scan or enter the item Id.

Note: To add Wish List item(s) to the Order Broker Cloud Service order, select **View Customer** and then select the **Wish List** tab (see [Purchasing Wish List Item\(s\)](#)).

To add Digital Cart item(s) to the Order Broker Cloud Service order, select **View Customer** and then select the **Digital Cart** tab (see [Purchasing Digital Cart Item\(s\)](#)).

For Pickup This Store

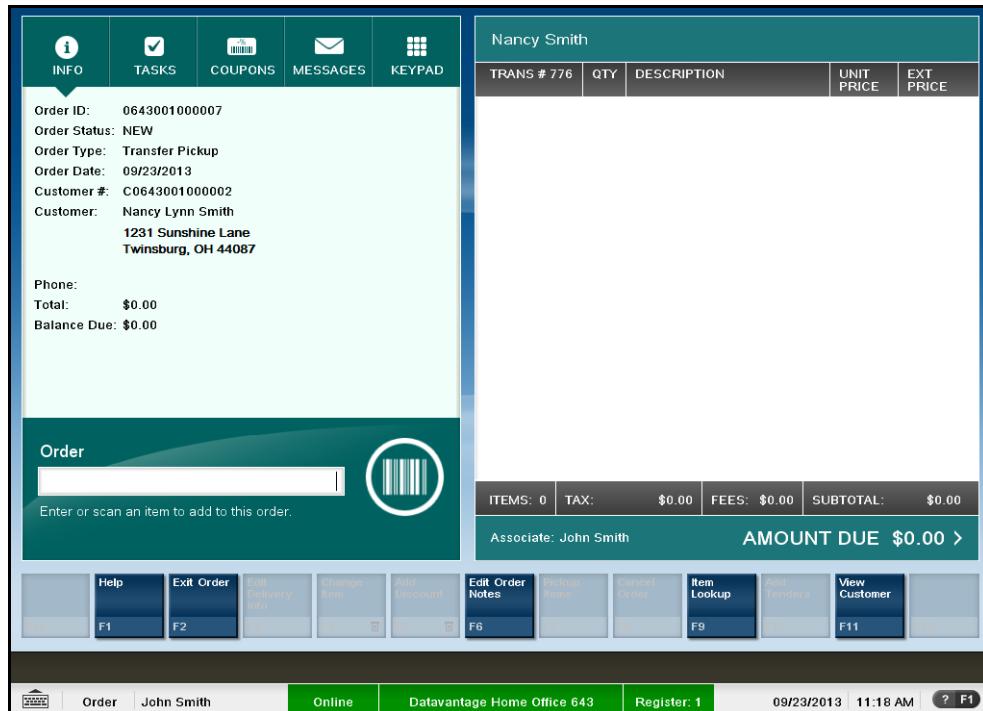
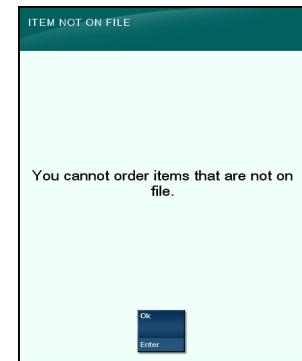


Figure 14-14: Order Screen - For Pickup This Store

- If you do not know the item number and cannot scan the item, use the **Item Lookup** option to find the item number.
- If system records indicate the item is available in your store, you are prompted whether or not to order the item anyway. Select **Yes** at the prompt to continue with order processing, select **No** to return to sale mode and sell the item from your current inventory.
- If the item is not on file, you are prompted with this message. Press [Enter] to close the message and return to the Order screen.



- If the item cannot be located, you are prompted with this message. Press [Enter] to close the message and return to the Order screen.

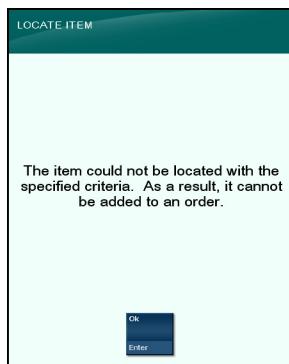


Figure 14-15: Cannot Be Located Prompt

- Depending upon the configuration of your system, you may be prompted to select the fulfilling location from the list of locations with the item available.

The screenshot shows a 'LOCATE ITEM' results list dialog box with a teal header. The main area is a table with columns: LOCATION, DISTANCE, QUANT... (Quantity). The table lists five locations:

LOCATION	DISTANCE	QUANT...
102 Seaside Outlet 30500 Bruce Ind Pkwy Solon, OH 44139 US	4.73 mi	99,826
101 Dataverage Home Office 494 Market St Perth Amboy, NJ 08862 US	4.73 mi	351
210 Clothing by Kris 30500 Bruce Industrial Pkwy Solon, OH 44139 US	4.73 mi	99,999
804 Base iStore Testing 30500 Bruce Industrial Pkwy Solon, OH 44139 US	4.73 mi	99,999
154 Jack's Test Store 30500 Bruce Ind Pkwy Solon, OH 44139	4.73 mi	99,998

At the bottom are buttons: 'Back', 'Ok', 'Esc', and 'Enter'.

Figure 14-16: Locate Item Results List

For *pickup this store* orders, the system automatically searches for fulfilling locations based on your store address, and returns a list of valid locations.

- Information shown here includes the fulfilling location name and address, the distance between the fulfilling location and your store, and the on hand quantity at the fulfilling location.
- If the quantity for a location is zero, the words "Drop Ship" display in the Quantity column.
- If the quantity for a location is less than the requested quantity, the word "Backorder" displays in the Quantity column.

Important: The Locate Item Results List may not display on your screen depending on your store's configurations. If your store is configured for *Group Shipment* or *Split Shipment* Oracle Retail Order Broker Cloud Service will automatically assign a store to the order.

- Press [Enter] to continue.

For Pickup This Store

- If your system is set up to specify a shipping method, select the shipping method from the list when prompted and press [Enter]. The item is added to the order and shown on the View Port along with the location information.

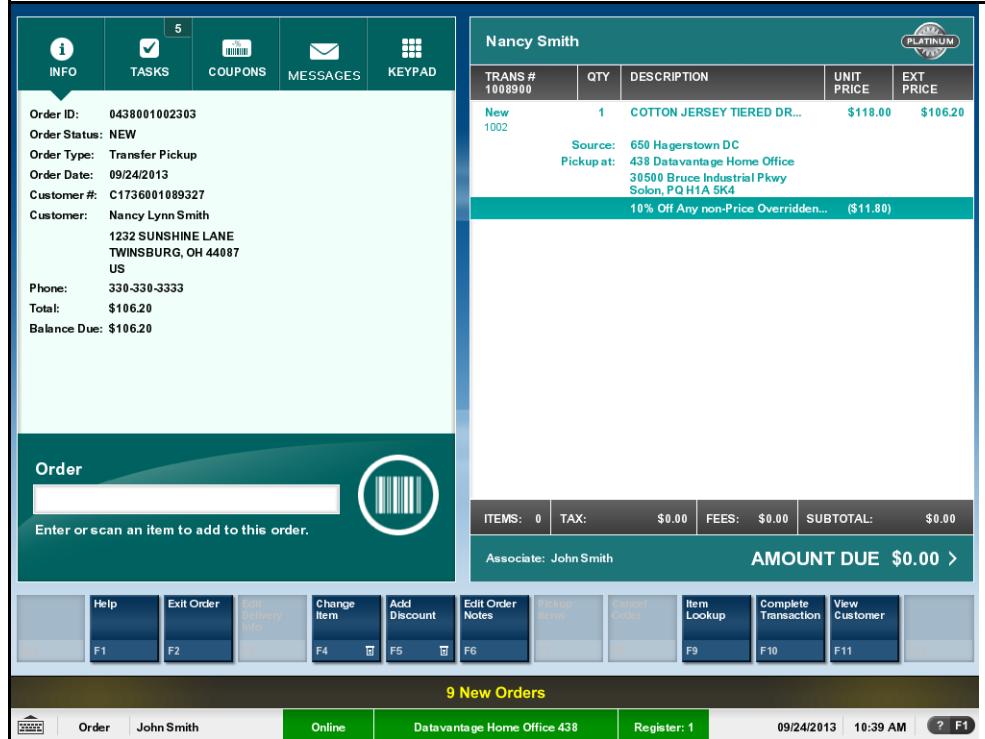


Figure 14-17: View Port - For Customer Pickup At This Store Order

- When you are finished adding items, select **Complete Transaction** or **Exit Order**.
- At the prompt for the order deposit, enter the dollar amount (without a decimal point) that the customer wants to apply to the order, and press [Enter].
 - If you selected **Complete Transaction** the system displays the tender list.
 - If you selected **Exit Order** the system returns to Sale mode.
- Tender the order using the normal tendering process.

Editing Order Items at Setup

During an order setup transaction you can also perform the following activities before tendering the sale. Order items can only be modified in Order mode.

To change order information, select from the following options:

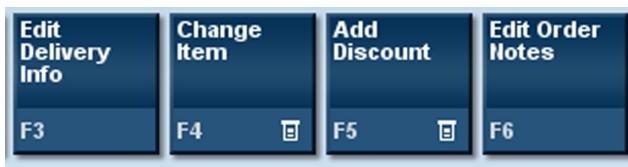


Figure 14-18: Change Order Menu Options

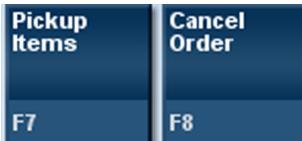
- To change the delivery information (when applicable) select the **Edit Delivery Info** option, and complete the delivery form.
- To add/change/delete discounts, select the **Add Discount** option. Refer to [Adding a Discount/Award to an Item or Transaction](#).

- To add or edit comments associated with this order, select the **Edit Order Notes** option and type a comment about the order.
- To change a *line item* on the order, select the **Change Item** option. The following operations are available in the Change Item menu buttons:
 - * To change item quantities, refer to [Changing the Item Quantity](#) for more information.
 - * To override a price, refer to [Changing the Item Quantity](#) for more information.
 - * To void an item, refer to [Voiding an Item](#) for more information.
 - * To change the commissioned sale associate for the sale, refer to [Changing the Commissioned Associate](#) for more information.
 - * To add or edit comments associated with a line item on the order, select the **Edit Line Notes** option and type a comment or edit an existing comment about the line item.

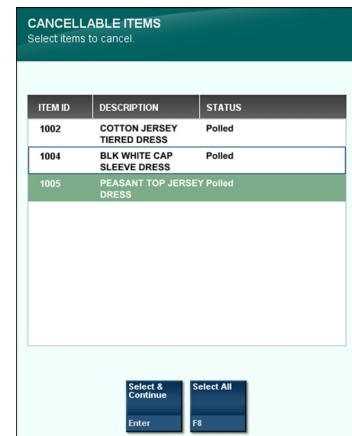
Cancelling an Order

Note: If you are cancelling a Delivery or Pick Up This Store, the customer must return to where they placed the order to cancel. If the item has been reserved a message prompt will display indicating that you must un-reserve the item in the Back Office before cancelling the order.

1. From the Sale screen, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Order** option.
3. Search and select the order to be cancelled. See [Searching for Order Broker Orders](#).
4. From the Order screen, select the **Cancel Order** option.



5. Select the items you wish to cancel. If cancelling the entire order, use the **Select All** button.



Cancelling an Order

6. When prompted, select **Yes** to confirm you want to cancel the order.

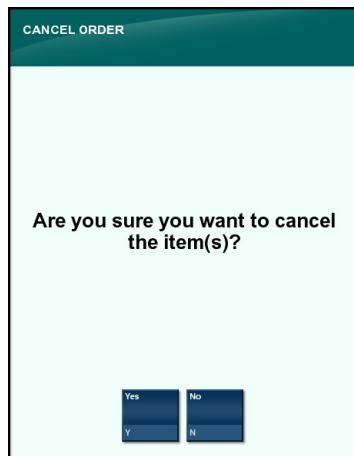


Figure 14-19: Cancel Order Confirmation Prompt

Note: Canceled order detail is available from the Back Office Order Maintenance function. See the *Oracle Retail Xstore Point of Service Manager's Guide* for more information about maintaining Orders.

7. Select a reason for the cancellation and press [Enter].

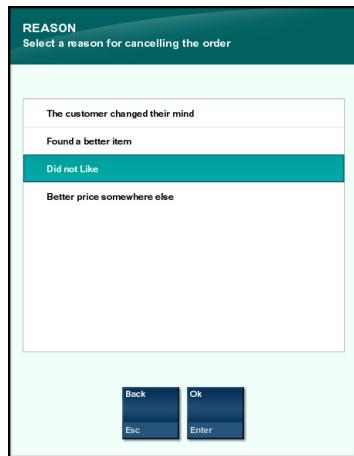


Figure 14-20: Select A Reason List

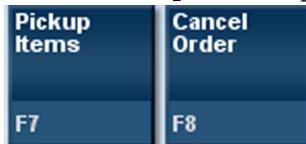
8. Process the transaction as required, returning any refund amounts to the customer. See "[Processing Tenders](#)" for more information about processing refund tenders.

Picking Up an Order

If the customer had the order item(s) delivered to this store, use the following procedure to pick up the item(s).

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.

1. From the Sale screen, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Order** option.
3. Search and select the order you wish to pick up. See [Searching for Order Broker Orders](#).
4. At the order screen, select **Pickup Items** to pick up the items on the order.



5. Select each item from the Pickup Items list and press [Enter], or select **Pickup All** to select all items at once.

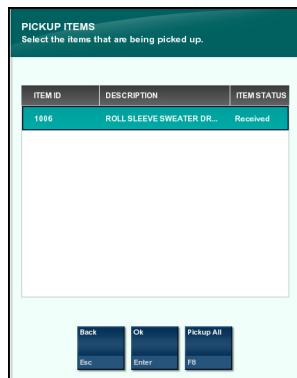


Figure 14-21: Pickup Items List

Picking Up an Order

The item status on the View Port changes from Received to Fulfilled indicating the item has been picked up. See Order and Item Status values for more information about valid order and item statuses.

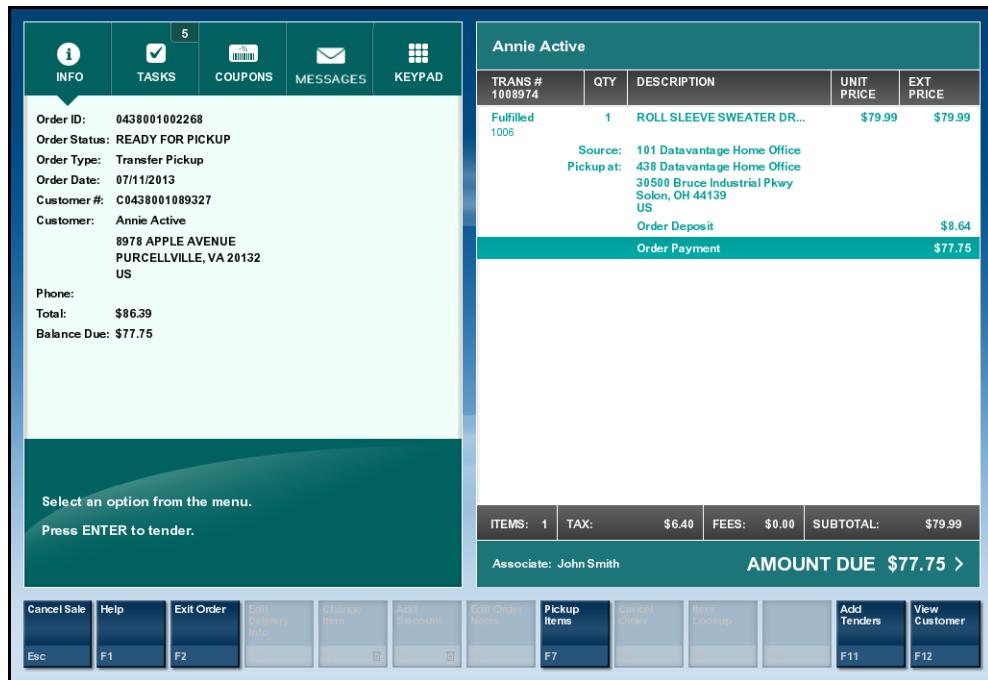


Figure 14-22: Order Screen - Fulfilled Status

6. Select **Exit Order** or **Add Tenders** to complete the order:

- Select **Exit Order** to return to the sale screen where you can add regular sale items to the transaction.
- Select **Add Tenders** to display the Tender list. See [Processing Tenders](#) for more information about tendering the transaction.

Pre-Sale Accounts

Overview

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.

Pre-Sale Account Transactions

1. From the Sale screen, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Pre-Sale** option.
3. The next steps depend on whether or not a customer is associated with the current transaction:
 - If you have assigned a customer, see [If a customer is associated with the transaction](#).
 - If you have not assigned a customer, see [If a customer has not been associated with the transaction](#).

Pre-Sale Account Transactions

If a customer is associated with the transaction

- When a customer has been associated with the current transaction, the system automatically searches the database to locate any open Pre-Sale accounts for this customer.
- If no Pre-Sale accounts are found, you have the following options:

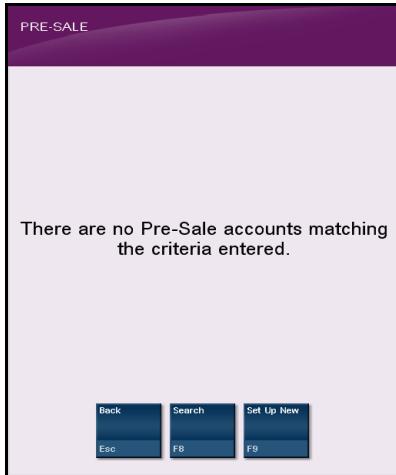


Figure 15-1: No Pre-Sale Accounts Found

- Select **Set Up New** to create a Pre-Sale account for this customer. Continue with [Creating a New Pre-Sale Account](#).
- Select **Search** to enter criteria to find a Pre-Sale account. See [Searching for a Pre-Sale Account](#)

- If a Pre-Sale account is found, you have the following options:

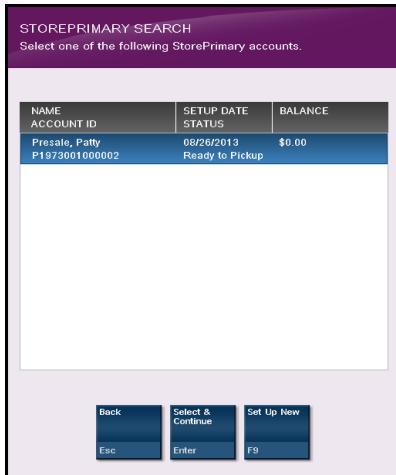


Figure 15-2: Pre-Sale Account Found

- Select **Set Up New** to create a new Pre-Sale account. Continue with [Creating a New Pre-Sale Account](#).
- Press [**Enter**] to view the selected Pre-Sale account.

If a customer has not been associated with the transaction

- When there is no customer associated with the current transaction, the Pre-Sale Search form displays. You have the following options:

Figure 15-3: Pre-Sale Search Form

- Select **Set Up New** to create a new Pre-Sale account. After associating a customer with the transaction, continue with [Creating a New Pre-Sale Account](#).
- To search for a Pre-Sale account, enter search criteria and select **Process**. See [Searching for a Pre-Sale Account](#).
- Select **Back** to return to the Sale screen.

Creating a New Pre-Sale Account

...continued from step 3

- After a customer is associated with the transaction, scan or enter the Pre-Sale item Id.

Note: To add Wish List item(s) to the Pre-Sale, select *View Customer* and then select the *Wish List* tab (see [Purchasing Wish List Item\(s\)](#)).

Creating a New Pre-Sale Account

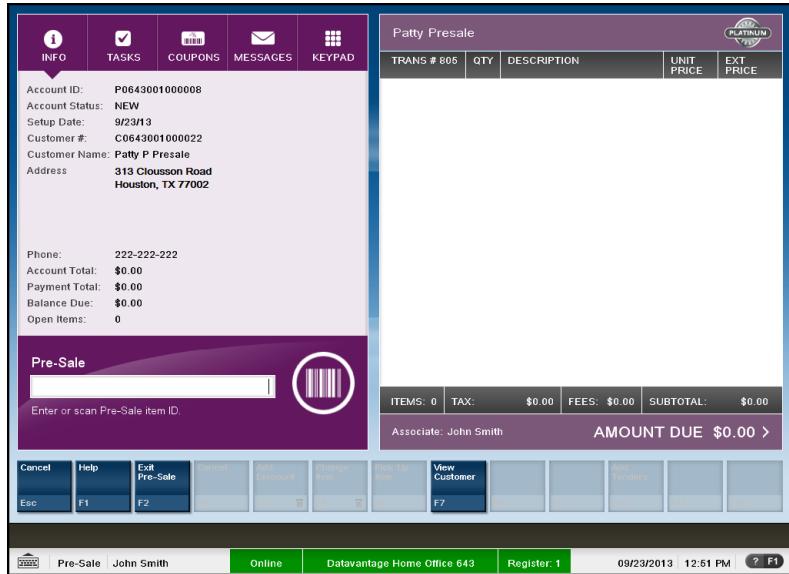


Figure 15-4: Pre-Sale Item Id Prompt

2. You have the following options at the Pre-Sale screen before tendering:

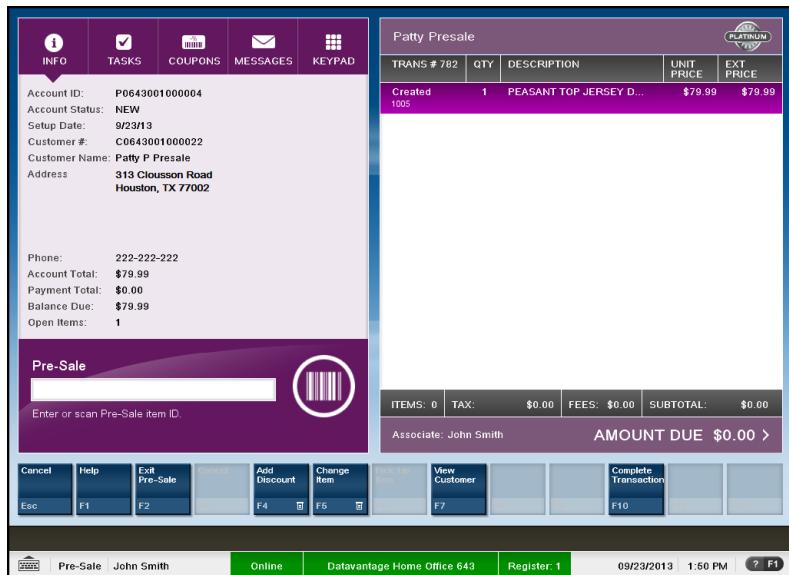


Figure 15-5: Pre-Sale Screen

- You can scan another Pre-Sale item.
- You can change an item by:
 - * Adding a discount (See [Adding a Discount/Award to an Item or Transaction](#)).
 - * Changing the item price ([Changing the Item Price](#)).
 - * Voiding a line item ([Voiding an Item](#)).
 - * Voiding a discount (this is only available for items with a discount applied, and uses the same process as voiding an item).

3. After adding items to the Pre-Sale, do one of the following to complete the Pre-Sale setup:
 - Select **Exit Pre-Sale** to exit Pre-Sale mode and return to sale mode before tendering the sale.
 - <OR>
 - Select **Complete Transaction** to complete the Pre-Sale setup.
4. When prompted, press [**Enter**] to accept the deposit amount. Pre-Sale items must be paid in full at setup.



Figure 15-6: Pre-Sale Deposit Amount Prompt

-
- You cannot over tender a Pre-Sale.
 - You cannot override the deposit amount. Pre-Sale items must be paid in full at setup.
 - Pre-Sale items may only be modified in the Pre-Sale screen.
 - You cannot change the Pre-Sale item quantity.
-

5. If you selected **Complete Transaction**, tender the sale. If you selected **Exit Pre-Sale**, you are returned to the sale screen before tendering the sale.

Searching for a Pre-Sale Account

...continued from step 3

1. To search for a Pre-Sale account, enter search criteria in the Pre-Sale Search form.

Figure 15-7: Pre-Sale Search Form

Picking Up Pre-Sale Items

- **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.
2. Select **Process**.
- If there are no Pre-Sale accounts matching your search criteria, you will see a message indicating no accounts were found. See [Figure 15-1](#).
 - If at least one Pre-Sale account matches your search criteria, the account or accounts are listed in the Pre-Sale Account Search Results Form. See [Figure 15-2](#).

Picking Up Pre-Sale Items

1. From the Sale screen, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Pre-Sale** option.
3. Find the Pre-Sale Account:
 - If prompted, enter search criteria to find the Pre-Sale Account.
 - If a customer has been associated with the transaction, Oracle Retail Xstore Point of Service returns a list of Pre-Sale accounts for the customer.
4. Select a Pre-Sale account from the list, then press [**Enter**].

NAME ACCOUNT ID	SETUP DATE STATUS	BALANCE
Presale, Patty P1973001000002	08/26/2013 Ready to Pickup	\$0.00

Figure 15-8: Pre-Sale Account List

- At the Pre-Sale Account screen, select Pick Up Item.

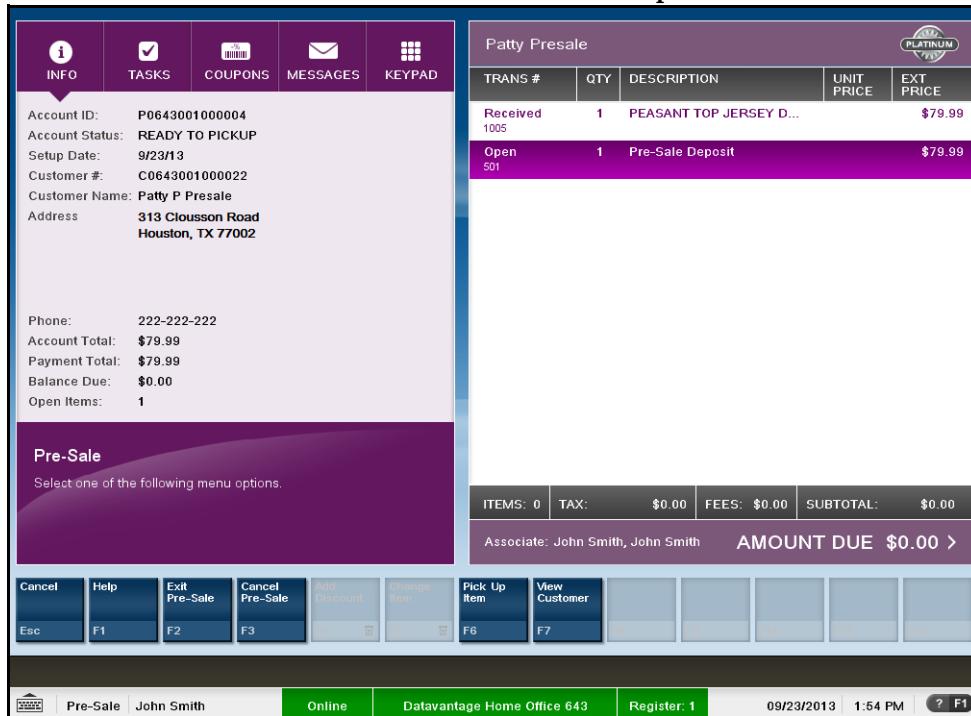


Figure 15-9: Pre-Sale Account Screen - Item Received

- If prompted, select Yes to pick up all the Pre-Sale items. Selecting No returns to the Pre-Sale Account screen.

Note: This prompt only displays when there are multiple Pre-Sale items on the account

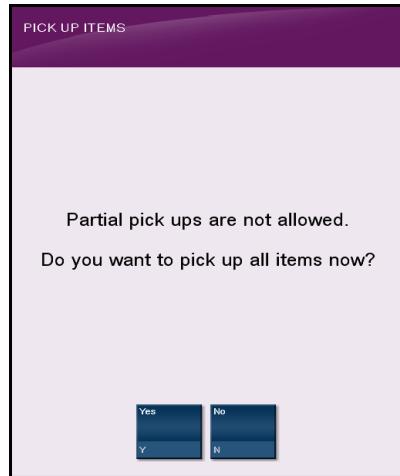


Figure 15-10: Pick Up Items Confirmation Prompt

Cancelling a Pre-Sale Account

7. The system returns to the Pre-Sale Account screen and all items are marked as **Picked Up**.

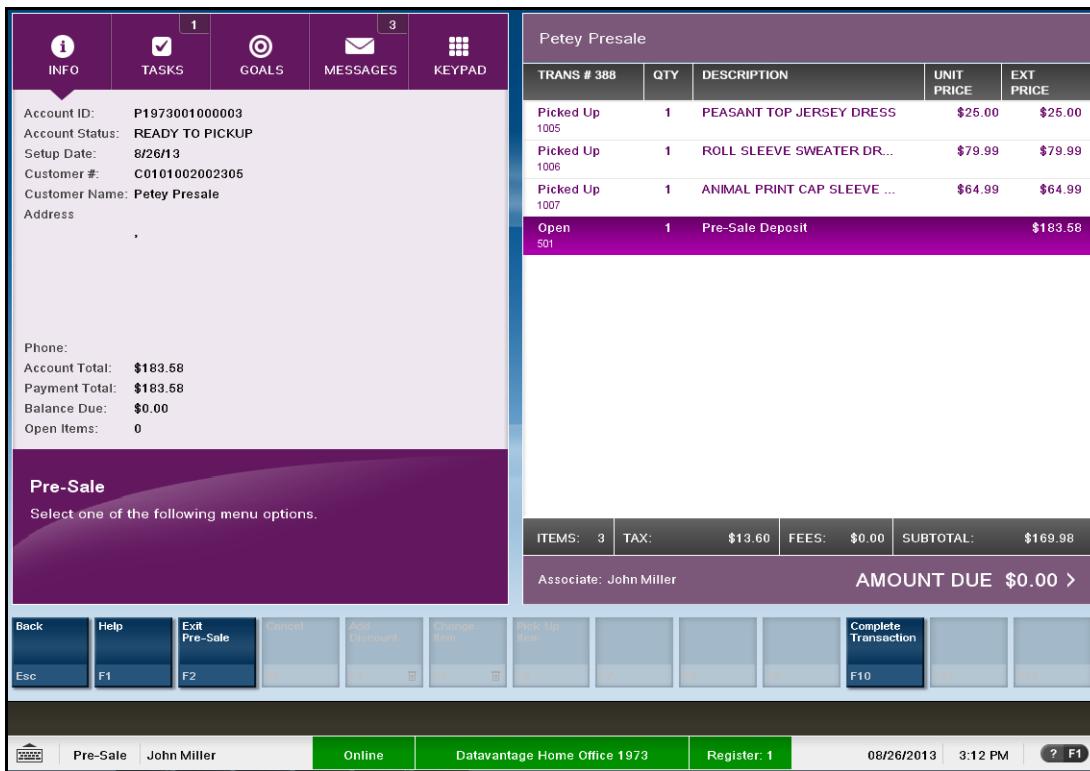


Figure 15-11: Pre-Sale Account Screen - Multiple Items Picked Up Example

8. Complete the transaction:
 - Select **Complete Transaction** to complete the transaction. See [Email Receipt Options](#) for more information about receipts.
<OR>
 - Select **Exit Pre-Sale** to return to the Sale screen before tendering the sale.

Cancelling a Pre-Sale Account

1. From the Sale screen, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Pre-Sale** option.
3. Find the Pre-Sale Account:
 - If prompted, enter search criteria to find the Pre-Sale Account.
 - If a customer has been associated with the transaction, Oracle Retail Xstore Point of Service returns a list of Pre-Sale accounts for the customer.

4. Select a Pre-Sale account from the list, then press [Enter].

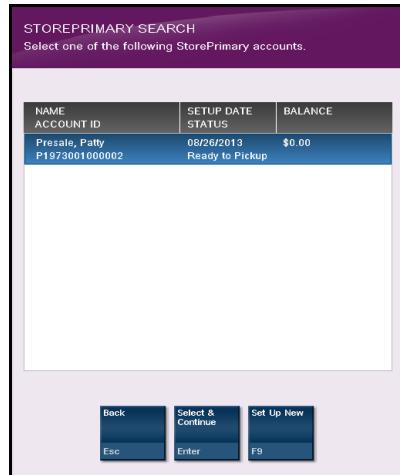


Figure 15-12: Pre-Sale Account List

5. At the Pre-Sale Account screen, select Cancel Pre-Sale.

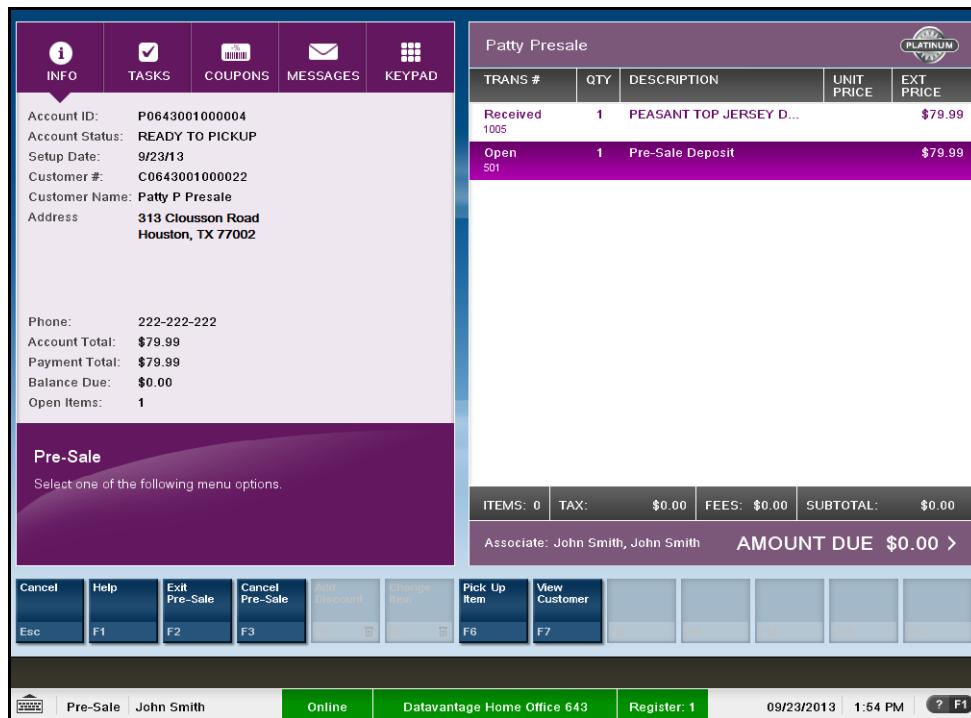


Figure 15-13: Pre-Sale Account Screen

Cancelling a Pre-Sale Account

6. When prompted, select **Yes** to confirm you want to cancel this Pre-Sale account. Selecting **No** returns to the Pre-Sale Account screen.

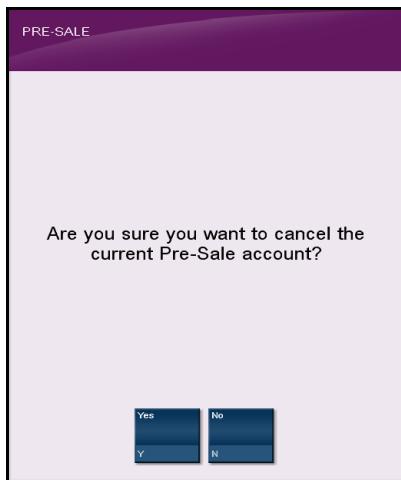


Figure 15-14: Cancel Pre-Sale Account Confirmation Prompt

7. When prompted, select **Yes** to confirm the customer is present.

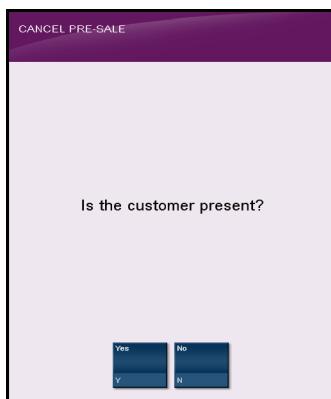


Figure 15-15: Customer Is Present Confirmation Prompt

Note: If the customer is not present, select **No**. Pre-Sale Accounts cannot be canceled if the customer is not present.

Press [**Enter**] to close the prompt and return to the Pre-Sale Account screen.

8. The system returns to Sale mode where you can refund the customer's deposit.

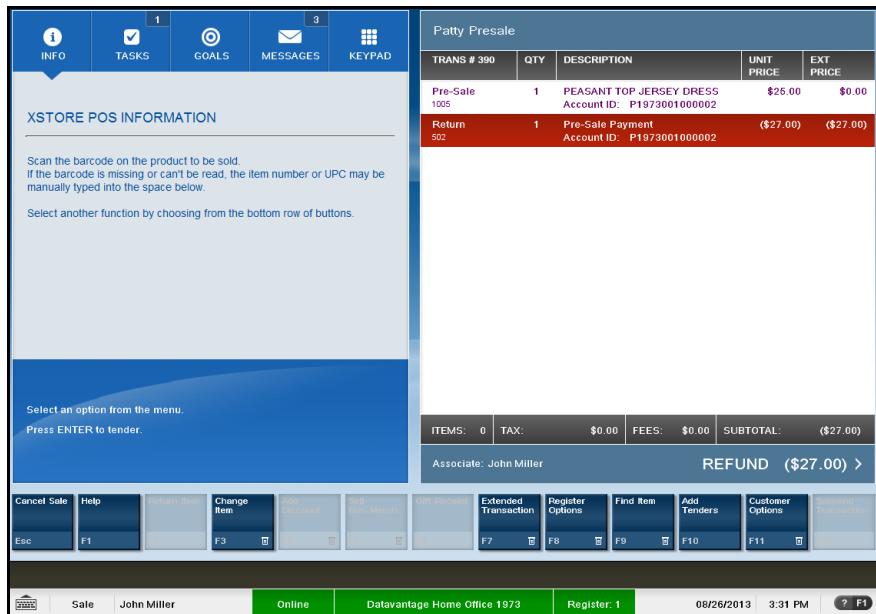


Figure 15-16: Sale Screen - Refund Deposit

Cancelling a Pre-Sale Account

16

Hold Account Transactions

Overview

A Hold Account transaction is typically performed when customers plan to purchase merchandise, but would like the store to hold the item(s) for a short period of time so they can return to the store later to complete the purchase and pick up the reserved items. You must associate a customer with the transaction to ensure they receive the reserved items once they return.

Hold Account Transactions

1. From the Sale screen, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Hold** option.
3. The next steps depend on whether or not a customer is associated with the current transaction:
 - If you have assigned a customer, see [If a customer is associated with the transaction](#).
 - If you have not assigned a customer, see [If a customer has not been associated with the transaction](#).

Hold Account Transactions

If a customer is associated with the transaction

- When a customer has been associated with the current transaction, the system automatically searches the database to locate any open Hold accounts for this customer.
- If no Hold accounts are found, you have the following options:

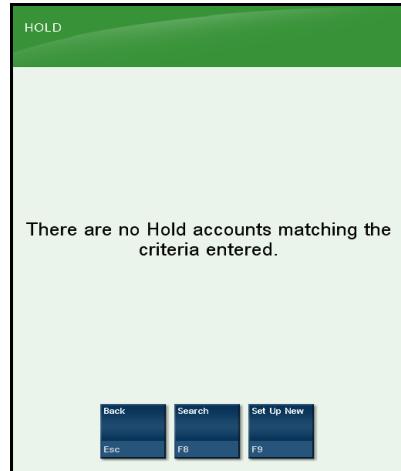


Figure 16-1: No Hold Accounts Found

- Select **Set Up New** to create a Hold account for this customer. Continue with [Creating a New Hold Account](#).
- Select **Search** to enter criteria to find a Hold account. See [Searching for a Hold Account](#).

- If a Hold account is found, you have the following options:

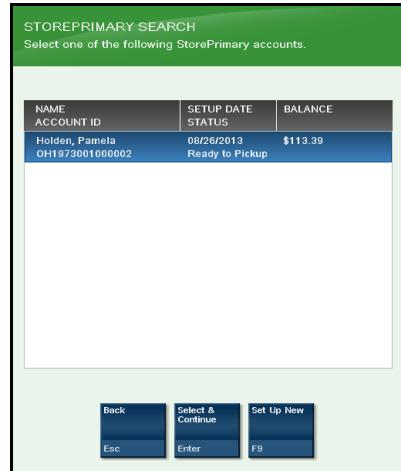


Figure 16-2: Hold Account Found

- Select **Set Up New** to create a new Hold account. Continue with [Creating a New Hold Account](#).
- Press [**Enter**] to view the selected Hold account.

If a customer has not been associated with the transaction

- When there is no customer associated with the current transaction, the Hold Search form displays. You have the following options:

The screenshot shows the 'HOLD SEARCH' interface. At the top, it says 'Enter search criteria.' and features a magnifying glass icon. Below this are five input fields: 'Account ID', 'Last Name', 'First Name', 'Customer ID', and 'Phone #'. At the bottom, there are four buttons: 'Back' (labeled 'Esc'), 'Help' (labeled 'F1'), 'Process' (labeled 'F8'), and 'Set Up New' (labeled 'F9').

Figure 16-3: Hold Search Form

- Select **Set Up New** to create a new Hold account. After associating a customer with the transaction, continue with [Creating a New Hold Account](#).
- To search for a Hold account, enter search criteria and select **Process**. See [Searching for a Hold Account](#).
- Select **Back** to return to the Sale screen.

Creating a New Hold Account

...continued from step 3

- After a customer is associated with the transaction, scan or enter the Hold item Id.

Note: To add Wish List item(s) to the Hold, select *View Customer* and then select the *Wish List* tab (see [Purchasing Wish List Item\(s\)](#)).

Creating a New Hold Account

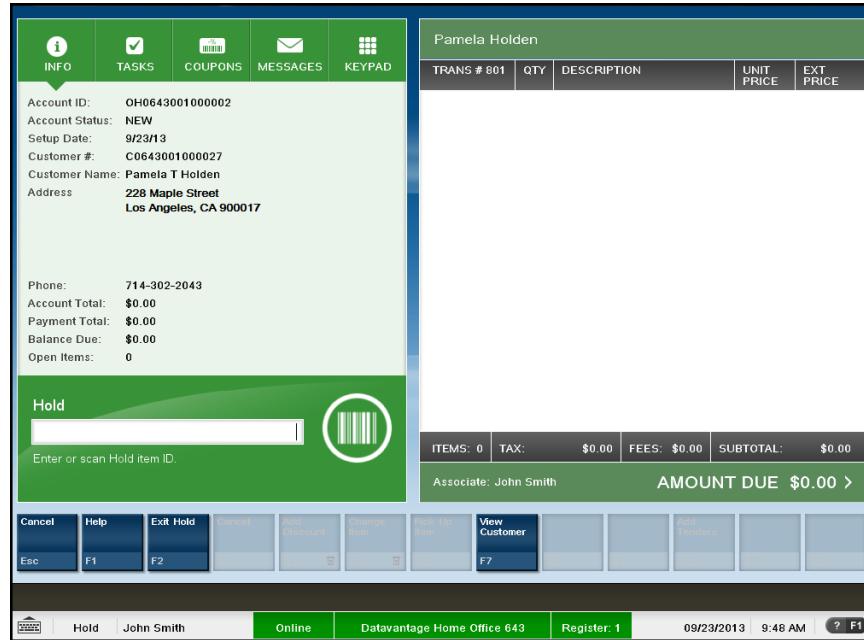


Figure 16-4: Hold Item Id Prompt

2. You have the following options at the Hold screen before tendering:

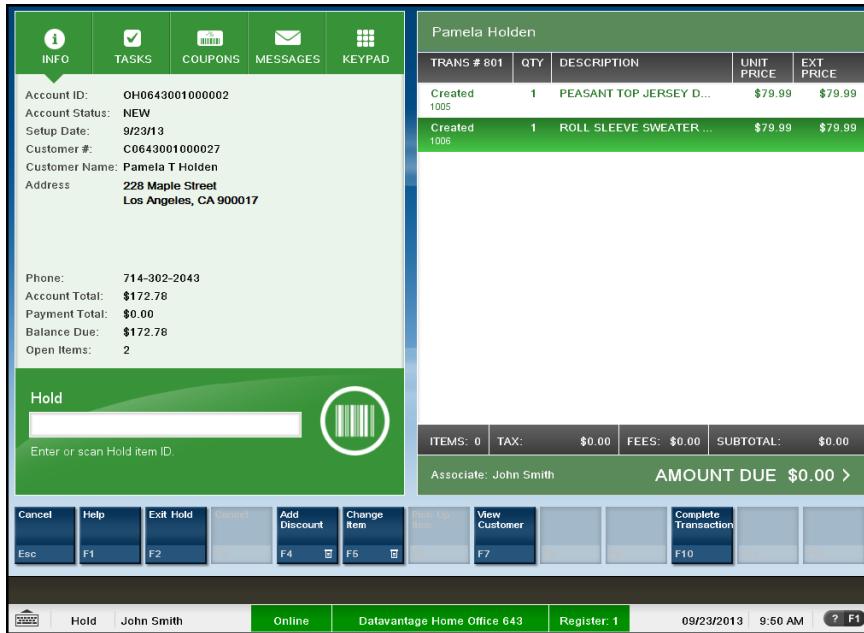


Figure 16-5: Hold Screen - Item Added

- You can scan another Hold item.

- You can change an item by:
 - * Adding a discount ([Adding a Discount/Award to an Item or Transaction](#)).
 - * Changing the item price ([Changing the Item Price](#)).
 - * Voiding a line item ([Voiding an Item](#)).
 - * Voiding a discount (this is only available for items with a discount applied, and uses the same process as voiding an item).
3. After adding items to the Hold account, do one of the following to complete the account setup:
 - Select **Exit Hold** to exit Hold mode and return to sale mode before completing the Hold account setup.
 - <OR>
 - Select **Complete Transaction** to complete the Hold account setup.

 - Hold items may only be modified in the Hold screen.
 - You cannot change the Hold item quantity.

Searching for a Hold Account

...continued from step 3

1. To search for a Hold account, enter search criteria in the Hold Search form.

The Hold Search Form is a window titled "HOLD SEARCH" with a subtitle "Enter search criteria." It contains five input fields: "Account ID", "Last Name", "First Name", "Customer ID", and "Phone #". Below the fields are four buttons: "Back", "Help", "Process", and "Set Up New".

Figure 16-6: Hold Search Form

- **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.
2. Select **Process**.
 - If there are no Hold accounts matching your search criteria, a message displays indicating no accounts were found. See [Figure 16-1](#).

Picking Up Hold Items

- If at least one Hold account matches your search criteria, the account or accounts are listed in the Hold Account Search Results Form. See [Figure 16-2](#).

Picking Up Hold Items

- From the Sale screen, select **Extended Transaction**.
- At the Extended Transaction menu, select the **Hold** option.
- Find the Hold Account:
 - If prompted, enter search criteria to find the Hold Account.
 - If a customer has been associated with the transaction, Oracle Retail Xstore Point of Service returns a list of Hold accounts for the customer.
- Select a Hold account from the list, then press [Enter].

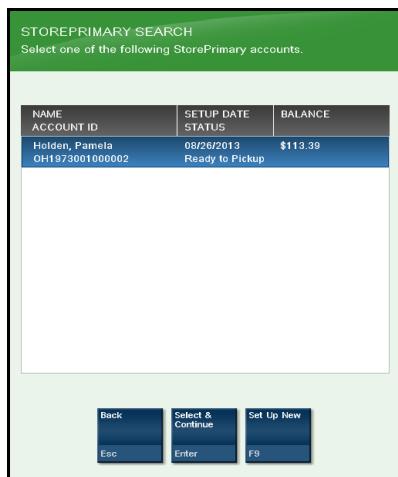


Figure 16-7: Hold Account List

- At the Hold Account screen, select **Pick Up Item**.

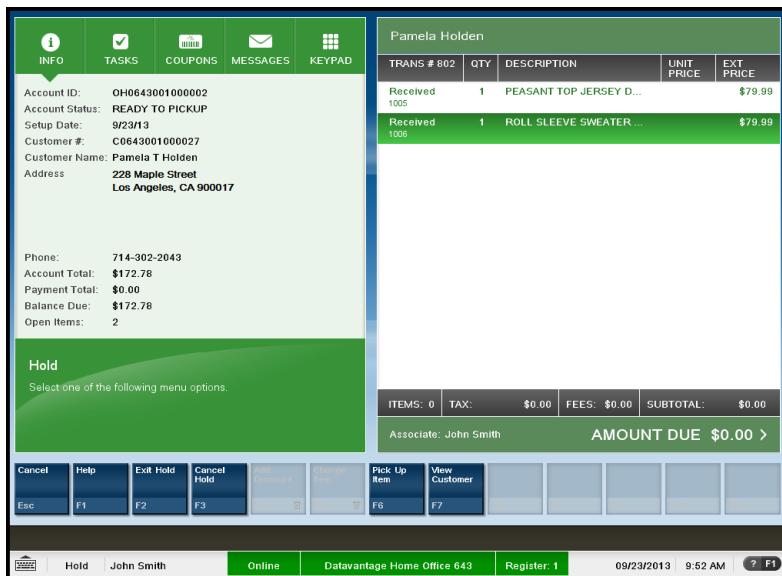


Figure 16-8: Hold Account Screen Button Options

- If prompted, select **Yes** to pick up all the Hold items. Selecting **No** returns to the Hold Account screen.

Note: This prompt only displays when there are multiple Hold items on the account.

t

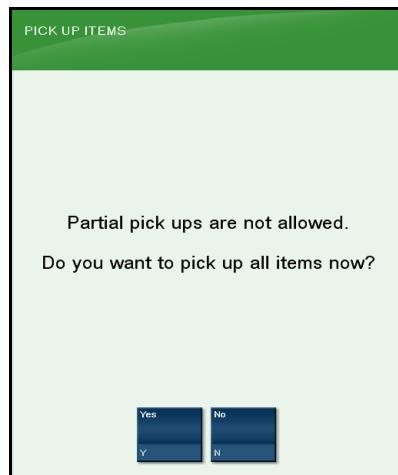


Figure 16-9: Pick Up Items Confirmation Prompt

- The system returns to the Hold Account screen and all items are marked as **Picked Up**.

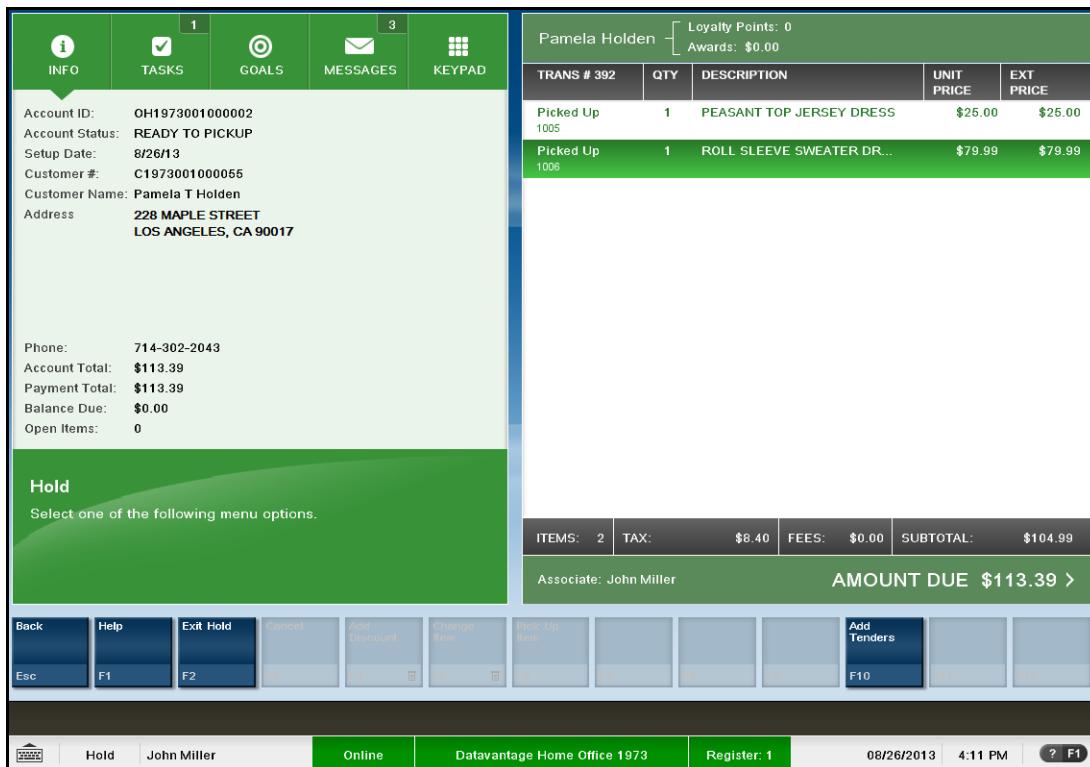


Figure 16-10: Hold Account Screen - Items Picked Up

Cancelling a Hold Account

8. Complete the transaction:
 - Select **Add Tenders** to complete the transaction. See [Email Receipt Options](#) for more information about receipts.
 - <OR>
 - Select **Exit Hold** to return to the Sale screen before completing the transaction.

Cancelling a Hold Account

1. From the Sale screen, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Hold** option.
3. Find the Hold Account:
 - If prompted, enter search criteria to find the Hold Account.
 - If a customer has been associated with the transaction, Oracle Retail Xstore Point of Service returns a list of Hold accounts for the customer.
4. Select a Hold account from the list, then press **[Enter]**.

STOREPRIMARY SEARCH
Select one of the following StorePrimary accounts.

NAME	SETUP DATE	BALANCE
ACCOUNT ID	STATUS	
Holden, Pamela	08/26/2013	\$113.39
OH1973001000002	Ready to Pickup	

Back Select & Continue Set Up New
Esc Enter F9

5. At the Hold Account screen, select **Cancel Hold**.

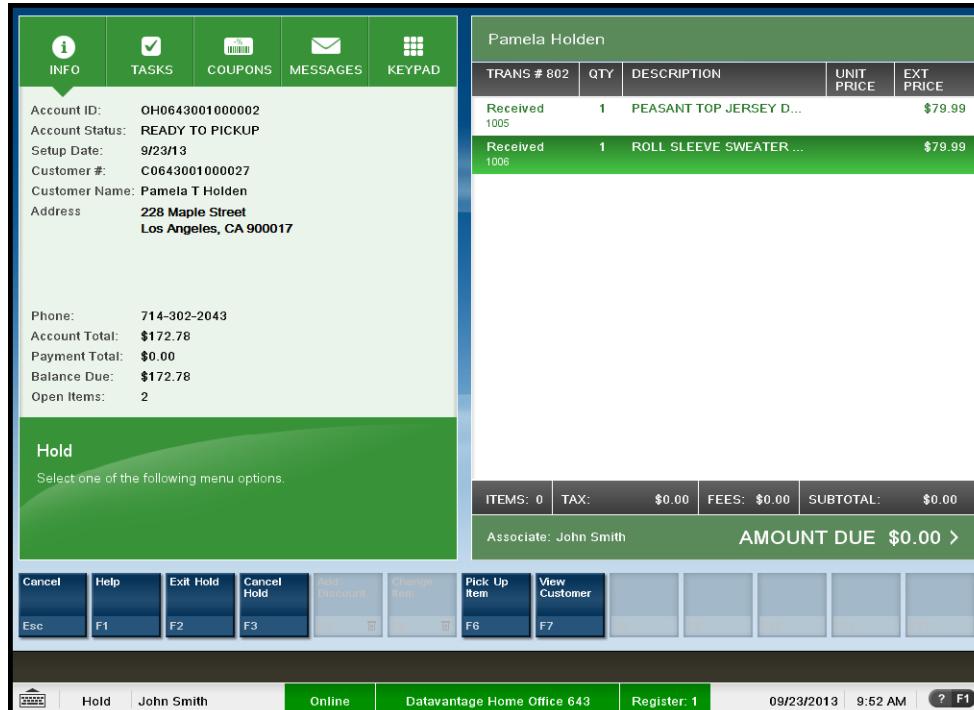


Figure 16-11: Hold Account Screen Button Options

6. When prompted, select **Yes** to confirm you want to cancel this Hold account. Selecting **No** returns to the Hold Account screen.

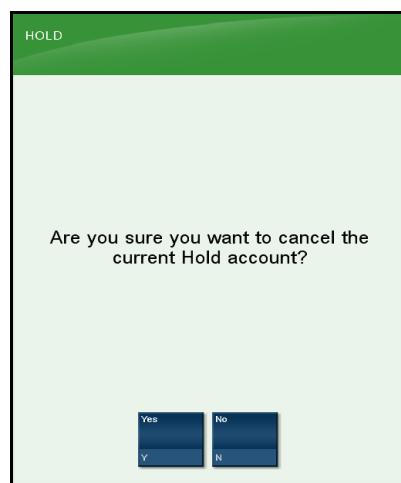


Figure 16-12: Cancel Hold Account Confirmation Prompt

7. The system returns to Sale mode where you can complete the cancel process.

Cancelling a Hold Account

Gift Registry

Overview

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 (formerly MICROS Retail Relate). The following can be done in the Register mode of Oracle Retail Xstore Point of Service:

- [Selling Gift Registry items](#)
- [Returning/Cancelling Gift Registry items](#)

Selling 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 as well as Oracle Retail Order Broker Cloud Service (formerly MICROS Retail Locate) orders.

Assign the Gift Registry

Important: 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.

Note: If the printed gift registry is available, scan the bar code to assign the gift registry to the sale.

1. From the Sale screen, select the **Register Options** menu button.

Selling Gift Registry items

- From the Register Options menu, select the **Assign Gift Registry** menu button.

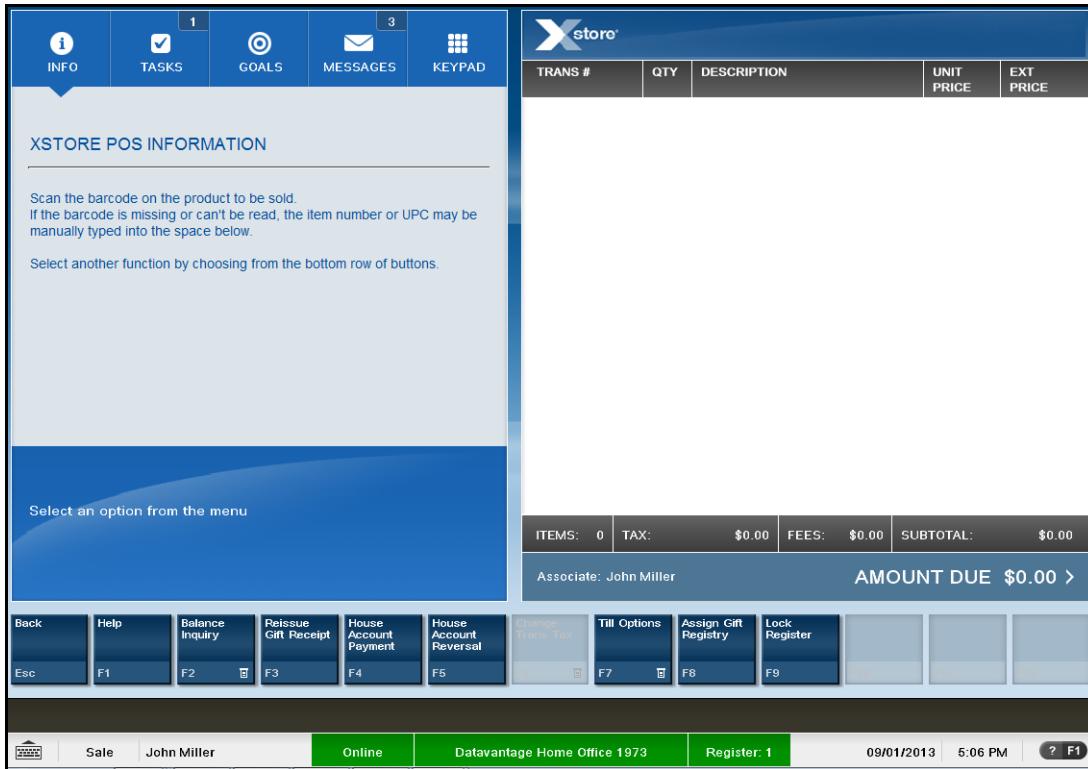


Figure 17-1: Register Options Menu - Assign Gift Registry

- Enter the search criteria and select **Process**.

The screenshot shows the "GIFT REGISTRY SEARCH" dialog box. It has a search bar at the top with the placeholder "Enter search criteria." and a magnifying glass icon. Below the search bar are five input fields: "Registry #", "Registry Name", "Owner Last Name", "Owner First Name", and "Event Type". At the bottom of the dialog are three buttons: "Back" (Esc), "Help" (F1), and "Process".

Figure 17-2: Gift Registry Search

- Select the desired registry from the returned list and press [Enter].

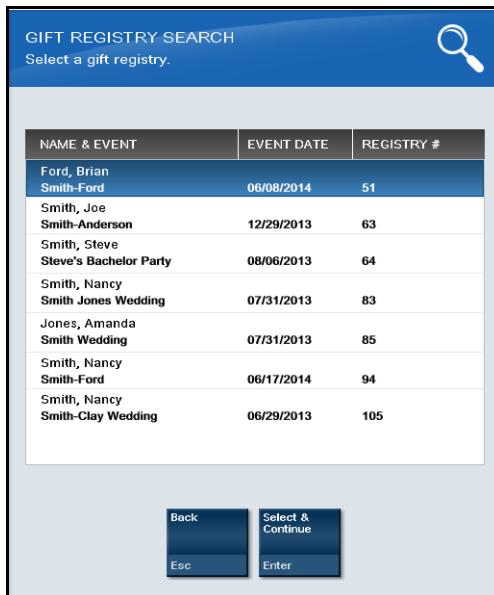


Figure 17-3: Gift Registry Search Results

- The Sale screen displays. Enter an item from the gift registry to purchase. The view port displays a gift registry number and gift receipt icon.

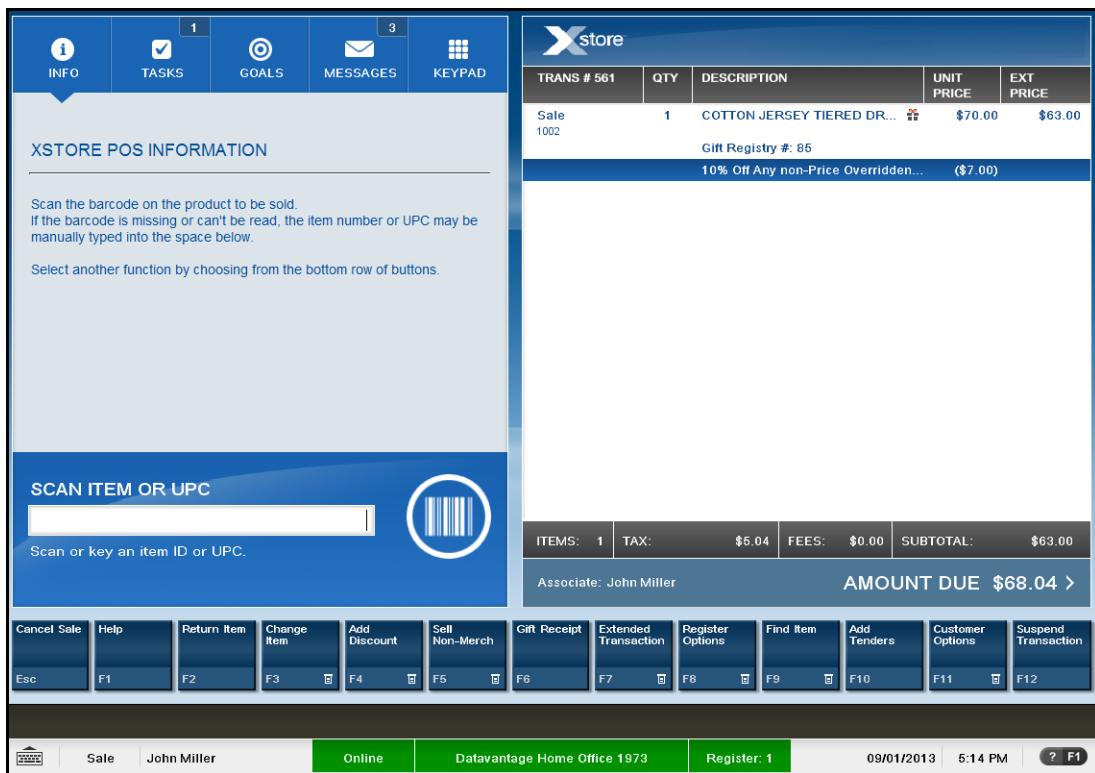
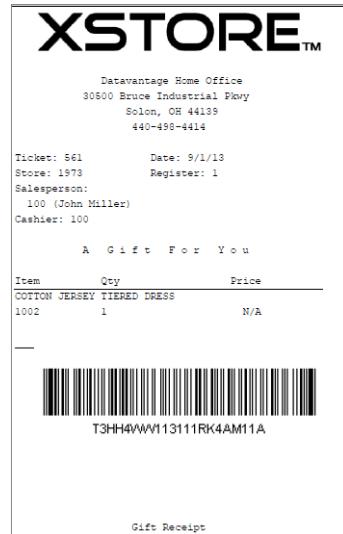


Figure 17-4: Sale with Gift Registry Item

Returning/Cancelling Gift Registry items

6. Complete the Sale. See [Entering Items into the Sale Screen](#) and [Sale Tenders](#).

Note: Xstore automatically prints a gift receipt for Gift Registry items based on your store's configuration.



Returning/Cancelling Gift Registry items

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 automatically updates the purchase quantity on the registry as a result of the return.

For Order Broker orders you must assign the gift registry *manually prior* to entering the return or cancelling the order.

1. Assign the customer to a sale (see [Associating a Customer with the Sale](#)).

Important: For Order Broker orders, assign the gift registry. Select **Register Options --> Assign Gift Registry** (see [Assign the Gift Registry](#)).

2. Return the item or cancel the order:

- Return the item (see [Return Transactions](#)).
- Cancel the order (see [Cancelling an Order](#)).

18

Task Management

Overview

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 (formerly MICROS Retail Relate) users, this section also includes instructions on how to use the Black Book feature to focus on your primary customers.

The following instructions are found in this chapter:

- [Viewing and Maintaining Your Tasks](#)
- [Viewing Your Black Book \[CUSTOMER ENGAGEMENT ONLY\]](#)

Viewing and Maintaining Your Tasks

Use the My Tasks screen to view and maintain your tasks.

Accessing the My Tasks Screen

Access the My Tasks screen through the Register Login screen or the Back Office. The functionality is the same, however, the Register screen has a green background and the Back Office screen has a black background:

Register Login Screen	Back Office
<ul style="list-style-type: none"> Select the My Tasks menu option. Enter your Employee ID and password. Press [Enter]. The Task List displays. <p>Note: If you use a biometric device for employee authentication, you are not prompted for a password.</p>	From the Back Office main menu, select Associate Tasks --> My Tasks . The Task List displays.

Task List Associate Sakthi, Shree Activity All				
P	DATE	START TIME	DURATION	ACTIVITY
↓	02/13/2015	12:00 PM	1.75 hours	APPOINTMENT
!	02/13/2015	3:00 PM	1 hour	TODO
	02/13/2015	4:00 PM	1 hour	APPOINTMENT
!	02/12/2015	6:00 AM	1 hour	TODO
!	02/12/2015	5:00 PM	1 hour	TASK
	02/11/2015	4:00 PM	169 hours	TODO
	02/11/2015	4:00 PM	1 hour	APPOINTMENT
	<i>Daisy's dress is for her daughter's wedding.</i>			
	02/11/2015	5:00 PM	1 hour	APPOINTMENT
↓	02/11/2015	5:00 PM	1 hour	TODO

Figure 18-1: Task List - Register

Task List Associate Sakthi, Shree Activity All				
P	DATE	START TIME	DURATION	ACTIVITY
↓	02/13/2015	12:00 PM	1.75 hours	APPOINTMENT
!	02/13/2015	3:00 PM	1 hour	TODO
	02/13/2015	4:00 PM	1 hour	APPOINTMENT
!	02/12/2015	6:00 AM	1 hour	TODO
!	02/12/2015	5:00 PM	1 hour	TASK
	02/11/2015	4:00 PM	169 hours	TODO
	02/11/2015	4:00 PM	1 hour	APPOINTMENT
	<i>Daisy's dress is for her daughter's wedding.</i>			
	02/11/2015	5:00 PM	1 hour	APPOINTMENT
↓	02/11/2015	5:00 PM	1 hour	TODO

Figure 18-2: Task List - Back Office

Viewing Task Information

Associates with a Manager security level or higher can view the list of tasks for all employees, as well as the store tasks. Associates with any security level below the Manager level can only view tasks assigned to them or assigned to their group(s).

The My Tasks screen displays all tasks visible to you. The menu options available are based on the task status and the associated workflow.

Task List		Associate	Sakthi, Shree	Activity All		Status All	Start Date	02/11/2015	End Date	03/13/2015
P	Date	Start Time	Duration	Activity	Description	Customer	Status	Associate		
!	02/13/2015	3:00 PM	1 hour	TODO	Mail Pre-Sale Invitations		In Progress	Shree Sakthi		
	02/12/2015	4:00 PM	1 hour	APPOINTMENT	Pre-Sale	Amy Cameron	Open	Shree Sakthi		
!	02/12/2015	5:00 PM	1 hour	TASK	Clean Fitting Room		Open	Shree Sakthi		
	02/11/2015	4:00 PM	1 hour	APPOINTMENT	Dress Fitting	Daisy Wagner	Open	Shree Sakthi		
	02/11/2015	5:00 PM	1 hour	APPOINTMENT	Dress Fitting	Cynthia Fox	Cancelled	Shree Sakthi		
↓	02/11/2015	5:00 PM	1 hour	TODO	Clean Counter		Open	Shree Sakthi		

Figure 18-3: My Tasks Screen

The My Task screen displays the following fields:

Table 18-1: Task List Fields

Field	Description
Priority (P)	The Importance of the task (High (!), Medium (none), or Low (↓).
Date	The date the task should be started.
Start Time	The time the task should begin.
Duration	The length of time for the task.
Activity	Type of task.
Description	Detailed description the task.
Customer	The customer associated with the task. If a customer is associated with the task, the task can be viewed from the Customer Maintenance Task tab as well, see Tasks Tab .

Viewing and Maintaining Your Tasks

Table 18-1: Task List Fields

Field	Description
Status	Indicates the progress of the task: Open - The appointment is open, but not started. In Progress - The appointment has been started, but not completed. Cancelled - The appointment has been cancelled and cannot be reopened or edited. Closed - The appointment has been completed and cannot be reopened or edited.
Associate	The employee or employee group responsible for completing the task.

Viewing Notes

The most recent note associated with the task displays beneath the task row:

Task List	Associate	Sakthi, Shree	Activity All	Status All	Start Date	02/11/2015	End Date	03/13/2015
P	DATE	START TIME	DURATION	ACTIVITY	DESCRIPTION	CUSTOMER	STATUS	ASSOCIATE
!	02/13/2015	3:00 PM	1 hour	TODO	Mail Pre-Sale Invitations		In Progress	Shree Sakthi
	02/12/2015	4:00 PM	1 hour	APPOINTMENT	Pre-Sale	Amy Cameron	Open	Shree Sakthi
!	02/12/2015	5:00 PM	1 hour	TASK	Clean Fitting Room		Open	Shree Sakthi
	02/11/2015	4:00 PM	1 hour	APPOINTMENT	Dress Fitting	Daisy Wagner	Open	Shree Sakthi
					Daisy's dress is for her daughter's wedding.			

Figure 18-4: View Recent Note

To view all notes associated with the task, select **View Notes** menu option.

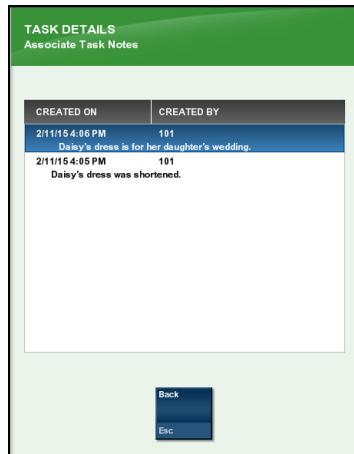


Figure 18-5: Associate Task Notes

Filtering Tasks

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. To filter:

1. Select one of the following Headings:

- **Associate** - your security privileges determine which Associates you can view. Select a value and then select **Ok**.
- **Activity** - Select a value and then select **Ok**.
- **Status** - Select a value and then select **Ok**.
- **Start Date** - override the default value.
- **End Date** - override the default value.



Figure 18-6: Filter Bar

Oracle Retail Xstore Point of Service displays tasks that meet your filter values.

Note: You can also use the following menu options to filter:

- Associate List Filter
- Activity List Filter
- Status List Filter

Sorting Columns

Select a heading to sort information by descending or ascending order.

Task List	Associate	Sakthi, Shree	Activity All	Status All	Start Date	02/11/2015	End Date	03/13/2015	
P	DATE		START TIME	DURATION	ACTIVITY	DESCRIPTION	CUSTOMER	STATUS	ASSOCIATE
P	02/13/2015		4:00 PM	1 hour	APPOINTMENT	Pre-Sale	Amy Cameron	Open	Shree Sakthi
P	02/13/2015		3:00 PM	1 hour	TODO	Mail Pre-Sale Invitations		In Progress	Shree Sakthi
P	02/12/2015		5:00 PM	1 hour	TASK	Clean Fitting Room		Open	Shree Sakthi

Figure 18-7: Task List Sort Columns - Date

Viewing Customer Information

To view customer information:

1. Select the task associated with the customer and then select the **View Customer** menu option. The Customer Maintenance screen displays the Contact Information tab.
2. To view all tasks associated with the customer, select the **Tasks** tab. See [Tasks Tab](#).
3. Select **Cancel** to return to the Task List.

Adding a Task

1. From the My Tasks screen or the Customer Maintenance Task tab, select **Add Task**. The Task Details prompt displays.

Viewing and Maintaining Your Tasks

2. Enter the following task information:

The screenshot shows the 'TASK DETAILS' window with the following fields filled in:

- Type: APPOINTMENT
- Description: TODO
- Priority: TASK
- Start Date: 02/13/2015
- End Date: 02/13/2015
- Visibility: Store
- Assigned To: Customer

At the bottom, there are four buttons: Back (Esc), Help (F1), Assign Customer (F6), and Save (F8).

Figure 18-8: Task Details - Add Task

Note: Admin and Event type tasks cannot be added through Xstore. Admin and Event type tasks may still be viewed on the task list.

Table 18-2: Task Details Options

Field	Description
Type	Select a pre-defined task category. The categories are customized by your home office.
Description	Enter a detailed description of the task you are creating.
Priority	Select the priority of the task (High , Medium , or Low).
Start Date	Enter the date the task should be started.
End Date	Enter the date the task should be completed.
Start Time	Enter the time the task should begin. If you enter the time as military, Oracle Retail Xstore Point of Service will convert the time when you press [Enter].
End Time	Enter the time the task should end. If you enter the time as military, Oracle Retail Xstore Point of Service will convert the time when you press [Enter].
Visibility	Select the group that can view the task (Store , Employee Group , or Employee). Note: If using Customer Engagement tasks, Employee Group visibility is not an option.

Table 18-2: Task Details Options

Field	Description
Assigned To	<p>This option is only editable if the Visibility field is set to Employee Group or Employee. Select from the list.</p> <p>Note: The employee must exist in Customer Engagement. If not, Oracle Retail Xstore Point of Service will indicate the user supplied is not a valid Customer Engagement user.</p>

3. If needed, assign a customer to the task:

- a. Select the **Assign Customer** button.
- b. Enter your search criteria and then select **Process**.
- c. If a list of matching customer records is found, select a customer from the list and choose one of these options:
 - * **Select & Continue** – Assigns the selected name to the task.
 - * **Select & View** – Opens the selected customer record for viewing, editing, or printing. See [Viewing a Customer Record](#). Once you are done viewing or editing the record, select **Assign and Continue** option to associate the customer's information to the task.
 - * **New** – Displays a form for adding a new customer record to the customer database. See [Adding a New Customer Record](#).

Important: If you are adding a task from the Customer Maintenance screen, you do not have the option to add the customer to the task. Oracle Retail Xstore Point of Service will automatically assign the task to the customer.

4. Select **Save**. The task displays on the Task List, see [Figure 18-3](#).

Adding Notes

1. From the My Tasks screen or the Customer Maintenance Tasks tab, select the appointment.
2. Select **Add Note**.

Viewing and Maintaining Your Tasks

3. Enter the text of your note and then select **Ok**.



Figure 18-9: Task Details - Enter Notes

4. The note displays beneath the task row. To view additional notes, select **View Notes**.

Task List		Associate Sakthi, Shree		Activity All		Status All		Start Date	02/11/2015	End Date	03/13/2015
P	Date	Start Time	Duration	Activity	Description	Customer	Status	Associate			
!	02/13/2015	3:00 PM	1 hour	TODO	Mail Pre-Sale Invitations		In Progress	Shree Sakthi			
	02/12/2015	4:00 PM	1 hour	APPOINTMENT	Pre-Sale	Amy Cameron	Open	Shree Sakthi			
!	02/12/2015	5:00 PM	1 hour	TASK	Clean Fitting Room		Open	Shree Sakthi			
	02/11/2015	4:00 PM	1 hour	APPOINTMENT	Dress Fitting	Daisy Wagner	Open	Shree Sakthi			
		Daisy's dress is for her daughter's wedding.									

Figure 18-10: My Tasks screen - Note

Editing a Task

1. From the My Tasks screen or the Customer Maintenance Tasks tab, select the task you wish to edit.
2. Select **Edit Task**. The Task Details prompt displays. Modify information as needed. Grayed out fields cannot be modified. Your security privilege may prevent you from being able to modify the visibility and assigned to fields.

Figure 18-11: Task Details

3. To modify the assigned customer, select **Assign Customer** (see step 3).

- Select **Save**. The task is updated with the new information and displays on the Associate Task screen.

Updating Task Progress

The status of tasks can only be updated through the My Tasks menu option. You cannot update the status from the Customer Maintenance screen.

To update the status of a task:

- From the My Tasks screen, select the task.
- Select a status menu option. All status menu options may not be visible depending on the current status of the task. Oracle Retail Xstore Point of Service displays the next status options in the workflow. Menu options include:
 - Begin Task** - Sets the status to In progress.
 - Reopen Task** - Sets the status to Open.
 - Complete Task** - Sets the status to Closed and *cannot be re-opened or edited*. A verification prompt displays, select **Yes** if applicable.
 - Cancel Task** - Sets the status to Cancelled and *cannot be re-opened or edited*. A verification prompt displays, select **Yes** if applicable.

The task status is updated.

Task List	Associate	Sakthi, Shree	Activity All	Status All	Start Date	02/11/2015	End Date	03/13/2015
P	DATE	START TIME	DURATION	ACTIVITY	DESCRIPTION	CUSTOMER	STATUS	ASSOCIATE
!	02/13/2015	3:00 PM	1 hour	TODO	Mail Pre-Sale Invitations		In Progress	Shree Sakthi

Figure 18-12: Begin Task Option - In Progress Status

Viewing Your Black Book [CUSTOMER ENGAGEMENT ONLY]

Use the Black Book feature to view your primary customers contact information. The Black Book feature is only available to Oracle Retail Customer Engagement Cloud Services (formerly MICROS Retail Relate) users. Your security privileges determine the associates and customers you can access.

To view the Black Book screen:

- Open the Back Office Main Menu and then select **Associate Tasks -->Black Book**.
- Depending on your security privileges either:
 - The My Customer screen displays.
 - <OR>
 - The Associate Filter prompt displays. Select an associate and press **[Enter]**. The My Customers screen displays.

Tip: To view the customers for a different associate, select **Back**. Select an associate from the Associate Filter prompt and press **[Enter]**.

Viewing Your Black Book [CUSTOMER ENGAGEMENT ONLY]

My Customers			Associate Gayle Graham
CUSTOMER NAME	EMAIL	PHONE	
Pamela Brown	pamelabrown2@gmail.com	484-901-2448	
Sabrina Aaron	sabrinaaaron@yahoo.com	918-784-7410	
Levi Aaron	leviaaron@gmail.com	954-392-3344	
Peter Abate	peterabate@gmail.com	360-793-0993	
Lise Aaron	liseraaron@yahoo.com	386-627-6129	
Steve Aaron	steveaaron@yahoo.com	712-346-8385	
Natalie Aaston	geraldclilley@gmail.com	314-333-2950	

Back Help View Customer Esc F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 Register F12

Figure 18-13: My Customers Screen

The My Customers Screen displays the following:

Table 18-3: My Customers Screen Fields

Field	Description
Customer Name	The primary customer's name.
Email	The primary customer's email address.
Phone	The primary customer's phone number.

Viewing a Customer Record

To view a customer record from the Black Book:

1. Select a customer from the list and then select **View Customer**. The Customer Maintenance Purchase History tab displays. See [Purchase History Tab](#).
2. Select **Back** to return to the My Customers screen.

Miscellaneous Transactions

Overview

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:

- Clocking in and clocking out process (see [Clocking In and Clocking Out](#)).
- Balance inquiry process (see [Balance Inquiry](#)).
- Change password process (see [Changing Your Password](#)).
- Viewing your timecard record (see [Viewing Your Timecard](#)).
- Viewing your work schedule (see [Viewing/Printing Your Work Schedule](#)).
- Viewing Other Employees' Schedules (see [Viewing Other Employees' Schedules](#)).
- House Account Payments (see [House Account Payment](#)).
- Post Voids (see [Post Void](#)).
- No Sales (see [No Sale](#)).
- Locking/Unlocking a Register (see [Lock/Unlock a Register](#)).

Clocking In and Clocking 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 steps.

Clocking In

- At the Login screen, select the **Clock In/Out** option. The system knows your clock-in status. If you are clocked in you are prompted to clock out; if you are not clocked in you are prompted to do so. This option is available at both the Register Login screen and the Back Office Login screen.

Tip: Touch-screen users swipe the clock area to clock in or clock out.

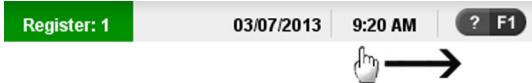
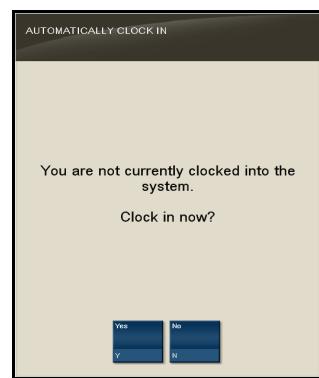


Figure 19-1: Register Login Screen

Note: After logging in, if you are required to clock in, Oracle Retail Xstore Point of Service prompts you to do that by displaying a message. Select *Yes* and go to step 4.



2. Scan or enter your employee ID at the Clock In/Out prompt.
3. At the Clock In/Out Employee Password prompt, enter your password and press [Enter] to continue.
4. If prompted, use the up and down arrow keys to select a work code for your current activity and press [Enter] to continue.

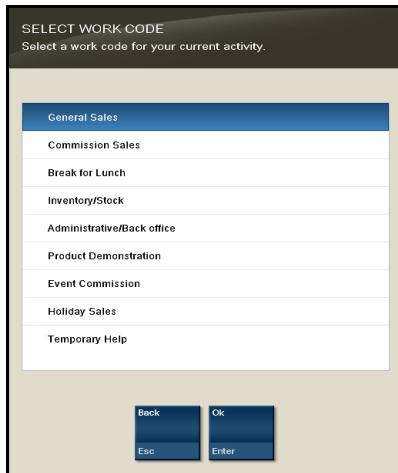


Figure 19-2: Work Code List

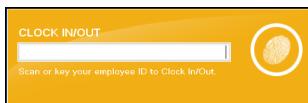
You are now clocked in and the system may print a clock in receipt for your records.

Clocking Out

1. At the Login screen, select the **Clock In/Out** option. The system knows your clock-in status. If you are clocked in you are prompted to clock out; if you are not clocked in you are prompted to do so. This option is available at both the Register Login screen and the Back Office Login screen.
2. Scan or enter your employee ID at the Clock In/Out Employee ID prompt and press [Enter].



Note: If your system is set up to use a Biometric Fingerprint device, an Employee ID prompt displays. Use the device to scan your fingerprint rather than entering your user ID and password. You may also scan or type your user id and password at this prompt if needed.



3. At the Clock In/Out Employee Password prompt, enter your password and press [Enter] to continue.

Clocking In and Clocking Out

4. You may be asked whether you want to clock out or if you would like to clock in for a new work activity:

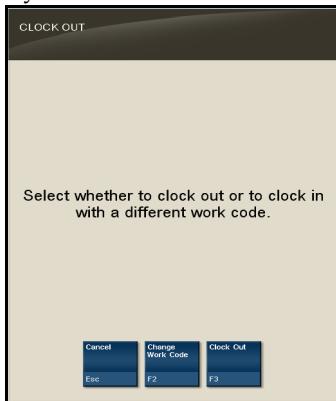


Figure 19-3: Clock Out/New Work Code Prompt

- To clock out for the day, select the **Clock Out** option. You are now clocked out for the day and the system may print a clock out receipt for your records.
- To change your work code assignment, select the **Change Work Code** option. Selecting this option automatically clocks you out for your current work code assignment and prompts you to select a new work code. The system then automatically clocks you back in for the new assignment. The system may also print both a clock out receipt for your old work code activity and a clock in receipt for your new work code activity.

Clocking In and Out from 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 take your meal break, select the Clock In/Out button from the main menu, enter your ID and password when prompted, and choose the meal break option from the Work Codes list.

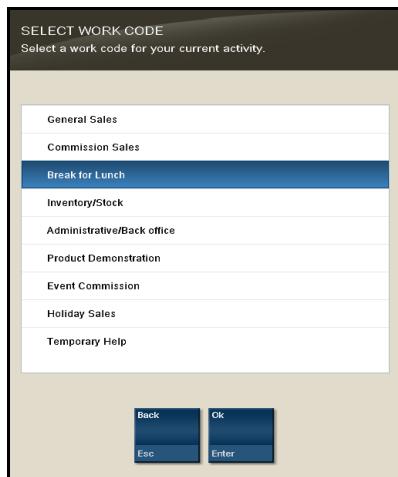


Figure 19-4: Work Codes List

The system automatically clocks you out from the current work code and clocks you in to the meal break work code.

- If you try to clock out (or to clock in with a different work code) from the meal break before 30 minutes have elapsed, then the message shown here is displayed.

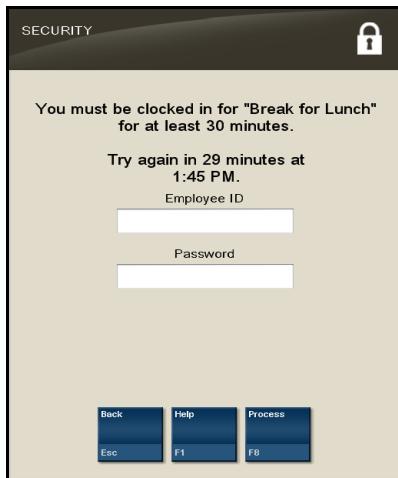


Figure 19-5: Try To Clock Out Early Message

If a minimum clocked-out time interval is used

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.

In effect, 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.

- To take your break at some point after your initial clock-in for the day, select the Clock In/Out button from the main menu, enter your ID and password when prompted, and choose to clock out.

Balance Inquiry

You are clocked out from the current work code.

2. If you try to clock back in to the system before 30 minutes have elapsed, then the message shown here is displayed. (The work code in this example has been replaced by XXXXXXXX.)

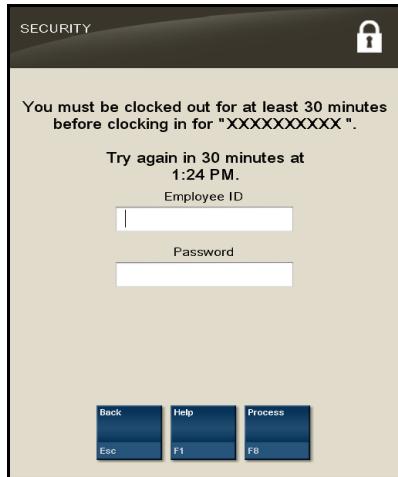


Figure 19-6: Try To Clock In Early Message

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. Select **Balance Inquiry** at the Register Login screen to view the inquiry functions available in your store.

2. Select the type of inquiry you want to perform by selecting the appropriate option from the Balance Inquiry menu.

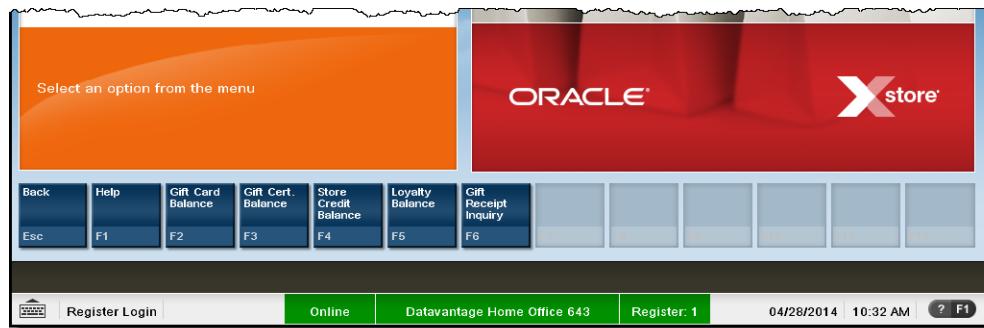


Figure 19-7: Balance Inquiry Menu Options

3. At the prompt, enter the information as prompted: a card number, account number, or gift receipt information.

A screenshot of a "Balance Inquiry" prompt window. It has a text input field labeled "Enter the Store Credit number." and a large "#".

Figure 19-8: Store Credit Number Prompt

A screenshot of a "Enter Price" prompt window. It has a text input field labeled "Scan or key encoded price from the gift receipt." and a large "\$".

Figure 19-9: Gift Receipt Prompt

Note: The information required here varies according to the type of balance inquiry you are performing. Enter the applicable information and press [Enter] to continue.

4. The system retrieves the account balance/gift receipt information and displays the information on the screen.

A screenshot of a "VOUCHER" message window. It displays the text "The available balance is \$27.00." and "Would you like a receipt?". At the bottom are two buttons: "Yes" and "No". The "Yes" button has "Y" and "N" options below it.

Figure 19-10: Available Account Balance

A screenshot of a "GIFT RECEIPT" message window. It displays the text "The item price is \$79.99". At the bottom is an "Ok" button with "Enter" below it.

Figure 19-11: Item Price From Gift Receipt

- If applicable, press [Y] to print a receipt for this balance information.
<OR>

Changing Your Password

- If applicable, press [N] if you do not need a printed receipt for this balance information.
- If the option to print a receipt is not available, press [**Enter**] to close the prompt.

Note: The system displays a message if the account is closed or cannot be located.

If a deal or discount was applied to the gift item at the time of purchase, you cannot use Balance Inquiry to look up the price. No item price code is printed on the receipt.



When a balance inquiry for a store credit or gift certificate is performed, Oracle Retail Xstore

Point of Service first determines which currency the store credit or gift certificate is in. If this currency is different than your store's local currency, then the foreign tender amount of the store credit or gift certificate is automatically converted to the local tender and amount using the current exchange rate on file. This localization is shown on the screen and on the receipt, if printed.

5. If you chose to print a receipt, the information shown on the receipt includes the date of this inquiry, the card or account information (masked), and the available balance on the card or account.

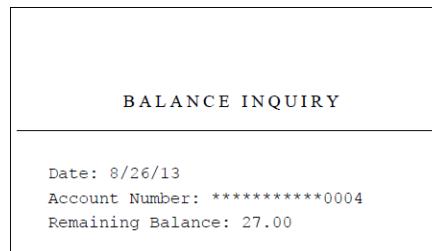


Figure 19-12: Sample Balance Inquiry Receipt

Changing Your Password

The **Change Password** option is available from the Register Login screen or the Back Office Login screen - *before* you log in.

1. Select the **Change Password** option from the Register Login screen or the Back Office Login screen. Oracle Retail Xstore Point of Service prompts for your employee ID.

2. Type or scan your employee ID at the Change Password prompt and press [Enter]. If fingerprint scans are supported, scan your finger at the prompt.

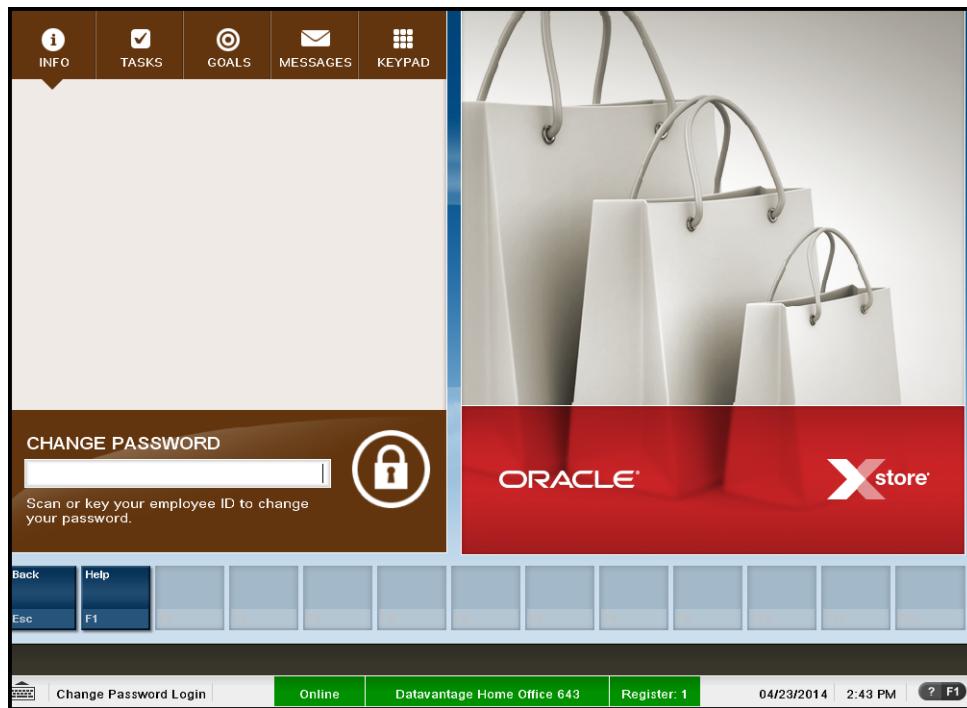


Figure 19-13: Change Password Login Screen

3. At the prompt for your password, enter your **current** password and press [Enter].

Note: If you scanned your finger, this prompt is not displayed.

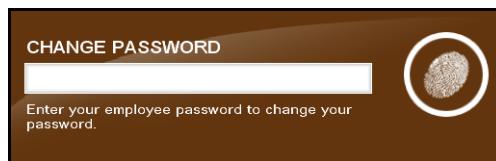


Figure 19-14: Enter Current Password Prompt

Changing Your Password

4. You are now prompted to enter and confirm your **new** password. Type your new password in the first field and type the password again to confirm it in the field below.

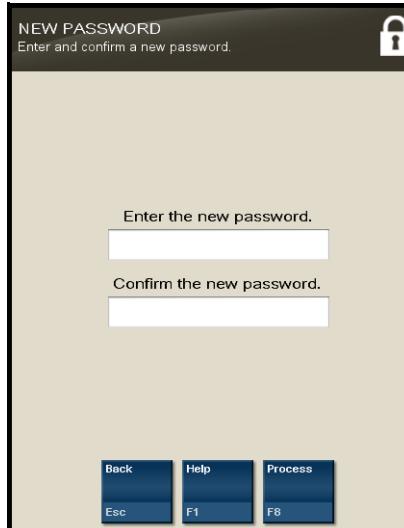


Figure 19-15: New Password Prompt

Tip: Passwords may be case sensitive so notice whether the Caps Lock key is on or off when you enter and confirm your new password.

5. Select **Process** to store your new password. If the system accepts the password, a confirmation message is shown indicating your password has been changed. Press **[Enter]** to acknowledge this prompt and return to the Register Login screen.

Note: The system 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.

To Change Your Password with Challenge Questions

If your store is configured to use password challenge questions, you can re-set your password without knowing your current password by answering a set of questions. The answers to the questions are established using the Back Office see the *Oracle Retail Xstore Point of Service Manager's Guide*.

1. Select the **Change Password** option from the Register Login screen or the Back Office Login screen. Oracle Retail Xstore Point of Service prompts for your employee ID.



Figure 19-16: Change Password Menu Option

2. Type or scan your employee ID at the Change Password prompt and press [Enter]. If fingerprint scans are supported, scan your finger at the prompt.
3. Select the **Forgot Password** menu button.



Figure 19-17: Forgot Password Menu Option

4. Enter your last name for verification.

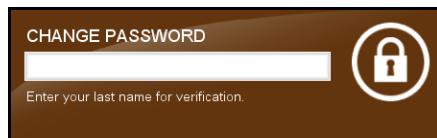


Figure 19-18: Change Password Verification

Viewing Your Timecard

5. For each challenge question, type the answer and then select **Next Question**. For the last question, select **Process**.

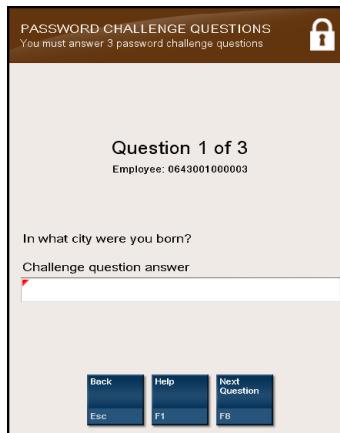


Figure 19-19: Example Challenge Question

6. Once you've answered all the questions correctly, the New Password prompt displays. Type your new password in the first field and type the password again to confirm it in the field below.

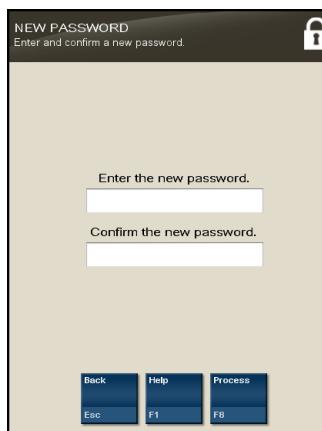


Figure 19-20: New Password Prompt

7. Select **Process** to save your new password. If the system accepts the password, a confirmation message is shown indicating your password has been changed.
8. Press [**Enter**] to acknowledge this prompt and return to the Register Login screen.

Note: The system 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.

Viewing Your Timecard

Use the following procedure to review your timecard. This option is available at both the Register Login screen and the Back Office Login screen.

1. At either Login Screen, select the **View Schedule & Time** option.
2. Select the **View Timecard** option.
3. Scan or enter your employee ID at the View Timecard Employee ID prompt and press **[Enter]**.



4. At the View Timecard Employee Password prompt, type your password and press **[Enter]** to continue.

Note: If you use a biometric device for employee authentication, you are not prompted for a password.

5. Your timecard entries for the current payroll week are displayed. This screen is view-only, however you can add a comment that will be linked to your timecard for this payroll week.

Figure 19-21: Timecard Maintenance Screen

Note: To view your timecard/schedule for a different week, select the **Payroll Dates** option and select a week from the list.

Adding a Comment to Your Timecard Record

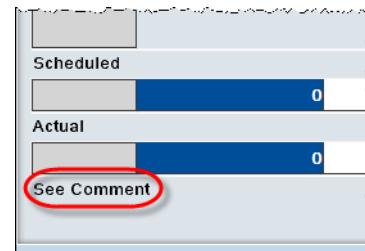
1. With your timecard record displayed, select **Next Tab**. The Timecard Comment screen displays.
2. At the Timecard Comment screen, select the **Add Comment** option.

Viewing/Printing Your Work Schedule

- Type a comment in the Add Comment form and press [Enter].

Figure 19-22: Timecard Add Comment Form

The comment is now associated with this record as indicated by the **See Comment** text at the bottom of the Timecard Maintenance screen.



- To view timecard comments, select the **Timecard Comment** tab.

Figure 19-23: Timecard Comment

All comments that are associated with this timecard record are displayed. In addition to the comment, the date and time the comment was entered and the ID of the person who entered the comment are also shown.

Viewing/Printing Your Work Schedule

Use the following procedure to view your work schedule. This option is available at both the Register Login screen and the Back Office Login screen.

- At either Login Screen, select the **View Schedule & Time** option.
- Select the **View Schedule** option.
- Scan or enter your employee ID at the View Schedule Employee ID prompt and press [Enter].
- At the View Schedule Employee Password prompt, type your password and press [Enter] to continue.

Note: If you use a biometric device for employee authentication, you are not prompted for a password.

The system displays the work schedule for the current payroll week.

Employee Schedule		Sched. Hrs: 160.00	From: 01/25/2015	Sched. Amt: 0.00		To: 01/31/2015		
	TOTAL HOURS	SUN 1/25/15	MON 1/26/15	TUE 1/27/15	WED 1/28/15	THU 1/29/15	FRI 1/30/15	SAT 1/31/15
Brown, Sarah	Working: 20.00 Break: 0.00		9:00 AM 1:00 PM CASHIER					
Dubois, Marie	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM CASHIER					
Gagnon, Jean	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM SALES					
Johnson, Simon	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM SALES					
Sakthi, Shree	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM ADMIN					
Smith, John	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM ADMIN					

Back Help Schedule Dates Previous Week Next Week Print Schedule F6 Esc F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12

Figure 19-24: Employee Schedule Screen - Weekly Summary

The information shown here includes the hours and your work assignment for each day of the week and the total number of hours and break time scheduled for the week.

5. With your schedule displayed, you have the following options here:

- Select the **Previous Week** option to view last week's schedule.
- Select the **Next Week** option to view your work schedule for next week.
- Select the **Schedule Dates** option to view a specific week's work schedule:

The system displays a list of schedule week dates.

SCHEDULE WEEKS
Select a week.

06/30/2013	—	07/06/2013
07/07/2013	—	07/13/2013
07/14/2013	—	07/20/2013
07/21/2013	—	07/27/2013
07/28/2013	—	08/03/2013
08/04/2013	—	08/10/2013
08/11/2013	—	08/17/2013
08/18/2013	—	08/24/2013
08/25/2013	—	08/31/2013
09/01/2013	—	09/07/2013

Back Ok
Esc Enter

Figure 19-25: Schedule Week Dates

Viewing Other Employees' Schedules

Use the up and down arrow keys to select a schedule week date from the list and press [Enter] to view your work schedule for the selected week.

Printing Your Schedule

To print a copy of your schedule for the displayed week, select the **Print Schedule** from the Employee Schedule Screen. The system prints the schedule on the receipt printer.

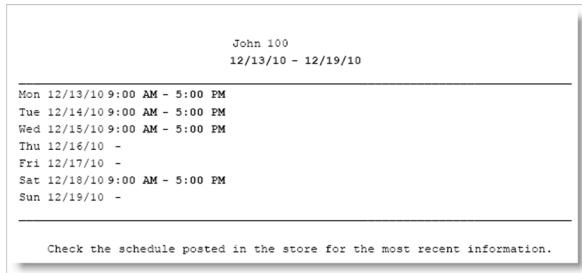


Figure 19-26: Printed Schedule Example

Viewing Other Employees' Schedules

Use the following procedure to view a list of associates that are scheduled to work on a specific day.

1. At either Login Screen, select the **View Schedule & Time** option.
2. Select the **View Scheduled Employees** option.
3. Scan or enter your employee ID at the View Schedule Employee ID prompt and press [Enter].
4. At the View Schedule Employee Password prompt, type your password and press [Enter] to continue.

Note: If you use a biometric device for employee authentication, you are not prompted for a password.

The system displays a list of associates scheduled to work on this day.

SCHEDULED EMPLOYEES		
The following employees are scheduled to work on Wednesday, July 24, 2013		
NAME	WORK CODE	SHIFT
Hayes, Millie	CASHIER	1:30 PM - 7:30 PM
Hunt, Jack	CASHIER	1:30 PM - 8:00 PM
Kestrel, Mary	CASHIER	2:00 PM - 9:00 PM
LeClair, Wayne	CASHIER	2:00 PM - 5:00 PM
Smith, John	ADMIN	1:00 PM - 8:30 PM

Back Esc Previous Day F4 Next Day F5

Figure 19-27: List of Scheduled Employees

The information shown here includes each associate's name, work code, and the scheduled shift hours.

5. To view the employees scheduled to work tomorrow and on future dates, select the **Next Day** option. To View the employees that were scheduled to work yesterday and previous days, select the **Previous Day** option.

House Account Payment

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.

Receiving a House Account Payment

1. Associate a customer with the transaction. Use the Customer Search screen to find the customer or company that is making the payment.
2. At the Sale screen, select **Register Options**.
3. At the Register Options menu, select **House Account Payment**.
4. Select the authorized buyer making the payment to the account and press [Enter].

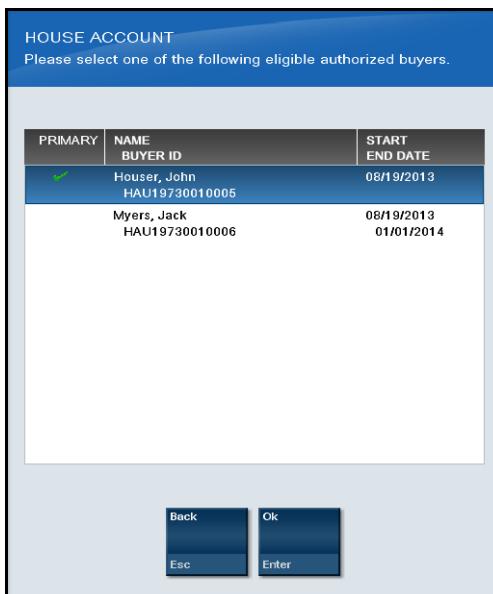


Figure 19-28: House Account Authorized Buyer List

5. Enter the payment amount and press [Enter].

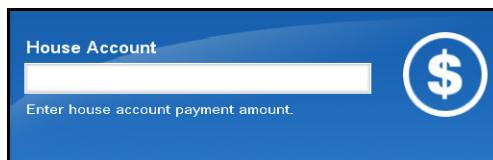


Figure 19-29: House Account Payment Amount Prompt

House Account Payment

6. If prompted, enter the date of the payment statement on which the payment should appear and press [Enter].

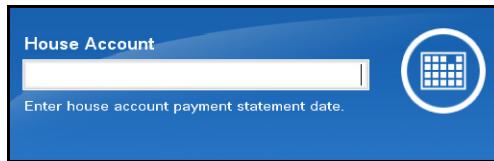


Figure 19-30: House Account Payment Statement Date Prompt

7. If prompted, enter the Invoice Number against which the payment is applied and press [Enter].

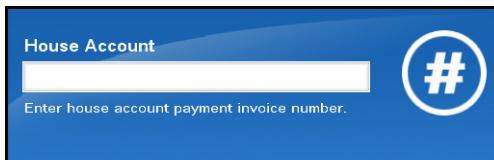
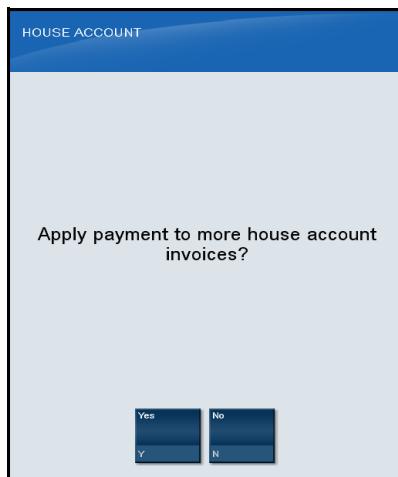


Figure 19-31: House Account Payment Invoice Number Prompt

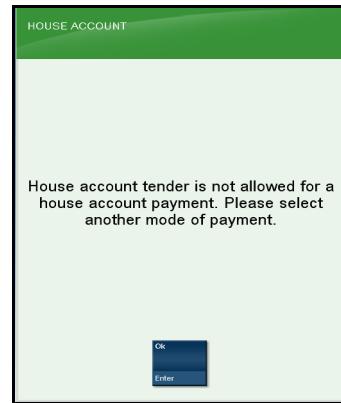
8. The system may ask if any more payment invoice numbers must be entered in this transaction:



- Choose **Yes** if more invoice numbers must be entered in this transaction. Go to step 7.
 - Choose **No** to return to the Register Options screen.
9. Choose another option at the Register Options menu or select **Back** to return to the Sale screen.

10. Complete the transaction by selecting the **Add Tenders** option. Select a tender type and choose **Ok**.

Note: Payments made to a House Account cannot be tendered using a House Account tender.



11. Enter the tender amount and press [**Enter**].
 12. When the system asks if the sale is complete, select **Yes**.

Reversing a House Account Payment

Use this function to reverse a payment on a house account.

1. Associate a customer with the transaction. Use the Customer Search screen to find the customer or company that is reversing the payment.
2. At the Sale screen, select **Register Options**.
3. At the Register Options menu, select **House Account Reversal**.
4. If the customer has more than one house account, select the account from the list.
5. When prompted, select a payment to be reversed and press [**Enter**].

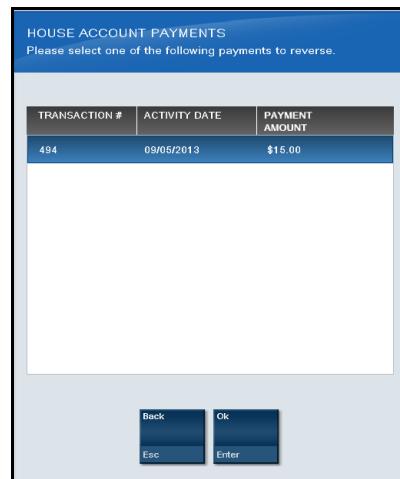


Figure 19-32: House Account Payments List

House Account Payment

6. Select a reason for the house account reversal and press [Enter].

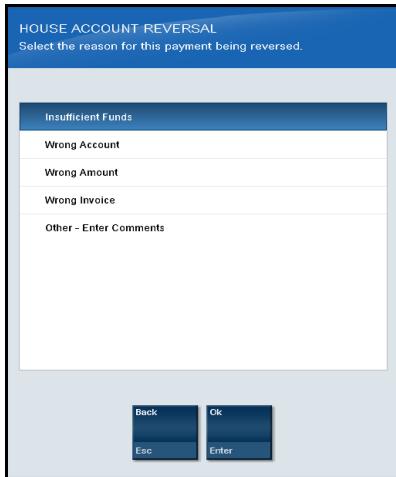


Figure 19-33: House Account Reversal Reason Code List

7. When prompted, type additional information about this house account payment reversal and press [Enter].

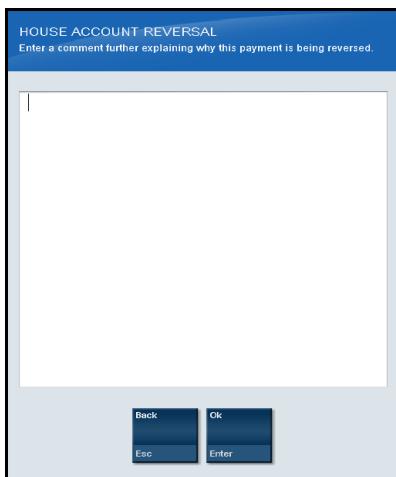


Figure 19-34: House Account Reversal Comment Prompt

- The house account payment reversal amount is shown in the View Port. Press [Esc] to return to the Sale screen and tender the payment reversal refund.

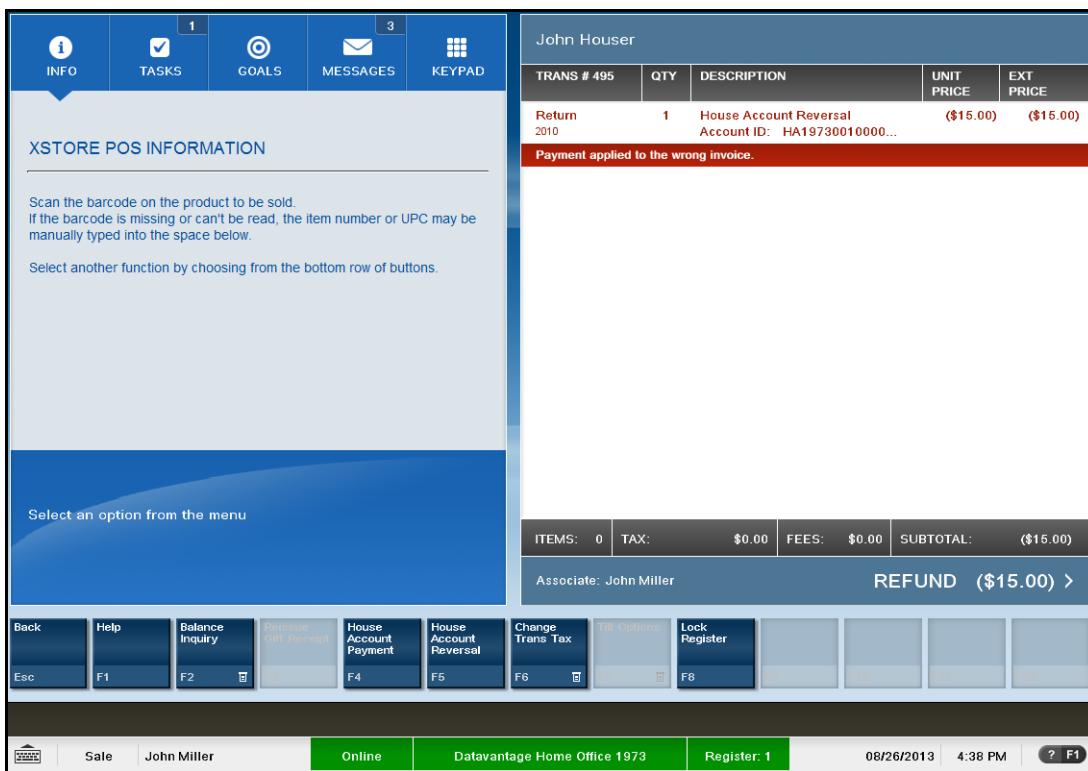


Figure 19-35: House Account Payment Reversal

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.

Performing a Post Void from the Register

1. At the Register Login screen, select **Manage Tills** and log in to display the **Manage Tills** menu, then select **Till Options --> Post Void**.
2. When the system prompts for the transaction barcode, scan the receipt barcode or enter the information manually and select **Process**.

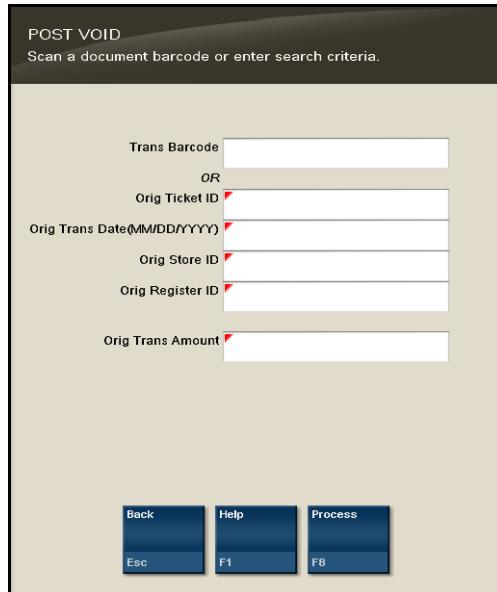
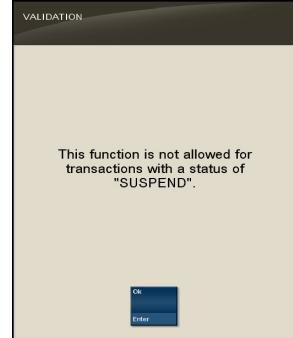


Figure 19-36: Prompt for Transaction Barcode

Note: If you scan or enter a barcode for a transaction type that cannot be post voided (such as a suspended transaction), the system displays a message informing you that the transaction cannot be post voided.



3. The system displays a message that prompts you to confirm that you want to post void the transaction. Select **Yes** to continue or **No** if you have changed your mind.

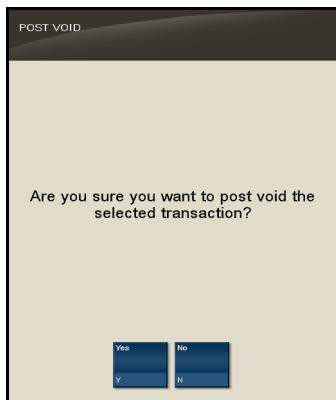


Figure 19-37: Prompt to Confirm Post Void

4. The system may require that you select a reason for post-voiding a transaction, depending upon your store policy. If prompted, select a reason from the list and select **Ok**. Use the up and down arrow keys to scroll through the list.

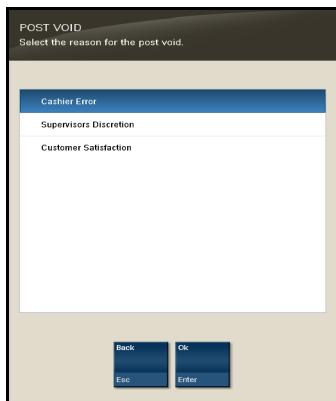


Figure 19-38: List of Post Void Reasons

5. If necessary, scan the cash drawer with which to perform the post void.
6. Your system may also be configured to require a comment entry about the Post Void transaction. If it does, a free-form text screen displays where you can type a comment. The kind of information you enter may be determined by your store policy. After entering a comment, select **Ok**.

Note: If awards were used to reduce the customer's cost on the original transaction, the awards are reversed after the Post Void transaction and added back to the customer's account.

No Sale

The system voids the transaction, prints void receipts for your records, and returns to the previous screen where you can continue working.

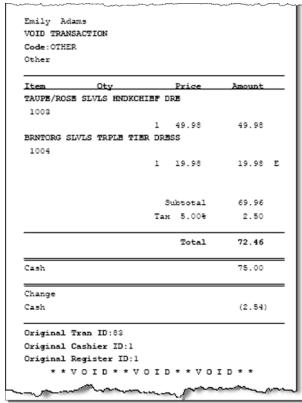


Figure 19-39: Void Receipt Example

No Sale

Use the **No Sale** option to open the cash drawer for a reason other than a normal sale transaction.

1. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, then select **Till Options --> No Sale**.
Or, at the Sale screen, select **Register Options --> Till Options --> No Sale**.
2. The system prompts you to select the reason you are opening the cash drawer. Select a reason from the list and press **[Enter]**.

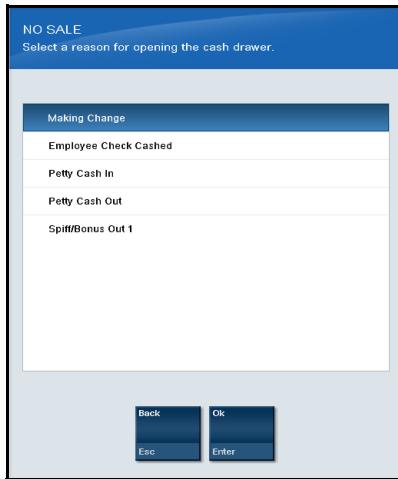


Figure 19-40: No Sale Reason List

3. If necessary, scan the cash drawer on which to perform the no sale.
4. The system may prompt you to enter a comment about the reason for opening the cash drawer. If it is required, enter the pertinent information in the comment entry form and press **[Enter]**.

The system prints a No Sale receipt for your records.



Figure 19-41: No Sale Receipt Sample

Lock/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.

Locking a Register

1. At the Register Login screen, select **Manage Tills** and log in to display the **Manage Tills** menu, and then select **Till Options --> Lock Register**.
Or, at the Sale screen, select **Register Options --> Lock Register**.
2. The system displays a message indicating that the system is now locked.

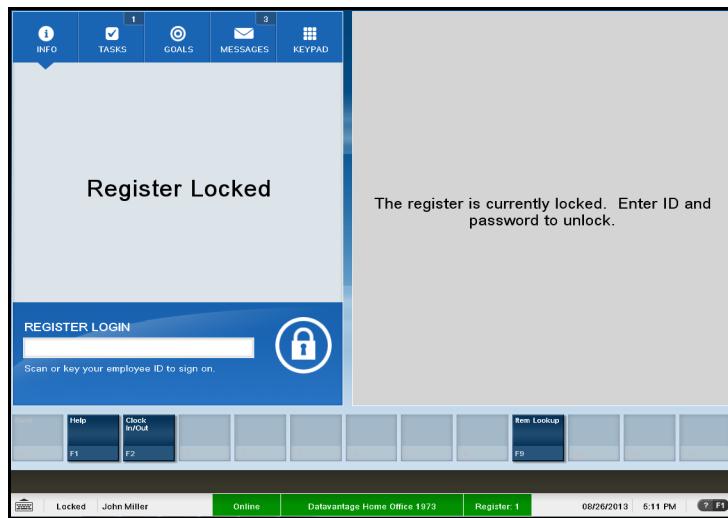


Figure 19-42: Register Locked Screen

Note: Any functions that may still be available are determined by your store policy.

Important: The register may be unlocked only by the associate who locked it or someone who has sufficient privileges to unlock the register, such as a manager.

Unlocking a Register

1. Enter your employee ID ([Figure 19-42](#)) and press [Enter] to unlock the register.

Note: If you use a biometric device for employee authentication, you are not prompted for a password.

2. Enter your employee password and press [Enter] to complete the unlock process.
The system is now unlocked and available for point-of-sale functions.

Issue a Tax Free Invoice

Some countries offer “Tax Free Shopping” to shoppers from other countries, and allow for the reclaiming of value added tax (VAT) on their purchases.

Oracle Retail Xstore Point of Service has been integrated with the two largest providers:

- Global Blue, which serves the following countries:
 - France
 - Germany
 - Italy
 - Netherlands
 - Portugal
 - Spain
 - Sweden
 - United Kingdom
 - Austria
- Premier Tax Free (PTF) (part of the Fintrax group), which serves the following countries:
 - Austria
 - Belgium
 - Czech Republic
 - Denmark
 - France
 - Germany
 - Greece
 - Hungary
 - Ireland

- Italy
- Luxembourg
- Monaco
- Netherlands
- Portugal
- Spain
- Sweden
- Switzerland
- United Kingdom

If Oracle Retail Xstore Point of Service at the store has been configured to integrate with one of these Tax Free Providers, then eligible shoppers can request a Tax Free Invoice during the sale, which they can later use to reclaim the VAT they have paid on their purchases.

To issue a Tax Free Invoice during a sale:

1. Select **Customer Options**.
2. Select **Print TaxFree**.
3. Open the Tax Free Invoice form.

Figure 19-43: TaxFree Invoice Form

4. Enter or retrieve the customer information for the customer:
 - Select **Lookup Traveller** to retrieve the customer's TFP information. See [Get Traveller Information](#) for more information.
 - Enter or edit information for the customer.
5. Enter the Tax Free information for the customer:
 - **Passport #:** ID number for the customer's passport.
 - **Birth Date:** Customer's birthdate.
 - **Email:** Customer email address.
 - **Arrival Date:** Date the customer arrived in the country.

Issue a Tax Free Invoice

- **Passport Country:** Country for the customer's passport.
-

Important: Only countries locally eligible for a VAT refund are available in this menu.

- **Final Destination:** Final travel destination for the customer.
 - **Departure Date:** Date the customer will leave the country.
 - **Refund Method:** Method by which to provide the refund.
-

Important: The Refund Methods available depend upon the refund methods offered by the provider. Contact your provider for more information.

6. Select **Print TaxFree** when all of the mandatory information has been entered.
 - The tendering screen opens. The tax free invoice will automatically print during the sale completion process.
 - To add more items to the transaction, select **Back** to return to the sale.
7. If you selected a Refund Method other than **Standard**, enter the information for the payment method:
 - Credit Card:
 - * **Token #:** Enter the token for the customer's credit card.

Note: This token is created by an external process.

 - * **Credit card type:** Select the type of credit card.
 - Fast Refund:
 - * **Token #:** Enter the token for the customer's credit card.

Note: This token is created by an external process.

 - * **Credit card type:** Select the type of credit card.
 - Alipay:
 - * **Phone Number:** Enter the phone number.
 - Etihad Guest Card:
 - * **Card #:** Enter the card number.

Get Traveller Information

To retrieve the traveler information for a customer:

- After selecting the **Lookup Traveller** button, a Customer Tax Free Provider Token window opens.

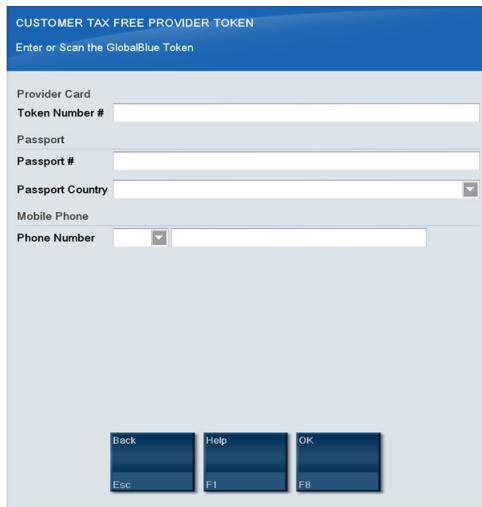


Figure 19-44: Customer Tax Free Provider Token Window

- Capture the customer's card information by doing one of the following:
 - Customer swipes the card on the MSR:
 - Customer requests to swipe the card on the MSR.
 - Cashier selects **Swipe Card** function.
 - Customer swipes the card.
 - Cashier manually enters the card number into the **Token Number #** field.
 - Cashier manually keys the customer's **Passport #** and selects the **Passport Country**.
 - Cashier manually keys the customer's mobile **Phone Number** including the country prefix.

If the customer information is found, a **Check Traveler Identity** popup opens.

Note: If the customer information is not found, re-enter the customer information.

If Oracle Retail Xstore Point of Service cannot connect to the Tax Free Provider service, the process will not continue.

- Cashier checks the customer's name, passport number, and country provided by the TFP against the customer's passport.
- The Customer Tax Free Provider Token window closes.

Oracle Retail Xstore Point of Service will populate the fields in the TFI request form with the information retrieved from the TFP.

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 Oracle Retail Xstore Point of Service Back Office.

To reprint a TFI:

1. Select **Receipt Reprint Options**.
2. Select **Reprint TaxFree Invoice**.

20

Flash Sales

Overview

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.

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.

Onscreen Navigation for Flash Sales Report

All of 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.

After you make your criteria selections and a report is displayed on the screen, options display at the bottom of the screen.



Figure 20-1: Report Navigation Options

- **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 onscreen magnification of the text.

Flash Sales Summary Report

The Flash Sales Summary Report ([Figure 20-1](#)) provides current sales results for the entire store. 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, etc.

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.

Running the Flash Sales Summary Report

1. Select the **Flash Sales** option from the Register Login menu.

The system displays a form where you can enter and select the report's criteria.

Enter parameters to use when running this report.	
Date	12/14/2016
	Specific Date <input type="button" value="▼"/>
Display Options	Summary <input type="button" value="▼"/>
Show Chart	Yes <input type="button" value="▼"/>
Show Criteria	Yes <input type="button" value="▼"/>

Back	Help	Run Report	Save	Print
Esc	F1	F8	F3	F4

Figure 20-2: Criteria Entry Form for Flash Sales Summary Report

2. Enter your criteria in the form or make a selection from a drop-down list:
 - **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.

Flash Sales Summary Report

- **Show Criteria:** Select **Yes** to display the criteria used when creating the report or **No** to only show the results.
3. Select one of these options to finish your report:
- **Run Report:** Execute the report and display the results on the screen.
 - **Print:** Execute the report and send the results to a printer.
 - **Save:** Keep the report with the current data, or save only the report parameters to run this specific report with these parameters again.
- 1) If you chose to save the report, assign a name to your report so it can be viewed whenever needed.



Figure 20-3: Save Report Options

- 2) Choose one of the options in the Report Save Options drop-down list:
- 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** to save the report. Reports are saved to your personal report area and can be retrieved from the Back Office Main Menu by selecting **Reports** and 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.

Flash Sales Summary Sample

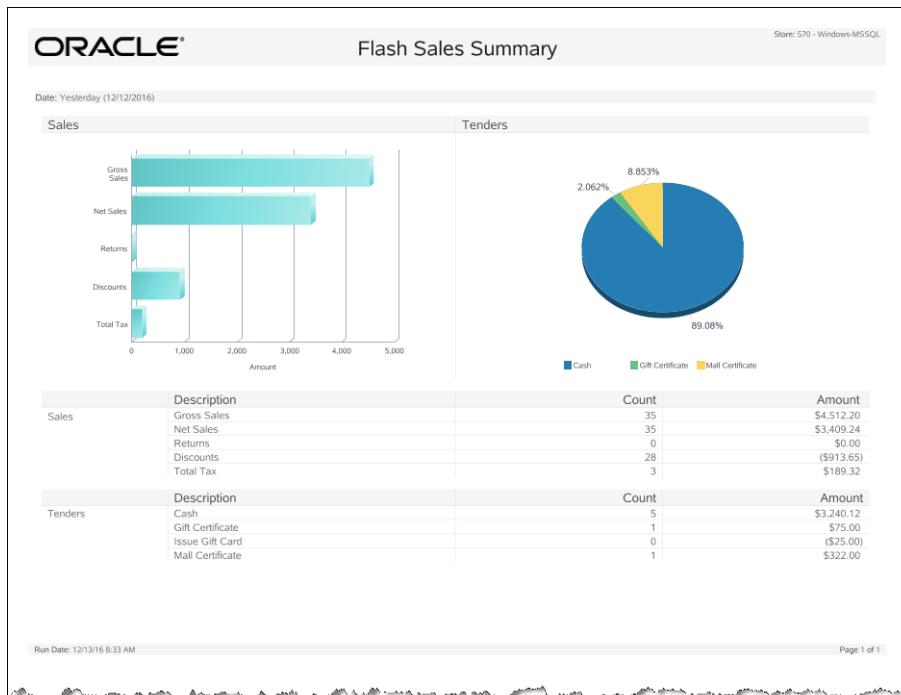


Figure 20-4: Flash Sales Summary Report

Flash Sales Summary (Data) Sample

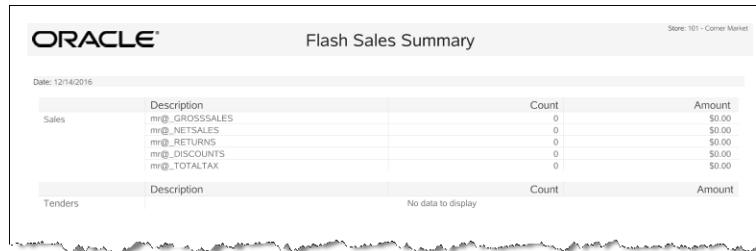


Figure 20-5: Flash Sales Summary Report - No Graph

Flash Sales Summary Report

Register Open and Close

Overview

The Register Open and Close procedures explain the steps you must perform to open and close a register.

Note: Due to the numerous system configuration options available, menu options are not identified by a function key number (F2, F3, etc.). Instead, the name on the button is used throughout this guide.

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.

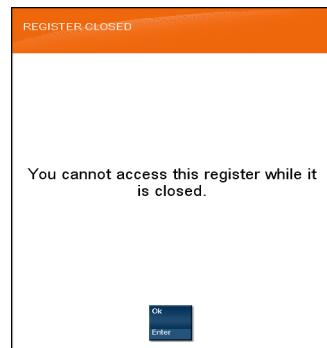
The register open process depends upon whether your register is configured for a standard open and close process, or if it is configured for 24/7 processing.

- [Standard](#) open process.
- [24/7](#) trading open process.

Standard

Note: The open/close processes below include the counting of tills to show all steps to close the register. See "[Manage Till Options](#)" for more information on the functionality of tills.

1. When you attempt to log in to the system, Oracle Retail Xstore Point of Service determines the status of the register and store. If the register status is closed, a Register Closed message displays if configured to do so. Press [Esc] to close the message.



Register Open

The red register indicator on the status bar also shows that the register is closed.



Figure 21-1: Status Bar - Register Closed

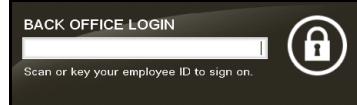
Tip: If you are using a touch-screen, tap the red register status bar to open the register. The focus bar prompts for your employee ID and password. Enter the information when prompted. Proceed to step 7.



-
2. Select the **Back Office** option on the Register menu to open the register from the Back Office Main Menu.

Note: Access to the back office functions is controlled by security levels. You must have the correct security privileges to access the Back Office.

3. Oracle Retail Xstore Point of Service prompts for your employee ID to log in to the back office. Enter your employee ID and then press [Enter].



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

Note: Scanned and keyed entry is also supported at this prompt.



-
4. Oracle Retail Xstore Point of Service prompts for your employee password to complete the login process. Enter your employee password and then press [Enter].

5. At the Back Office Main Menu, select the **Open/Close Options** option and press **[Enter]**, or press the number associated with the menu option on the keyboard to display the Open/Close Options menu.

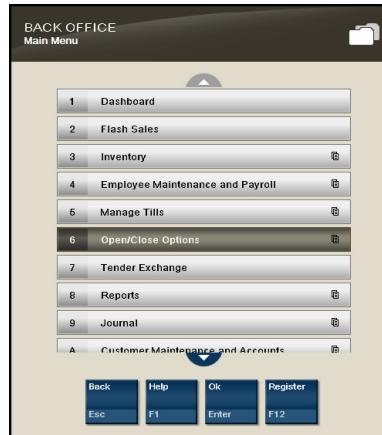


Figure 21-2: Back Office Main Menu

6. At the Open/Close Options menu, select the **Register Open** option and press **[Enter]**, or press the number associated with the menu option on the keyboard.

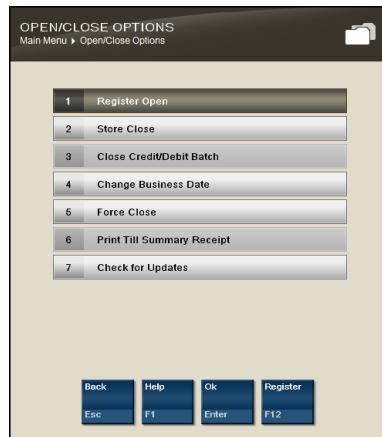


Figure 21-3: Open/Close Options Menu

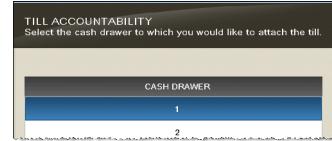
Note: The Register menu option toggles between open and close. If the available menu option is "Register Close", the register is currently open. If the available menu option is "Register Open", the register is currently closed.

Register Open

- Xstore prompts: Do you want to open this register? press [Y] to confirm that you want to open this register.

Note: The following prompts are optional depending on your configuration:

- If your register has more than one cash drawer, you are prompted to select the drawer from a list of available cash drawers.
- The system may be configured to print a Register Open receipt.



- The Count Summary screen displays, select the tender type to be counted and then select the Count Selected button to display the tender group's count screen.

A screenshot of the "Count Summary" screen. At the top, it shows "Cashier ID: 100 Till Name: Test Till 1" and "Balance Summary Over/Short". The main area is a table with four columns: "COUNT GROUP", "DECLARED AMOUNT", "SYSTEM AMOUNT", and "OVER/SHORT". The table contains four rows for different tender types: Cash, Australian Cash, Canada Cash, and Euro Cash, all showing a declared amount of \$0.00 and a system amount of \$100.00, resulting in an over/short of -\$100.00 for each. At the bottom, there is a navigation bar with buttons for "Back", "Help", "Count Selected" (which is highlighted in blue), and "Counting Complete". Below the navigation bar is a numeric keypad. At the very bottom, there is a status bar with icons and text: "Begin Count | John Smith", "Online", "Datavantage Home Office 643", "Register: 1", "03/31/2014 | 10:02 AM", and "? F1".

Figure 21-4: Begin Count Summary Screen

- Enter each value as required in the focus bar of the count screen and press [Enter]. Xstore will highlight the next denomination in the list.

Note: Depending upon the configuration of your system, you may be prompted to enter the *total* opening amount rather than prompted to count by denomination. See [Tender Count Screen Xstore Base Examples](#).

The screenshot shows the 'Denomination Count' screen for 'Cash'. At the top, there's a navigation bar with 'INFO', 'TASKS', 'GOALS', 'MESSAGES', and 'KEYPAD'. Below the keypad, there's a message box with the text 'Enter Counts' and a small icon. To the right of the keypad is a table titled 'Denomination Count' showing the following data:

DENOMINATION	QTY	@	AMOUNT
Penny	30	0.010000	\$0.30
Nickel	10	0.050000	\$0.50
Dime	0	0.100000	\$0.00
Quarter	0	0.250000	\$0.00
Half Dollar	0	0.500000	\$0.00
Dollar Coins	0	1.000000	\$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

TOTAL
\$0.80

At the bottom, there are function keys: Back, Help, Prior Group, Next Group, Summary, Counting Complete, Esc, F1, F2, F3, F4, F5, F6, F7, F8, F9, F10, F11, F12, F13, F14, F15, F16.

Figure 21-5: Denomination Count - Cash

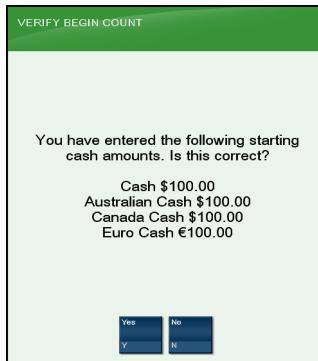
10. Select Next Group to display the next count screen.

Tip: Select *Prior Group* to go back to the previous count screen.

11. Repeat steps 9-10 until all tenders are counted and then select Summary to return to the Count Summary screen.
12. Review the amounts. If the totals are correct, select the **Counting Complete** button.

Tip: Check the Over/Short column to see if your till is balanced with the system values for each tender type. To modify counts see [Editing Tender Group Counts](#).

13. 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.

**Figure 21-6: Verify Begin Count Prompt**

Register Open

If configured, the system prints a Begin Count receipt showing the amount of starting cash in the till and signature lines for the cashier and manager to sign confirming this open amount.

14. If the currency amounts do not match, the system displays a prompt to either recount the till or to accept the difference:

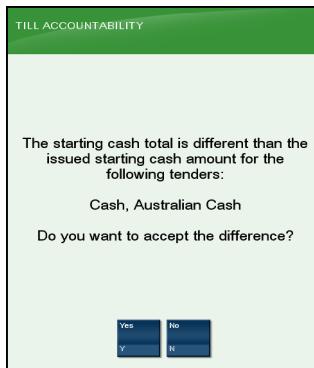


Figure 21-7: Starting Cash Difference Prompt

- * Press [Y] to accept the amount you counted and continue opening the register. You are prompted to enter/select the reason for the discrepancy between the counted amount and the expected amount. You may be required to enter a comment and then press [Enter].
- <OR>
- * Press [N] to recount the till.
15. If you counted the till from the Back Office, select the **Register** option to display the register screen. The register is now open and a till has been counted and attached to the current register. The system may print a receipt indicating the register number that is open and the cashier ID who is at the register.

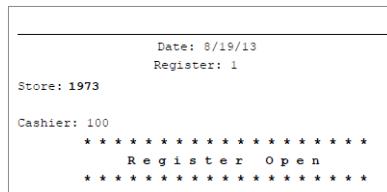
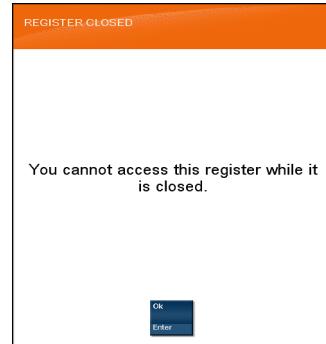


Figure 21-8: Register Open Receipt

24/7

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.

- When you attempt to log in to the system, Oracle Retail Xstore Point of Service determines the status of the register and store. If the register status is closed, a Register Closed message displays if configured to do so. Press [Esc] to close the message.



The red register indicator on the status bar also shows that the register is closed.



Figure 21-9: Status Bar - Register Closed

Tip: If you are using a touch-screen, tap the red register status bar to open the register. The focus bar prompts for your employee ID and password. Enter the information when prompted. Proceed to step 7.



- Select the **Back Office** option on the Register menu to open the register from the Back Office Main Menu.

Note: Access to the back office functions is controlled by security levels. You must have the correct security privileges to access the Back Office.

- Oracle Retail Xstore Point of Service prompts for your employee ID to log in to the back office. Enter your employee ID and then press [Enter].



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

Note: Scanned and keyed entry is also supported at this prompt.



4. Oracle Retail Xstore Point of Service prompts for your employee password to complete the login process. Enter your employee password and then press [Enter].
5. At the Back Office Main Menu, select the **Open/Close Options** option and press [Enter], or press the number associated with the menu option on the keyboard to display the Open/Close Options menu.

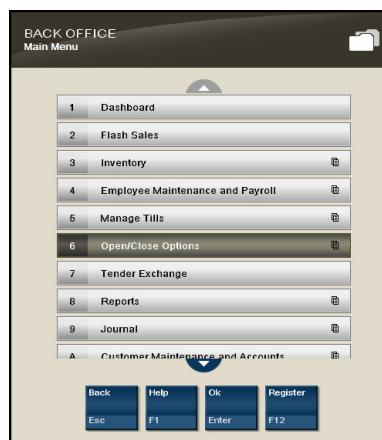


Figure 21-10: Back Office Main Menu

- At the Open/Close Options menu, select the **Register Open** option and press [Enter], or press the number associated with the menu option on the keyboard.

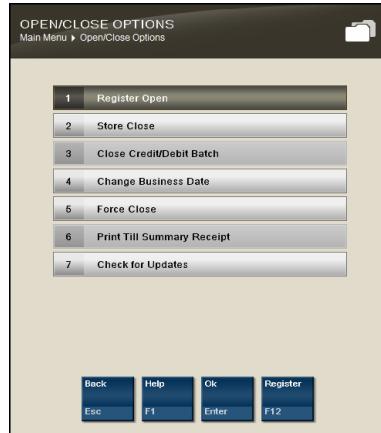


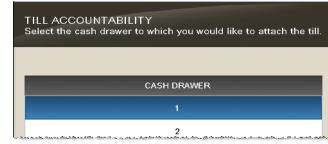
Figure 21-11: Open/Close Options Menu

Note: The Register menu option toggles between open and close. If the available menu option is “Register Close”, the register is currently open. If the available menu option is “Register Open”, the register is currently closed.

- Xstore prompts: Do you want to open this register? press [Y] to confirm that you want to open this register.

Note: The following prompts are optional depending on your configuration:

- If your register has more than one cash drawer, you are prompted to select the drawer from a list of available cash drawers.
- The system may be configured to print a Register Open receipt.



Register Open

An insert till notification window opens.

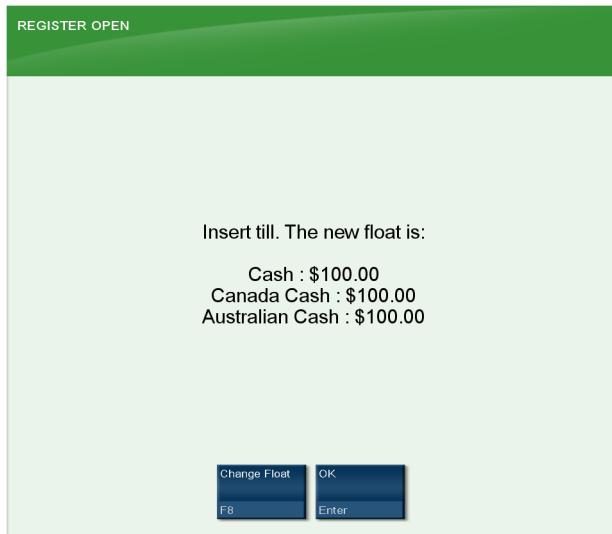


Figure 21-12: Insert Till

- Click **OK** to open the till.
The till opens and you are returned to the Back Office Main Menu.
- Click **Change Float** to change the float amount:
 - 1) Click to select the reason for the change to the float amount.
 - 2) Click **OK**.
 - 3) Enter additional comments, if necessary.
 - 4) Click **OK**.
 - 5) Click to select the currency to change.
 - 6) Click **OK**.
 - 7) Enter the new amount in the **Change Float Amount** field.



Figure 21-13: Change Float Amount

- 8) Press the [Enter] button.
- 9) Click **Yes** to confirm the new amount.
Return to the Insert Till screen.
- 10) If necessary, click **Change Float** to repeat steps 1-9 for a different currency.
The till opens and you are returned to the Back Office Main Menu.

Cash Drawer Open

If your system is configured to use network-enabled cash drawers, opening the register is done by opening the cash drawer.

To open the cash drawer:

1. In the Back Office menu, select **Open/Close Options**.
2. Select **Cash Drawer Open**.
A list of cash drawers is displayed.
3. Select the drawer to open.
4. Select **OK**.
A confirmation prompt opens.
5. Select **Yes**.
A list of tills opens.
6. Select the till to assign to the cash drawer.
7. Select **OK**.
8. The Count Summary screen displays, select the tender type to be counted and then select the Count Selected button to display the tender group's count screen.

The screenshot shows the 'Count Summary' screen with the following details:

Header: Count Summary
Cashier ID: 100 Till Name: Test Till 1
Balance Summary Over/Short

Table:

COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVER/SHORT
Cash	\$0.00	\$100.00	(\$100.00)
Australian Cash	\$0.00	\$100.00	(\$100.00)
Canada Cash	\$0.00	\$100.00	(\$100.00)
Euro Cash	\$0.00	\$100.00	(\$100.00)

Keypad:

Back	Help	Count Selected	Counting Complete									
Esc	F1	F2	F3									

Bottom Navigation:

- Icons: Register, Help, Home, Log Off
- Text: Begin Count, John Smith, Online, Datavantage Home Office 643, Register: 1, Date/Time: 03/31/2014 | 10:02 AM, F1

Figure 21-14: Begin Count Summary Screen

Register Open

9. Enter each value as required in the focus bar of the count screen and press [Enter]. Xstore will highlight the next denomination in the list.

Note: Depending upon the configuration of your system, you may be prompted to enter the *total* opening amount rather than prompted to count by denomination. See [Tender Count Screen Xstore Base Examples](#).

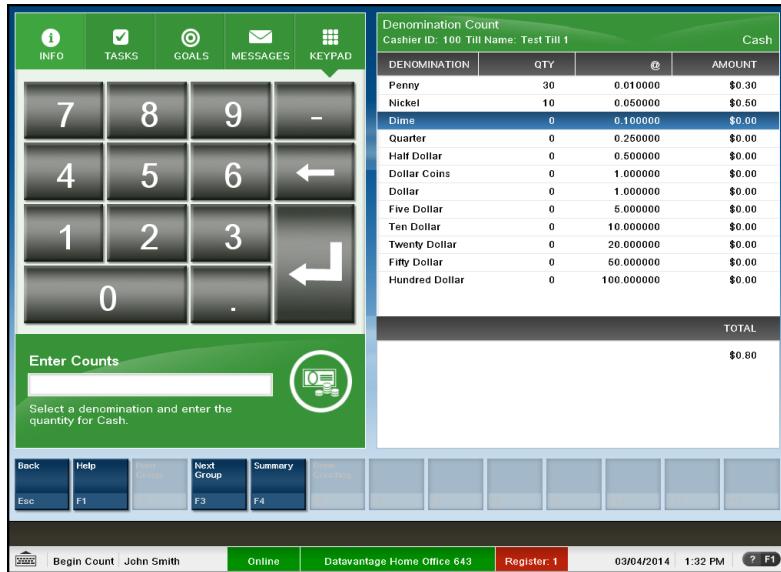


Figure 21-15: Denomination Count - Cash

10. Select Next Group to display the next count screen.

Tip: Select *Prior Group* to go back to the previous count screen.

11. Repeat steps 9-10 until all tenders are counted and then select Summary to return to the Count Summary screen.
12. Review the amounts. If the totals are correct, select the **Counting Complete** button.

Tip: Check the Over/Short column to see if your till is balanced with the system values for each tender type. To modify counts see [Editing Tender Group Counts](#).

13. If the starting cash amount matches, the system prompts to confirm the amount for all cash currencies you entered and opens the cash drawer after you acknowledge the system amount.

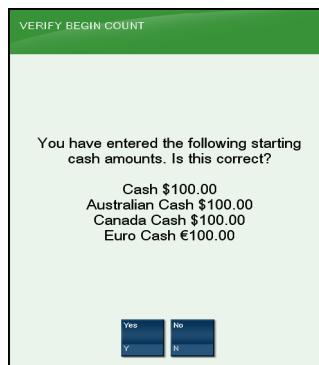


Figure 21-16: Verify Begin Count Prompt

If configured, the system prints a Begin Count receipt showing the amount of starting cash in the till and signature lines for the cashier and manager to sign confirming this open amount.

14. If the currency amounts do not match, the system displays a prompt to either recount the till or to accept the difference:

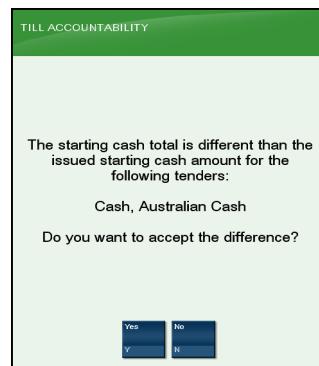


Figure 21-17: Starting Cash Difference Prompt

- * Press [Y] to accept the amount you counted and continue opening the cash drawer. You are prompted to enter/select the reason for the discrepancy between the counted amount and the expected amount. You may be required to enter a comment and then press [Enter].
- <OR>
- * Press [N] to recount the till.
15. Open the till to associate with the Cash Drawer. See [Open a Till - Cash Drawer](#) for more information.
 16. If you counted the till from the Back Office, select the **Register** option to display the register screen. The register is now open and a till has been counted and attached to the current register. The system may print a receipt indicating the register number that is open and the cashier ID who is at the register.

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 closing process depends upon whether your system is configured for standard opening and closing, or 24/7 trading:

- [Standard](#) close process.
- [24/7](#) trading close process.
- [Cash Drawer](#) close process.

Standard

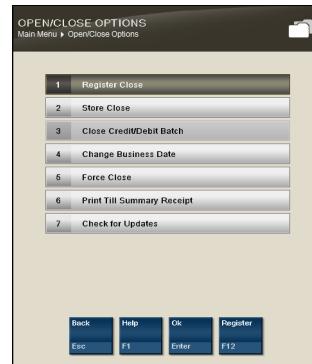
Note: The open/close instructions below include the counting of tills to show all steps to close the register. Refer to [Chapter 23, "Manage Till Options"](#) for more information.

1. From the register to be closed, select the **Back Office** option on the menu. Follow any prompts to log in to the Back Office as required.
2. At the Back Office Main Menu, use the up and down arrow keys to select **Open/Close Options** and press **[Enter]**, or press the number associated with the menu option on the keyboard.



Figure 21-18: Back Office Main Menu

3. Oracle Retail Xstore Point of Service displays the Open/Close Options menu. Select the **Register Close** option and press [Enter], or press the number associated with the menu option on the keyboard.



Important: Note that the Register option toggles between open and close. If the option is "Register Close", the register is currently open. If the option is "Register Open", the register is currently closed.

4. Oracle Retail Xstore Point of Service displays a confirmation prompt: Do you want to close this register? Press [Y] to close the register.

Note: Pressing [N] at the Register Close confirmation prompt cancels the register close process and returns you to the Open/Close Options menu.

5. The cash drawer opens and Oracle Retail Xstore Point of Service displays the Close Count Summary screen. Each count group (tender type) is counted individually. Specific groups require additional information as determined by the home office.

Register Close

Select the tender type to be counted and then select the Count Selected option to display the tender group's count 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
Store Credit	\$0.00	\$0.00	\$0.00
US Traveler Check	\$0.00	\$0.00	\$0.00
XPAY GIFT CARD	\$0.00	\$0.00	\$0.00
Cash	\$0.00	\$100.00	(\$100.00)
Australian Cash	\$0.00	\$100.00	(\$100.00)
Canada Cash	\$0.00	\$100.00	(\$100.00)
Euro Cash	\$0.00	\$100.00	(\$100.00)
Gift Certificate	\$0.00	\$0.00	\$0.00

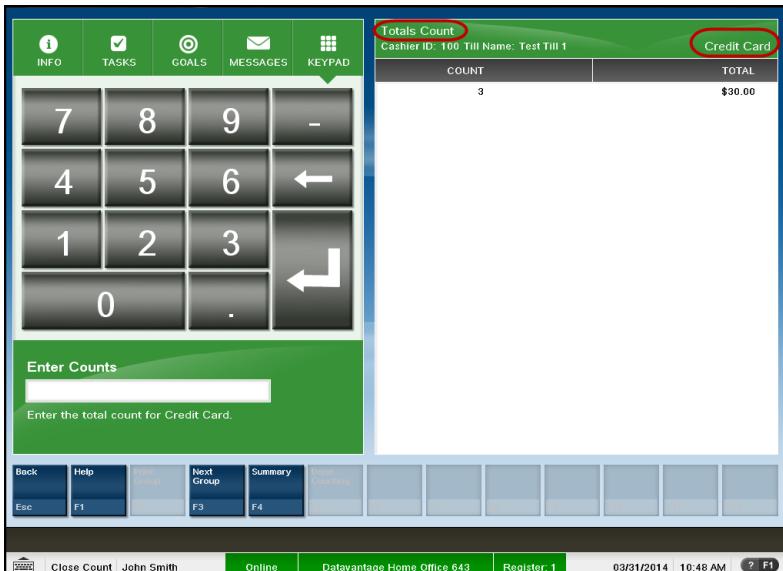
Bottom navigation bar: Back, Help, Count Selected, Done Counting, Esc, F1, F2, F3, Online, Datavantage Home Office 643, Register: 1, 03/31/2014 10:11 AM, ? F1

Figure 21-19: Close Count Summary Screen

Note: Depending upon the configuration of your system and your store policy, the over/short amounts as shown above may not be displayed.

6. Enter each value as required in the focus bar and press [Enter]. The tender type you select and your system's configuration determine the type of count you must perform. The following table shows Xstore base examples.

Table 21-1: Tender Count Screen Xstore Base Examples

Tender Count	Example
Credit Card <i>(Totals Count)</i>	The focus bar prompts to enter the Count and then the Amount . 

Cash (*Denomination Count*)

The focus bar prompts to enter the **Count** for each denomination. In the example below, the Fifty dollar denomination is being counted. Once [Enter] is pressed, the system highlights the next denomination in the count. The amount is calculated based on the quantity entered and displays a running total at the bottom of the screen.

Denomination Count			
Cash			
DENOMINATION	QTY	@	AMOUNT
Penny	4	0.010000	\$0.04
Nickel	0	0.050000	\$0.00
Dime	26	0.100000	\$2.60
Quarter	30	0.250000	\$7.50
Half Dollar	0	0.500000	\$0.00
Dollar Coins	0	1.000000	\$0.00
Dollar	68	1.000000	\$68.00
Five Dollar	12	5.000000	\$60.00
Ten Dollar	30	10.000000	\$300.00
Twenty Dollar	15	20.000000	\$300.00
Fifty Dollar	0	50.000000	\$0.00
Hundred Dollar	0	100.000000	\$0.00
TOTAL			\$738.14

Table 21-1: Tender Count Screen Xstore Base Examples

Tender Count	Example
Check <i>(Totals Count)</i>	The focus bar prompts to enter the Serial # and then the Amount . The system calculates the amount based on the quantity entered and displays a running total at the bottom of the screen.

Note: A Totals Count prompts for a total number of the tender type and the total amount.

A Denomination Count requires that you specify the number of items (Count) and the value of each item in the tender group (Amount) that you selected.

Tip: The type of count is labeled on the upper left portion of the count screen view port. The tender type is identified in the upper right portion of the count screen view port.

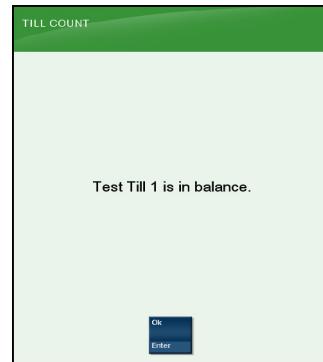
- Select **Next Group** to display the next count screen.

Tip: Select **Prior Group** to go back to the previous count screen.

- Repeat steps 6-7 until all tenders are counted. Select **Summary** to return to the Count Summary screen.
- Review the amounts. If the totals are correct, select the **Counting Complete** button.

Tip: Check the Over/Short column to see if your till is balanced with the system values for each tender type. To modify counts see [Editing Tender Group Counts](#).

10. If the till is in balance, a confirmation message displays. Press [Enter] to continue the register close.



11. If any tenders are out of balance—your counts do not match the system expected amounts—Xstore displays a list of tenders that are out of balance.

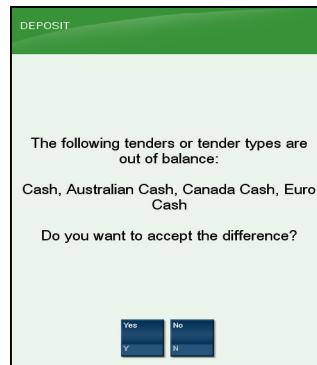
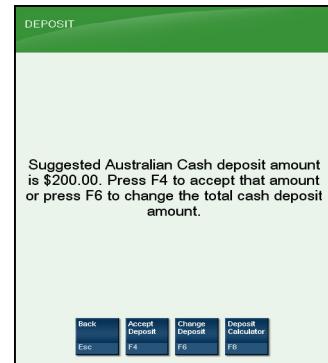
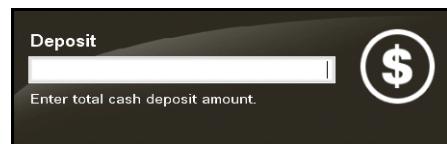


Figure 21-20: Tenders Out of Balance Prompt

- * Select **Yes** to accept your counted amounts. If prompted, select a reason for the count discrepancy and/or type a comment about the discrepancy.
<OR>
 - * Select **No** to recount any tenders as needed. Oracle Retail Xstore Point of Service re-displays the Close Count screen where you can make your changes as needed. See [Editing Tender Group Counts](#).
12. Depending upon your system's configuration, you may be prompted with the suggested deposit amount.
- Select **Accept Deposit** to confirm the amount to be deposited and go to step 13.
 - Select **Change Deposit** to enter an amount to be deposited:
 - 1) You are prompted to enter the amount to be deposited.



Register Close

- 2) Enter the amount and press [Enter] to continue the register close.

Tip: You can select the **Deposit Calculator** option to display a denomination count screen that can be used as a calculator—showing a running total at the bottom of the screen as you count the cash amount to be deposited.

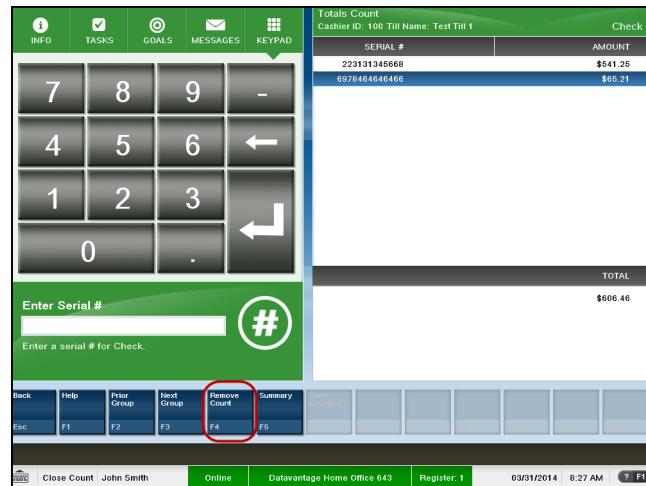
13. The system may be configured to print a **Closed Count** receipt and a **Register Closed** receipt.

Close the cash drawer and the system closes the register.

Editing Tender Group Counts

If a tender group is out of balance, you can recount an individual tender group and edit the original count you entered into the system.

1. At the Count Summary screen ([Figure 21-19](#)), select the tender group that must be recounted and select the **Count Selected** option to display the tender group count screen.
2. Recount the tender and enter the new count values. Most tenders allow you to override the denomination count by selecting the row and then adding values into the focus bar prompts. When you press [Enter] the count value changes. For checks, however, you must select the **Remove Count** button to delete the row and then re-enter the **Serial #** and **Amount**.
3. Select the **Summary** option to view the changes and return to the Tender Group Summary screen.
4. Repeat steps 1-3 for each tender group that is not balanced. When you have completed editing the tender groups, select the **Counting Complete** option. If there are tender groups that are still out of balance, a screen displays prompting whether you want to recount the tenders or accept the count and continue with the register close process.
5. Depending upon your system's configuration, you may be prompted with the suggested deposit amount. See step 11 to complete the register close process.



24/7

The register close process must be performed on each opened register for it to be rolled over into the next day.

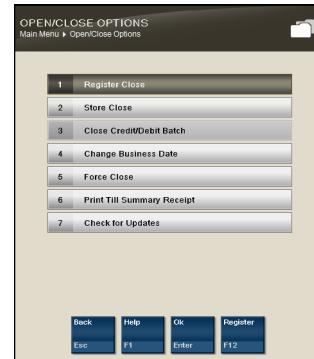
Note: Near the end of a day, warning messages will appear on registers that remain open close to and after the required close time. If a register continues to stay open past the required close time, the register will eventually prevent the user from opening any more transactions until the register is closed and reopened for the next day.

1. In the register to be closed, select the **Back Office** option. Follow any prompts to log in to the Back Office as required.
2. At the Back Office Main Menu, use the up and down arrow keys to select **Open/Close Options** and press [Enter], or press the number associated with the menu option on the keyboard.



Figure 21-21: Back Office Main Menu

3. Oracle Retail Xstore Point of Service displays the Open/Close Options menu. Select the **Register Close** option and press [Enter], or press the number associated with the menu option on the keyboard.



Important: Note that the Register option toggles between open and close. If the option is “Register Close”, the register is currently open. If the option is “Register Open”, the register is currently closed.

Register Close

4. Oracle Retail Xstore Point of Service displays a confirmation prompt: Do you want to close this register? Press [Y] to close the register.

Note: Pressing [N] at the Register Close confirmation prompt cancels the register close process and returns you to the Open/Close Options menu.

The cash drawer opens.

5. Depending upon the configuration of your system, you may be prompted to either remove all non-cash tenders from the till, or remove the till. Follow the instructions on the screen, then click **OK** to continue.
6. The system may be configured to print a **Closed Count** receipt and a **Register Closed** receipt.

Close the cash drawer and the system closes the register.

Note: Till reconciliation is done separately from the close process.
See [Reconcile a Till](#) for more information.

7. After the register close is complete, you may be prompted whether to re-open the register.
 - Click **No** to keep the register closed.
 - Click **Yes** to re-open the register. See step 7 in [24/7](#) for more information.

Cash Drawer

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 [Removing a Till from a Register - Till Accountability Mode](#) for more information.

To close the cash drawer:

1. In the Back Office menu, select **Open/Close Options**.
2. Select **Cash Drawer Close**.
A list of open cash drawers displays.
3. Select the drawer to close.
4. Select **OK**.
A confirmation prompt opens.
5. Select **Yes**.
6. The physical cash drawer opens and Oracle Retail Xstore Point of Service displays the Close Count Summary screen. Each count group (tender type) is counted individually. Specific groups require additional information as determined by the

home office. Select the tender type to be counted and then select the Count Selected option to display the tender group's count 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
Store Credit	\$0.00	\$0.00	\$0.00
US Traveler Check	\$0.00	\$0.00	\$0.00
XPAY GIFT CARD	\$0.00	\$0.00	\$0.00
Cash	\$0.00	\$100.00	(\$100.00)
Australian Cash	\$0.00	\$100.00	(\$100.00)
Canada Cash	\$0.00	\$100.00	(\$100.00)
Euro Cash	\$0.00	\$100.00	(\$100.00)
Gift Certificate	\$0.00	\$0.00	\$0.00

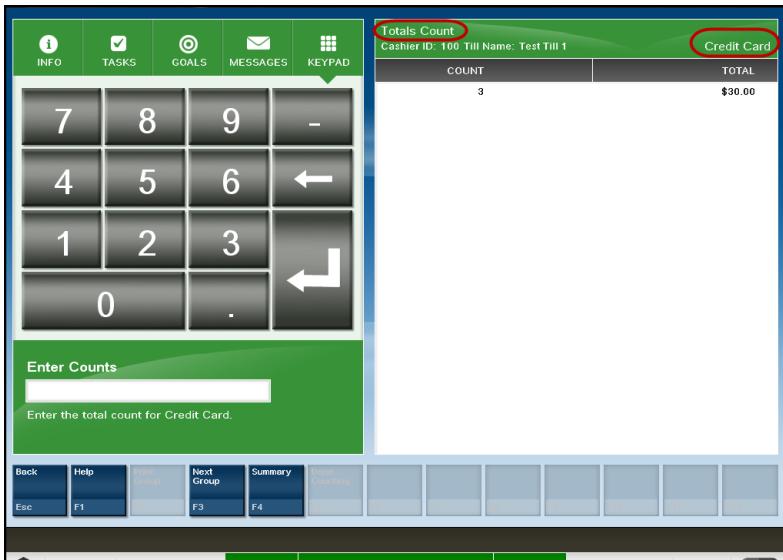
Figure 21-22: Close Count Summary Screen

Note: Depending upon the configuration of your system and your store policy, the over/short amounts as shown above may not be displayed.

Register Close

- Enter each value as required in the focus bar and press [Enter]. The tender type you select and your system's configuration determine the type of count you must perform. The following table shows Xstore base examples.

Table 21-2: Tender Count Screen Xstore Base Examples

Tender Count	Example
Credit Card <i>(Totals Count)</i>	The focus bar prompts to enter the Count and then the Amount . 

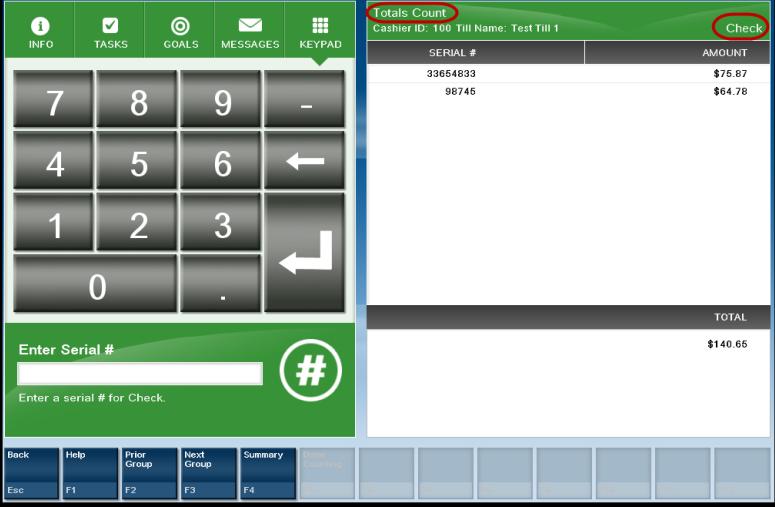
Cash (*Denomination Count*)

The focus bar prompts to enter the **Count** for each denomination. In the example below, the Fifty dollar denomination is being counted. Once [Enter] is pressed, the system highlights the next denomination in the count. The amount is calculated based on the quantity entered and displays a running total at the bottom of the screen.

Denomination Count			
Cash			
DENOMINATION	QTY	@	AMOUNT
Penny	4	0.010000	\$0.04
Nickel	0	0.050000	\$0.00
Dime	26	0.100000	\$2.60
Quarter	30	0.250000	\$7.50
Half Dollar	0	0.500000	\$0.00
Dollar Coins	0	1.000000	\$0.00
Dollar	68	1.000000	\$68.00
Five Dollar	12	5.000000	\$60.00
Ten Dollar	30	10.000000	\$300.00
Twenty Dollar	15	20.000000	\$300.00
Fifty Dollar	0	50.000000	\$0.00
Hundred Dollar	0	100.000000	\$0.00
			TOTAL
			\$738.14

Table 21-2: Tender Count Screen Xstore Base Examples

Tender Count	Example
Check <i>(Totals Count)</i>	The focus bar prompts to enter the Serial # and then the Amount . The system calculates the amount based on the quantity entered and displays a running total at the bottom of the screen.



Totals Count	
Cashier ID: 100 Till Name: Test Till 1	
SERIAL #	AMOUNT
33654833	\$75.87
98745	\$64.78
	TOTAL
	\$140.65

Note: A Totals Count prompts for a total number of the tender type and the total amount.

A Denomination Count requires that you specify the number of items (Count) and the value of each item in the tender group (Amount) that you selected.

Tip: The type of count is labeled on the upper left portion of the count screen view port. The tender type is identified in the upper right portion of the count screen view port.

8. Select **Next Group** to display the next count screen.

Tip: Select **Prior Group** to go back to the previous count screen.

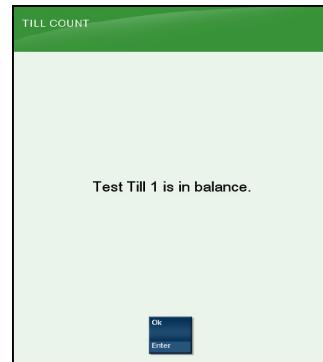
9. Repeat steps 6-7 until all tenders are counted. Select **Summary** to return to the Count Summary screen.

10. Review the amounts. If the totals are correct, select the **Counting Complete** button.

Tip: Check the Over/Short column to see if your till is balanced with the system values for each tender type. To modify counts see [Editing Tender Group Counts](#).

Register Close

11. If the till is in balance, a confirmation message displays. Press [Enter] to continue the cash drawer close.



12. If any tenders are out of balance—your counts do not match the system expected amounts—Xstore displays a list of tenders that are out of balance.

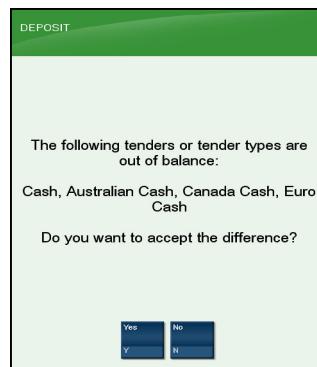
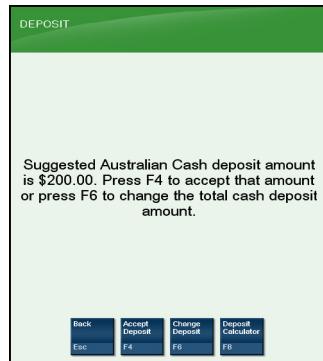
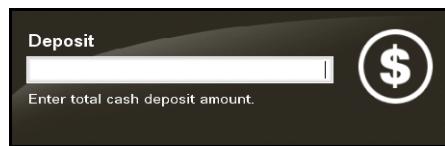


Figure 21-23: Tenders Out of Balance Prompt

- * Select **Yes** to accept your counted amounts. If prompted, select a reason for the count discrepancy and/or type a comment about the discrepancy.
<OR>
 - * Select **No** to recount any tenders as needed. Oracle Retail Xstore Point of Service re-displays the Close Count screen where you can make your changes as needed. See [Editing Tender Group Counts](#).
13. Depending upon your system's configuration, you may be prompted with the suggested deposit amount.
 - Select **Accept Deposit** to confirm the amount to be deposited and go to step 13.
 - Select **Change Deposit** to enter an amount to be deposited:
 - 1) You are prompted to enter the amount to be deposited.



- 2) Enter the amount and press [Enter] to continue the cash drawer close.

Tip: You can select the **Deposit Calculator** option to display a denomination count screen that can be used as a calculator—showing a running total at the bottom of the screen as you count the cash amount to be deposited.

14. The system may be configured to print a **Closed Count** receipt and a **Cash Drawer Closed** receipt.

Close the physical cash drawer to complete the close process.

Register Close

22

Store Open/Close

Overview

When the store is physically closed at the end of business hours, the Oracle Retail Xstore Point of Service application 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. Refer to ["Register Open and Close"](#) for the register close process.

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.

The store must be opened to allow business transactions in the system.

REGISTER STATUS		
These registers are still open and must be closed before the store is closed.		
RETAIL LOCATION	REGISTER ID	STATUS
1973	1	OPEN

Store Close

To close the 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.

Important: 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 Oracle Retail Xstore Point of Service to automatically cancel all listed transactions and continue with the store close.

SUSPENDED TRANSACTIONS				
The following transactions have been suspended. Please note, all suspended transactions will be automatically cancelled if this retail location is closed.				
TICKET	REG.	TIME	CASHIER	CUSTOMER
206	1	2:49 PM	100	
496	1	4:51 PM	100	

Store Close

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 Oracle Retail 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.

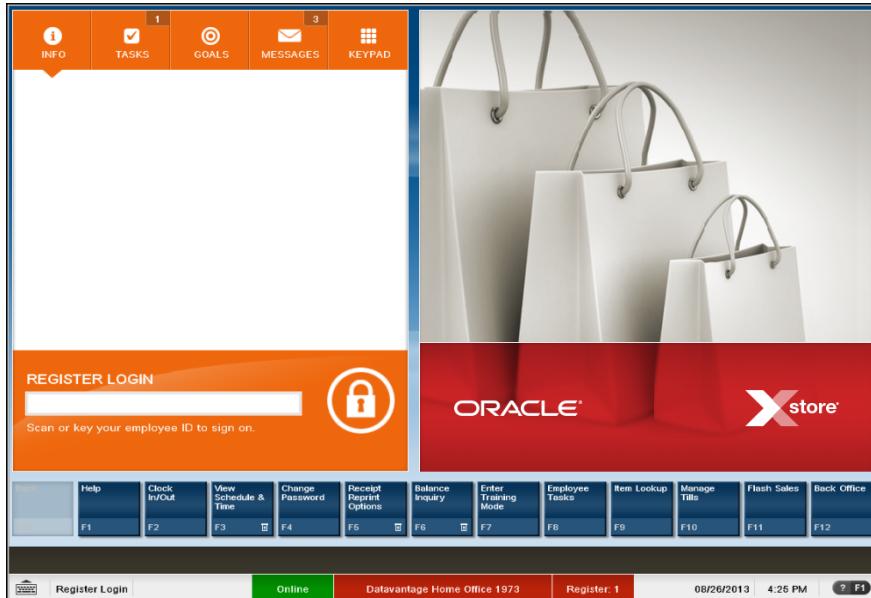


Figure 22-1: Register Login Screen - Store Closed

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.

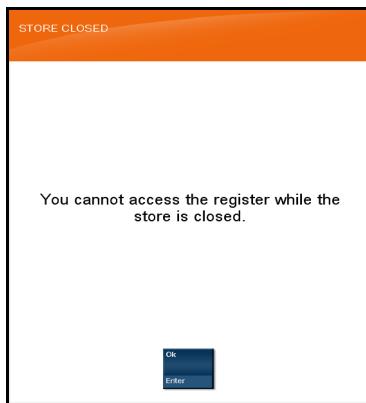


Figure 22-2: Store Closed Message

Press [Esc] to acknowledge the message and return to the Register Login screen.

Note: The store must be opened before you can log in and perform transactions.

The store open procedure signals to all registers that the store is open. Once the store is open, sales cannot be rung until the register is opened and a till is counted for the register.

Refer to the *Oracle Retail Xstore Point of Service Manager's Guide* for procedural information.

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. Enter 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. Continue with the next step.
 - If all retail periods have been reconciled, a prompt opens indicating that all retail periods have been closed. Select **OK** to finish.
4. Select the retail period to close.
5. Select **OK**.

A confirmation prompt opens, asking whether to close the retail period.
6. Select **Yes**.
7. Perform a count of each Count Group.
8. Select **Counting Complete** when you have completed each count.

Store Open

A confirmation prompt opens, prompting for confirmation of the deposits to be made.

9. Select Yes.

A notification window opens, indicating the retail period has ended.

10. Select OK.

Store Open

Important: 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.

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.

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 "[Order Transactions via Order Broker](#)" 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 22-3: 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 22-4: Status Bar: Store Open - Register Open

Manage Till Options

Overview

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: Due to the flexibility of the system, menu options in this guide are not identified by a function key number (F2, F3, etc.). 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.

Manage Till Options Login

These Manage Till functions are available from either the Till Options menu or the Till Maintenance menu under the Manage Till menu option.

-
- Refer to [No Sale](#) and [Lock/Unlock a Register](#) for more information about "No Sale" transactions and locking/unlocking a register.
 - Refer to [Post Void](#) for more information about Post Voiding a transaction.
 - Refer to **Store Bank Maintenance** options in the *Oracle Retail Xstore Point of Service Manager's Guide* for more information about managing the store bank and other Back Office functions.
-

Paid In-Paid Out

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 Transaction

1. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, then select **Till Options** to display the Till Options menu.
Or, at the Sale screen, select **Register Options --> Till Options** to display the Till Options menu.
2. Select the **Paid Out** option.

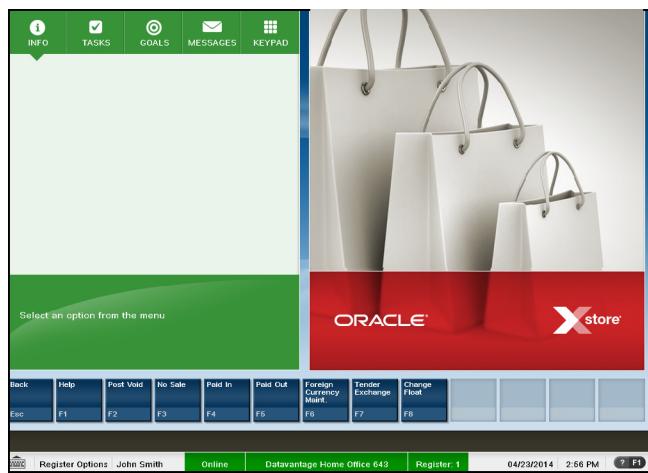
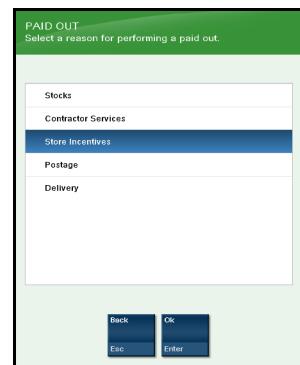


Figure 23-1: Till Options Menu

3. If necessary, scan the cash drawer with which to perform the paid out transaction.
4. The system displays a list of possible reasons for performing the paid out transaction. Choose a reason from the list and select **Ok**.
5. Depending upon the reason you selected, you may be prompted for additional information/comments. Enter the information as required and press **[Enter]**.

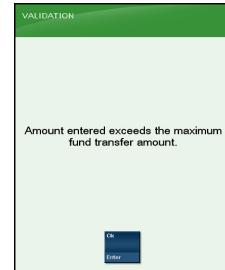


- Enter the amount that you are removing from the till and press [Enter].



Figure 23-2: Paid Out Amount Prompt

Note: If you exceed your store's maximum amount allowed for a paid out transactions you will see this message. Press [Enter] to close the prompt and reenter a new paid out amount.



- Remove the cash and close the cash drawer. The system prints receipts as required by your store policy.



Figure 23-3: Sample Paid Out Receipt

Paid In Transaction

- At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, then select **Till Options** to display the Till Options menu.
Or, at the Sale screen, select **Register Options-->Till Options** to display the Till Options menu.

Paid In-Paid Out

2. Select the Paid In option.

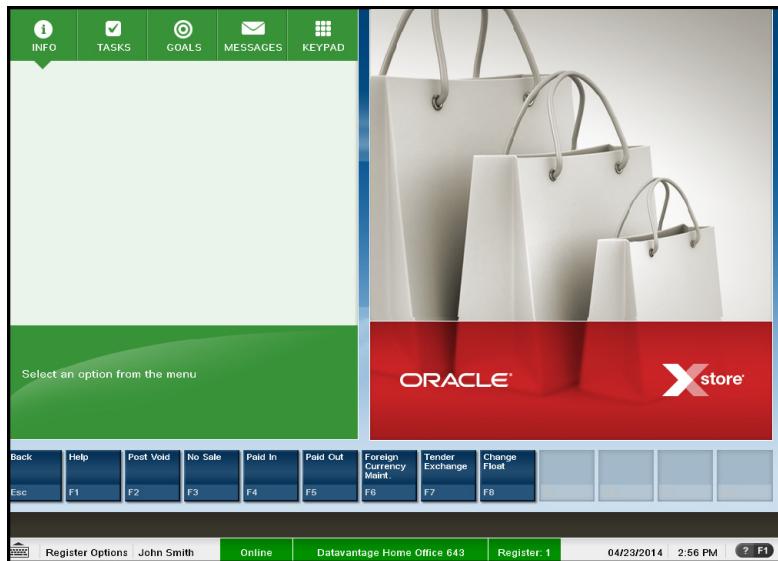


Figure 23-4: Till Options Menu

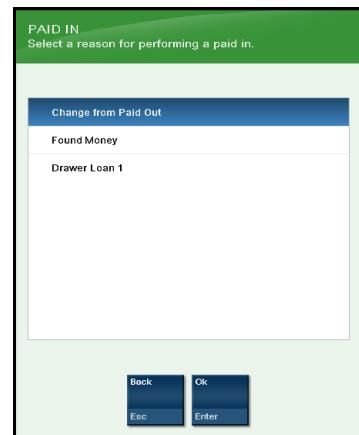
3. If necessary, scan the cash drawer with which to perform the paid in transaction.
4. If you are returning any funds from a previous paid out transaction, enter the tracking number or scan the paid out transaction receipt barcode and press [Enter]. Otherwise, just press [Enter] to bypass this prompt.



Figure 23-5: Prompt for Paid Out Receipt Barcode

5. The system displays a pre-defined list of possible reasons for performing the paid in transaction. Use the up and down arrow keys to choose a reason from the list and select Ok.

Depending upon the reason you selected, you may be prompted for additional information/ comments. Enter the information as required and press [Enter].



- Enter the amount that you are placing in the till and press [Enter].



Figure 23-6: Paid In Amount Prompt

- Close the cash drawer. The system prints receipts as required by your store's policy.



Figure 23-7: Paid In Receipt

Note: The reference to the original paid out transaction number shown in this example. This information associates the original paid out transaction with the current paid in transaction for accounting purposes.

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.

- At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, then select **Till Options** to display the Till Options menu.

<OR>

At the Sale screen, select **Register Options** --> **Till Options** to display the Till Options menu.

2. Select **Tender Exchange** from the Till Options menu.

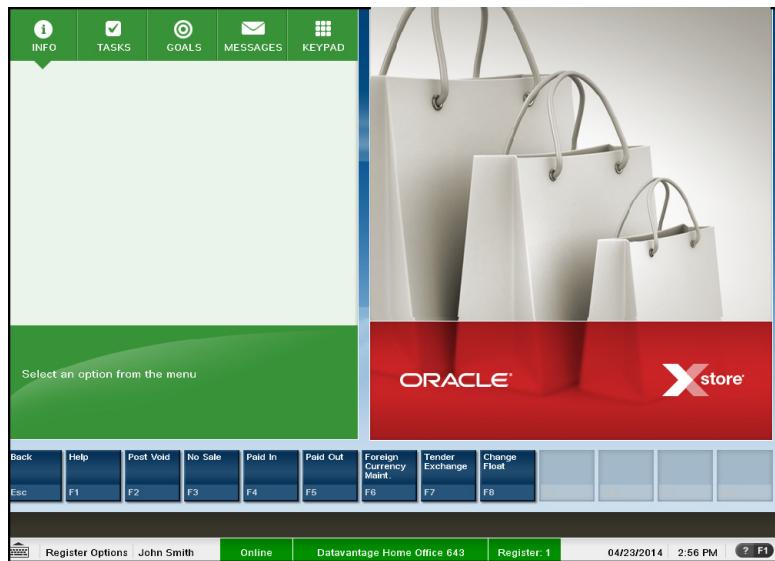
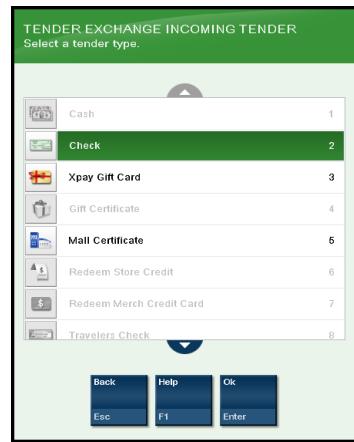


Figure 23-8: Till Options Menu

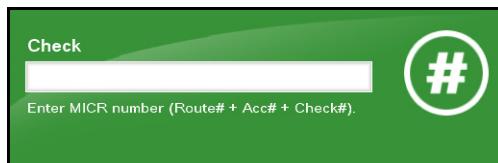
3. Choose the incoming tender type from the tender exchange list and select **Ok**. Use the up and down arrow keys to scroll through the list if necessary.



Note: Only those types of tender that are configured to be available appear in the list. After selecting a tender type, the prompts that display depend upon the kind of tender selected. For example, exchanging a gift card for cash prompts for the gift card number.

In the example, a check is exchanged for cash—a common type of tender exchange—and the check information is entered manually rather than read by a MICR reader. If a reader is used, some of the following prompts may not appear because the information is picked up by the MICR reader.

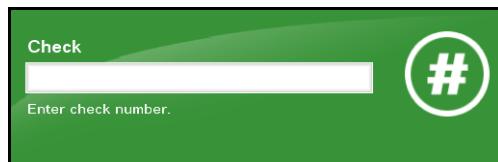
4. When a check is exchanged, the system prompts for the MICR number that includes the check routing number, the bank account number, and the check number. Enter the information and press [Enter].



A screenshot of a software interface for entering a MICR number. The background is green. At the top left, the word "Check" is displayed. To its right is a large circular icon containing a hash symbol (#). Below this is a white rectangular input field. Underneath the input field, the text "Enter MICR number (Route# + Acc# + Check#)." is displayed.

Figure 23-9: Check MICR Number Prompt

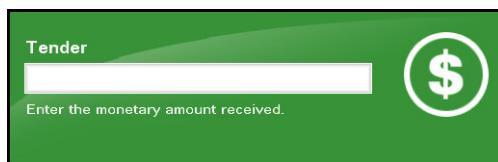
5. When prompted, enter the check number and press [Enter].



A screenshot of a software interface for entering a check number. The background is green. At the top left, the word "Check" is displayed. To its right is a large circular icon containing a hash symbol (#). Below this is a white rectangular input field. Underneath the input field, the text "Enter check number." is displayed.

Figure 23-10: Check Number Prompt

6. When prompted, enter the state/province that issued the ID being used to verify the person requesting the exchange and press [Enter]. Input for the state must be the standard two-letter postal abbreviation.
7. When prompted, enter the ID number being used for identification and press [Enter].
8. When prompted, enter the birth date of the person requesting the exchange (as shown on the ID) and press [Enter]. The date must be in the format mm/dd/yyyy.
9. When prompted, enter the amount of the incoming tender to be exchanged.



A screenshot of a software interface for entering the amount of a tender. The background is green. At the top left, the word "Tender" is displayed. To its right is a large circular icon containing a dollar sign (\$). Below this is a white rectangular input field. Underneath the input field, the text "Enter the monetary amount received." is displayed.

Figure 23-11: Amount Received From Customer Prompt

10. The system may prompt: Are there more incoming tenders to add to this exchange?

- Select Yes to return to the incoming tender list

<OR>

- Select No to continue with the next step in the tender exchange process.

This function allows you to combine several incoming tender types for this customer rather than creating separate transactions.

Note: If more tenders must be added to the current exchange, repeat step 3 through step 10 until you have added all tenders.

11. Choose the outgoing tender type from the list and press [Enter].

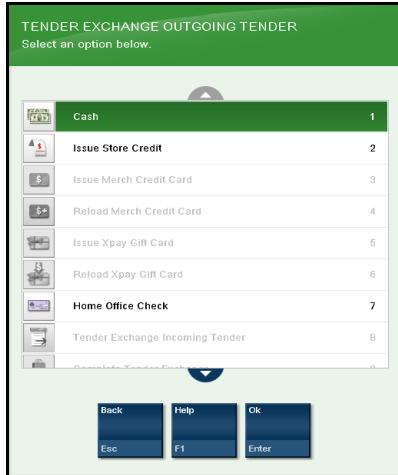


Figure 23-12: Tender (Out) Exchange List

Note: Only those types of tender that are configured to be given out appear in the list, similar to the tender types that appear on the tender (in) exchange list.

12. When prompted, enter the amount that is owed to the customer and press [Enter].



Figure 23-13: Amount Given to Customer for Exchange Prompt

Note: Your store may only allow one outgoing tender. If this is your store policy, the outgoing tender amount must equal the incoming tender amount.

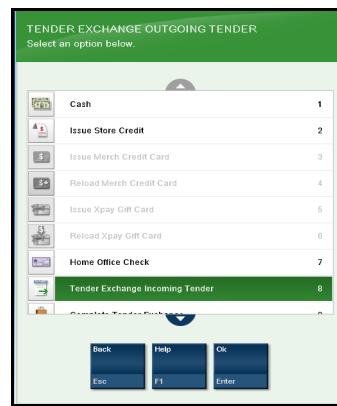
13. The system prompts: Is this tender exchange complete?

- If you select Yes, the system may prompt you to close the cash drawer. The tender exchange is now complete.

<OR>

- If you select **No**, and your system is configured to allow multiple tenders in an exchange, the system returns you to the outgoing tender list where you may now have the option to add a new incoming tender to repeat the exchange process.

You may also be able to make changes to the current tender exchange. Repeat step 3-13 if configured to allow multiple tenders in an exchange.



- If necessary, scan the cash drawer with which to perform the tender exchange.

When the transaction is complete, the system prints a tender exchange receipt showing the incoming and outgoing tenders and amounts.

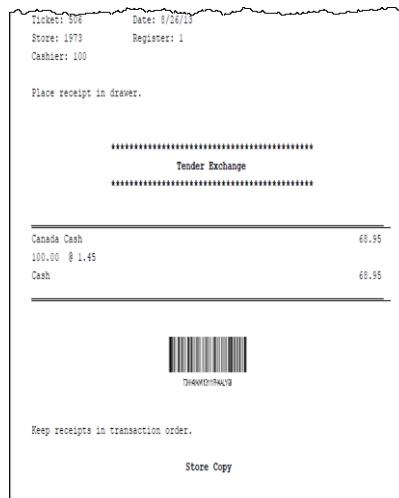


Figure 23-14: Tender Exchange Receipt - Canada Cash For USD Exchange Example

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.

Note: This option is controlled by security and may not be available.

- At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, then select **Till Options** to display the Till Options menu.
Or, at the Sale screen, select **Register Options --> Till Options** to display the Till Options menu.
- At the Till Options menu, select the **Change Float** option.

Change Float

3. The system prompts for the reason you are changing the float amount. Select a reason from the list and press [Enter] to continue.

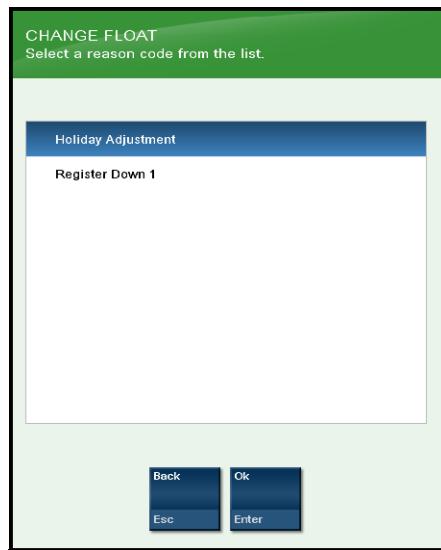


Figure 23-15: Change Float Reasons

4. Depending upon the reason you selected, you may be prompted for additional information/comments. Enter the information as required and press [Enter].
5. If your store is configured for foreign cash currency tenders to be given as change, select the type of float tender from the list.

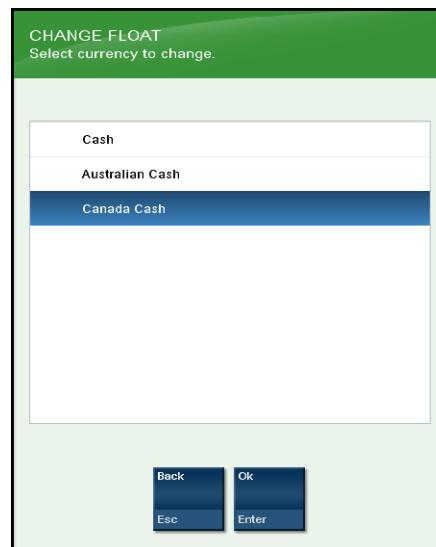


Figure 23-16: Change Float Currency List

- The system displays a list of tills. Use the up and down arrow keys to select the till(s) you want to change. Press the [Spacebar] to select multiple tills. After you select all of the tills you want to change, press [Enter].

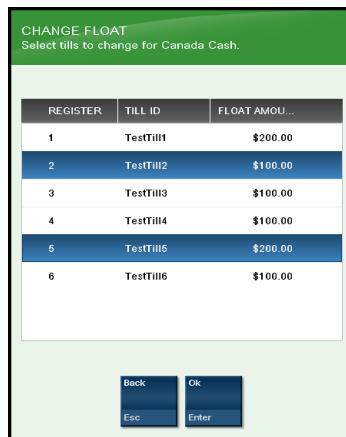


Figure 23-17: Till List - Two Tills Are Selected

- The system prompts for the new float amount for the selected tills. Enter the new float amount and press [Enter].

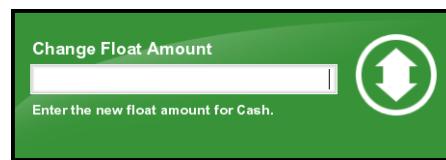
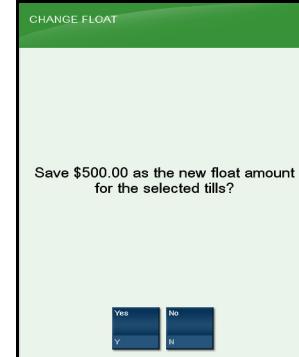


Figure 23-18: New Float Amount

- The system prompts to confirm the new float amount for the selected tills. Press [Y] to accept the new float amount. The system updates the float amount to the new value for the selected tills and returns to the Till Options Menu.



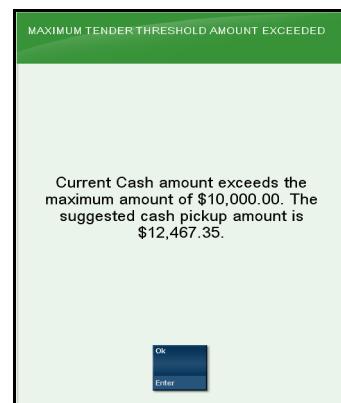
Cash Pickup

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.

1. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu.
2. Select **Till Maint** to display the Till Maintenance Options menu.
3. Select **Cash Pickup** from the menu.
4. If necessary, scan the cash drawer on which to perform the cash pickup.
5. If your store is configured for foreign cash currency tenders to be given as change, select the type of tender from the list.

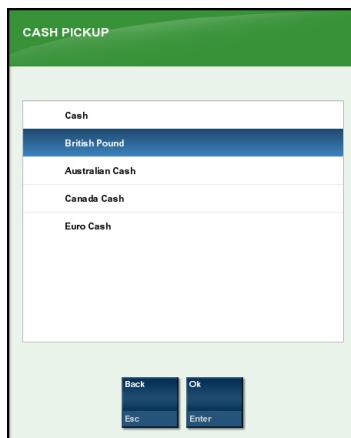


Figure 23-19: Cash Pickup Currency List

- At the Cash Pickup prompt, enter the cash amount that you are picking up and press [Enter].



Figure 23-20: Cash Pickup Amount - British Pound

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. Press [Enter] to return to the Cash Pickup amount prompt.

Your system may be configured to count the Cash Pickup currency. For examples of count screens, see [Tender Count Screen Xstore Base Examples](#).

- Remove the cash from the till and close the drawer.

The system prints a receipt for this cash pickup transaction.



- The system returns to the till options menu. Select the **Back** option to return to the previous screen.

Cash Transfer (From Store Bank To Till)

To perform a Cash Transfer from the store bank to a till, do the following:

- At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, then select **Till Maint** to display the Till Maintenance Options menu.
Or, at the Sale screen, select **Register Options --> Till Options** to display the Till Options menu.
- In the Till Maintenance menu, select the **Cash Transfer** option.

Note: If the register has more than one cash drawer, you may be prompted to select the till to be used for this process.

- If necessary, scan the cash drawer on which to perform the cash transfer.

Cash Transfer (From Store Bank To Till)

4. If your store is configured for foreign cash currency tenders to be given as change, select the type of tender from the list.

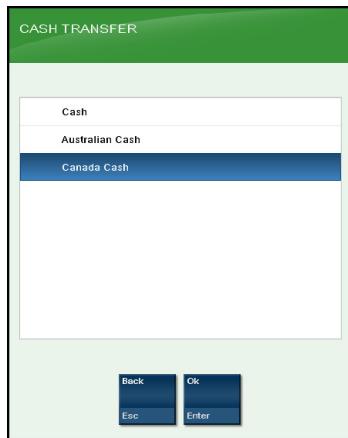


Figure 23-21: Cash Transfer Currency List

5. Enter the amount of cash you would like to transfer and then press [Enter].

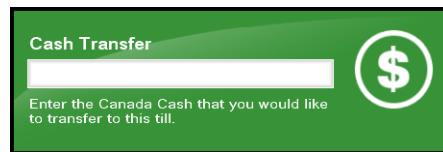


Figure 23-22: Cash Transfer Amount Prompt- Canada Cash

Note: Your system may be configured to count the Cash Transfer currency. For examples of count screens, see [Tender Count Screen Xstore Base Examples](#).

6. A receipt prints for the cash transfer and Oracle Retail Xstore Point of Service returns to the Till Maintenance menu.



Figure 23-23: Cash Transfer Receipt

Mid-Day Deposit

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.

1. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, then select **Till Maint** to display the Till Maintenance Options menu.
Or, at the Sale screen, select **Register Options** -> **Till Options** to display the Till Options menu.
2. Select the **Mid-Day Deposit** option.

Note: If the register has more than one cash drawer, you may be prompted to select the till to be used for this process.

3. If necessary, scan the cash drawer on which to perform the mid-day deposit.
4. The Count Summary screen displays a list of tender groups that may be removed from the till and deposited in the store bank. Use the up and down arrow keys to scroll through the list and choose a count group. Select the **Count Selected** option.

COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVER/SHORT
US Traveler Check	\$0.00	\$0.00	\$0.00
Cash	\$0.00	\$711.30	(\$711.30)
British Pound	£0.00	£280.00	(£280.00)
Australian Cash	\$0.00	\$0.00	\$0.00
Canada Cash	\$0.00	\$0.00	\$0.00
Euro Cash	€0.00	€558.00	(€558.00)
Check	\$0.00	\$356.51	(\$356.51)

Balance Summary Over/Short

Count Summary

Cashier ID: 100 Till Name: Test Till 1

Back Help Count Selected Done Counting Esc F1 F2 F3

Mid-day Count John Smith Online Datavantage Home Office 101 Register: 1 08/22/2014 8:50 AM ? F1

Figure 23-24: Count Summary Screen - Mid Day Count

5. Enter each value as required in the focus bar and press [Enter]. The tender type you select and your system's configuration determine the type of count you must perform. For examples of count screens, see [Tender Count Screen Xstore Base Examples](#).
6. If additional funds are to be placed into the store bank, select the **Next Group** option to display the input screen for the next tender type.

Till Audit

- a. Enter the count and amount values for the next tender group that you selected.

Tip: You may select *Prior Group* to return to the previous tender group in the list.

- b. Select the **Summary** option to return to the list of all tender groups.
7. At the Count Summary screen, select the **Counting Complete** option. The system prints a receipt for the Mid-Day deposit.

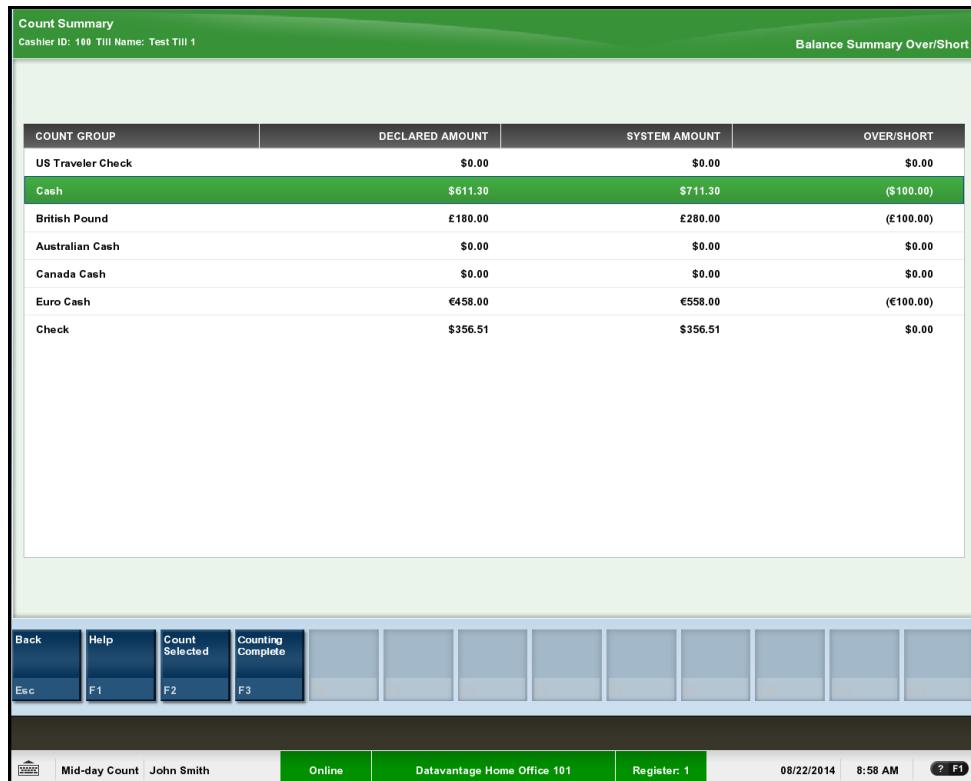


Figure 23-25: Mid-day Count Summary Screen - Counting Complete

Note: The difference between the Declared Amount (your count) and the System Amount is the amount remaining in the till.

8. Close the cash drawer. The system returns to the Till Options menu.

Till Audit

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.

1. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, then select **Till Maint** to display the Till Maintenance Options menu.

<OR>

At the Sale screen, select **Register Options** --> **Till Options** to display the Till Options menu.

2. Select the **Till Audit** option.

Note: If the register has more than one cash drawer, you may be prompted to select the till to be used for this process.

3. If necessary, scan the cash drawer on which to perform the till audit.
4. At the Count Summary screen, select the tender type you want to count and then select the **Count Selected** option. Use the up and down arrow keys to scroll through the list if necessary.

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
Store Credit	\$0.00	\$0.00	\$0.00
US Traveler Check	\$0.00	\$0.00	\$0.00
XPAY GIFT CARD	\$0.00	\$0.00	\$0.00
Cash	\$0.00	\$711.30	(\$711.30)
British Pound	£0.00	£280.00	(£280.00)
Australian Cash	\$0.00	\$0.00	\$0.00
Canada Cash	\$0.00	\$0.00	\$0.00
Euro Cash	€0.00	€558.00	(€558.00)
Gift Certificate	\$0.00	\$0.00	\$0.00
Mall Certificate	\$0.00	\$0.00	\$0.00
House Account	\$0.00	\$0.00	\$0.00
Check	\$0.00	\$356.51	(\$356.51)
Group Master Coupon	\$0.00	\$0.00	\$0.00

Figure 23-26: Audit Count - Count Summary Screen

5. Enter each value as required in the focus bar and press [Enter]. The tender type you select and your system's configuration determine the type of count you must perform. For examples of count screens, see [Tender Count Screen Xstore Base Examples](#).
6. After you complete the count for the selected group, select the **Next Group** option, and repeat this step for additional groups that you want to count.

Till Accountability Mode Functions

- After you count all groups that you want to audit, select the **Summary** option to return to the Count Summary screen. Check the Over/Short column to see if your till is now balanced with the system values for each tender type.

Count Summary		Balance Summary Over/Short	
Cashier ID: 100 Till Name: Test Till 1			
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
Store Credit	\$0.00	\$0.00	\$0.00
US Traveler Check	\$0.00	\$0.00	\$0.00
XPAY GIFT CARD	\$0.00	\$0.00	\$0.00
Cash	\$711.30	\$711.30	\$0.00
British Pound	£280.00	£280.00	£0.00
Australian Cash	\$0.00	\$0.00	\$0.00
Canada Cash	\$0.00	\$0.00	\$0.00
Euro Cash	€558.00	€558.00	€0.00
Gift Certificate	\$0.00	\$0.00	\$0.00
Mall Certificate	\$0.00	\$0.00	\$0.00
House Account	\$0.00	\$0.00	\$0.00
Check	\$356.51	\$356.51	\$0.00
Group Master Coupon	\$0.00	\$0.00	\$0.00

Figure 23-27: Count Summary Screen - Audit Complete

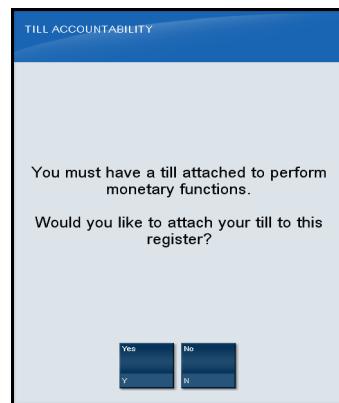
- Select the **Counting Complete** option when you complete your audit of the till.
- The system prints a till audit receipt for your records.
- Close the cash drawer. The system returns to the Till Options menu.

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 Oracle Retail 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.

Attaching a Till to a Register - Till Accountability Mode

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. See [Basic Transaction Entry](#).



Note: A register must be open before a till can be attached to it.

1. If prompted, select **Yes** to attach the till to the register. The Begin Count Summary screen displays.

COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVER/SHORT
Cash	\$0.00	\$100.00	(\$100.00)
Australian Cash	\$0.00	\$100.00	(\$100.00)
Canada Cash	\$0.00	\$100.00	(\$100.00)
Euro Cash	\$0.00	\$100.00	(\$100.00)

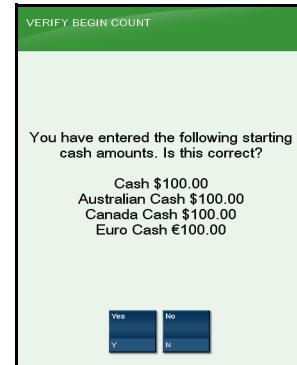
Figure 23-28: Begin Count Summary Screen

2. Enter the count in the Enter Counts focus bar field and then press [Enter]. Xstore will highlight the next denomination in the list.

Note: Depending upon the configuration of your system, you may be prompted to enter the *total* opening amount rather than prompted to count by denomination. See [Tender Count Screen Xstore Base Examples](#).

Till Accountability Mode Functions

3. Select **Summary** to complete the count.
4. Select **Counting Complete** after all denominations have been counted.
5. If the begin count matches the expected count, select **Yes**. Otherwise, select **No** to recount the till.



6. If the begin count does not match the expected amount, select **Yes** to accept the difference or select **No** to recount the till.

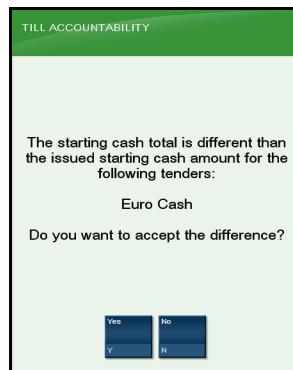


Figure 23-29: Begin Count Does Not Match Expected Amount

7. After accepting the till amount, the sale screen displays.

Open a Till - Cash Drawer

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. At a system connected to the Cash Drawer, welect **Manage Tills** at the Register Login screen and log in to the system, then select **Till Maint** from the menu.
2. Select **Attach Cash Drawer Till** from the Till Maintenance menu.

A list of tills opens.

3. Select the till to open from the list.
4. Select **OK**.
5. Scan the drawer to which the till will be attached.
A confirmation prompt opens.
6. Select **Yes**.

The cash drawer opens.

7. Insert the till into the cash drawer.
8. Close the cash drawer.
9. Select **OK** at the confirmation prompt.

Removing a Till from a Register - Till Accountability Mode

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.

Note: If you want to count/reconcile the till before removing it from the register, refer to [Performing a Close Count - Till Accountability Mode](#).

1. Select **Manage Tills** at the Register Login screen and log in to the system, then select **Till Maint** from the menu.
2. At the Till Maintenance menu, select the **Remove Till** or **Remove Cash Drawer Till** option. The name of the option will depend upon the configuration of your system.



Figure 23-30: Till Maintenance Menu Options

Note: The options available on this screen may be different, depending upon the configuration of your system.

3. Depending upon the configuration of your system, you may be prompted with a list of cash drawers:
 - a. Select the cash drawer from which to remove the till.
 - b. Scan the cash drawer when prompted.
4. When prompted, Select **Yes** to confirm you want to remove the till.
5. Remove the till.
6. When prompted, press **[Enter]** to confirm you have removed the till from the register.
7. Close the register drawer. The till may now be stored or reconciled at a different register.

Performing a Close Count - Till Accountability Mode

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.

1. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu.
2. Select **Till Maint** from the Manage Tills menu.
3. At the Till Maintenance menu, select the **Count Till** option ([Figure 23-30](#)). The system opens the cash drawer.

The Count Summary screen displays a list of tender groups and their current system amounts. If configured, your system may also show over/short amounts for each tender type.

Count Summary				Balance Summary Over/Short	
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		
Store Credit	\$0.00	\$0.00	\$0.00		
TR Credit Card	\$0.00	\$0.00	\$0.00		
US Traveler Check	\$0.00	\$0.00	\$0.00		
XPAY GIFT CARD	\$0.00	\$0.00	\$0.00		
Cash	\$0.00	\$254.00	(\$254.00)		
Canada Cash	\$0.00	\$0.00	\$0.00		
Euro Cash	\$0.00	\$0.00	\$0.00		
Gift Certificate	\$0.00	\$0.00	\$0.00		
Mall Certificate	\$0.00	\$0.00	\$0.00		

Figure 23-31: Close Count Summary Screen

Note: When a tender group is balanced, the value for the tender is zero in the Over/Short column.

4. At the Count Summary screen, use the up and down arrow keys to select (highlight) a count group. Select the **Count Selected** option on the menu.

Note: The Count Group you select determines the requirements for doing the count. For example, if you select *Cash*, you may need to count the total value of each denomination in the till. But if you select *Check*, you may need to indicate the number of checks in the till and their total value.

5. Enter each value as required in the focus bar and press [Enter]. The value of the Total Amount in the lower right corner of the screen updates each time you make or change an entry, and it should equal the value for the same Count Group displayed on the Count Summary screen. See [Tender Count Screen Xstore Base Examples](#).
6. After completing the count for a group, select the **Next Group** option to display the count screen for the next sequential tender group in the list. It is always the group immediately below the current group on the Count Summary screen.

Tip: The Next Group that is displayed may not have any items in the till. For example, there may not be any European Cash in the till. You can select the *Summary* option and use the up and down arrow keys to choose any group on the Count Summary screen.

7. Count all tender groups and enter their values.

Note: The type of count (by denomination, by item, total value, etc.) that must be performed is configurable for each tender type. Some count groups may require only a total value while other groups require a count by denomination.

8. After you think all groups are balanced, select the **Summary** option to view the Count Summary screen showing the values you entered.
9. At the Count Summary screen select the **Counting Complete** option.
10. If any tender types are out of balance in the till, the system displays a warning message:

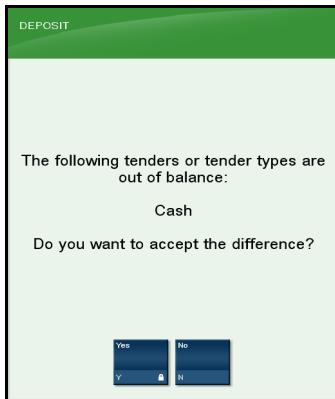


Figure 23-32: Tender Out of Balance Prompt

Till Accountability Mode Functions

- Select **No** if you want to return to the Count Summary screen and correct an out-of-balance tender group.
- Select **Yes** if you want to continue and finalize the closing count for the till and accept the difference between your count and the expected count.

Note: If you select **Yes** at this prompt you are prompted for additional information about the discrepancy. This function may require a Manager security level.

11. Select **Remove Till** to remove the till from the cash drawer. See [Removing a Till from a Register - Till Accountability Mode](#).

When the till has been end-counted and removed, it can be returned to the Cash Manager where it is reconciled and prepared to be issued again.

Note: Refer to the *Oracle Retail Xstore Point of Service Manager's Guide* for more information about all the functions available in Till Accountability mode.

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. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu.
2. Select **Till Maint** from the Manage Tills menu.
3. Select **Reconcile Register** from the Till Maint menu.
4. Select the register to count in the Closed Register Summary window, then select **OK**.

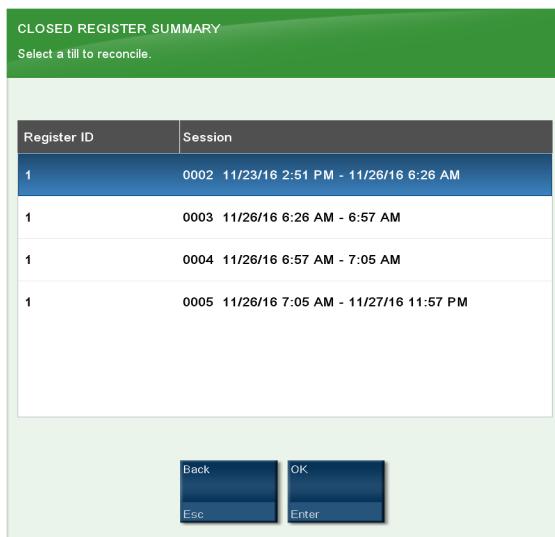


Figure 23-33: Closed Register Summary

5. Click **Yes** to confirm that you want to count the register.
6. Oracle Retail Xstore Point of Service displays the Close Count Summary screen. Each count group (tender type) is counted individually. Specific groups require additional

information as determined by the home office. Select the tender type to be counted and then select the Count Selected option to display the tender group's count 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
Store Credit	\$0.00	\$0.00	\$0.00
US Traveler Check	\$0.00	\$0.00	\$0.00
XPAY GIFT CARD	\$0.00	\$0.00	\$0.00
Cash	\$0.00	\$100.00	(\$100.00)
Australian Cash	\$0.00	\$100.00	(\$100.00)
Canada Cash	\$0.00	\$100.00	(\$100.00)
Euro Cash	\$0.00	\$100.00	(\$100.00)
Gift Certificate	\$0.00	\$0.00	\$0.00

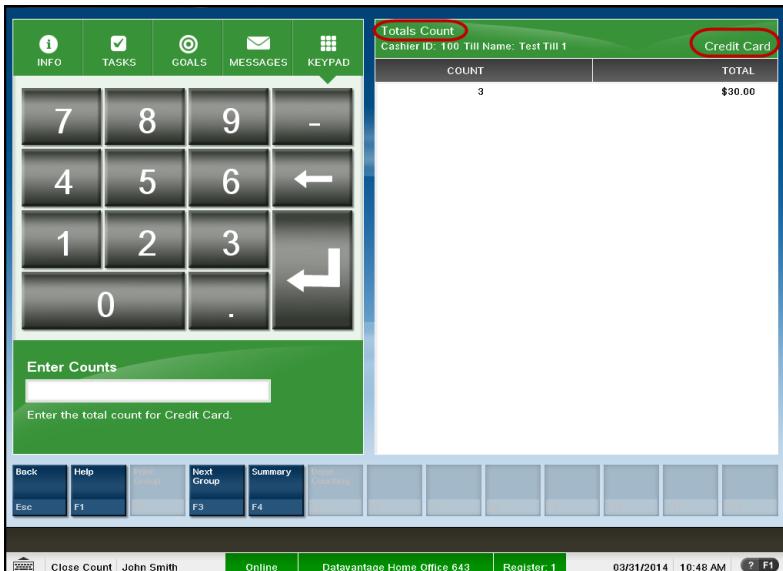
Figure 23-34: Close Count Summary Screen

Note: Depending upon the configuration of your system and your store policy, the over/short amounts as shown above may not be displayed.

Till Accountability Mode Functions

- Enter each value as required in the focus bar and press [Enter]. The tender type you select and your system's configuration determine the type of count you must perform. The following table shows Xstore base examples.

Table 23-1: Tender Count Screen Xstore Base Examples

Tender Count	Example
Credit Card <i>(Totals Count)</i>	The focus bar prompts to enter the Count and then the Amount . 

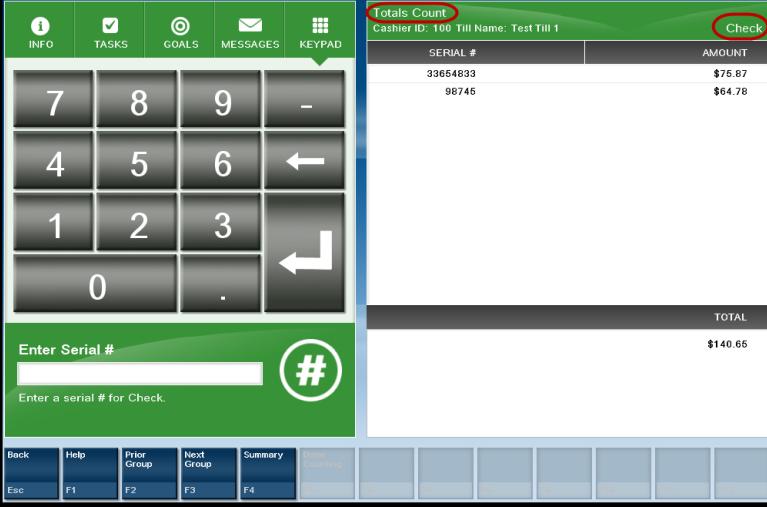
Cash (*Denomination Count*)

The focus bar prompts to enter the **Count** for each denomination. In the example below, the Fifty dollar denomination is being counted. Once [Enter] is pressed, the system highlights the next denomination in the count. The amount is calculated based on the quantity entered and displays a running total at the bottom of the screen.

Denomination Count			
Cash			
DENOMINATION	QTY	@	AMOUNT
Penny	4	0.010000	\$0.04
Nickel	0	0.050000	\$0.00
Dime	26	0.100000	\$2.60
Quarter	30	0.250000	\$7.50
Half Dollar	0	0.500000	\$0.00
Dollar Coins	0	1.000000	\$0.00
Dollar	68	1.000000	\$68.00
Five Dollar	12	5.000000	\$60.00
Ten Dollar	30	10.000000	\$300.00
Twenty Dollar	15	20.000000	\$300.00
Fifty Dollar	0	50.000000	\$0.00
Hundred Dollar	0	100.000000	\$0.00
TOTAL			\$738.14

Table 23-1: Tender Count Screen Xstore Base Examples (continued)

Tender Count	Example
Check <i>(Totals Count)</i>	The focus bar prompts to enter the Serial # and then the Amount . The system calculates the amount based on the quantity entered and displays a running total at the bottom of the screen.



Note: A Totals Count prompts for a total number of the tender type and the total amount.

A Denomination Count requires that you specify the number of items (Count) and the value of each item in the tender group (Amount) that you selected.

Tip: The type of count is labeled on the upper left portion of the count screen view port. The tender type is identified in the upper right portion of the count screen view port.

8. Select **Next Group** to display the next count screen.

Tip: Select **Prior Group** to go back to the previous count screen.

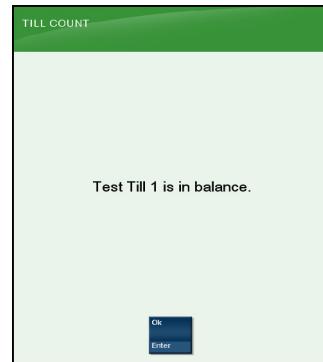
9. Repeat steps 7-8 until all tenders are counted. Select **Summary** to return to the Count Summary screen.

10. Review the amounts. If the totals are correct, select the **Counting Complete** button.

Tip: Check the Over/Short column to see if your till is balanced with the system values for each tender type. To modify counts see [Editing Tender Group Counts](#).

Till Accountability Mode Functions

11. If the till is in balance, a confirmation message displays. Press [Enter] to continue the register close.



12. If any tenders are out of balance—your counts do not match the system expected amounts—Xstore displays a list of tenders that are out of balance.

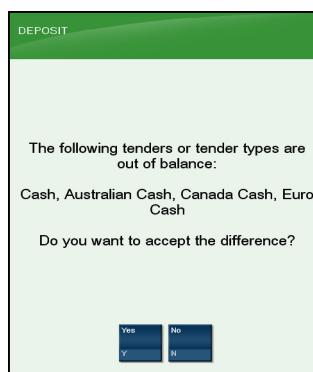
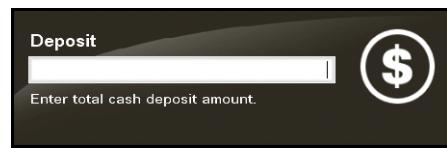


Figure 23-35: Tenders Out of Balance Prompt

- * Select **Yes** to accept your counted amounts. If prompted, select a reason for the count discrepancy and/or type a comment about the discrepancy.
<OR>
 - * Select **No** to recount any tenders as needed. Oracle Retail Xstore Point of Service re-displays the Close Count screen where you can make your changes as needed. See [Editing Tender Group Counts](#).
13. Depending upon your system's configuration, you may be prompted with the suggested deposit amount.
- Select **Accept Deposit** to confirm the amount to be deposited and complete the reconciliation.
 - Select **Change Deposit** to enter an amount to be deposited:
 - 1) You are prompted to enter the amount to be deposited.



-
- 2) Enter the amount and press [Enter] to complete the reconciliation.
-

Tip: You can select the **Deposit Calculator** option to display a denomination count screen that can be used as a calculator—showing a running total at the bottom of the screen as you count the cash amount to be deposited.

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.

1. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, then select **Till Options** to display the Till Options menu.
2. Select the **Foreign Currency Maint** option.

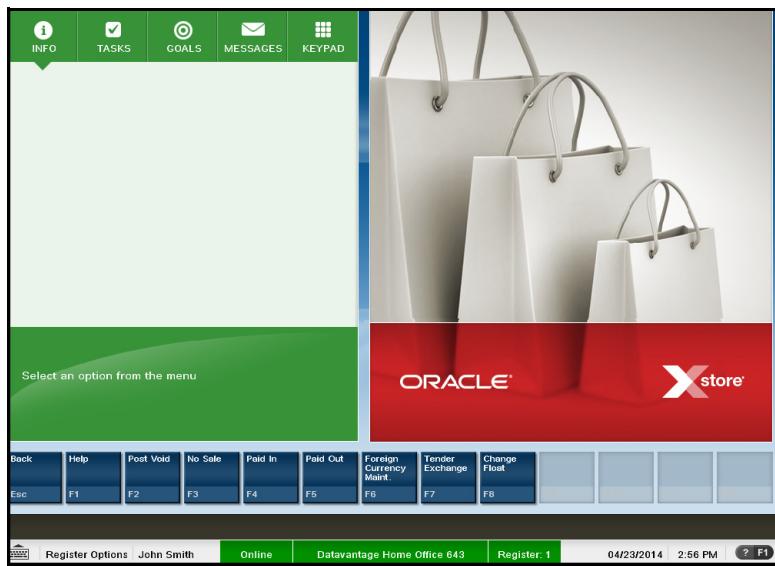


Figure 23-36: Till Options - Foreign Currency Maintenance

Note: If a key symbol is displayed on the Foreign Currency Maintenance option, your security level requires you to verify your identity by entering your ID and password.

3. If prompted, enter your employee ID and password and select **Process**.

Foreign Currency Maintenance

- At the foreign currency list, choose the foreign tender you want to edit and select **Ok**.

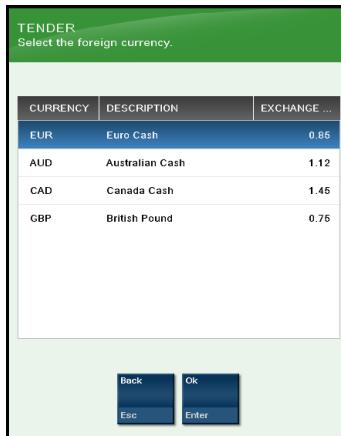


Figure 23-37: List of Foreign Currencies

- The system displays the current information for the currency you selected. Enter the new exchange rate and a comment (optional), then select **Save New Rate**.

The screenshot shows a software interface titled 'CURRENCY EXCHANGE' with a sub-instruction 'Enter the new exchange rate'. It displays the following information:

Base Currency: USD Cash
Target Currency: EUR Euro Cash
Current Exchange Rate: 0.85
New Exchange Rate:

Comments:
Updated per request from J Miller at corporate.

At the bottom are three buttons: 'Cancel', 'Help', and 'Save New Rate'. Underneath these buttons are 'Esc', 'F1', and 'Enter' keys.

- When prompted, select **Yes** to confirm that you want to complete the process.

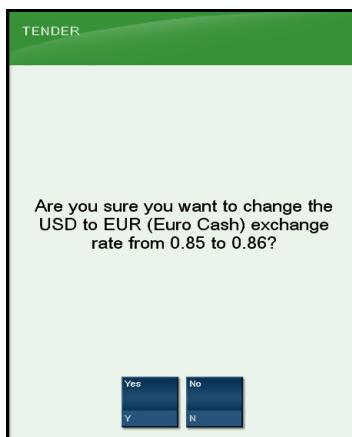


Figure 23-38: Change Exchange Rate Confirmation Prompt

Note: If you select **No** at this prompt, Xstore returns to the Till Options menu without making any changes to the exchange rate.

The new currency exchange rate is now effective and the system prints a receipt with the new exchange rate. Xstore returns to the Till Options menu.

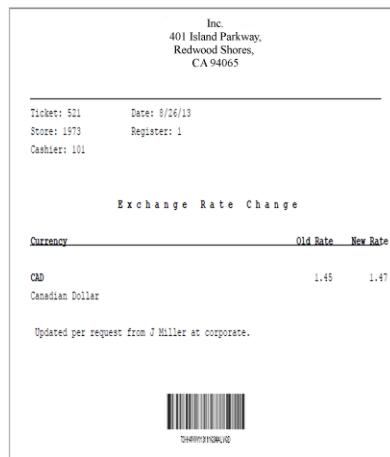


Figure 23-39: Exchange Rate Receipt

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Glossary

ASN

Abbreviation for Advance Shipping Notice. An ID number received during receipt of a vendor shipment.

back office

An application that runs in Oracle Retail Xstore Point of Service and handles non-retail transaction functions such as inventory and register/store open/close.

bar code

A printed code consisting of a series of vertical bars that vary in width. Bar codes are capable of being read and decoded by bar code scanners.

blind return

A return transaction where the customer does not present the original sale receipt.

blind return threshold

An amount limit for blind returns. If the total return value exceeds the set threshold value, the transaction requires a manager's authorization to be completed.

business date

The date for which the store is open.

cash drawer

A cash register component where cash from transactions is kept. It often contains a removable till.

credit card authorization

The process in which a credit card is accepted, read and approved for a sales transaction. Pertinent credit information is transmitted via a modem and telephone line to a credit card clearinghouse. The clearing house (authorization source) communicates with the credit card's bank for approval and the appropriate debit amount of the sale.

credit card reader

See [magnetic swipe reader](#).

CRM

See [Customer Relationship Management](#).

cross channel return

A register transaction in which a customer exchanges merchandise previously purchased on the website for other merchandise, a refund, or some form of credit. Cross channel returns are performed as verified returns using the customer's shipping document information to locate the transaction information.

Customer Relationship Management

The management of customers with a retailer. This may refer to a module in Oracle Retail Xstore Point of Service, a separate software package such as Oracle Retail Customer Engagement Cloud Services (formerly MICROS Retail Relate), or the overall concept of managing customer lists.

debit

Tender type where the user presents a card, swipes, and enters a PIN. Funds are withdrawn and settled instantly.

download

To import data into Oracle Retail Xstore Point of Service from the host system.

electronic journal

An electronically-captured record of all the transactions, it contains a duplication of the text printed on each receipt. This feature allows a user to view transactions and optionally perform post voids.

Euro

The currency used by the European Union (EU) countries.

forced SKU

An item ID that may be configured for use when an item is not found in the database of saleable items. Use of a Forced SKU in a sale transaction may trigger prompting for additional information such as an item description and item amount.

franking

Marking a document such as a check, gift certificate, or store credit to indicate that it has been processed. This is typically performed by inserting the document into a device at the register. After franking, the document may be returned to the customer, depending upon the type of document. Checks, for example, would be retained by the store.

fulfilling store

In a remote send transaction, this is the store that processes the requested item. The fulfilling store has the option of fulfilling or cancelling the order. If it fulfills the order, it may ship to the originating store or directly to the customer.

gross sales

Total sales for a given time period, before making deductions for customer discounts, allowances, or returns.

GST

Abbreviation for *Goods and Services Tax*, which is used in Canada.

hand held device

A computer that can be used as a stand-alone portable unit for point-of-sale, inventory, receiving and other applications.

home office

Physical building where a retailer is headquartered. While the organization may have stores worldwide, the home office contains management, IT staff, marketing, and other corporate offices.

IATA

Abbreviation for *International Air Transport Association*.

HST

Abbreviation for *Harmonized Sales Tax*, which is used in Canada.

layaway

A transaction for which the merchandise is held as the customer makes payments for it. When the item is paid in full, the customer may pick up the merchandise.

layaway account

The system records related to items, payments, and payment schedule for a customer who has made a layaway transaction. The system may be configured to allow single or multiple layaway accounts per customer.

lead register

A cash register that acts as the central register or file server in a multiple register environment. The master register normally controls slave registers that are networked to it.

loyalty

A concept of a customer gaining benefits from shopping. When the customer purchases items they are recorded against a loyalty account via CRM software, and the software at various times offers optional perks such as discounts, coupons, or other special offers that are only available to loyalty customers.

loyalty card

Credit card-sized card that identifies a customer as belonging to a specific loyalty account. The customer presents the loyalty card in order to record purchases against the loyalty account as well as to redeem awards.

mag stripe reader

See [magnetic swipe reader](#).

magnetic swipe reader

Hardware device that reads magnetic track data from a credit, debit, or gift card. A user swipes a card through the device, and the device translates the magnetic data on the stripe into serialized track data which it then sends to the host application.

MICR

Acronym for *Magnetic Ink Character Recognition*. A character recognition system that prints special ink and characters on checks that can be magnetized and read automatically. Within Oracle Retail Xstore Point of Service, MICR technology is used to read check data for check authorization.

MSR

See [magnetic swipe reader](#).

net sales

Total sales for a given time period, after the deduction of returns, allowances for damaged or missing goods, and any discounts allowed.

one-step processing

A send sale configuration in which all shipping-related functions are performed at the same time that items are added to the sales transaction. See [two-step processing](#).

originating store

In a remote send transaction, this is the store in which the customer places the order.

persistent sale

A sale transaction that includes additional, related transactions that occur after the original register sale. Layaway sales, special orders, and work orders are examples of persistent sales. They include additional transactions and record keeping that are recorded in the system such as payments, shipping, and receiving.

pickup

Refers to the status of an item in a layaway account that is eligible to be carried out of the store. Also refers to the function performed in the system when it records related information about the layaway item such as the pickup date and other account data.

PIN

Acronym for *Personal Identification Number*. A password code, usually 4 digits, entered by the customer on a pinpad when using a debit card or a credit card for tendering.

PIN pad

Also PINpad, pinpad, pin pad, or PED (Pin Entry Device). An electronic device for reading debit or credit cards and for entering personal identification numbers (PIN) for authorization.

point-of-sale

Term used to describe cash register systems that record transactions or the area of checkout in a retail store.

POS

See [point-of-sale](#).

postal code

A code that identifies a postal delivery area. Known as a *zip code* in the United States.

post void

The action of cancelling the effects of a transaction within the system. Typically post voids are restricted to being performed on the same date as the original transaction and only for certain tenders. Rules governing whether a transaction may be post voided or not are configured in the system.

PST

Abbreviation for *Provincial Sales Tax*, which is used in Canada.

register accountability

Refers to the money-handling processes that are required of a cashier upon opening and closing a register and that are available to the cashier during a session. Register accountability processes are available in a non-cashiering mode when the till is not assigned to a specific cashier.

remote send

A transaction for which items that are not currently in stock at the store are sold at the store but are fulfilled and shipped to the customer from another store/location. The store in which the customer places the order is the originating store: the store that processes the requested item is the fulfilling store.

return

A register transaction in which a customer exchanges previously purchased merchandise for other merchandise, a refund, or some form of credit. Returns may be blind (no receipt), verified (receipt used to reference original transaction), or unverified (receipt provided but cannot be validated by the database).

sale

A register transaction in which the user of the system is providing items to a customer in exchange for tenders. This is a basic transaction where the customer purchases items from a store.

send sale

A transaction in which items that are in stock are mailed to or for the customer. Delivery information and shipping charges are entered in Oracle Retail Xstore Point of Service.

ship sale

See [send sale](#).

signature capture device

A peripheral device that electronically captures an individual's signature for customer identification and transaction applications.

SKU

Acronym for *Stock Keeping Unit* which is an identification number assigned to a unique item by the retailer. The SKU may be an internal number or may be tied to an item's UPC or EAN.

special order

A transaction for which items that are not currently in stock at the store are ordered. The order is taken and the item is shipped either to the store or directly to the customer. Often used to purchase items that are not commonly stocked in the store, which may also be expensive to ship via traditional means.

store bank

The in-store safe that holds tenders until they can be deposited at a banking institution.

tender

A specified form of payment (cash, check, credit card, gift certificate, etc.) that a customer gives to the store in return for receiving items or services. Tender also refers to that part of the sale transaction in which the sale is completed by receiving the payment and the **Add Tenders** function is performed by the cashier.

tender franking

See [franking](#).

tender repository

Object that contains tenders. This may be synonymous with a till, or it may represent the store bank.

till

The paper money and currency tray that holds money in a cash drawer.

till accountability

Refers to the money-handling processes that are required or available when the till accountability configuration is in effect. A till is assigned to a specific cashier who has responsibility for the money in the till until the time when it is assigned to a different associate.

till count

Action performed where the user counts the tenders in a till. Till counts typically occur when issuing and returning tills to and from the store bank. Counts may also occur at arbitrary times (auditing a till) or when performing cash pickups or midday deposits.

timecard

The Clock In/Out entries for a pay period for an associate. The timecard calculates and shows the hours the associate worked.

timecard entry

A Clock In or Clock Out record that displays on the timecard. Each timecard entry consists of an activity (Clock In or Out), a time stamp, and a flag that indicates if the entry was maintained through Timecard Maintenance.

timecard record

See [timecard entry](#).

transaction

One unit of work performed by the user of the system. A transaction may be a retail sale, a return, post void, inventory movement, inventory count, etc. Each transaction has its own ID and is recorded by the system.

two-step processing

A send sale configuration in which shipping-related functions are performed as a separate step in the Back Office module after the sales transaction is completed at the register. See [one-step processing](#).

unverified return

A return transaction where the original receipt is found in the database, but is missing data required to process the return, or the customer has a receipt but it cannot be found in the database.

UPC

An abbreviation for *Universal Product Code* which is an encoded set of lines and spaces that can be scanned and interpreted into numbers to identify a product.

upload

To export data from Oracle Retail Xstore Point of Service to the host system.

verified return

A return transaction using the customer's original sale receipt to locate the transaction information stored in the database.

VAT

Abbreviation for Value-Added Tax, which is a form of sales tax used in Canada and Europe.

warranty

Nonphysical item that provides a service to another item where the customer may receive compensation such as a replacement or repair if the item is damaged or destroyed.