360Commerce®

360Store®

Back Office User Guide

Release 7.2.0 LA

February 2006

Confidential

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PREFACE

Audience

This user guide is intended for Store Managers and System Administrators who use 360Store® Back Office in a retail environment.

About this Book

After reading this user guide, Store Managers and System Administrators should be able to manage beginning and end-of-day procedures, employee status, roles, cash, items, pricing and time management.

Feedback

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Trademarks

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Text Conventions

The following table shows the text conventions used in this document:

Table P-1 Conventions

Sample	Description
`Italic text`	This is used to call attention to important terms defined in the text, for example, *quantity on hand* is .... It is occasionally used for emphasis.
Bold text	This is used for text (in an application window or on a keyboard) that is acted upon by the user, for example, Click **Next**.
`Courier Text`	This is used for filenames, paths, syntax, and code.
<Italics and angle brackets>	This is used for text that needs to be supplied by the user. If it is within a code sample, the text is in Courier font.

OVERVIEW

Back Office was designed as a means of accessing, maintaining, and monitoring store business. The general Back Office user is a store manager, assistant manager, or system administrator. Occasionally, store employees may have access to time maintenance functions. From one central server, you can access and manage employees' status and roles, items, pricing, and store transactions. You can also perform basic store operations such as opening and reconciling tills, adding items, and applying price promotions. This chapter provides an introduction to Back Office, including navigational tools, screen region functions, and an overview of the Back Office features, which allows you to successfully access and manage store operations. Topics in this chapter are:

- "Getting Started"
- "User Interface"
- "Security and Errors"

Getting Started

Starting the Application

To access Back Office, open a browser by double clicking the browser icon on your desktop. To access the Back Office login screen, type the Back Office URL into the browser address bar:

http://<*hostname*>:<*portnumber*>/backoffice

Logging In/Out

You must log in to Back Office before any of the functions can be accessed. Logging in is done from the Login Screen that appears when Back Office is launched or after a screen timeout. You must also log out of Back Office when you wish to terminate use of the application.

Logging In

Enter your personal User ID and password on the Login Screen and click **Login**. The application displays the Home page if it accepts your ID and password.

Figure 1-1 Login Screen

Logging Out

Click the **Logout** link in the top right hand corner of the screen. The application logs out the current user and displays the Login screen.

User Interface

Screen Regions

Back Office contains several screen regions listed in the following table.

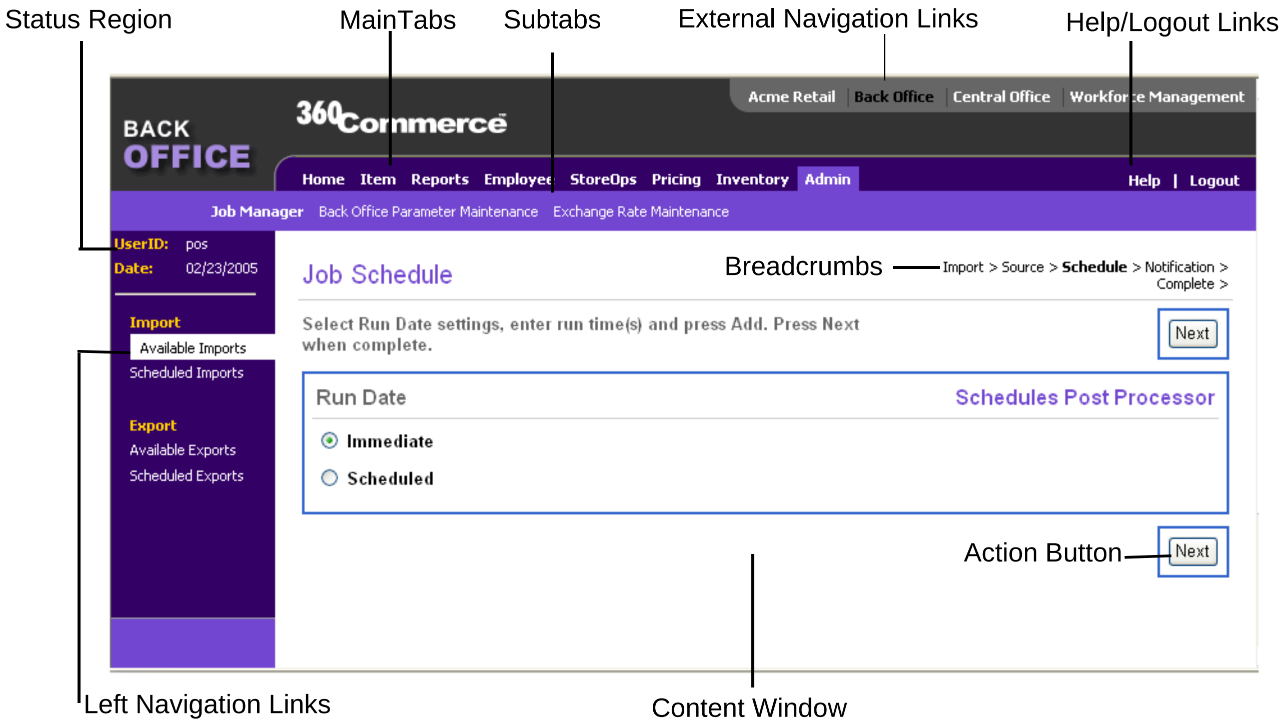
Table 1-1 Screen Regions

Screen Region	Definition
Content Window	The main part of the screen; it displays dynamic information and action buttons.
Status Region	Contains the User ID of the user currently logged in, the store ID, and the current date.
Main Tabs	Located below the 360Commerce logo; displays the main functions of the application.
Subtabs	Located below the main tabs; displays options within a specific tab.
Left Navigation Links	Located below the status region. displays the links within a specific subtab.
Action Buttons/Links	Located in the content window; allows you to perform functions specific to the screen
External Navigation Links	Located in the top right hand corner of the screen; links you to other applications and websites.
Breadcrumbs	Located in the content window; aids you through a sequence of screens to indicate progress. Breadcrumbs do not appear on every screen.

Navigation

Knowing the screen regions and how to access them makes Back Office easy to navigate. To select a tab, link, or button, left-click (single-click with a Mac mouse) the object. Selecting one of these objects accesses its functionality.

Figure 1-2 Navigation



Main Tabs

The main tabs provide the main functions of Back Office. The following features are accessible from the main Tabs.

Note: The Inventory tab is only accessible to those with the Inventory Management feature.

Table 1-2 Main Tabs

Tab	Function(s)
Home	The Home tab allows you to view the dashboard.
Item	The Item tab allows you to search for and add items and/or kits.
Reports	The Reports tab allows you to view reports on item performance, price changes and discounts, store sales, financial status and employees. You can also export reports, save reports, and view report schedules in this feature.
Employee Pricing	The Employee tab allows you to search for and add employee roles and temporary employees. You can also clock employees in and out as well as enter and adjust time entries made at Point of Sale or Back Office and enter special hours.
StoreOps	The StoreOps tab allows you to open and close the store, open and close registers, open and reconcile tills, and create a bank deposit.
Pricing	The Pricing tab allows you to search, create, and add price promotions, price changes, and discount rules.
Admin	The Admin tab allows maintenance of store and Back Office parameters, as well as provides available imports and exports for the job manager. You can also set and maintain foreign currency exchange rates.
Inventory	Note: Inventory Management customers should refer to the Inventory Management User Guide for information on this feature.

Subtabs

The subtabs appear below the main tabs when a main tab is clicked. The subtabs that appear correspond to the chosen tab. For instance, clicking the **Employee** tab displays employee-related subtabs.

Left Navigation Links

The left navigation links appear or change when a subtab is clicked. The left navigation links allows you to choose a specific function within that subtab. For instance, clicking the **Clock In/Out** subtab displays a new screen and the left navigation choices specific to that subtab. You can click one of the left navigation links to perform that specific function.

Content Window

You can view or perform tasks in the content window; for example, add employees, create price promotions, or running a report. You can perform these tasks by typing information into a field, choosing an item from a drop-down menu, or checking a box. These functions allow for easy updates or changes to information.

Action Buttons and Links

The action buttons and links in the content window aid you in performing tasks in the content window. The action buttons and links, if available, provide you with multiple options for each screen.

Help

The Help link is permanently located in the top right corner of the screen next to the Logout link. When **Help** is clicked, information that corresponds to the chosen tab, subtab, or left navigation link is displayed. For instance, clicking **Help** while in the Employee tab displays Employee-related help topics.

External Navigation Links

The external navigation links aid you in navigating between different applications. The external navigation links may include links to the retailer’s website, Central Office or Workforce Management. These links are configurable during installation.

Security and Errors

User Messages

A message is displayed to notify you of an error or task completion. Common error messages include not entering specified fields or an incorrect User ID or password. You must correct the specified error before continuing.

Screen Timeout

If you attempt to perform a task after several minutes of inactivity, the screen defers back to the login screen for security purposes. The default screen timeout occurs after five minutes, but this time is configurable during installation. If the screen returns to the login screen, enter your User ID and password. The Home page or the last screen viewed is displayed.

ITEM MAINTENANCE

Back Office provides the functionality to maintain the store database of items and kits that are available in the store. A kit is a collection of items grouped under one price. You can search for and modify existing items or kits as well as add items or kits to the database. You can also add or modify the items included in a kit. Topics in this chapter are:

- “Searching for an Item or Kit”
- “Modifying an Item or Kit”

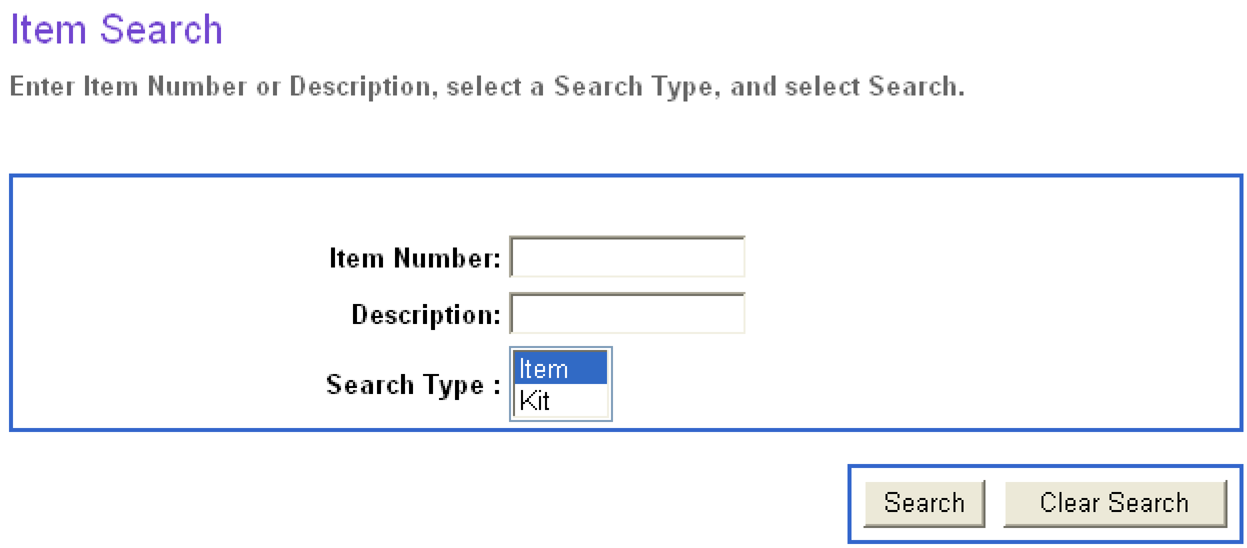
Searching for an Item or Kit

You can search for items or kits by item number or description and optionally select to add the new item or kit to the database if it is not found. A search must be made before you can add an item or kit to the database to avoid duplication.

To search for an item:

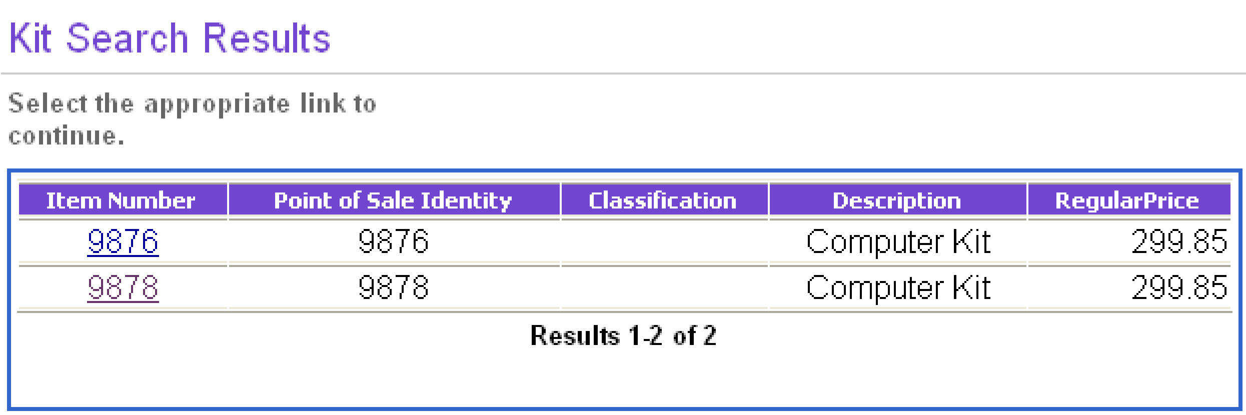
1. Click the **Item** tab.
2. Click the **Search** subtab. The Item Search screen is displayed.

Figure 2-1 Item Search Screen



3. Enter an item number or description. If the exact description is unknown, you can search by typing in part of the description name with a wild card (*). For example, you can search for “computer*” to yield any items or kits with “computer” in the name.
4. Select a search type from the box. The search type is either an item or kit. You can search for both an item and kit by multisecting both words in the box.
5. Click **Search**. Depending on the result, do one of the following:
   - If an item description is not found, enter new criteria.
   - If an item number is not found, add the item or continue without adding. To add the item to the database, click **Yes**. To return the search screen, click **No**.
   - If the item number or description is found, the Item Maintenance screen is displayed.
   - If multiple kits or items are found, a search results screen is displayed. Click the item number or kit to view its details.

Figure 2-2 Kit Search Results Screen



Kit Search Results

Select the appropriate link to continue.

Item Number	Point of Sale Identity	Classification	Description	RegularPrice
9876	9876		Computer Kit	299.85
9878	9878		Computer Kit	299.85

Results 1-2 of 2

Modifying an Item or Kit

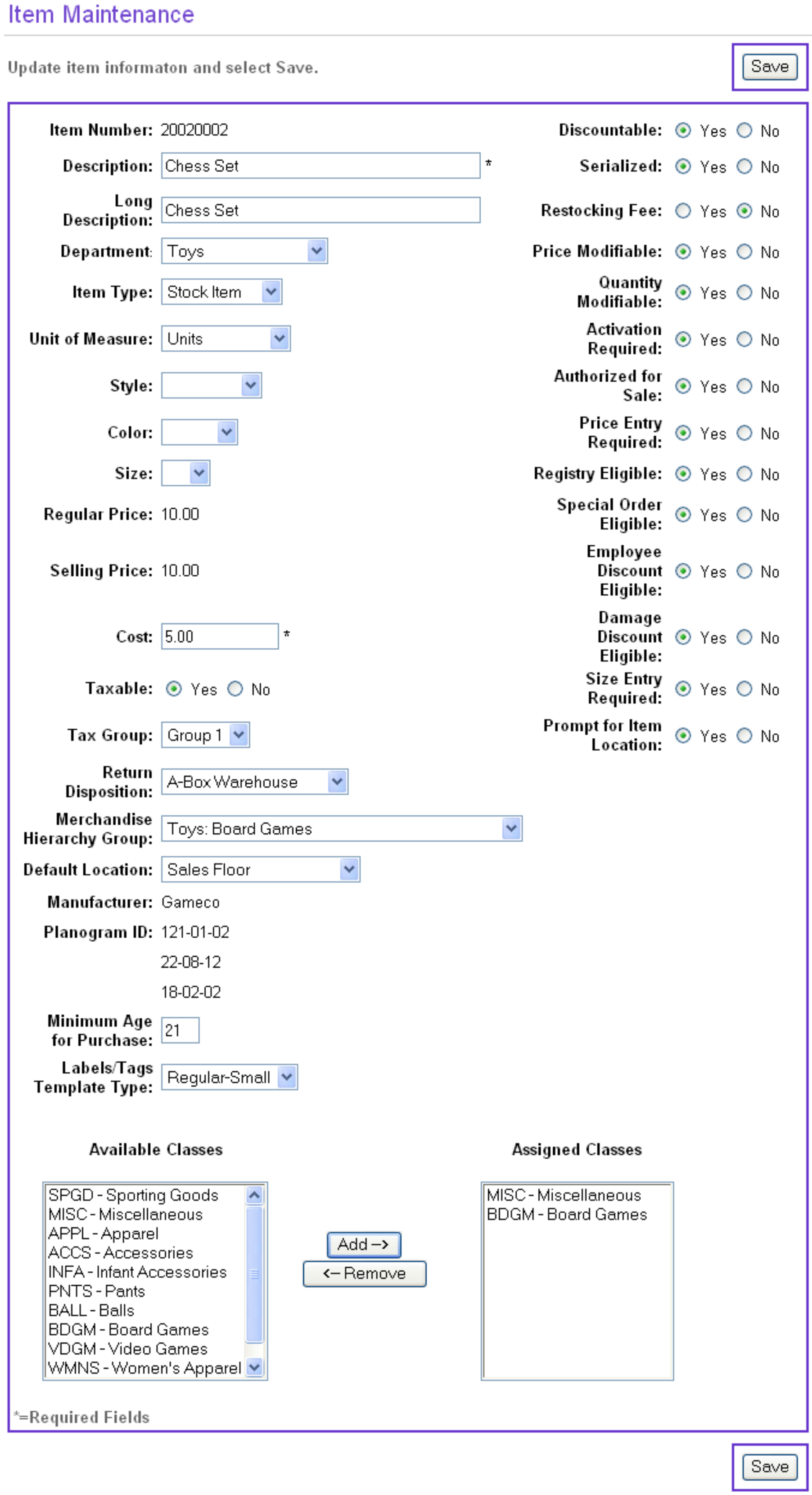
Once a search is made, you can choose to modify the existing item or kit or add an item or kit to the database. You must run a search before adding an item or kit to avoid duplication.

Modifying and Adding Items

To modify or add an item:

1. Run a search for an item using steps 1-5 in “Searching for an Item or Kit” on page 2-1. Select Item as the search type.
    - If the item number is found, the Item Maintenance screen is displayed. The Item Maintenance screen contains all information associated with the item or kit.
    - If an item number is not found, you can add the item. To add the item to the database, click **Yes.** To return to the Search screen and re-enter the criteria, click **No**. If you select to add the item, the Item Maintenance screen is displayed.

Figure 2-3 Item Maintenance Screen



2. Enter or update the item information. You may:
    - Enter a new item description or cost. Description, Long Description, and Cost are required fields and may not be left blank.
    - Select options from the available drop-down menus.
    - Click **Yes** or **No** for each provided item feature. The administrator can customize these features.

Table 2-1 Item Maintenance Features

Feature name	Description
Discountable	When set to No, the markdown and discount buttons are not be available
Serialized	When set to Yes, you are prompted to enter the item's serial number
Restocking Fee	When set to Yes, and the item is returned, a percentage of the item price is included as a fee
Price Modifiable	When set to No, the Price Override button is not available
Quantity Modifiable	When set to No, the Quantity button is not available. This is set to No on all gift cards.
Activation Required	When set to Yes, a message appears at the end of a transaction when a gift card is sold to state it should later be used as tender
Authorized for Sale	When set to No, the item is not allowed to be sold at Point-of-Sale
Price Entry Required	When set to Yes, you are prompted to enter a price for the item
Registry Eligible	When set to No, the Item Registry button is not available
Special Order Eligible	When set to No, the Special Order button is not available
Employee Discount Eligible	When set to No, the item may not have an employee discount applied
Damage Discount Eligible	When set to No, the item may not have a damage discount applied

3. Select one or more classes from the Available Classes menu.
4. To add the classes to the Assigned Classes box, click **Add**. To remove items from the Assigned Classes box, click the class name, and click **Remove**.

   Note: No more than nine classes can be assigned to an item.
5. To save the updated information, click **Save**. The Item Search screen is displayed.

Modifying and Adding Kits

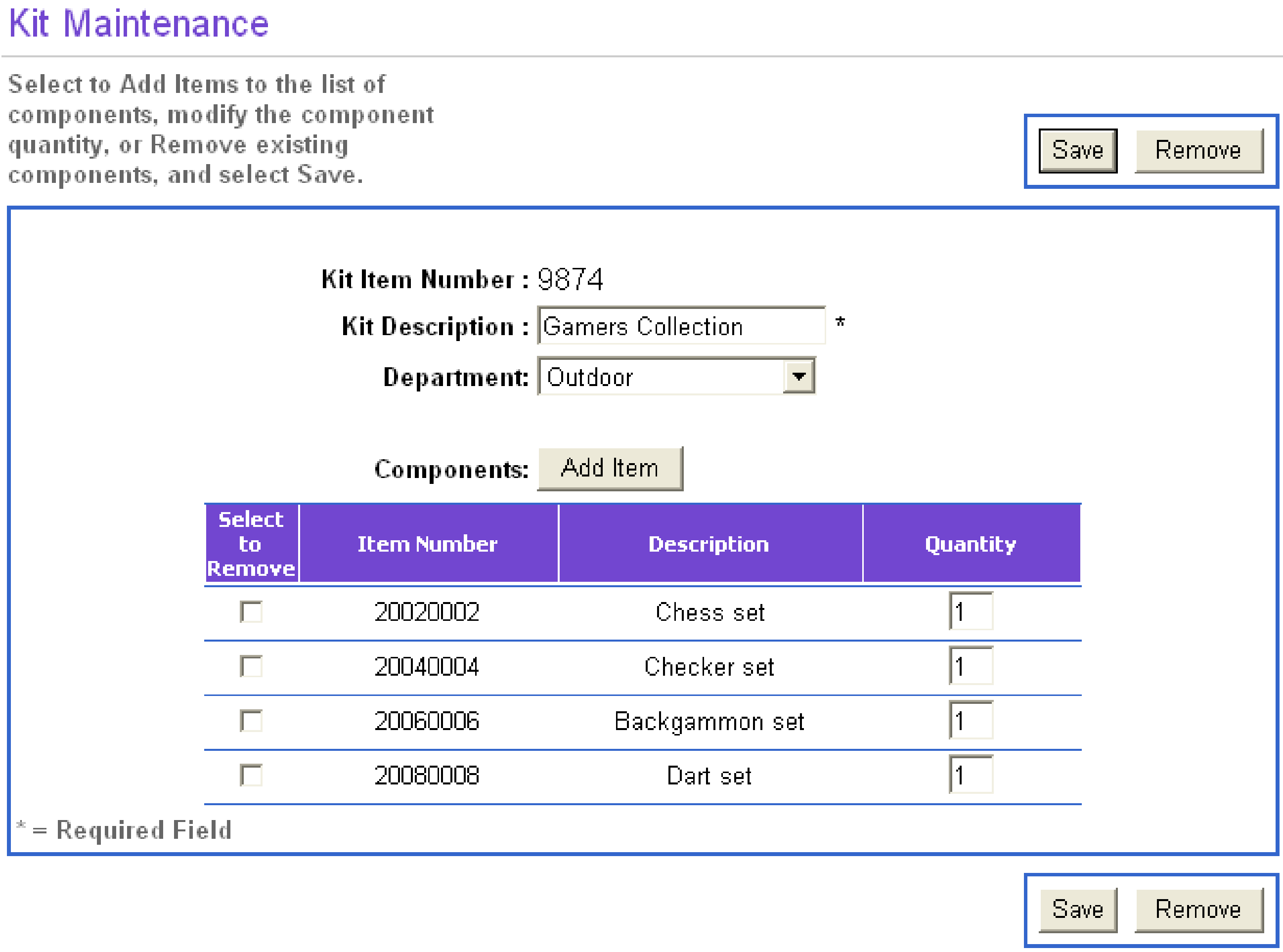
A kit is a set of items grouped under one promotional price. You can modify existing kits or add a new kit to the database.

To modify or add a kit:

1. Run a search using steps 1-5 in "Searching for an Item or Kit" on page 2-1. Select Kit as the search type.
    - If multiple kits are found, the list of results is displayed. To view that kit, click the kit item number. The Kit Maintenance screen is displayed.

- If the kit is not found, you can add the kit. To add it, click **Yes**. To return to the search screen, click **No**.

Figure 2-4 Kit Maintenance Screen



2. Enter or modify kit information.
   - To edit the kit description, enter a new description into the field.
   - To change the department, select a new department from the drop-down menu.
   - To change the quantity of items, delete the number in the Quantity box and enter a new number.
   - To remove an item, check the box next to the item number, and click **Remove**.
3. Click **Save**.

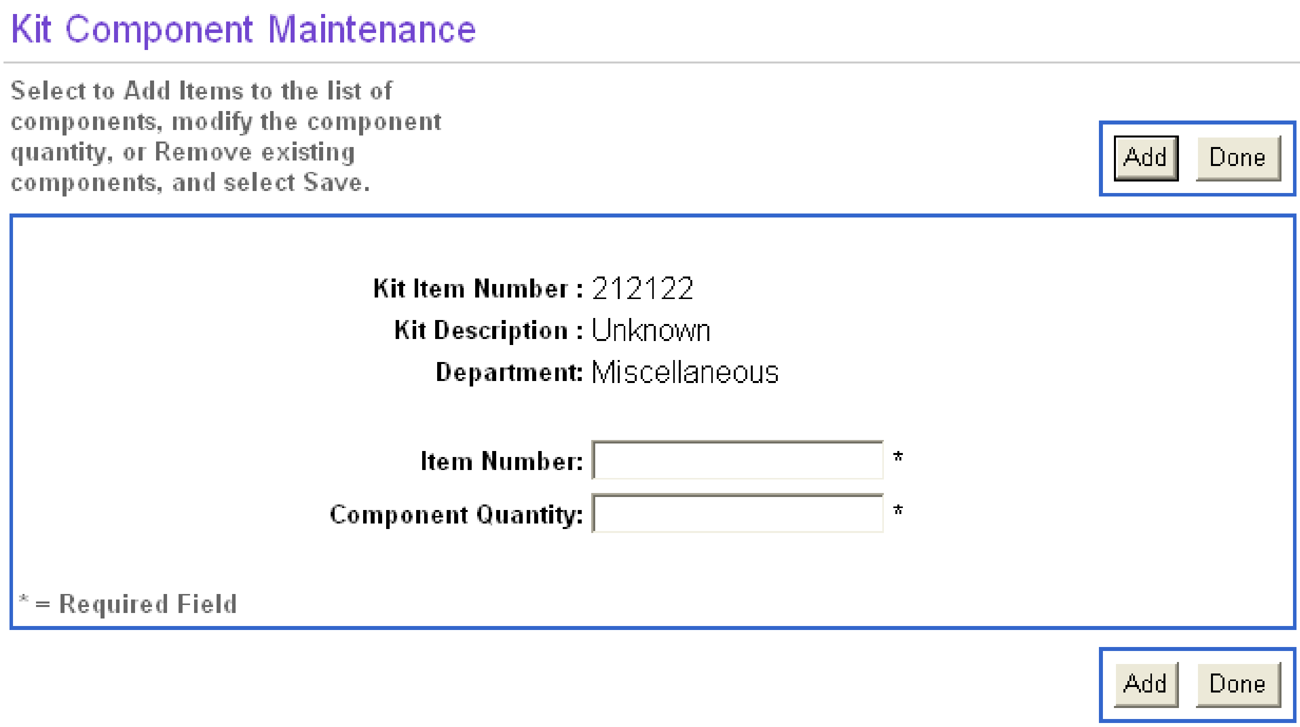
Adding Items to a Kit

You can add items to an existing or new kit. The items must exist before they can be added to a kit.

To add items to a kit:

1. Run a kit search using steps 1-5 in “Searching for an Item or Kit” on page 2-1. Choose to modify an existing kit or add a new kit to the database. The Kit Maintenance screen (Figure 2-4, “Kit Maintenance Screen” on page 2-6) is displayed.
2. Click **Add Item**. The Kit Component Maintenance screen is displayed.

Figure 2-5 Kit Component Maintenance Screen



3. Enter the item number in the given field.
4. Enter the quantity in the component Quantity field.
5. To add the item, click **Add**. The Kit Maintenance screen is displayed. The new item appears at the bottom of the screen.
6. To add another item to the kit, click **Add Item**.
7. To save all the changes, click **Save** on the Kit Maintenance screen.

REPORTS

The Reports feature allows you to view, export, print, and save all of the reports in Back Office. The reports provide summaries of store activity, performance, and records. Reports viewed frequently can also be added to a list of Favorite Reports. Reports can be viewed over a specific time period or added to a schedule. Topics in this chapter are:

- "Overview"
- "Accessing Reports"
- "My Favorite Reports"
- "Report Schedules"

Overview

From the Reports main tab, you can access summary reports on the status of sales, returns, employees, item performance, and other data collected through the Point-of-Sale.

Report Subtabs

Reports can be viewed and exported. These reports are all available under the Reports main tab. A report can be accessed by choosing the appropriate subtab and left navigation link. Reports can be viewed for hourly, weekly, monthly, or yearly activity. The following table describes the available reports and their features. For further information on the purpose and screens for each report, refer to the Reports Overview document.

Table 3-1 Reports

Report	Features
Customer	Displays customer demographic statistics
Discount Rules	Displays active discount rules and discount rule sales
Employee	Displays employee activity reports, including current training activity and top employee productivity
Exceptions	Displays summaries of suspended transactions, override exceptions, and full exceptions; displays summaries of No Sales and cancelled and post voided transactions by operator and by workstation

Table 3-1 Reports

Report	Features
Financial	Displays summaries of till status, overs and shorts by operator and by workstation, gift card sales and tenders, tax reports, and bank deposit amounts
Inventory	Displays summaries of reorders, counts, transfers, returns; displays stock ledger, adjustment, and receiving reports Note: Inventory Management customers should refer to the Inventory Management User Guide for information on inventory reports.
Item Performance	Displays item price exceptions, non-movers, and top and bottom sellers. You can also add items into the system that are not on file.
Order	Displays layaway and special order reports
Returns	Displays returns summaries by customer, cashier, and workstation
Sales	Displays flash sales, store sales by operator, till, and workstation; displays department sales, and hourly productivity by operator, till, and workstation

Report Action Buttons

The action buttons in a Report screen provide you with a variety of options specific to that screen. You can view, export, and print reports or save reports to a list of favorites or add them to a schedule. The following table defines these action buttons and what they do.

Table 3-2 Report Buttons

Button	Function
Ad hoc	Allows you to view reports with specific criteria
Export	Exports the report to an external file
Add to Favorites	Adds report to My Favorite Reports
Done	Returns you to the Display Report screen
Schedule Report(s)	Adds report(s) to schedule or edits a schedule
Add	Adds criteria or report
Remove	Removes criteria or report
Save	Saves information

Terminology

The following terms are used in this chapter.

Table 3-3 Glossary of Terms

Term	Definition
Operator	Employee at a specific workstation
Workstation	The sum of all tills; can have multiple tills and operators
Till	Physical money tray at a workstation
Daily	The current day’s activity, from store open to the current time

Table 3-3 Glossary of Terms

Term	Definition
Weekly	The current week to date **Note:** If the start of the week is Sunday, the report shows Sunday through the current day. Week starting and ending days must be defined by retailer.
Monthly	The current month to date
Yearly	The current year to date
Hourly	Activity broken into hour increments; for example, 8:00-8:59 A.M.
Net Sales	Stock and service item sales minus returns, excluding tax
Gross Sales	Stock and service item sales, excluding tax
Flash Sales	Sales up to the current date and time; can include daily, weekly, monthly, or yearly sales
Departmental Sales	Sales by department up to the current date and time

Accessing Reports

You can view any of the available reports in the Back Office application. The hierarchy links, if available, allow you to view reports for the store, district, or region. You can also export and print reports.

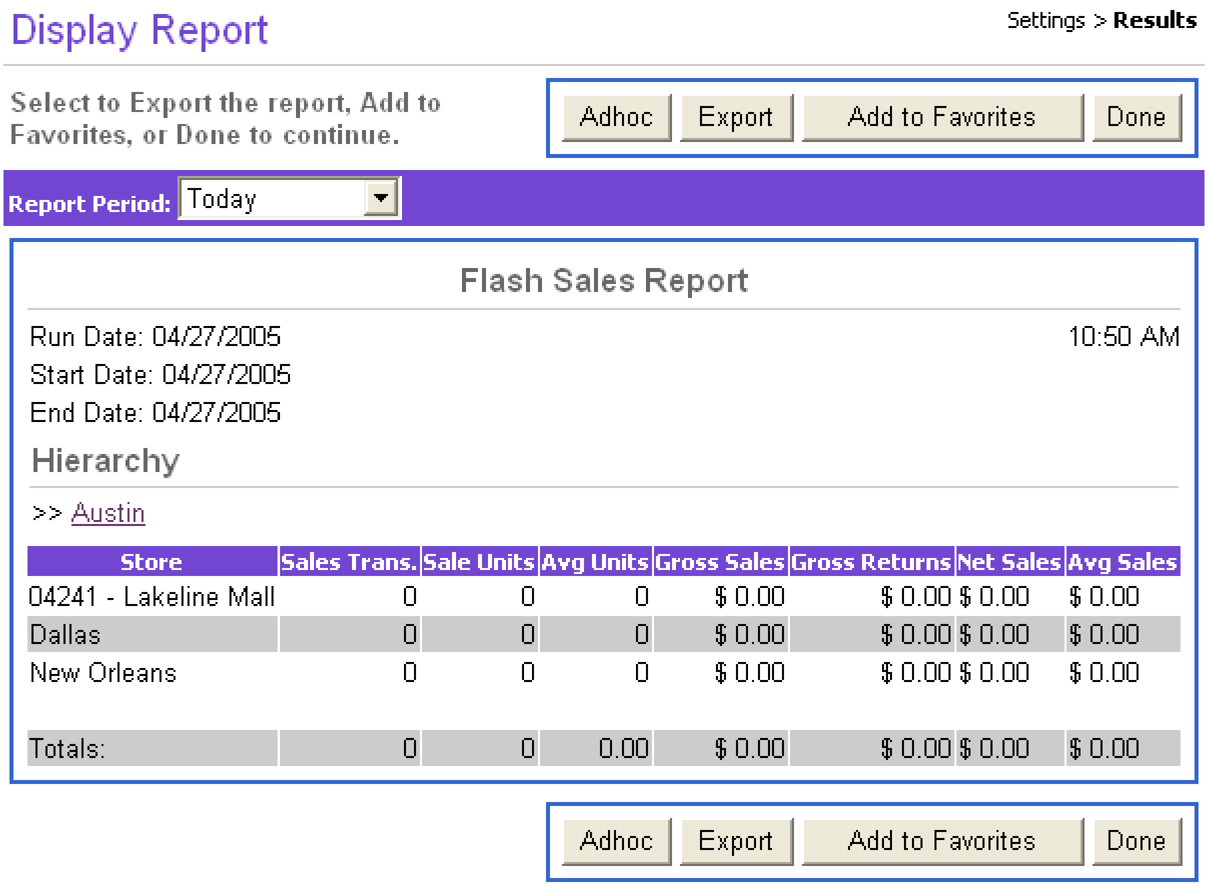
Viewing a Report

You can view any of the reports listed under the Reports tab. The Ad Hoc button allows you to specify report settings.

To view a report:

1. Click the **Reports** tab.
2. Click the subtab of the report category you want to view.
3. Click a specific left navigation link to display that report. The Display Report screen is displayed.

Figure 3-1 Display Report Screen



Store	Sales Trans.	Sale Units	Avg Units	Gross Sales	Gross Returns	Net Sales	Avg Sales
04241 - Lakeline Mall	0	0	0	$ 0.00	$ 0.00	$ 0.00	$ 0.00
Dallas	0	0	0	$ 0.00	$ 0.00	$ 0.00	$ 0.00
New Orleans	0	0	0	$ 0.00	$ 0.00	$ 0.00	$ 0.00
Totals:	0	0	0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00

Note: Display Reports screens vary by report. Refer to the Reports Overview for specific screens.

4. Select a report period from the drop-down menu at the top of the page by clicking the arrow next to the box and choosing one of the options. Reports can be run for the current or previous day, week, month, or year.
5. To change the report settings, click **Adhoc**. Changes to date range, report information, and number of results shown can be made by typing new information into the fields, choosing different options from the drop-down menus, or checking the appropriate boxes.
6. To see the report, click **View**.
7. To add the report to your favorites, click **Add to Favorites**.

Exporting a Report

Exporting a report creates a new external file of the report that can be viewed outside of Back Office.

To export a report:

1. Display the report following steps 1-3 in "Accessing Reports" on page 3-3.
2. To export the report to an external file, click **Export**.

3. Select an output format from the drop-down menu. The formats are as follows:

Table 3-4 File Formats

Format Type	Definition
PDF	Portable Document Format, a read-only file that can be read using Adobe Reader
TXT	Text format, viewable in an application such as Notebook
HTML	A file with HTML tags that can be viewed as a web page
CSV	Comma separated values that can be read in software such as Microsoft Excel

Printing a Report

You can choose to print a report using the browser menu. Click **File-Print** or hold down CTRL+P on the keyboard to access the Print setup dialogue box.

My Favorite Reports

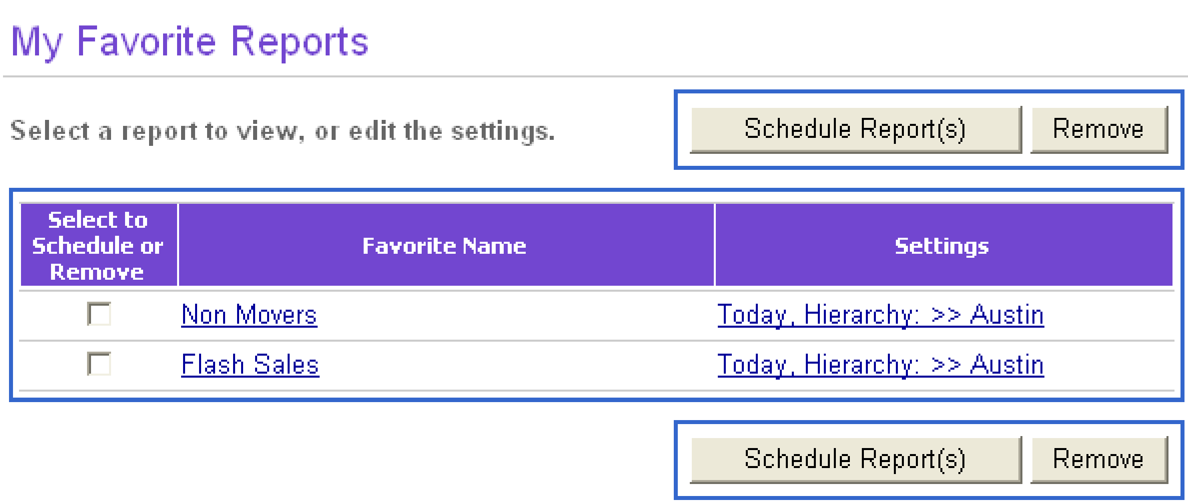
Reports can be saved for easy access. These reports are saved under My Favorite Reports. The list of favorites is created by choosing the Add to Favorite Reports button when viewing a report. You can select to schedule or view favorite reports or remove them from the favorites list.

Viewing Favorite Reports

To view your favorite reports:

1. Click the **Reports** main tab. A subtab for My Favorite Reports appears on the right side of the page.
2. Click the **My Favorite Reports** subtab. The My Favorite Reports screen is displayed.

Figure 3-2 My Favorite Reports Screen



3. Click the appropriate link to report name to display that report. The report can be viewed or exported.
4. To add the report to a schedule, click **Schedule Report(s)**. To return to the My Favorite Reports screen, click **Done**.

Editing Report Settings

To edit the report settings:

1. Click the **My Favorite Reports** subtab under the Reports tab.
2. Click the settings link across from the report name.
3. Enter the criteria and click **Save**.

Removing a Report

To remove a report:

1. Click the **My Favorite Reports** subtab under the Reports tab.
2. Check the box(es) next to the schedule(s) to remove.
3. Click **Remove**.

Report Schedules

Reports can be scheduled to run at repeating dates and times. You can choose the reports to run and at which intervals to run them. The Report Schedule Definition screen is displayed when you select to add a report to run at a specified date or time to a specific output. You can add, edit, or remove the schedule data.

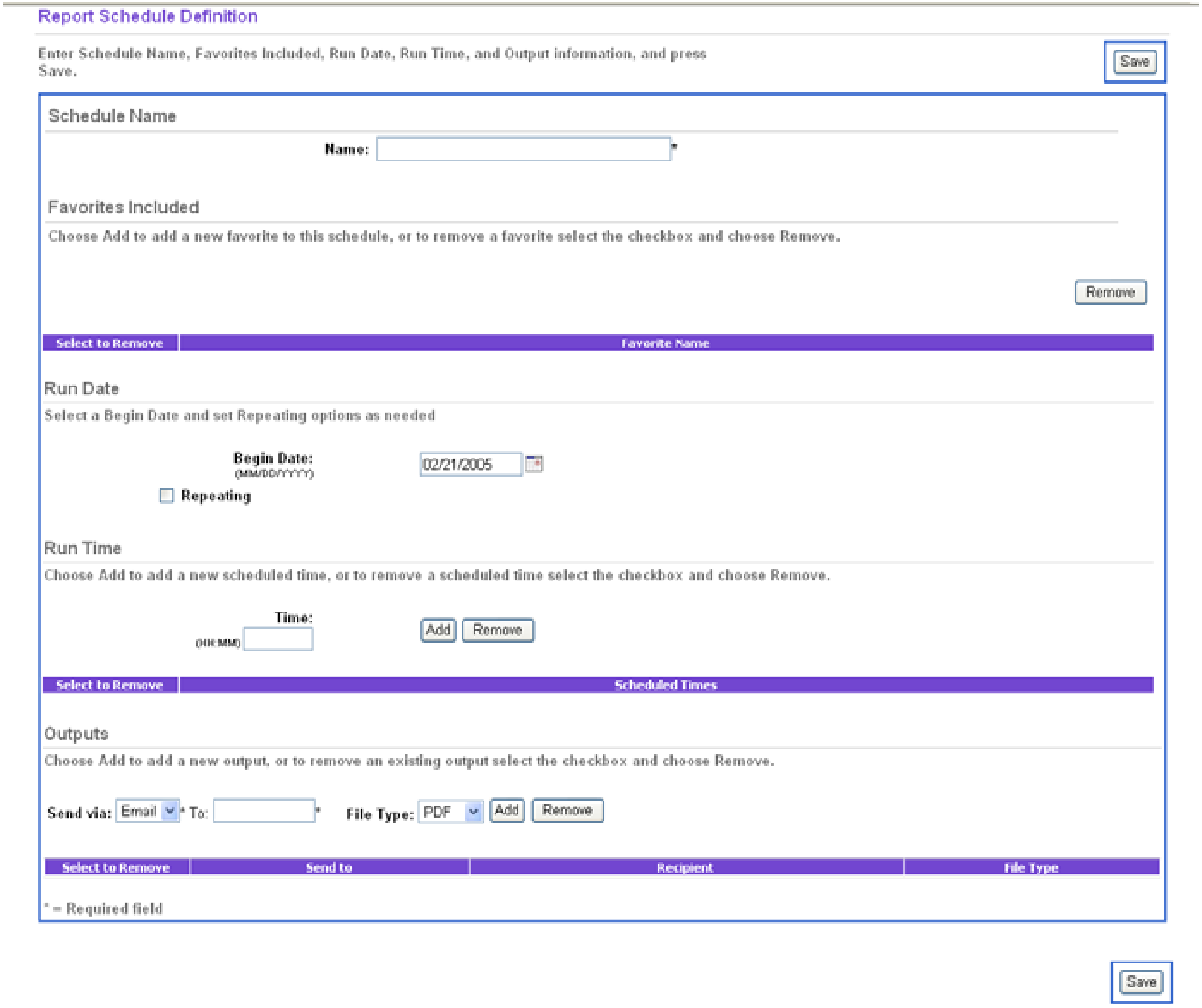
Adding a Report

To add a report:

1. Click the **Report Schedules** subtab on the right side of the screen. The Report Schedules screen is displayed.

   Note: Report Schedules can also be accessed from the My Favorite Reports screen by clicking **Schedule Report(s)**.

Figure 3-3 Report Schedules Screen



2. Enter the schedule name.
3. To add a new favorite report to the schedule, select a report from the dropdown menu and click **Add**. To remove that report from the schedule, click **Remove**.
4. Select run date and run time. You may choose to run the report for a specific duration or on a repeating schedule by choosing the appropriate option boxes.
5. You can choose to send reports to an email account by choosing Email from the output drop down box and entering an email address in the field. Select a file type from the File Type menu and click **Add**.
6. Click **Save** when finished.

Removing a Report

To remove a report:

1. Click the **Report Schedules** subtab on the top right side of the screen. The Report Schedule Definition screen is displayed.
2. Check the box(es) next to the report(s) you wish to remove from the schedule.
3. To remove the selected reports, click **Remove**.

EMPLOYEES

The employee tab allows you to manage employee information. You can search for employees, add new and temporary employees, and edit employee security roles. Employees can clock in and out and view their collected time for the week, while managers can adjust time, confirm hours, and view employee time reports. Topics in this chapter are:

- “Employee Management”
- “Clocking In/Out”
- “Time Maintenance”

Employee Management

You can search for employees and modify an employee’s name, role, or status. You can also add permanent and temporary employees to the database. However, employees may not be removed from the database.

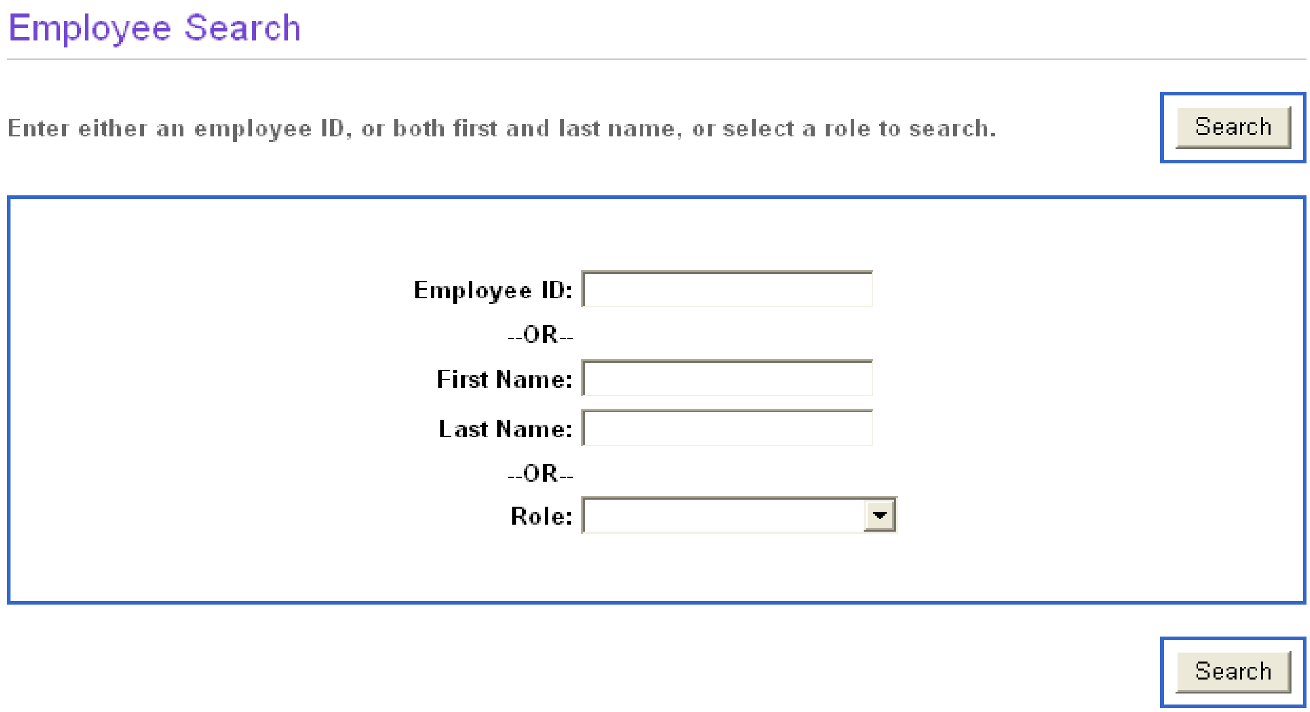
Searching for Employees

Users can search for employees based on employee’s first and last name, ID, or role as well as modify employee information. Employee information consists of the employee name, employee ID, login ID, password, role, and status.

To search for an employee:

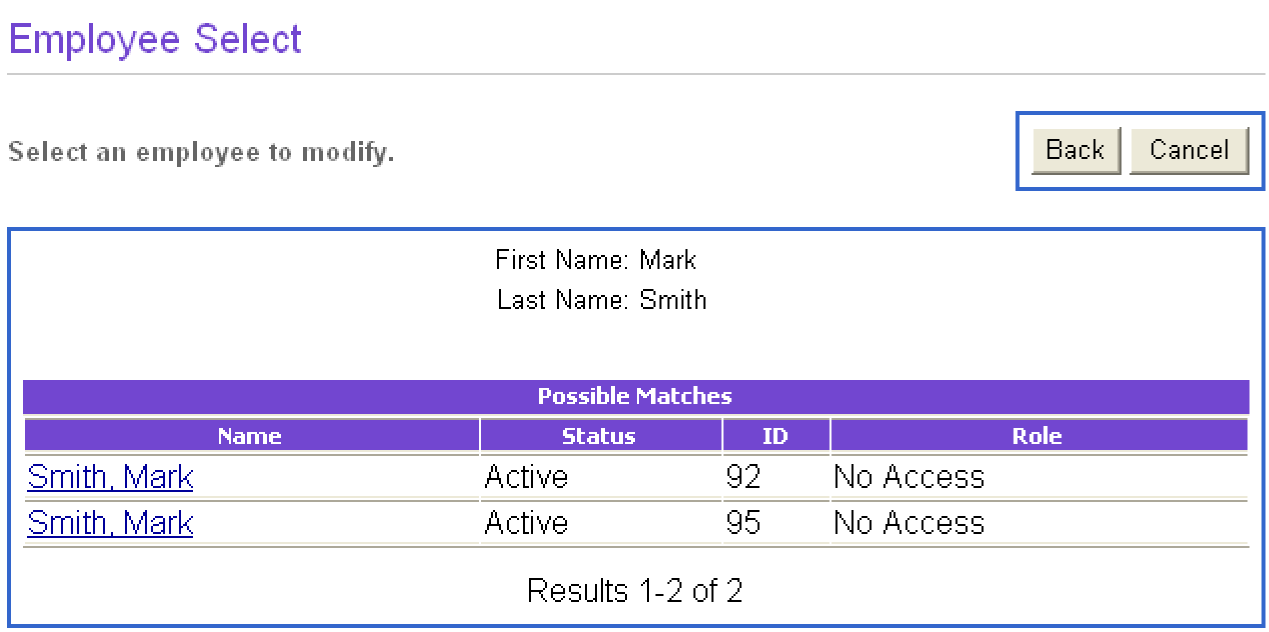
1. Click the **Employee** tab.
2. Click the **Employee** subtab if it is not chosen.
3. Click the **Search** left navigation link. The Employee Search screen is displayed.

Figure 4-1 Employee Search Screen



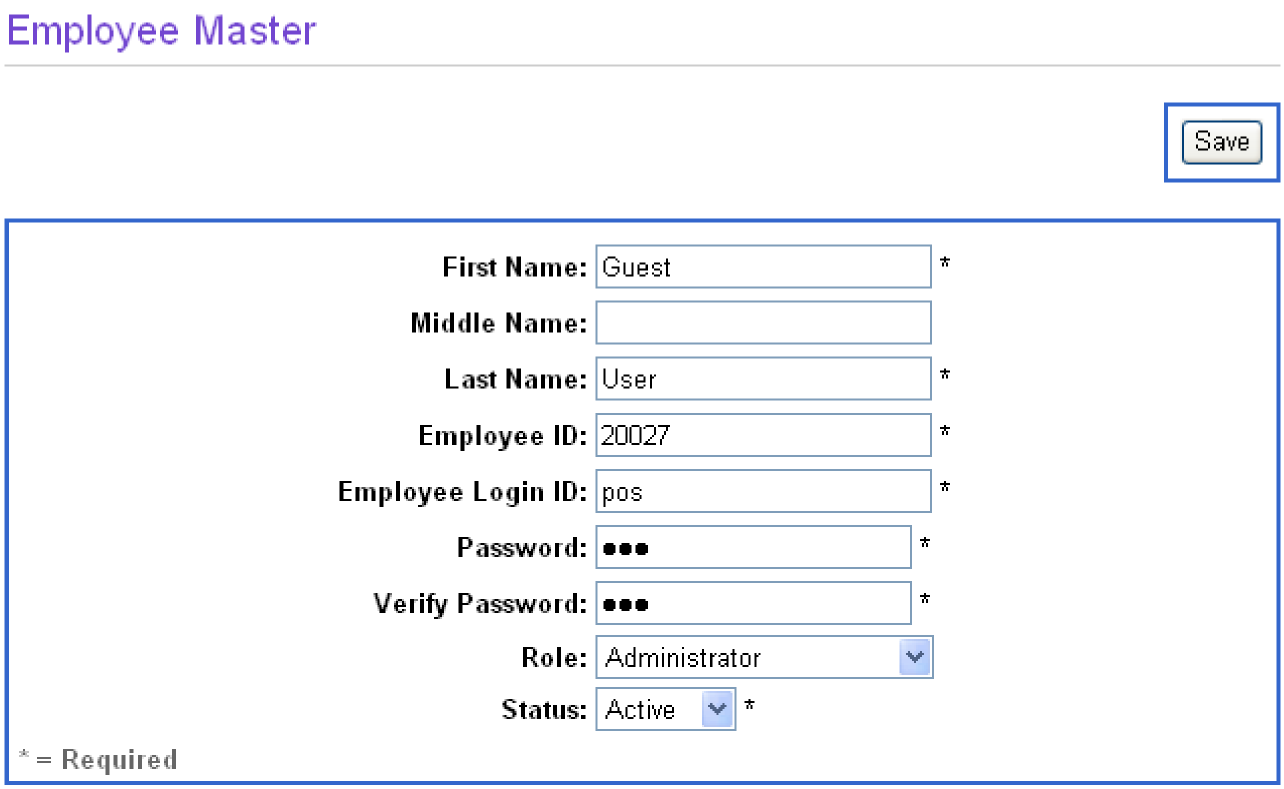
4. Enter the search criteria. You can search by employee's ID, first and last name, or role.
5. Click **Search**.
   - If more than one employee is found, the Employee Select screen is displayed. Click the employee name link of the employee to view that employee's information on the Employee Master screen. See Figure 4-3, "Employee Master Screen" on page 4-3.

Figure 4-2 Employee Select Screen



- If the employee is found, the details of the employee are displayed on the Employee Master screen. If the employee is temporary, the Temporary Employee screen is displayed. See Figure 4-4, “Temporary Employee Screen” on page 4-4.

Figure 4-3 Employee Master Screen



6. Edit the employee information.
   - Change employee’s name, employee ID, login ID, or password.
   - Select a new role or status from the available drop-down menus.
7. Click **Save**. The Employee Search screen is displayed.

Adding Employees

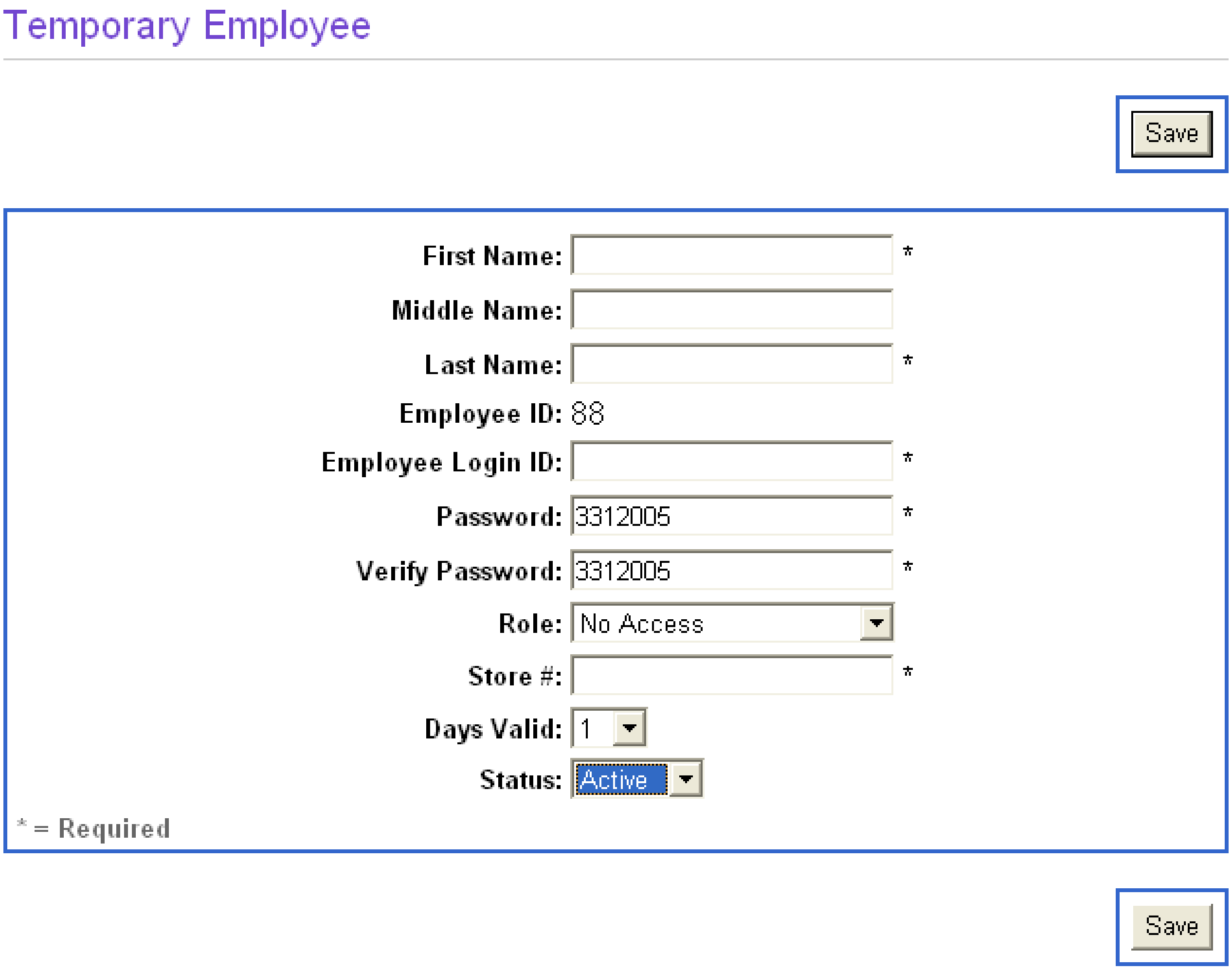
Users can add new permanent or temporary employees to the database. You can enter employee information and assign a security role to the employee.

To add an employee:

1. Click the **Employee** tab.
2. Click the **Employee** subtab.
3. Select to add an employee. You can select to add a permanent or a temporary employee.
   - If the employee is permanent, click **Add**. The Employee Master screen is displayed. See Figure 4-3, “Employee Master Screen” on page 4-3.

- If the employee is temporary, click **Add Temp**. The Temporary Employee screen is displayed.

Figure 4-4 Temporary Employee Screen



4. Enter the employee's first and last name in the given fields. The employee's middle name is optional.
5. Enter the employee ID. The employee ID should be a number from 1-99999. If the employee is temporary, an employee ID is automatically assigned.
6. Enter an employee login ID and password. If the employee is temporary, the employee is automatically assigned a default password. The password is the current date formatted MMDDYYYY.

   Note: You can change a temporary employee's password by typing over the default password.
7. Select a role from the drop-down menu. A role defines the amount of access the employee has to specific Back Office and Point-of-Sale functions.

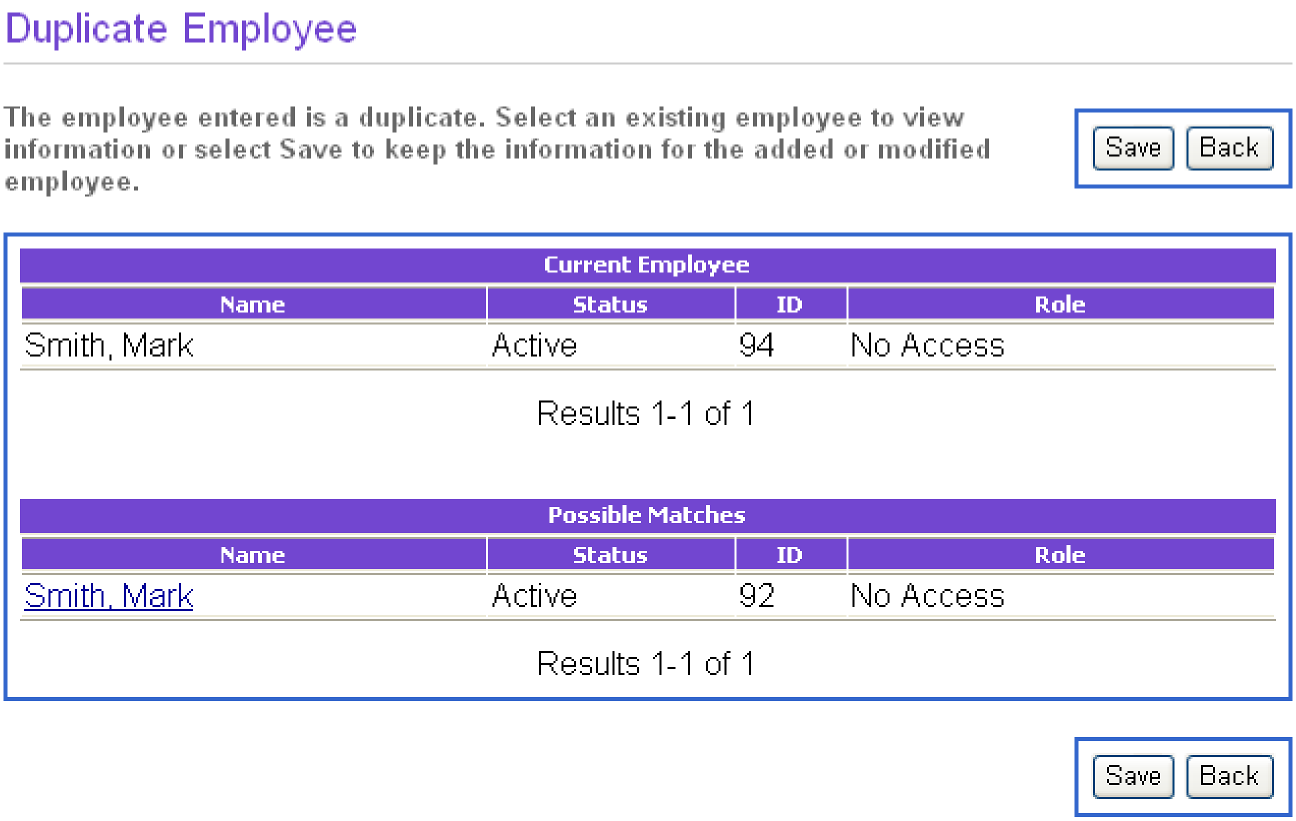
   Note: Roles can be specified by the manager. Refer to "Security Roles" on page 4-5 for information on editing security roles.
8. If the employee is temporary, enter the store number and select the number of days the employee will be working.

9. Select an employee status from the dropdown menu. Employee status is “active” or “inactive.” If the employee is actively working, click **Active**. If the employee is not currently working, click **Inactive**.
10. To save the information, click **Save**. If the information matches an existing employee, the Duplicate Employee screen is displayed.

Duplicate Employee

If the permanent or temporary employee entered has the same information as an existing employee, the Duplicate Employee screen is displayed. The current employee as well as possible matches is displayed.

Figure 4-5 Duplicate Employee Screen



You can choose to select an existing employee or save the information for the newly added employee.

- To view the information for the existing employee, click the employee’s name link.
- To save the new employee’s information, click **Save**.
- To return to the Employee Master or Temporary Employee screen, click **Back**.

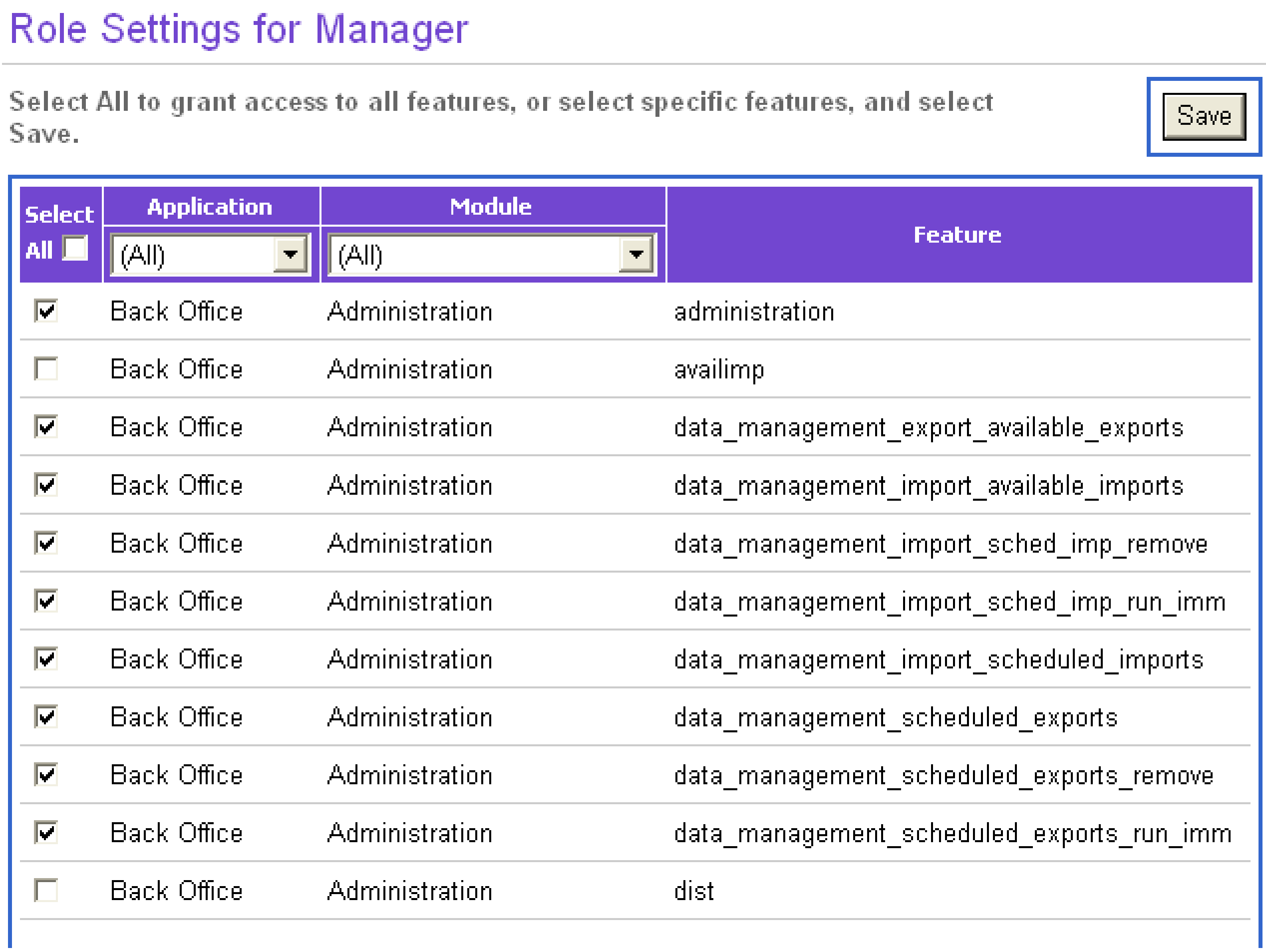
Security Roles

The role assigned to an employee allows that employee access to specific functions in Back Office and Point-of-Sale. The administrator can define and modify security roles and may allow employees access to all or certain applications or modules (parts of an application). The access points set for a role determine what functionality is available to the user. If the functionality is not available to the user, the button or link that executes the function is not displayed.

To access roles:

1. Click the **Employee** tab.
2. Click the **Employee** subtab.
3. Click the **Roles** left navigation link.
4. Click a security role from the list. The Role Settings screen is displayed for that security role.

Figure 4-6 Role Settings Screen


Role Settings for Manager

Select All to grant access to all features, or select specific features, and select Save.

Save

Select All	Application (All)	Module (All)	Feature
☑	Back Office	Administration	administration
☐	Back Office	Administration	availimp
☑	Back Office	Administration	data_management_export_available_exports
☑	Back Office	Administration	data_management_import_available_imports
☑	Back Office	Administration	data_management_import_sched_imp_remove
☑	Back Office	Administration	data_management_import_sched_imp_run_imm
☑	Back Office	Administration	data_management_import_scheduled_imports
☑	Back Office	Administration	data_management_scheduled_exports
☑	Back Office	Administration	data_management_scheduled_exports_remove
☑	Back Office	Administration	data_management_scheduled_exports_run_imm
☐	Back Office	Administration	dist

5. Select an application from the dropdown menu to include in the chosen role. To include all applications, click **All**. Applications are the software applications used by the store, including Back Office, Point-of-Sale, and Inventory Management.
6. Select a module from the dropdown menu. A module is one part of an application. For example, the Employee tab is one module of Back Office.
7. Select specific features to include in the role setting. Check the boxes next to the feature names or click **Select All** to select all features in the list.
8. Click **Save**. The Roles screen is displayed.

9. Click another role in order to view or change the settings.

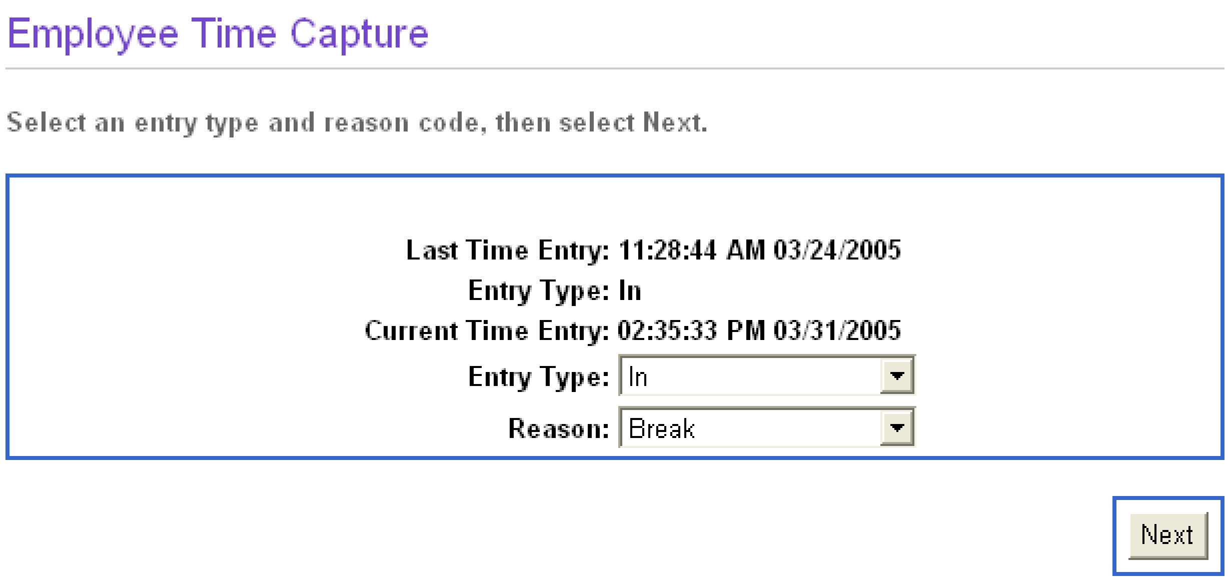
Clocking In/Out

Employees must clock in and out at the beginning and end of a shift, break, or meal. Capturing employee time is necessary in maintaining payroll, attendance, and time-related benefits. Clocking in and out in Back Office eliminates the use of manual timesheets as the time capture saves the employee clock in and out times and compiles them into a report.

To clock in or out:

1. Log in to Back Office using your employee user ID and password. Refer to “Logging In/Out” on page 1-1 for information on logging in.
2. Click the **Employee** tab.
3. Click the **Clock In/Out** subtab. The Employee Time Capture screen is displayed.

Figure 4-7 Employee Time Capture Screen



4. Select an entry type from the drop-down menu. The entry type is either In or Out.
5. Select a reason from the drop-down menu. Reason options are: Break, lunch, Start of day, and End of day.
6. Click **Next**. The Successful Time Entry screen is displayed.
7. To return to the Employee Search screen, click **Enter**.

Time Maintenance

The Time Maintenance function allows you to view employee time summaries and time reports. You can confirm employee hours as well as view and edit employee hours. Authorized managers can enter and edit time entries made at Point-of-Sale or Back Office. You can also export a list of employees and their collected hours.

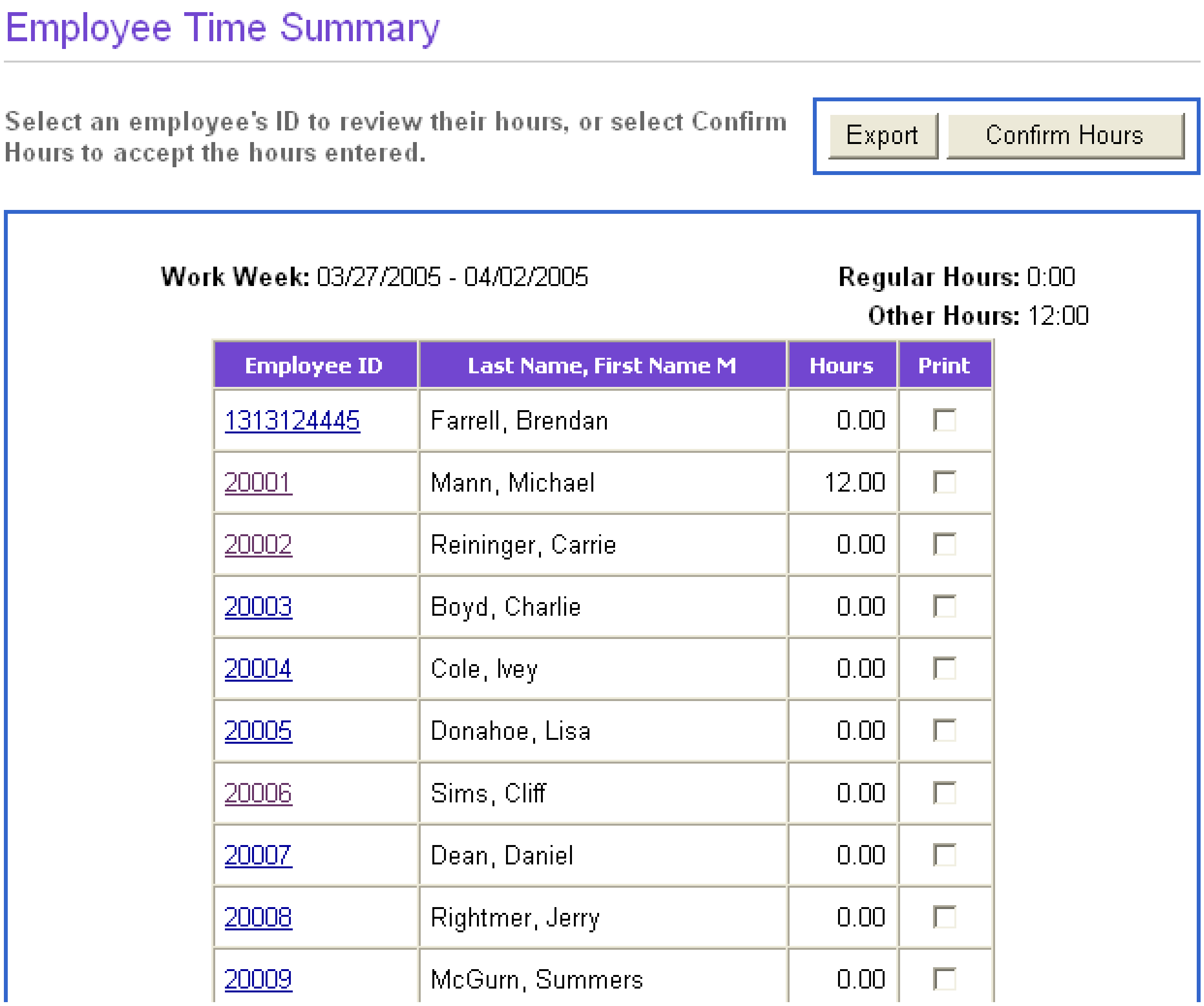
Viewing Employee Time

A manager can view the hours for any employee and export a report of a single or multiple employees.

To view employee time:

1. Click the **Employee** tab.
2. Click the **Time Maintenance** subtab.
3. Click the **Employee Time Maintenance** left navigation link. The Employee Time Summary screen is displayed.

Figure 4-8 Employee Time Summary Screen



From this screen, you can:

- View the time for an employee by clicking the employee's ID.
- Confirm hours by clicking **Confirm Hours**. Refer to "Confirming Employee Hours" on page 4-12 for more information on confirming hours.
- Export employee data.

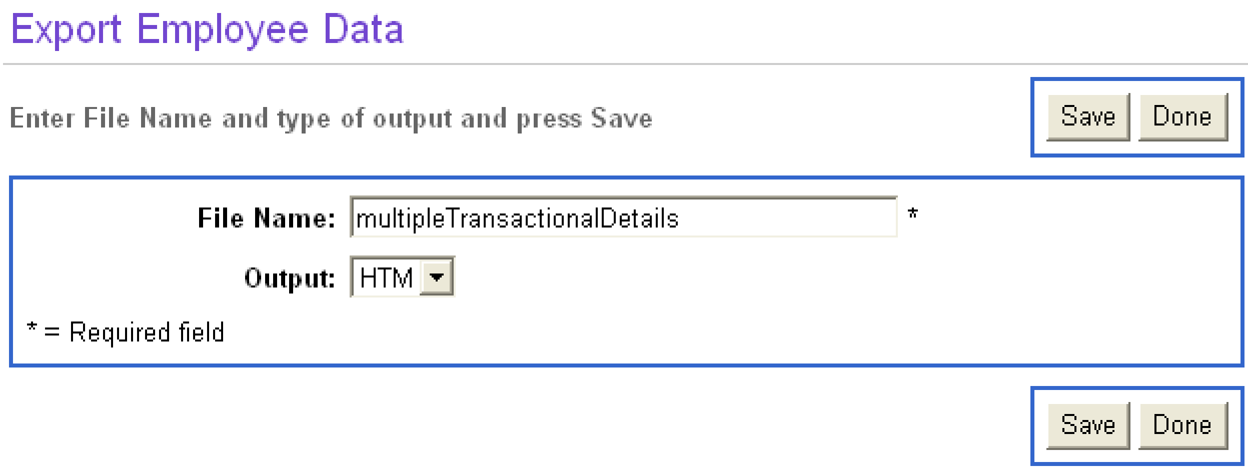
Exporting Employee Data

To export employee data:

1. Click the **Employee** tab.
2. Click the **Time Maintenance** subtab.
3. Click the **Employee Time Maintenance** left navigation link. The Employee Time Summary screen is displayed. See Figure 4-8, "Employee Time Summary Screen" on page 4-9.
4. Check boxes in the Print column next to the name of each employee you wish to include.

5. Click **Export**. The Export Employee Data screen is displayed.

Figure 4-9 Export Employee Data Screen



6. Enter a file name in the field.
7. Select an output from the drop-down menu. You can select HTM or PDF as the output format.
8. To save the data as an external file, click **Save**. To return to the Employee Time Summary screen, click **Done**.

Editing Employee Time

Managers can edit employee hours for the current week. For example, editing employee hours may be necessary when an employee forgets to clock in or out.

To edit an employee's time:

1. Click the **Employee** tab.
2. Click the **Time Maintenance** subtab.
3. Click the **Employee Time Maintenance** left navigation link. The Employee Time Summary screen is displayed. See Figure 4-8, "Employee Time Summary Screen" on page 4-9.
4. To review an employee's hours, click the employee ID link of the specific employee. The Employee Hours by Date screen is displayed.

Figure 4-10 Employee Hours by Date Screen

Employee Hours by Date

Select a date to view or edit the employee's hours.

Employee ID: 20027 **Total Week's Hours:** 0.00

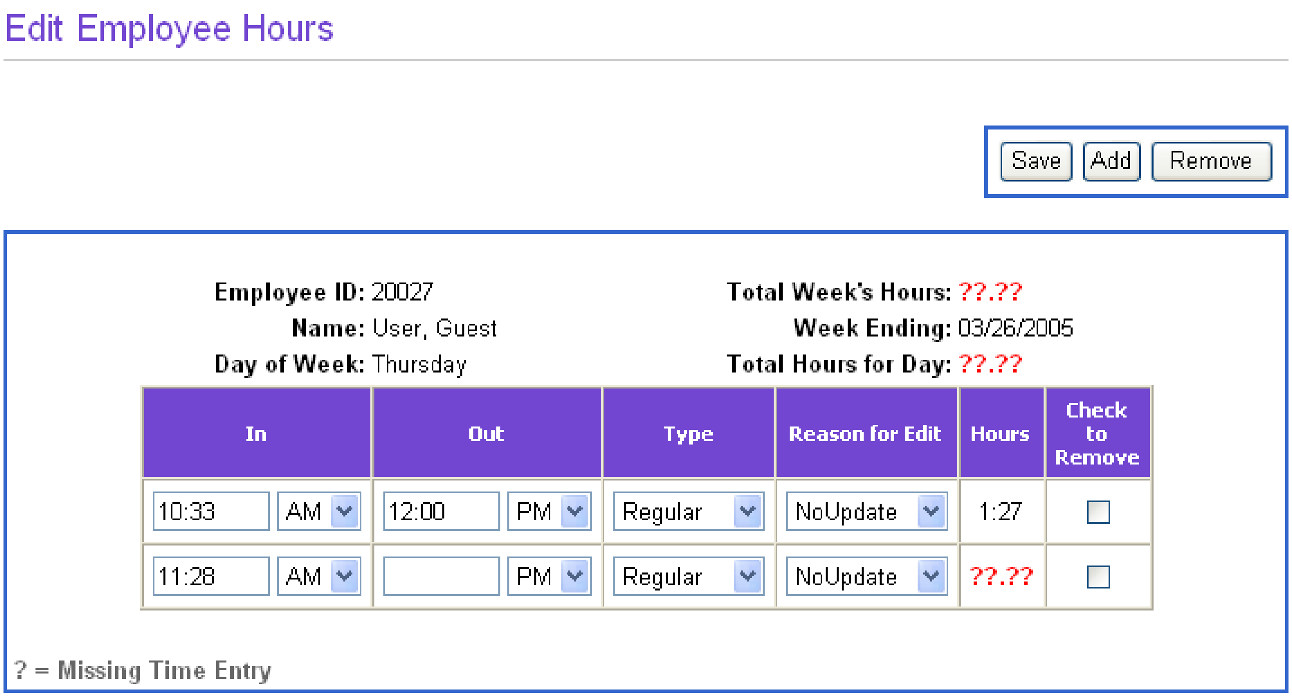
Name: User, Guest **Week Ending:** 04/02/2005

Day	Date	Total Hours
Sunday	03/27/2005	0.00
Monday	03/28/2005	0.00
Tuesday	03/29/2005	0.00
Wednesday	03/30/2005	0.00
Thursday	03/31/2005	0.00
Friday	04/01/2005	0.00
Saturday	04/02/2005	0.00

? = Missing Time Entry

Click the date link of the hours you wish to view. The Edit Employee Hours screen is displayed.

Figure 4-11 Edit Employee Hours Screen



Note: Question Marks (??:??) indicate a missing time entry.

To edit the hours:

1. Edit the time information.
   - To edit time, enter a new time as HH:MM and select AM or PM from the drop-down menu.
   - To add a type and reason for edit, select from the provided drop-down menus.
   - To remove a time entry, check the box next to the entry and click **Remove**.
   - To add a time entry, click **Add**. Another time entry option is added.
2. To save the changes, click **Save**. The information on the Edit Employee Hours screen is updated.

Confirming Employee Hours

The Confirm Employee Hours function allows a manager to validate an employee's hours for the given week. The hours can only be confirmed at the end of a work week.

To confirm an employee's hours:

1. Click the **Employee** tab.
2. Click the **Time Management** subtab.
3. Click the **Confirm Employee Hours** left navigation link.

Note: The Confirm Employee Hours screen can also be accessed from the Employee Time Summary screen.

4. To edit the employee's hours, click **Edit**. The Employee Time Summary screen is displayed. To edit the hours, refer to "Editing Employee Time" on page 4-10.
5. To return to the confirmation screen, click **Confirm Employee Hours**.

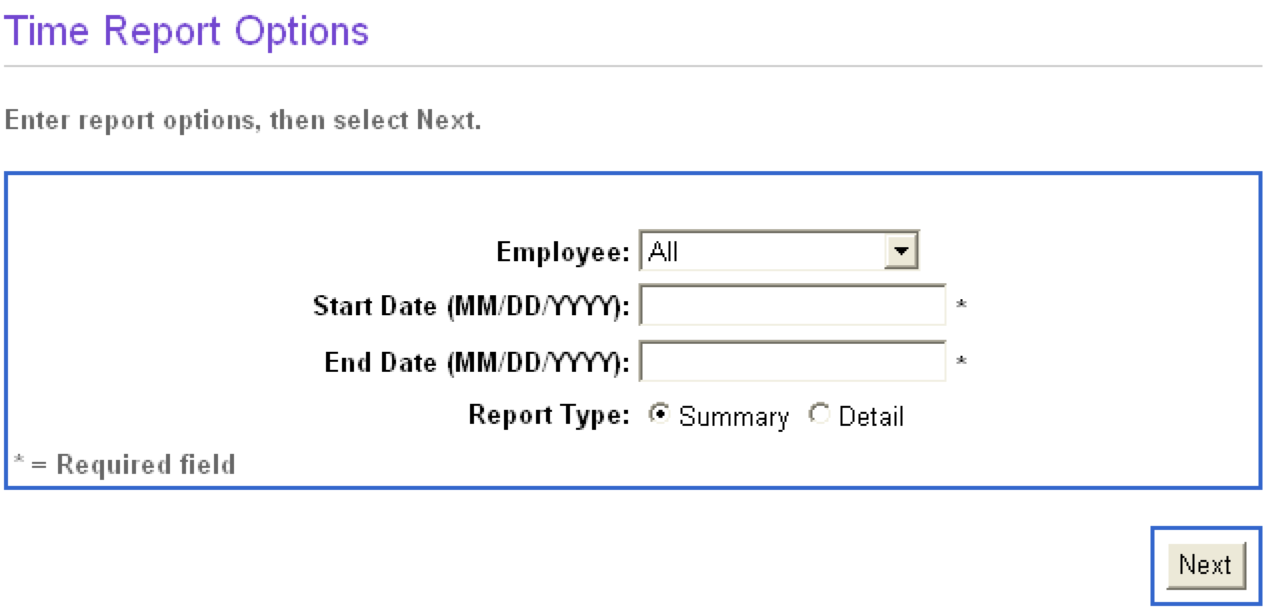
Viewing Employee Time Reports

You can choose to view or print an employee time report, the detail time report, the confirm employee time report, or see the audit log of employee time adjustments.

To view employee time reports:

1. Click the **Employee** tab.
2. Click the **Time Maintenance** subtab.
3. Click the **Employee Time Reports** left navigation link. The Time Report Options screen is displayed.

Figure 4-12 Time Report Options Screen



4. Select an employee from the drop-down menu. To select all employees, click **All**.
5. Enter starting and ending dates in the MM/DD/YYYY format.
6. Select a Report type, either Summary or Detail.
7. Click **Next**. If summary was selected as the report type, the Summary Employee Time Report is displayed. If detail was selected, the Detail Employee Time Report is displayed. Refer to Figure 4-13, "Summary Employee Time Report Screen" and Figure 4-14, "Detail Employee Time Report Screen."
8. To return to the Employee Time summary screen, click **Done**. To export the report, click **Export**.

Figure 4-13 Summary Employee Time Report Screen

Run Date: 03/31/2005 04:40 PM

Summary Employee Time Report

Store #04241

ID	Employee	Sick	Vacation	Comp Day	Jury Duty	Personal	Bereave	Regular Hours	Other Hours	Total Hours
20001										
		0:00	0:00	12:00	0:00	0:00	0:00	0:00	12:00	12:00
20027										
		0:00	0:00	0:00	0:00	0:00	0:00	1:27	0:00	1:27
	Total Hours:	0:00	0:00	12:00	0:00	0:00	0:00	1:27	12:00	13:27

Figure 4-14 Detail Employee Time Report Screen

Run Date: 03/31/2005 04:43 PM

Detail Employee Time Report

Store #04241

ID	Employee	Date	DOW	Type	In	Out	Edited	Regular Hours	Other Hours	Total Hours
20001										
		03/27/2005	Sunday							
				CompDay	10:00 AM	10:00 PM	*	0:00	12:00	12:00
							Total Hours:	0:00	12:00	12:00
20027										
		03/24/2005	Thursday							
				Regular	10:33 AM	12:00 PM	*	1:27	0:00	1:27
							Total Hours:	1:27	0:00	1:27
							Total Hours:	1:27	12:00	13:27

Viewing My Time

The View My Time feature is only available to the employee logged into Back Office. The employee can use this option to view time entries and any adjusted time for the current work week.

To view my time:

1. Log into Back Office. For help logging in, refer to “Logging In/Out” on page 1-1.
2. Click the **Employee** tab.
3. Click the **Time Maintenance** subtab.
4. Click the **View My Time** left navigation link. The Employee Hours by Date screen is displayed. Refer to Figure 4-10, “Employee Hours by Date Screen” on page 4-11.
5. To view or edit hours for a particular day, select that date from the list. The Edit Employee Hours screen is displayed. Refer to Figure 4-11, “Edit Employee Hours Screen” on page 4-12.
6. Edit the time information if needed. For help editing the information, refer to “Editing Employee Time” on page 4-10.
    - To edit time, enter a new time as HH:MM and select AM or PM from the drop-down menu.
    - Select type and reason for edit from the provided dropdown menus.
    - To remove a time entry, check the box next to the entry and click **Remove**.
    - To add a time entry, click **Add**. Another time entry option is added.
7. To save the changes, click **Save**.

STORE OPERATIONS

Store operations provide communication and activity between Point-of-Sale and Back Office and allows you to perform daily functions associated with store opening and closing and register and till maintenance. The operations performed in Back Office affect the status of the store as well as the registers and tills at Point-of-Sale. Refer to the Point-of-Sale User Guide for more information on daily operations at Point-of-Sale.

- “Opening the Store”
- “Closing the Store”
- “Bank Deposits”

Opening the Store

Opening the store includes the Start of Day function, opening registers, and opening tills. The store must be open in order for the store employees to perform transactions.

Note: Registers and tills may be opened at any point during the day.

Start of Day

The Start of Day function includes defining the business date and the opening cash fund for the day. The Start of Day function must be performed before registers and tills can be opened.

To run Start of Day:

1. Click the **StoreOps** tab.
2. Click the **Store** subtab.
3. Click the **Start of Day** left navigation link.

   Note: If the store is already open, you are not allowed to run the start of day operation.
4. Enter the new business date and click **Next**. The Operating Fund Count screen is displayed.
5. Enter the cash amount of the store operating fund.

- If Start of Day is set to Summary, enter a dollar amount.
- If Start of Day is set to Detail, enter amount for each type of currency and click **Refresh Total**.

6. Click **Next**.
   - If the cash amount is not what the system expects, a Count Error Notice is displayed. To accept the amount, click **Yes**. To enter the count again, click **No**.
   - If the system accepts the amount, the store is successfully opened and you can continue with other store operations.

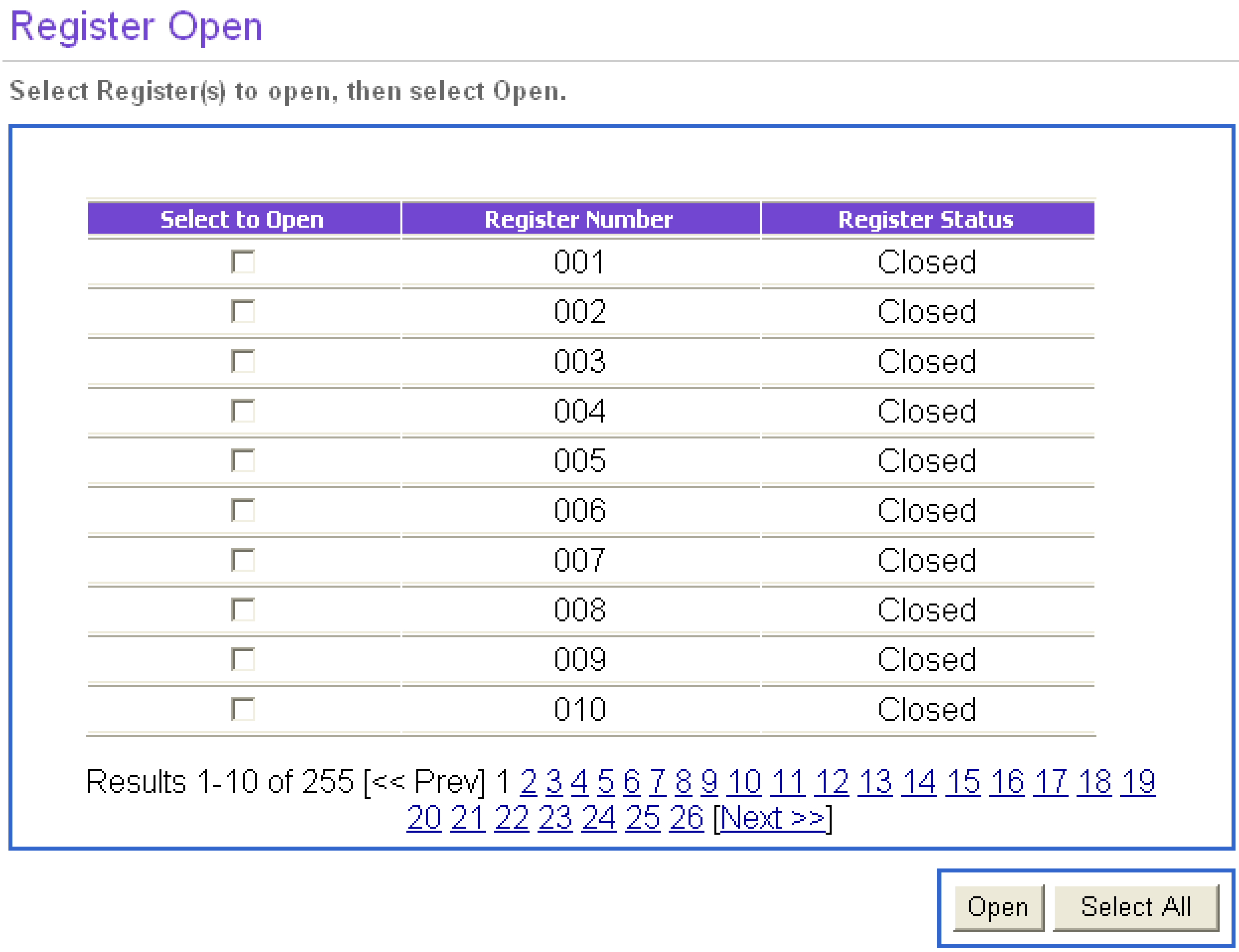
Opening Registers

A register must be opened before a till can be assigned to it. Registers may be opened at any time during the day.

To open registers:

1. Click the **StoreOps** tab.
2. Click the **Register** subtab.
3. Click the **Open Registers** left navigation link. The Register Open screen is displayed, which contains the register number and register's current status.

Figure 5-1 Register Open Screen



4. Select Register(s) to open by checking the box(es) next to the register number or click **Select All** to select all the registers. Click a page number link at the bottom of the screen to view more registers.
5. To open the registers, click **Open**. The register status changes to Open.

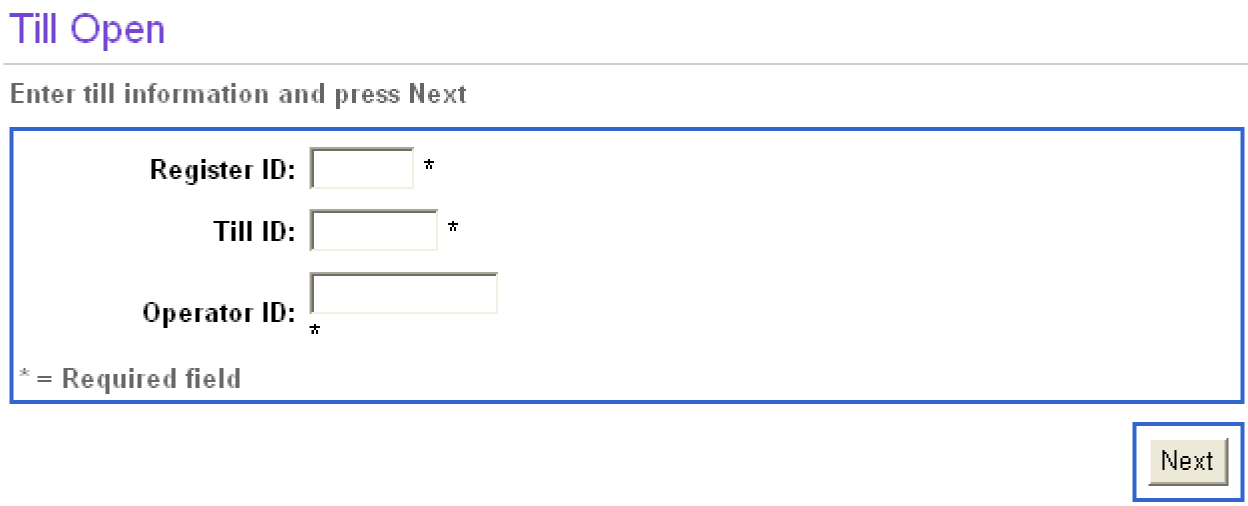
Opening Tills

A register must be open before a till can be opened. Tills may be opened in Back Office or Point-of-Sale.

To open a till in Back Office:

1. Click the **StoreOps** tab.
2. Click the **Till** subtab.
3. Click the **Open Till** left navigation link. The Till Open Screen is displayed.

Figure 5-2 Till Open Screen



4. Enter the till information, including register ID, till ID, and operator ID.
5. Click **Next**. If the system setting is set to Summary or Detail, you are asked for a currency count. If the system setting is set to No, you are not asked for a currency count.

   Note: For system settings, refer to “Setting Back Office Parameters” on page 7-11.
6. Enter the currency count if prompted and click **Next**.

   If the amount is not what the system expects, a Count Error Message is displayed. To accept the amount, click **Yes**. To re-enter the amount, click **No**. The till is opened when this operation is completed.

Closing the Store

The store should be closed at the end of every workday. Store financials are closed for the day and are reset at the next store open. To close the store, all registers must be closed and all tills reconciled.

Reconciling Tills

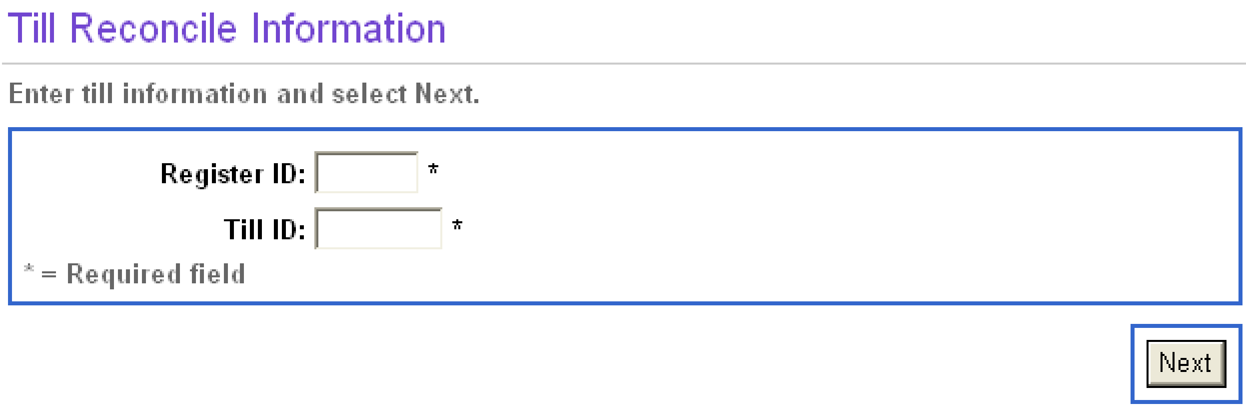
Reconciling a till means counting the funds in a specific till and comparing with the expected amount. A till can be reconciled at any time during the day. By default, a till can only be reconciled in Back Office. Tills must be closed in Point-of-Sale before they can be reconciled. Refer to the Point-of-Sale User Guide for information on closing tills.

To reconcile a till:

1. Click the **StoreOps** tab.
2. Click the **Till** subtab.

3. Click the **Reconcile Till** left navigation link. The Till Reconcile Information screen is displayed.

Figure 5-3 Till Reconcile Information Screen



4. Enter the register ID and till ID in the given fields.

   Note: You are prompted if the till is not yet closed or if the till has already been reconciled.

5. Click **Next**. Depending on the setting for Till Reconcile, do one of the following.
   - If Till Reconcile is set to Summary, enter the float dollar amount.
   - If Till Reconcile is set to Detail, enter the quantity or amount of each type of currency and Click **Refresh Total**.
6. Click **Next**. If the system accepts the till count, it assigns a transaction number and saves the till data.

Closing Registers

Closing the Register means setting that register status to Closed when the register is not in use. All tills at a register must be reconciled before that register can be closed.

To close registers:

1. Click the **StoreOps** tab.
2. Click the **Register** subtab.
3. Click the **Close Registers** left navigation link. The Register Close screen is displayed.

Figure 5-4 Register Close Screen

Register Close

Select a register to close.

Register Number	Register Status
001	Open
002	Open
003	Open
004	Open
005	Open

Results 1-5 of 5

Note: If all registers are closed, the Register Close screen displays Results 0-0 of 0.

4. Click the register number link to close that register. The Register Status screen is displayed. If a till has not been reconciled, the system does not allow the register to be closed.

Figure 5-5 Register Status Screen

Register Status

Select Print to print the Register Summary Report or Close More to close more registers.

Register Number	Register Status
001	Closed
002	Closed
005	Closed
009	Closed
010	Closed
011	Closed
012	Closed
013	Closed
014	Closed
015	Closed

Results 1-10 of 250 [<< Prev] 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 [Next >>]

Print | Close More

5. Click **Close More** to close another register. Registers must be closed one at a time.

End of Day

The End of Day function closes the store for the day and sets the store's financial status for the current business date. After End of Day is run, no more financial transactions can be performed for that business date. All registers must be closed before you can run the End of Day function and close the store. If one or more registers are open, a message prompts you to close all registers before End of Day can run successfully.

To run End of Day:

1. Click the **StoreOps** tab.
2. Click the **Store** subtab.
3. Click the **End of Day** left navigation link.
4. Enter a dollar amount if the system is set to Summary or Detail. If the entered amount does not equal the expected amount, the system displays a Count Error notice. To accept the amount, click **Yes**. To re-enter the amount, click **No**. If the system is set to No, it does not ask for an amount.

   Note: Refer to "Setting Back Office Parameters" on page 7-11 to adjust the system settings.

5. Click **Next**. The system displays the Store financial totals summary collected from Point-of-Sale. The summary includes amounts for starting float, ending float, till loans, and till pickups.
6. To accept the end of day summary, click **Next**. The store is successfully closed.
7. To view the report, click **Enter**. To export the report, click **Export**. To return to the Start of Day screen, click **Done**.

Bank Deposits

The Bank Deposit function creates a bank deposit and displays a report detailing individual totals that make up the deposit. The store must be open in order to perform a bank deposit, but it may be performed at any time during the day. The Bank Deposit can either be set to Summary or Detail. Follow the set of steps for the appropriate setting. Refer to "Setting Back Office Parameters" on page 7-11 for information on setting the Bank Deposit settings.

Creating a Summary Bank Deposit

If Bank Deposit is set to summary, you are prompted to enter amounts for deposit for each tender type.

To create a summary bank deposit:

1. Click the **StoreOps** tab.
2. Click the **Store** subtab.

3. Click the **Bank Deposit** left navigation link. The Summary Bank Deposit Tender screen is displayed.

Figure 5-6 Summary Bank Deposit Tender Screen

Tender Type	Expected Total	Entered Total
Cash	0.00	0.00
Deposited Check	0.00	0.00
Traveler's Check	0.00	0.00
Money Order	0.00	0.00
Canadian Cash	0.00	0.00
Canadian Check	0.00	0.00
Canadian Traveler's Check	0.00	0.00
Total	0.00	0.00
Canadian Total	0.00	0.00

4. In the Bank Deposit Tender screen, enter the total for each type of currency in the given fields.
5. Click **Refresh Total**.
6. To save the total, click **Save**. The Bank Deposit Detail report is displayed.
7. To export the report, click **Export**. To return to the Select Bank Deposit Tender screen, click **Done**.

Creating a Detail Bank Deposit

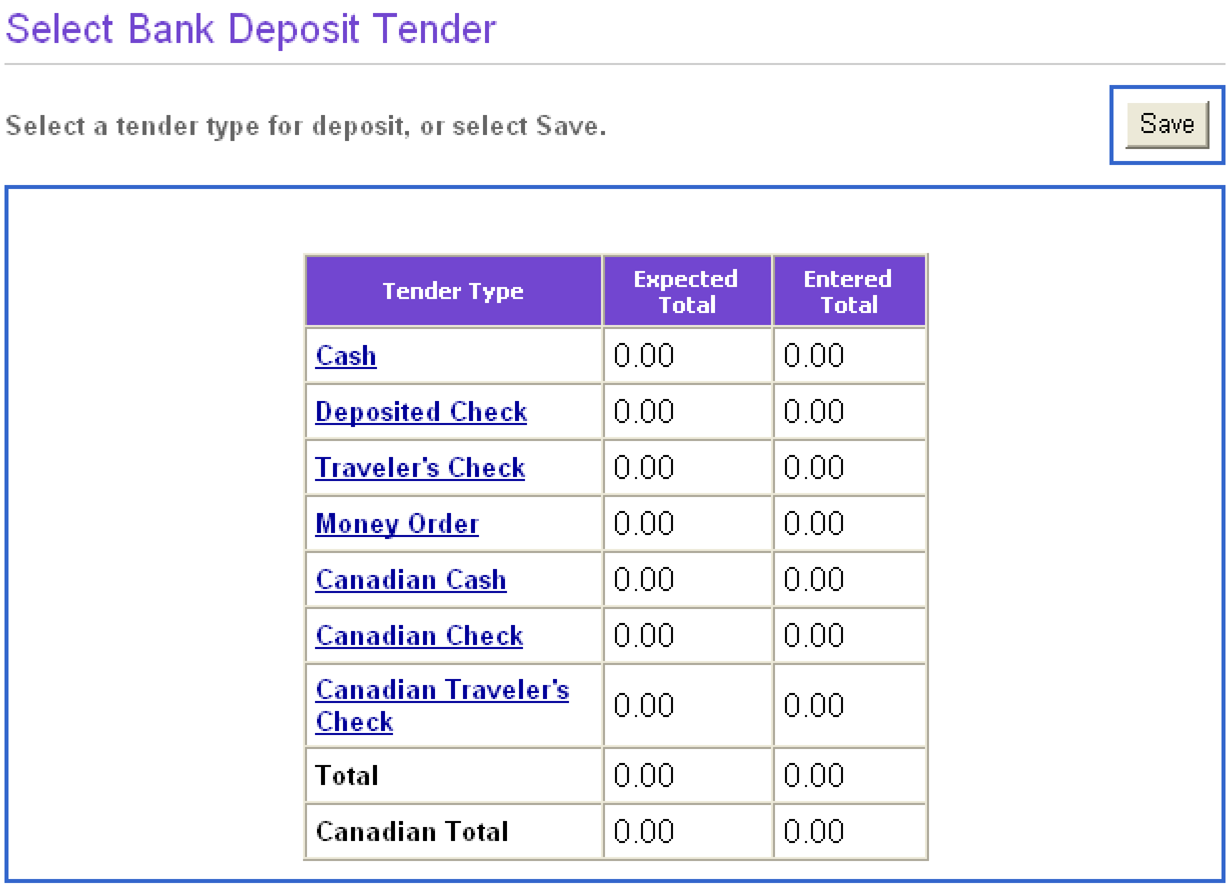
If the system is set to Detail, you are prompted to choose a tender type for deposit. Only one tender type may be selected at a time. In the Detail screen, you calculate an amount for deposit.

To create a detail bank deposit:

1. Click the **StoreOps** tab.
2. Click the **Store** subtab.

3. Click the **Bank Deposit** left navigation link. The Select Bank Deposit Tender screen is displayed.

Figure 5-7 Select Bank Deposit Tender Screen



Select Bank Deposit Tender

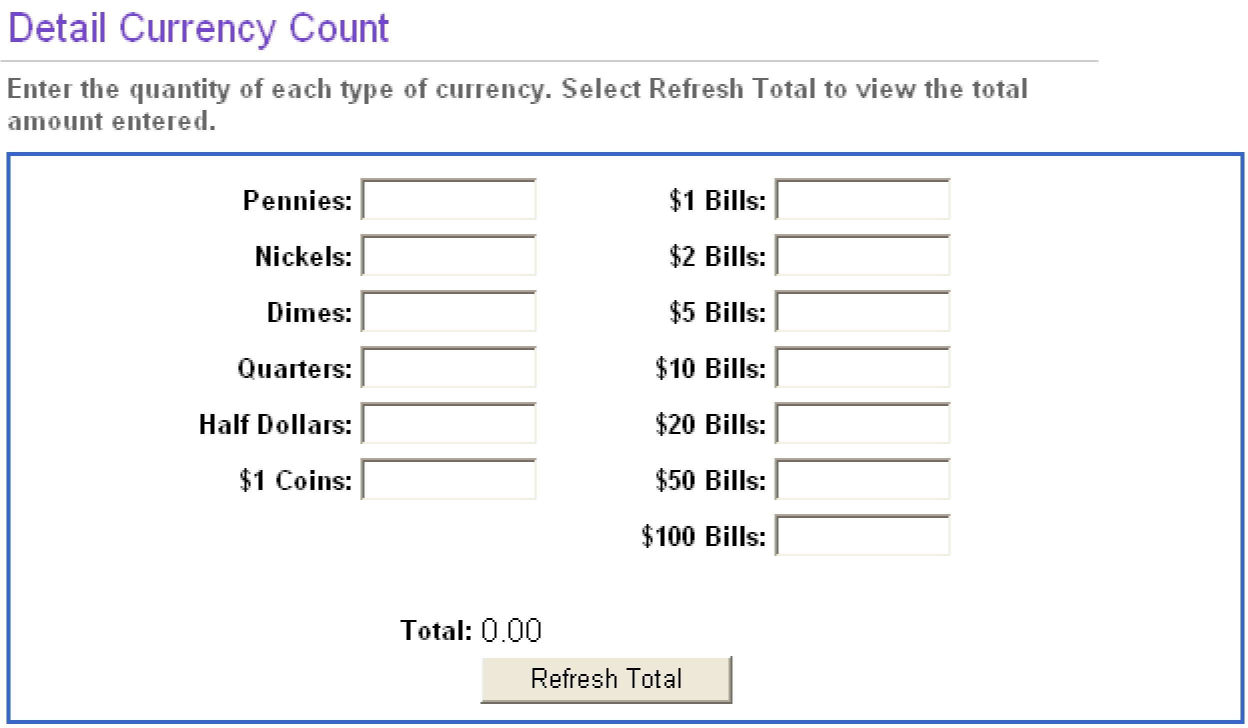
Select a tender type for deposit, or select Save.

Save

Tender Type	Expected Total	Entered Total
Cash	0.00	0.00
Deposited Check	0.00	0.00
Traveler's Check	0.00	0.00
Money Order	0.00	0.00
Canadian Cash	0.00	0.00
Canadian Check	0.00	0.00
Canadian Traveler's Check	0.00	0.00
Total	0.00	0.00
Canadian Total	0.00	0.00

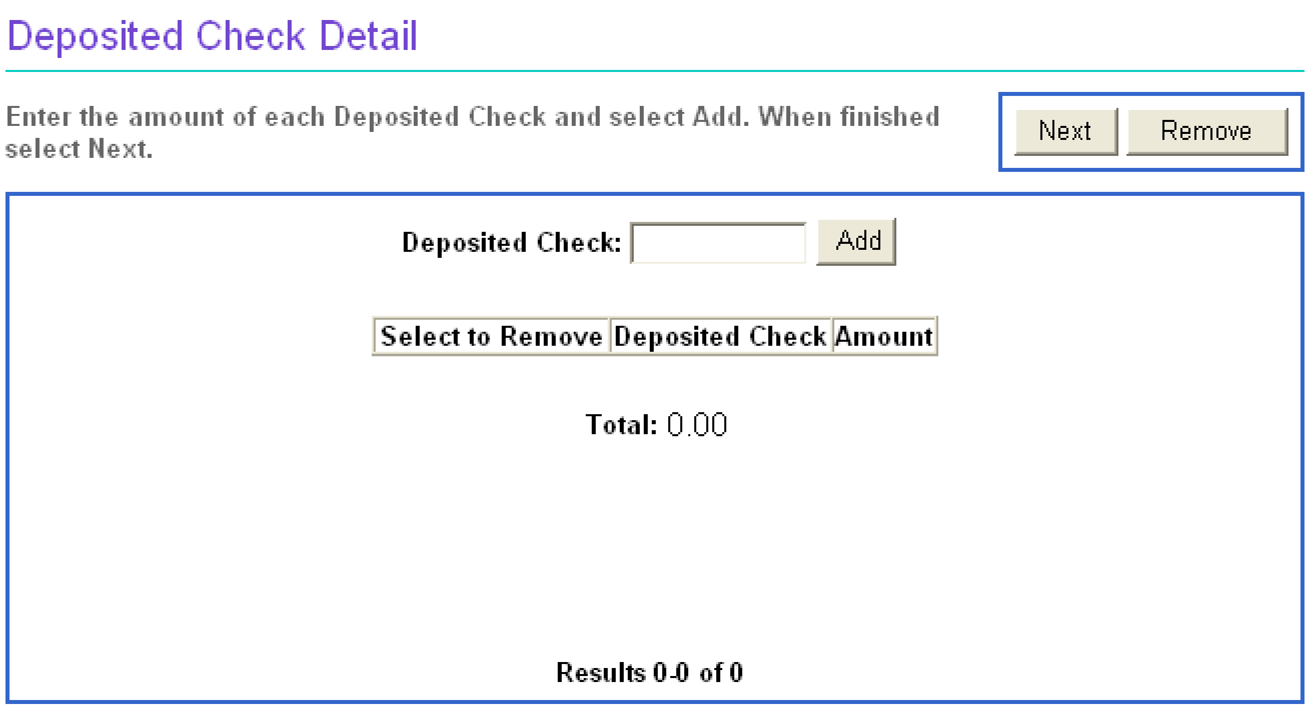
4. To select a tender type for deposit, click the tender type name. The Detail Currency Count screen is displayed.
5. Enter the quantity of each type of tender.
   - For Cash count, enter number of each type of currency. To view the total amount entered, click **Refresh Total**.

Figure 5-8 Detail Currency Count Screen



- For Check count, enter the check amount and click **Add**. Check the box next to the amount and click **Remove** to remove that amount.

Figure 5-9 Deposited Check Detail Screen



6. To return to the Bank Deposit Tender Screen, click **Next**.

7. Select another tender type or save the bank deposit. To save the bank deposit, click **Save**.

PRICING

The Pricing tab allows you to create or edit prices through Price Promotions, Price Changes, and Discount Rule options. Price promotions are temporary price reductions for a set period of time while price changes are permanent changes in the price of an item or group of items. Discount rules are used to apply price promotions to combinations of items or multiple items for a temporary time period. Topics in this chapter are:

- “Price Promotions”
- “Price Changes”
- “Discount Rules”

Price Promotions

Price promotions are temporary price reductions for a set period of time. You can search for, create, and edit price promotions. When creating a price promotion, you enter the name and description of the promotion, the starting and ending dates, the type of price reduction, and the amount of the reduction. You can then add items included in the price promotion. You can also search for a price promotion, edit summary information, change promotional prices, and add or remove items from the promotion.

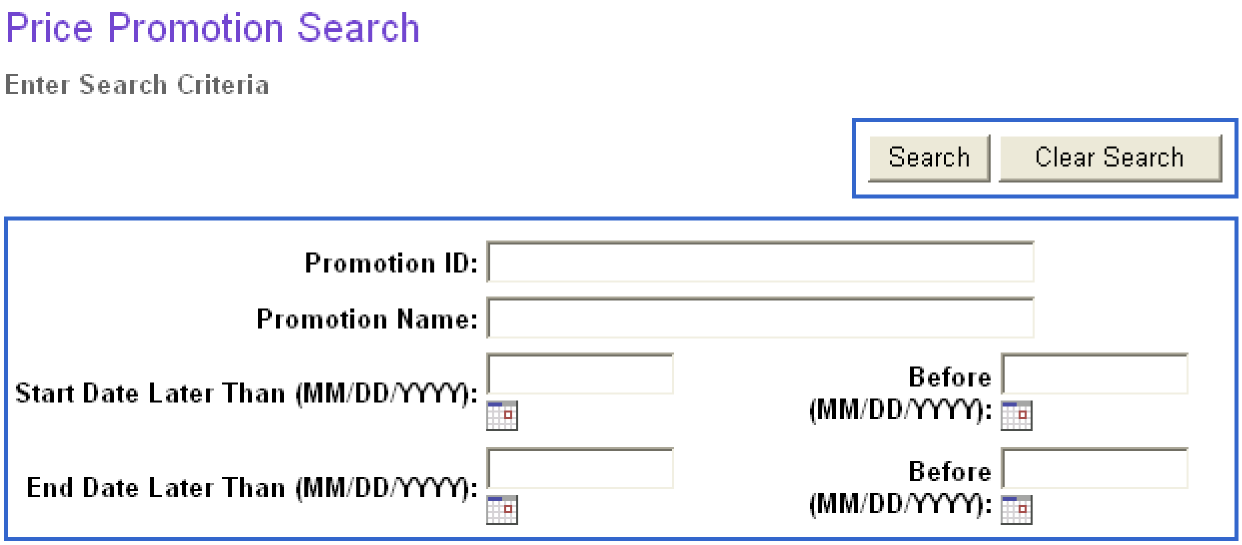
Searching for Price Promotions

The search option allows you to search and edit pending price promotions.

To search for price promotions:

1. Click the **Pricing** tab.
2. Click the **Price Promotion** subtab.
3. Click the **Search** left navigation link. The Price Promotion Search screen is displayed.

Figure 6-1 Price Promotion Search Screen



4. Enter search criteria and click **Search**. You can search by promotion ID, promotion name, start date, or end date.
5. Select a promotion number from the displayed list if more than one matching result is found. The details of the promotion are displayed.

   Note: If only one matching result is found, the details of the promotion are automatically displayed, and step 5 is skipped.

6. Edit the promotion details. To save the changes, click **Save**.

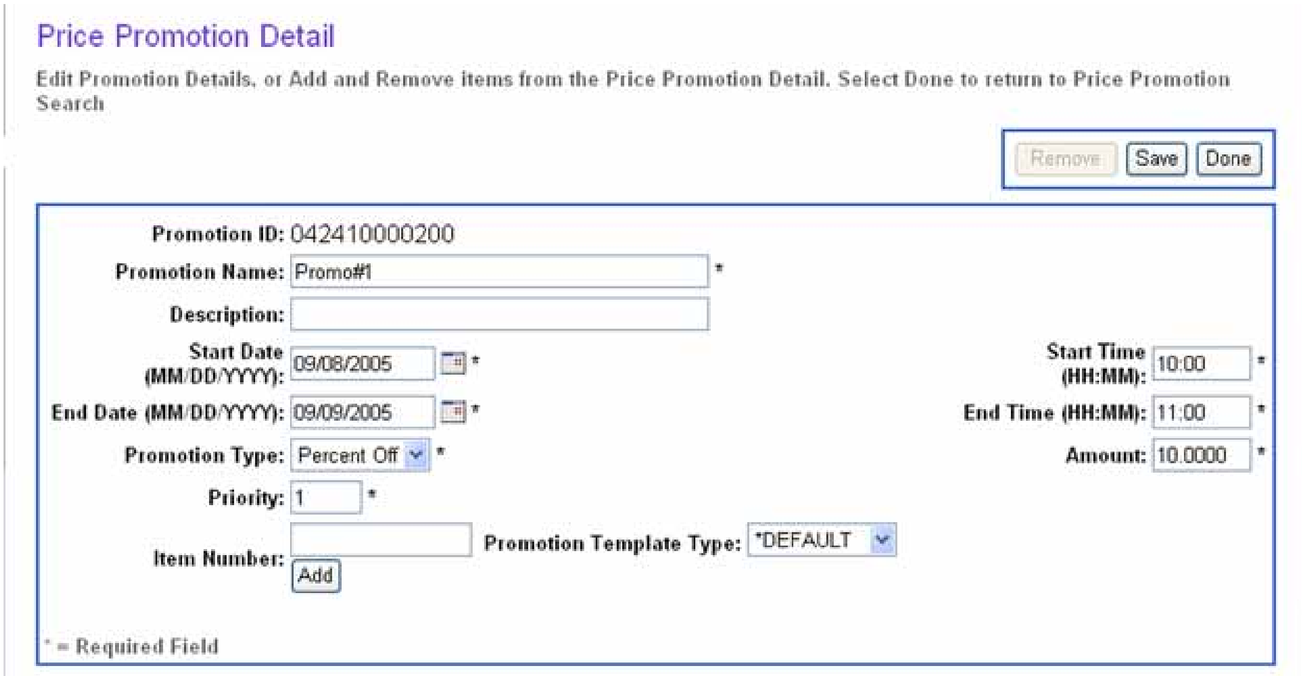
Adding a Price Promotion

The add promotion function allows you to create a new price promotion.

To add a price promotion:

1. Click the **Pricing** tab.
2. Click the **Price Promotion** subtab.
3. Click the **Add** left navigation link. The Price Promotion Detail screen is displayed.

Figure 6-2 Price Promotion Detail Screen



4. Enter the required fields. Required fields include promotion name, start date, end date, promotion type, priority, start time, end time, and amount.

   Note: Enter a numerical value for promotion priority. The higher the number, the higher the priority. For example, 99 is a higher priority than 1.

5. To add an item to the promotion, enter the item number and click **Add**. A promotional price for the item is generated. Select a template type for the item.

   Note: You can edit the promotional price that is calculated by the system. The new price is displayed on the Promotion Detail screen.

6. To save the promotion, click **Save**.
7. To return to Price Promotion Search page, click **Done**.

Price Changes

The price change function allows you to create and edit a permanent price change for a group of items or to search for a pending price change based on specific criteria. You can search for price changes, add a price change, or edit the details of an existing or new price change.

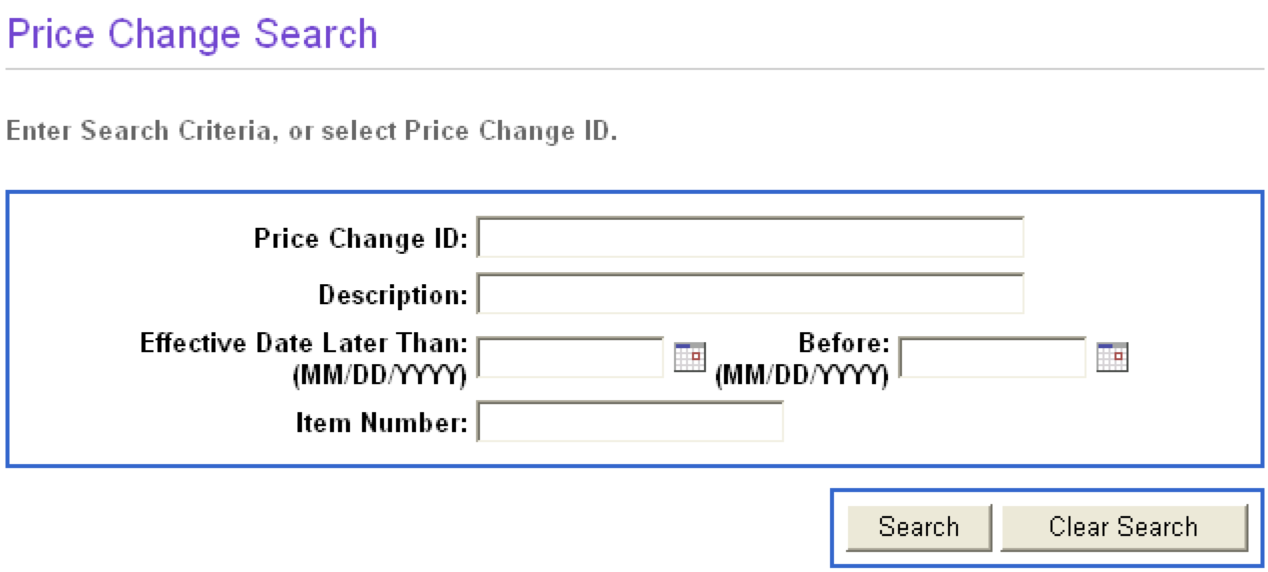
Searching for Price Changes

You can search for existing price changes.

To search for a price change:

1. Click the **Pricing** tab.
2. Click the **Price Change** subtab.
3. Click the **Search** left navigation link. The Price Change Search screen is displayed.

Figure 6-3 Price Change Search Screen



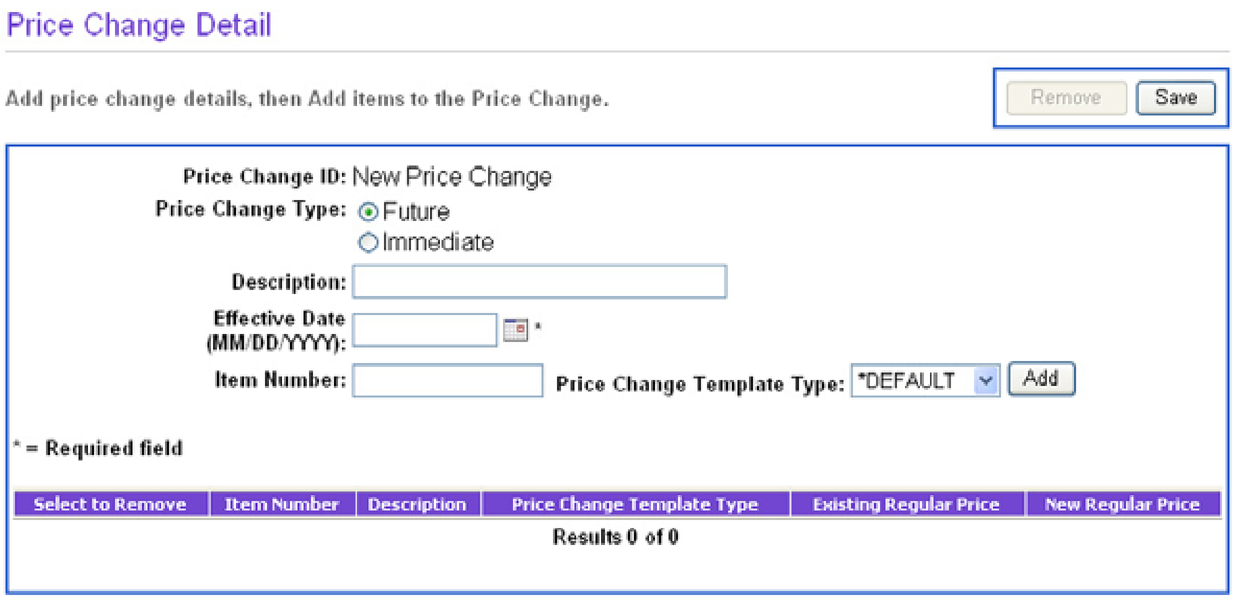
4. Enter search criteria. If no criteria is entered, the search is done for all pending price changes.
5. To search for an item, click **Search**.
6. Select a promotion number from the displayed list if more than one matching result is found. The details of the promotion are displayed.

   Note: If only one matching result is found, the details of the promotion are automatically displayed and step 6 is skipped.

Editing a Price Change

You can choose to edit an existing price change or a newly added price change. The Price Change Detail screen displays the information for a price change. You can edit the price change details, add a new item to the price change, or change the price of an item within the price change.

Figure 6-4 Price Change Detail Screen



To edit a price change:

1. Edit or enter the details for the price change.
   - Select a price change type. For a price change that takes effect at a later date, click **Future.** For a price change that takes effect immediately, click **Immediate**.
   - Type in a new price change description.
   - Enter a new effective date.
   - Remove an item from the price change. Check the box next to the item and click **Remove**.
   - Add an item to the price change. Type in an item number and click **Add**. The new item appears at the bottom of the screen.
   - Change the price of an existing item. See “Changing the Price of an Item” on page 6-5.
   - Change the template type for the item.
2. To save all changes, click **Save**.
3. To return to the Price Change Search screen, click **Done**. The previous results are displayed at the bottom of the screen.

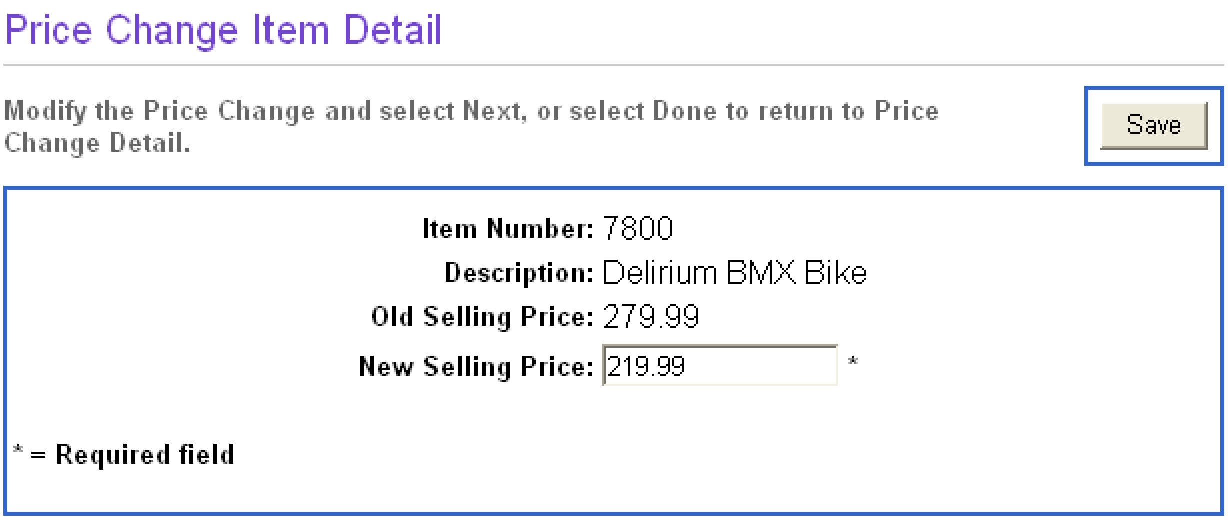
Changing the Price of an Item

You can change the new regular price of an item within a price change.

To change the price of an item:

1. Click the current price of the item you wish to change. The Price Change Item Detail screen is displayed.

Figure 6-5 Price Change Item Detail Screen



2. Enter a New Selling Price.
3. To save the new price, click **Save**. The Price Change Detail screen is displayed. You may select another price to change.

Adding a Price Change

To add a price change:

1. Click the **Pricing** tab.
2. Click the **Price Change** subtab.
3. Click the **Add** left navigation link. The Price Change Detail screen is displayed. See Figure 6-4, “Price Change Detail Screen” on page 6-5.
4. Enter the price change information. Refer to “Editing a Price Change” on page 6-4.

Discount Rules

Discount rules are created to temporarily reduce the price of an item or group of items. The discount rules apply to multiples or combinations of items. You can search for, create, edit, or end discount rules.

Discount Rules Terminology

The following table provides a list of terms used in the discount rules subtab.

Table 6-1 Terminology

Term	Definition
Source	Product that must be purchased before the target is eligible for a discount
Target	Product that is eligible for a discount once the source is met
Item	A specific product (i.e., Levi's 501 Jeans)
Class	A group of items whose members have an attribute, (i.e., jeans)
Department	A large collection of items that share a common denominator (i.e., Women's Apparel)

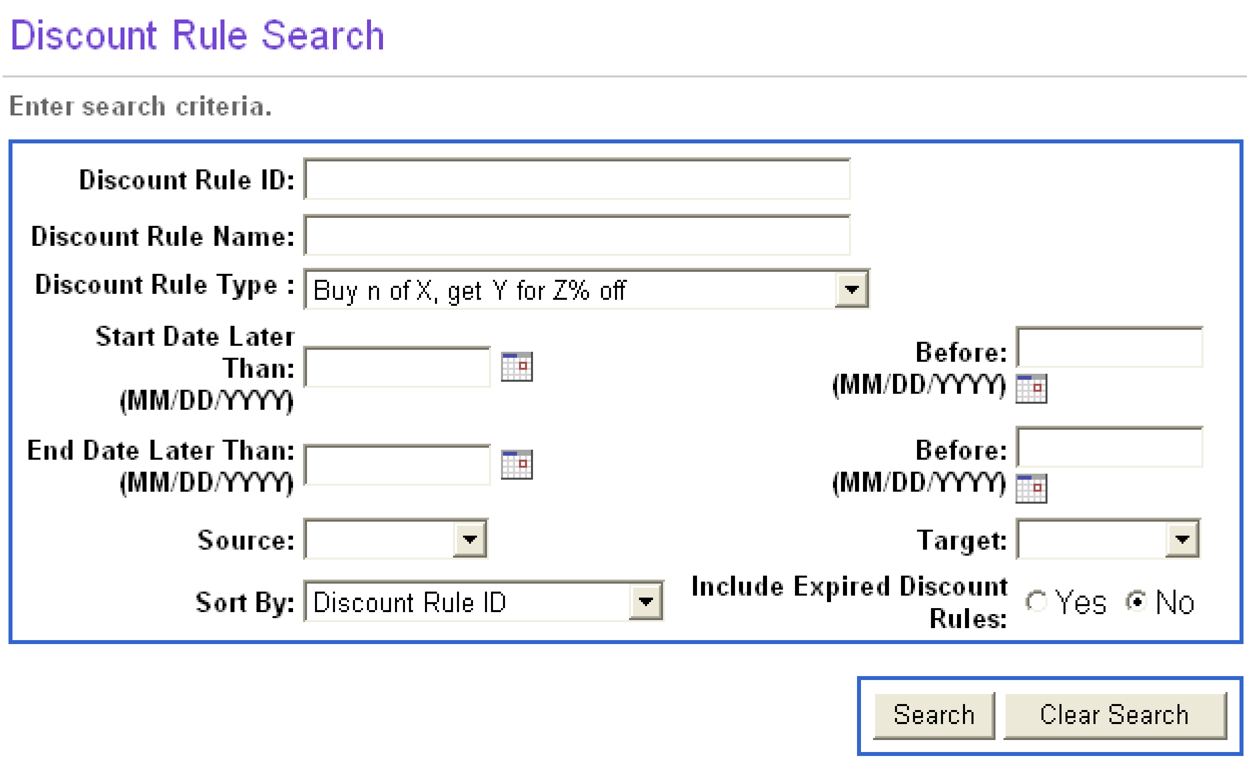
Searching for Discount Rules

You can search for existing discount rules by discount rule ID, name, type, start and end dates, source, or target.

To search for a discount rule:

1. Click the **Pricing** tab.
2. Click the **Discount Rule** subtab.
3. Click the **Search** left navigation link. The Discount Rule Search screen is displayed.

Figure 6-6 Discount Rule Search Screen



4. Enter the search criteria in the given fields. If no criteria is entered, the search is done for all active discount rules.

5. You may choose how to sort search results. If you do not choose to sort results, the results are sorted by the default criteria.
   - Select which criteria to sort by from the drop-down menu.
   - To include expired discount rules, click **Yes**. Otherwise, click **No**.
6. To search for a discount rule, click **Search**. To clear the search criteria, click **Clear Search**. The search results are displayed.

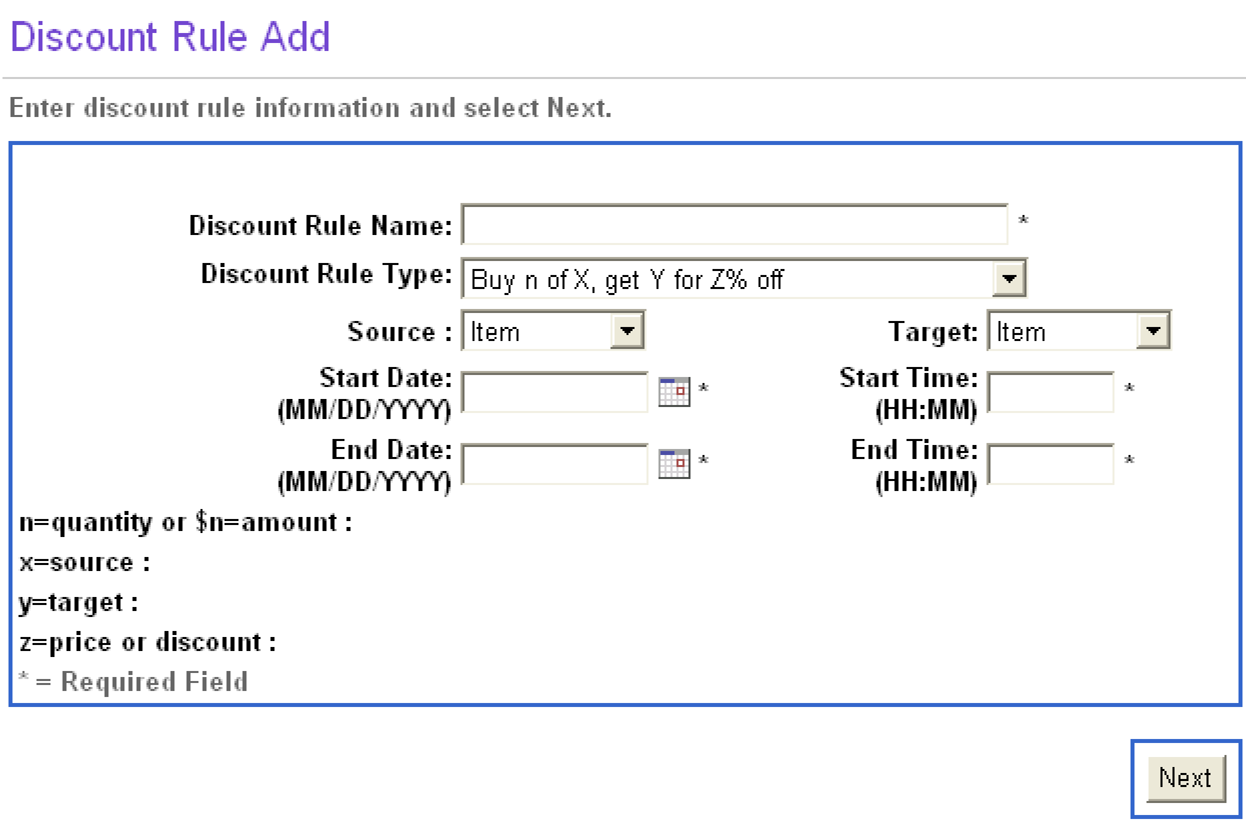
Adding Discount Rules

You can add new discount rules to the database.

To add a discount rule:

1. Click the **Pricing** tab.
2. Click the **Discount Rule** subtab.
3. Click the **Add** left navigation link. The Discount Rule Add screen is displayed.

Figure 6-7 Discount Rule Add Screen



4. Enter the discount rule name. This is a free text field to describe the discount rule.
5. Select the discount rule type from the drop-down menu. Refer to the discount rules chart for examples and definitions of the different discount rules.

6. Select the source and target from the drop-down menus. You may select item, class, or department for the source and target.
7. Enter start and end dates or select from the calendar next to the field box.
8. Enter starting and ending times.
9. Click **Next**.

   Note: If not all fields are entered, you receive an error message asking you to complete all fields before continuing. If successful, a message is displayed with the assigned rule ID.

Discount Rule Types

The following table lists available discount rule options and examples.

Table 6-2 Discount Rule Definitions

Letter	Name	Description
x	Source	Product that must be purchased before the target is eligible for a discount
y	Target	Product eligible for a discount once source is met
z	Price/Discount	Discount applied to the target
n	Quantity	Number of source that must be purchased to receive a discount
$n	Amount	Dollar amount of source that must be purchased to receive a discount

Note: X (source) and y(target) can be the same item.

Table 6-3 Discount Rule Examples

Discount Rule	Example
Buy n of X, get Y at Z% off	Buy 2(=n) pair of jeans(=x), get a sweater(=y) at 50%(=z) off
Buy n of X, get Y at $Z off	Buy 1(=n) suit coat, get a dress shirt (=y) for $10 off
Buy n of X, get Y at $Z	Buy 2(=n) shirts, get a pair of pants (=y) for $10
Buy n of X, get the highest priced X at Z% off	Buy 3 items, get 10% off highest priced item. Item A is $19.99, item B is 15.99, item C is 10.00. Since item A is the highest item, $1.99 (10% of $19.99) is taken off the total.
Buy n of X, get the lowest priced X at Z% off	Buy 3 items, get 10% off lowest priced item. Item A is $19.99, item B is $15.99, item C is $10.00 Since item C is the lowest item, $1.00(10% off $10.00) is taken off the total.
Buy $n or more of X, get item Y at $Z off.	Buy $20 (=$n) of Sporting Goods (=x), get $10(=z) off a basketball item (=y)
Buy $n or more of X, get Y at Z% off	Buy $20(=$n) of Sporting goods(=X), get 10%(=z) off a baseball cap (=y)
Buy $n or more of X, get Y for $Z	Buy $500(=$n) worth of jewelry(=x), get a pair of earrings(=y) for $25(z)

Group Discounts

Group discounts allow the customer to purchase a specified quantity of a particular item (x) to receive a discount on that item.

Table 6-4 Group Discount Definitions

Letter	Name	Description
n	Quantity	Number or amount of X purchased to be eligible for discount.
x	Source/Target	Item or group of items that must be purchased to receive discount on that item or group of items.
z	Discount	Discount applied to X.

Note: Prices for X can be different.

Table 6-5 Group Discount Rules

Discount Rule	Example
Buy n of X, get purchase for $50	Buy 2(=n) pair of jeans(=X), get them for $50(=Z).
Buy n of X, get Z% or $Z off	Buy 3(=n) pair of jeans(=X), get 35%(=Z) off total.

ADMINISTRATIVE FUNCTIONS

The Admin tab in Back Office provides access to job schedules and parameters. The job manager functionality allows you, if authorized, to create and schedule jobs, edit currently scheduled jobs, or remove jobs. You can also edit parameters that affect various application functions and maintain foreign exchange rates. Topics in this chapter are:

- “Job Manager”
- “Parameter Maintenance”

Job Manager

The Job Manager function allows you to create and schedule data movement jobs such as parameter distributions, file transfers, and the run of reports. A job is a system process that can be scheduled to perform an operation in Back Office.When a job runs, the system writes the data from an imported file to the database in the system. For example, the Job Manager can choose to import a file of price promotions and then schedule the system to execute those price promotions at a specific time. The job manager function allows you to add jobs, edit existing jobs, select registers as recipients of jobs, enter notifications of failure and success of jobs, and view and edit job settings.

Importing and Exporting Files

XML files are created on another system to be imported into Back Office. These files may contain updated item lists, price promotions, tax rules, or other data. You can also export files.

To import or export files:

1. Click the **Admin** tab.
2. Click the **Job Manager** subtab.
3. Click the **Available Imports** or **Available Exports** left navigation link.
4. Click the source link of the task to import or export. If importing a file, the Select Source-File screen is displayed.

Note: If the link is a schedule, the Job Manager screen is automatically displayed and you do not need to select a file.

Figure 7-1 Select Source-File Screen

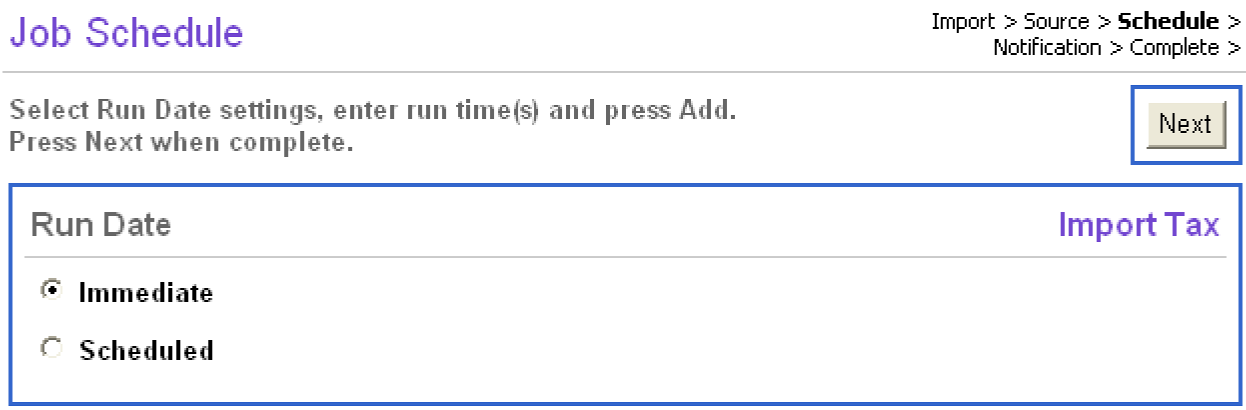
5. Click **Browse** to choose a file.
6. Click **Next**. If the job is not yet scheduled, the Job Schedule screen is displayed.

Scheduling a Job

The Job Schedule screen allows you to select the run frequency of an import or export job. You can schedule a job to run at a specific time or interval.

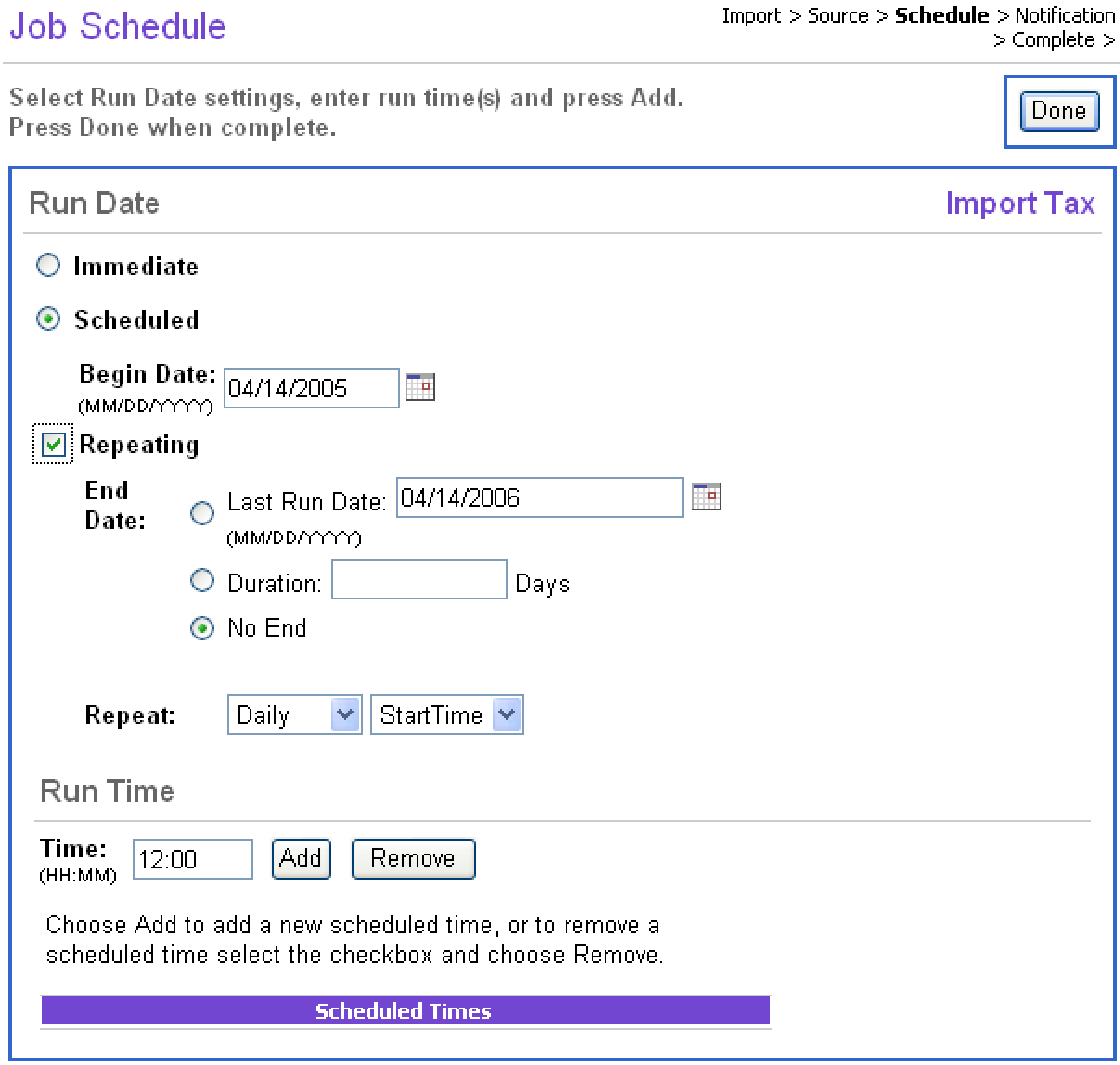
To schedule a job, click **Immediate** or **Scheduled** on the Job Schedule screen.

Figure 7-2 Job Schedule Screen



- To run the job immediately, click **Immediate**. The Notification screen is displayed and you do not enter scheduling information.
- To run the job at a future date and time, click **Scheduled**. The Job Schedule screen is expanded. You must enter scheduling information.

Figure 7-3 Expanded Job Schedule Screen



If scheduling a job to run at a future time, you enter scheduling information on the expanded Job Schedule screen.

To schedule a job:

1. Enter or select a begin date.
2. If you want the job to run on a repeating schedule, click **Repeating**. If you do not want to run the job on a repeating schedule, skip this step.

   a. Select Last Run Date, Duration, or No End.

   - If you select Last Run Date, enter a date or select one from the calendar.
   - If you select Duration, enter the number of days the job will run. Select to notify you of Success, Failure, or All from the drop-down menu.

b. Select to repeat Daily, Weekly, or Monthly from the drop-down menu.

c. Select to run at a Start Time or Interval from the drop-down menu.

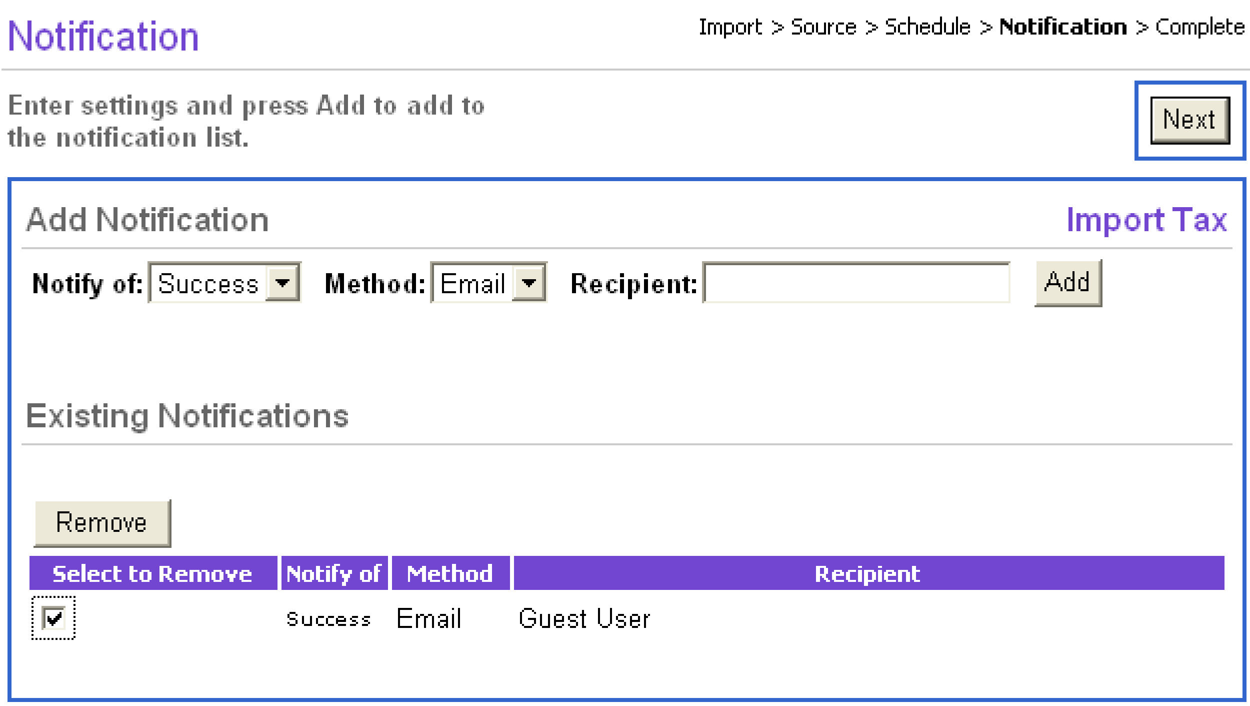
3. Enter a run time in HH:MM format. To add the time, click **Add**. To remove a time, check the box next to the time and click **Remove**. You may add multiple times if desired.

4. Click **Next**. The Notification screen is displayed.

Adding a Notification

You can set the system to notify recipients of the failure or success of jobs. You may want to notify yourself and other store managers if a job runs successfully.

Figure 7-4 Notification Screen



To add a notification:

1. Select to notify of Success, Failure, or All from the drop-down menu.

2. Select a delivery method from the dropdown menu. The default delivery method is Email.

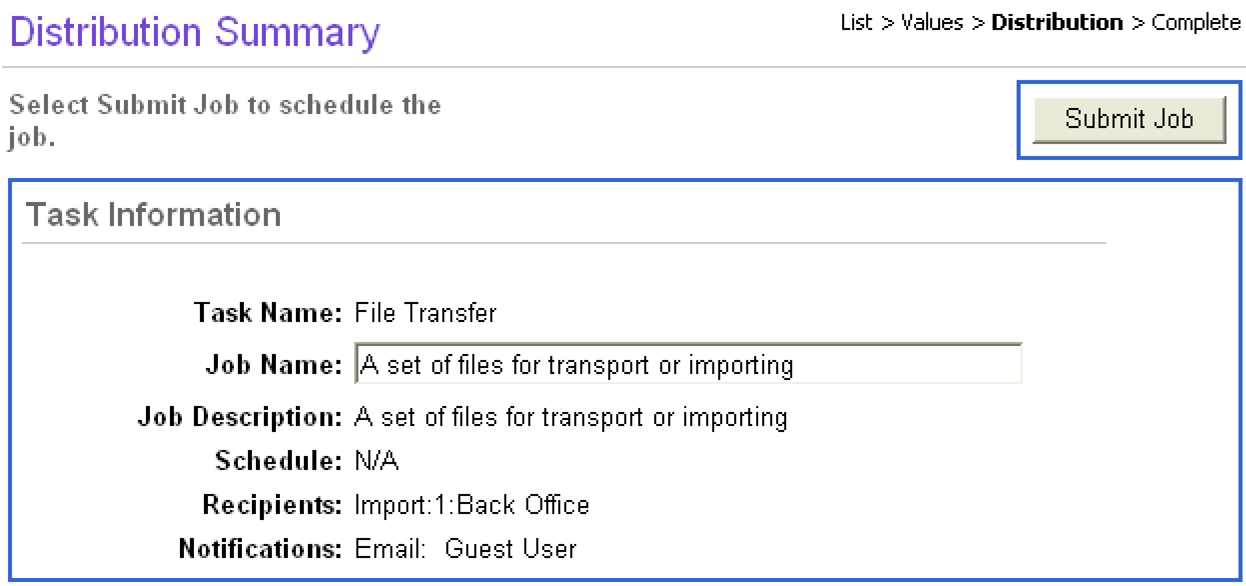
3. Enter a recipient's email address and click **Add**. To remove a recipient, check the box next to the name and click **Remove**.

4. Click **Next**.

Distributing a Job

After setting a notification, the Distribution Summary screen may be displayed. This provides a summary of information about the job to be scheduled. The Distribution Summary allows you to edit the job name and approve the job schedule.

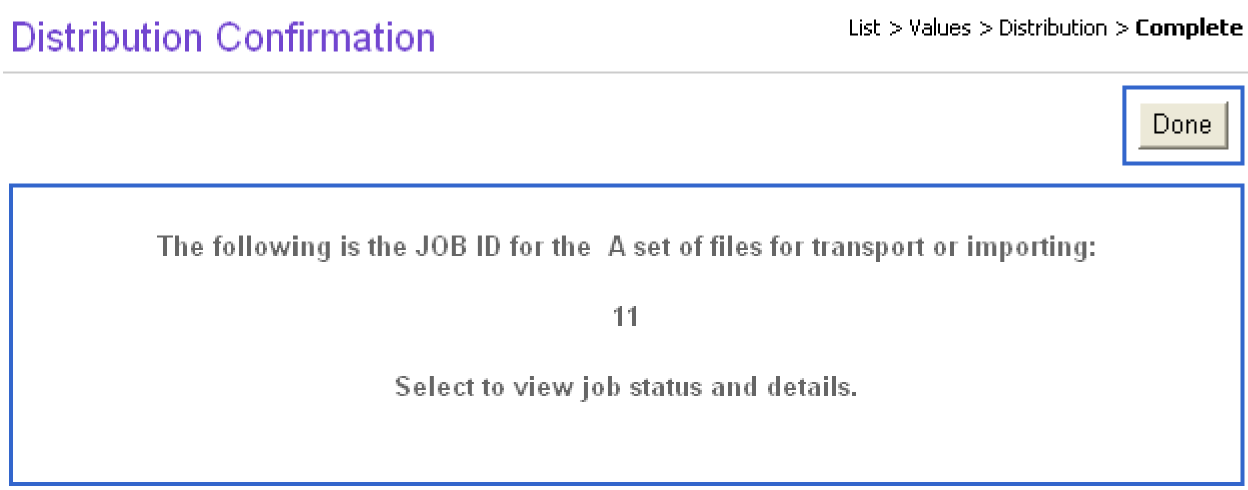
Figure 7-5 Distribution Summary Screen



To distribute a job:

1. Enter or edit the job name or accept the default.
2. Click **Submit Job**. The Distribution Confirmation screen is displayed.

Figure 7-6 Distribution Confirmation Screen



3. Click **Done** to return to the Available Imports or Available Exports screen where the process started.

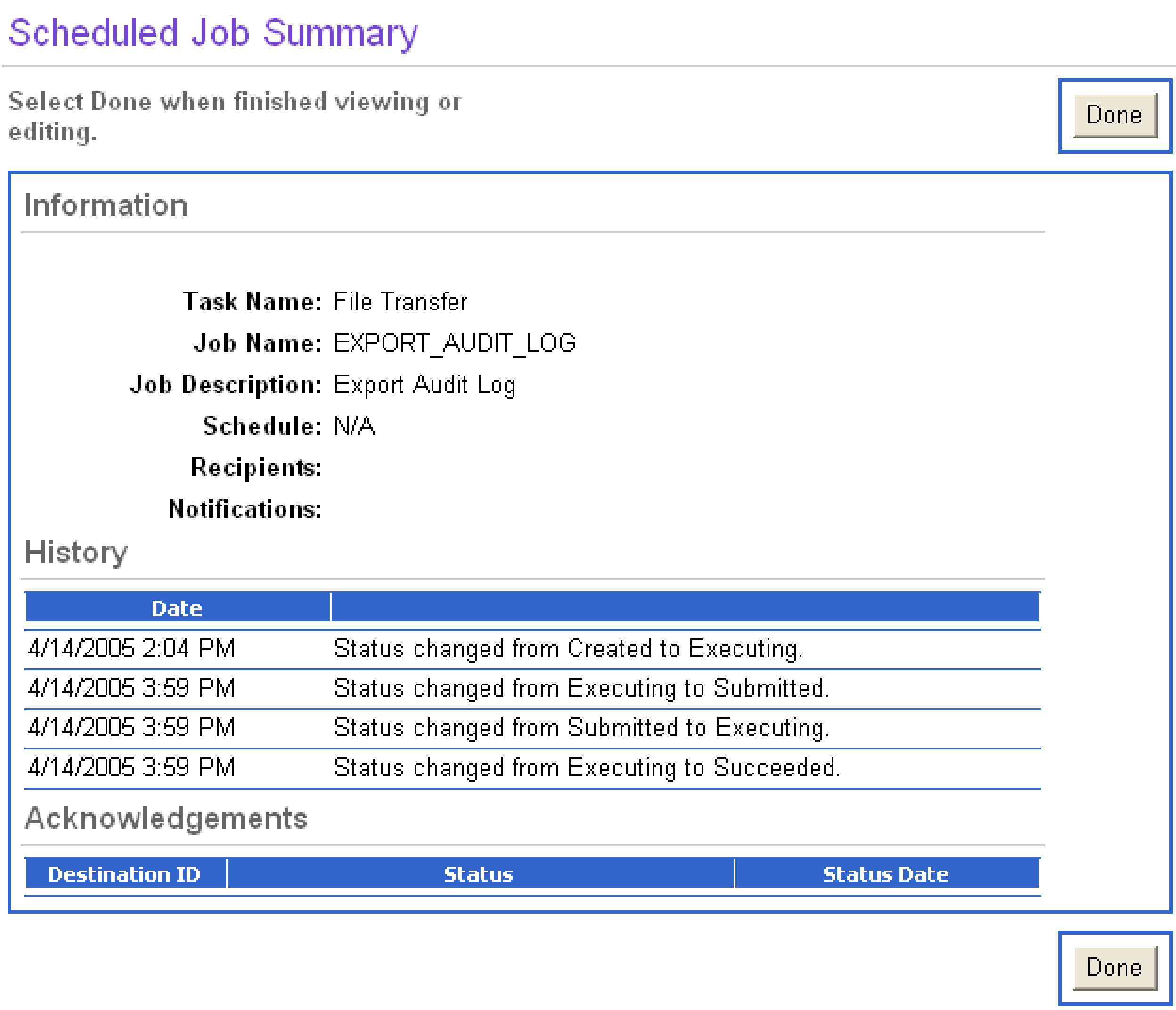
Viewing Scheduled Jobs

You can view a list of currently scheduled jobs as well as the summary for any specific job that scheduled.

To view scheduled jobs:

1. Click the **Admin** tab.
2. Click the **Job Manager** subtab if it is not selected.
3. Click the **Scheduled Imports** or **Scheduled Exports** left navigation link. The list of scheduled imports or exports is displayed. The screen contains the job description, scheduled run, recipient (if any), action date, and job status.
4. Click the job description link to view the summary for that job. The Scheduled Job Summary screen is displayed.

Figure 7-7 Scheduled Job Summary Screen

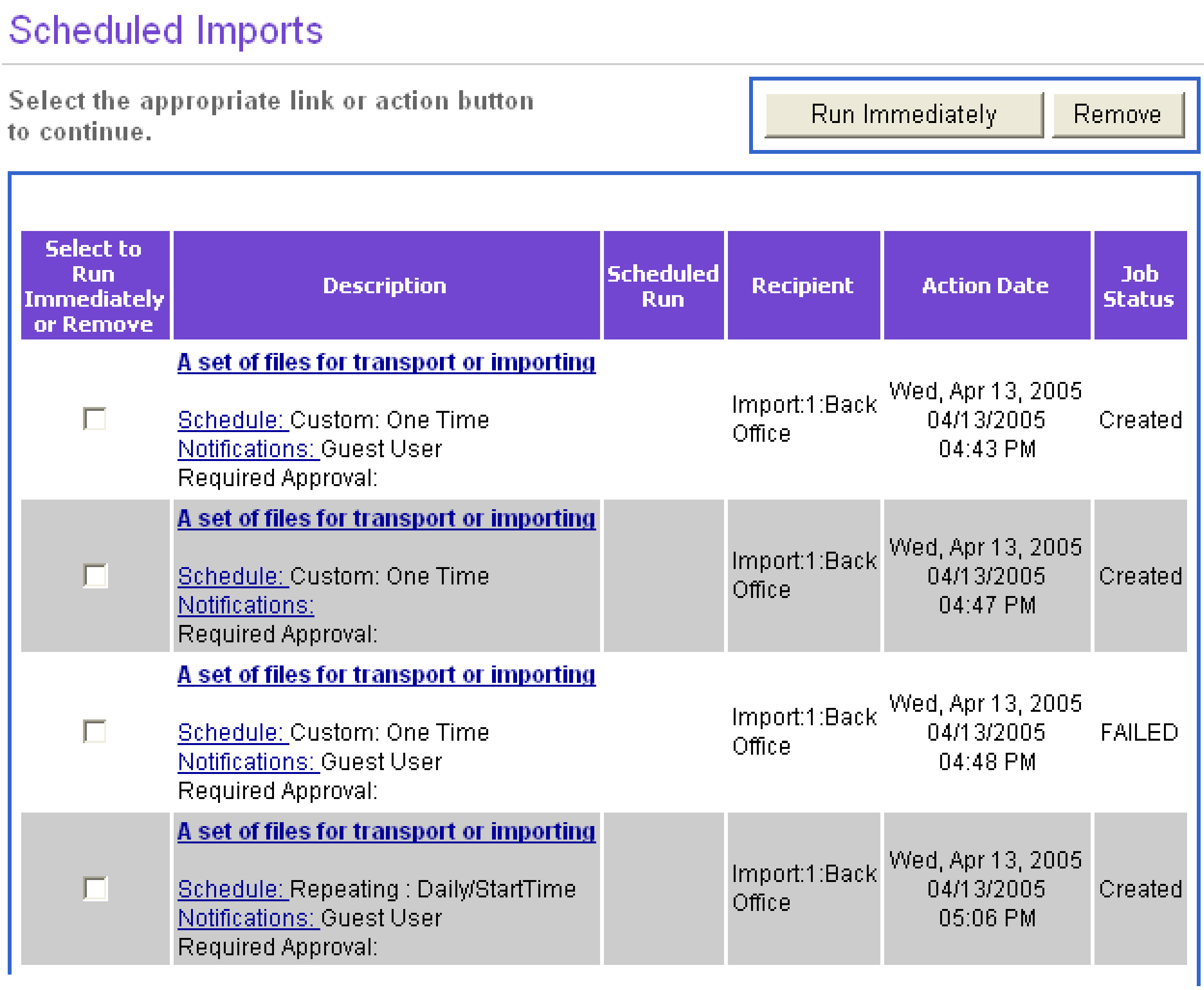


5. Click **Done**. Click another job description link to view the summary for that job.

Editing Scheduled Jobs

You may edit any of the jobs that appear on the Scheduled Imports or Scheduled Exports screens. You can remove a job, select to run a job immediately, edit the job schedule, or change and add notifications for the job.

Figure 7-8 Scheduled Imports Screen



Scheduled Imports

Select the appropriate link or action button to continue.

Run Immediately | Remove

Select to Run Immediately or Remove	Description	Scheduled Run	Recipient	Action Date	Job Status
☐	A set of files for transport or importing Schedule: Custom: One Time Notifications: Guest User Required Approval:		Import:1:Back Office	Wed, Apr 13, 2005 04/13/2005 04:43 PM	Created
☐	A set of files for transport or importing Schedule: Custom: One Time Notifications: Required Approval:		Import:1:Back Office	Wed, Apr 13, 2005 04/13/2005 04:47 PM	Created
☐	A set of files for transport or importing Schedule: Custom: One Time Notifications: Guest User Required Approval:		Import:1:Back Office	Wed, Apr 13, 2005 04/13/2005 04:48 PM	FAILED
☐	A set of files for transport or importing Schedule: Repeating : Daily/StartTime Notifications: Guest User Required Approval:		Import:1:Back Office	Wed, Apr 13, 2005 04/13/2005 05:06 PM	Created

- To remove or run a scheduled job, check the box next to the job description.
    - To remove the schedule from the list, click **Remove**. You are asked to confirm the task removal. To remove the job, click **Yes**. To return to the previous screen, click **No**.
    - To run the import or export, click **Run Immediately**. The job status changes depending on the success of the action.
- To edit the job schedule, click the **Schedule** link under the job description. The Job Schedule screen is displayed. Refer to "Scheduling a Job" on page 7-2 to edit the job schedule.
- To edit the notifications, click the **Notifications** link under the job description. The Notification screen is displayed. Refer to "Adding a Notification" on page 7-4 to edit the notifications.

Parameter Maintenance

The parameter maintenance function allows you, if authorized, to create, manage, or remove parameter lists. The parameter values set to a parameter list override the current values that the store uses. You can edit, delete, or modify the parameters within a list or edit the values of specific parameters.

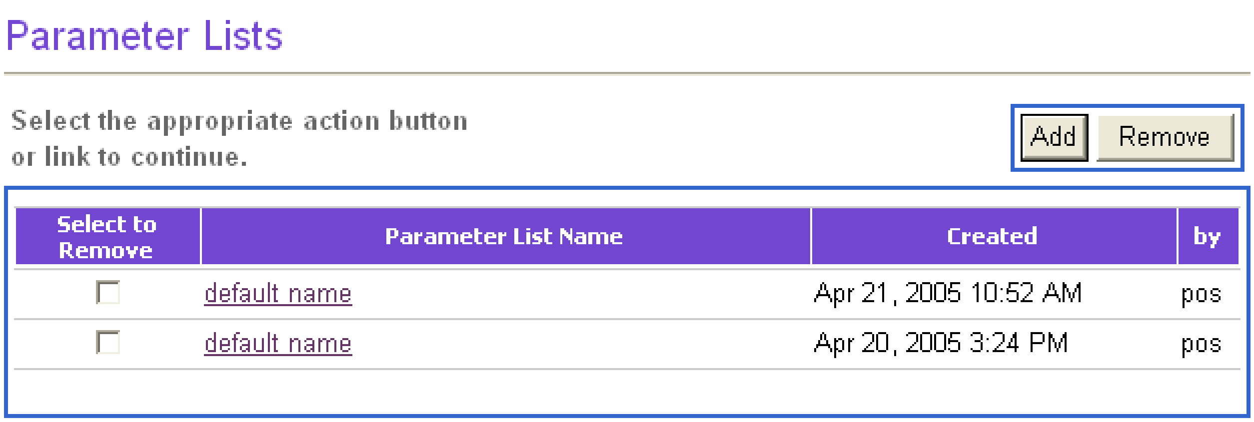
Maintaining Parameter Lists

You can create a list of parameters to be applied to Back Office or Point-of-Sale functions, view an existing list of parameters, or remove a parameter list.

To create or view a parameter list:

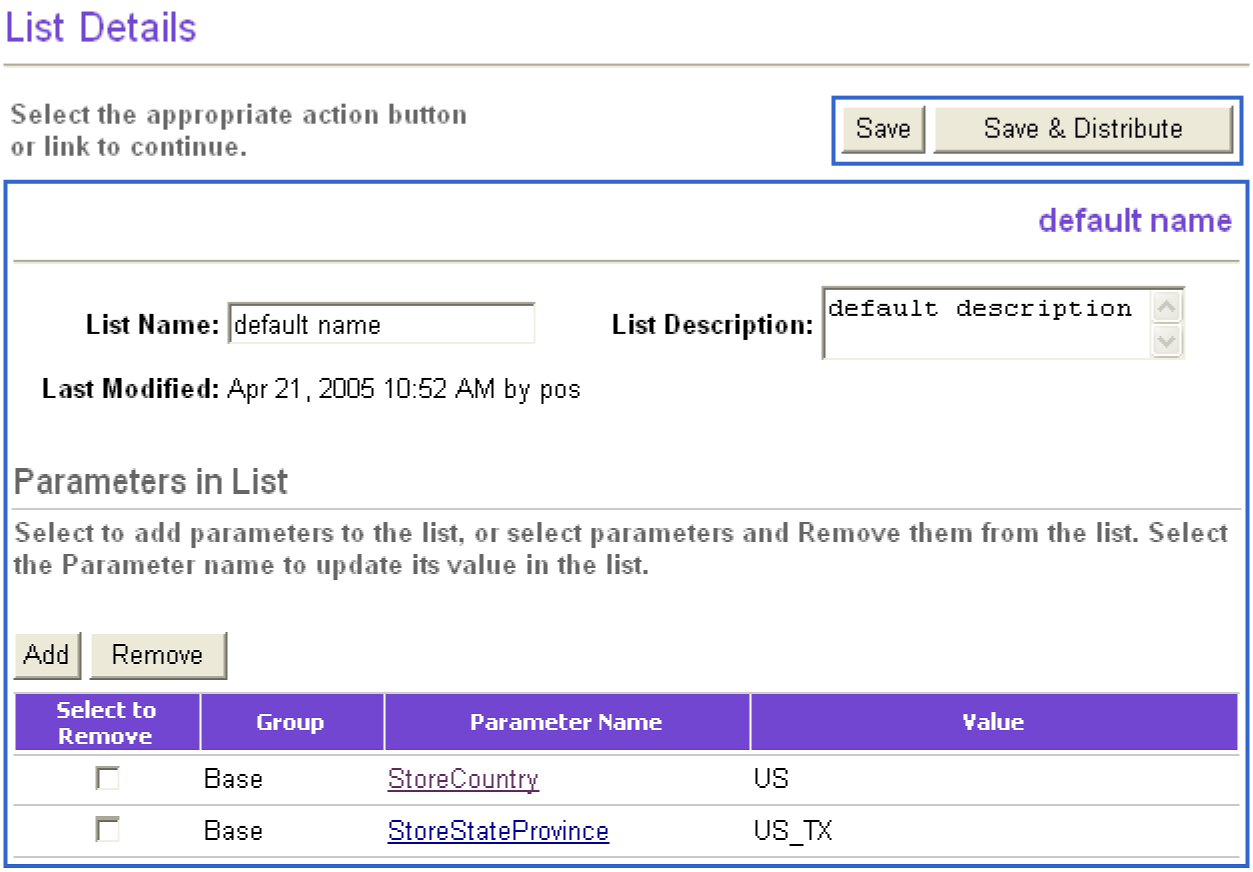
1. Click the **Admin** tab.
2. Click the **Parameter Maintenance** subtab.
3. Click the **Parameter Lists** left navigation link. The Parameter Lists screen is displayed.

Figure 7-9 Parameter Lists Screen



4. You may remove, add, or edit a parameter list.
   - To delete the list, check the box next to a parameter name and click **Remove**.
   - To create the list, click **Add**. The List Details screen is displayed. You may then add parameters to the list. See “Adding Parameters to a List” on page 7-10.
   - To view an existing list, click the link of the parameter name. The List Details screen is displayed. You may choose to edit the parameters within the list. See “Editing Parameters in a List” on page 7-9.

Figure 7-10 List Details Screen



Editing Parameters in a List

You can edit the parameters of a newly created or previously existing list. You may add or change the list name and description, add parameters to the list, or remove parameters from a list.

To edit the parameters in a list:

1. Enter or edit the list name and list description.
2. Add parameters to or remove parameters from the list.
   - To remove a parameter from a list, check the box next to the parameter name and click **Remove**.
   - To add a parameter to a list, click **Add**. Follow the steps in “Adding Parameters to a List” on page 7-10.
3. To save the list, click **Save.** To distribute the parameters to the registers, click **Save and Distribute**.

Adding Parameters to a List

On the List Details screen, you can add parameters to a new or existing list.

To add parameters to a list:

1. To add parameters to the list, click **Add**. The Select Parameter screen is displayed.
2. Select a group name from the drop-down menu and click **Refresh**. The screen displays the parameters for the chosen group.
3. To choose the parameters to add, check the box next to the parameter name and click **Update List**. To add more parameters, select a new group and click **Refresh** to display new parameters.
4. Click **Return to List**. The List Details screen is displayed containing the newly added parameters.

Distributing a Parameter List

Once you have saved a list and chosen to distribute it, the Select Recipient-Registers screen is displayed. You can distribute the list to all the registers or to specific registers.

- To send the list to all registers, click **All Registers** and click **Next**. The Job Schedule screen is displayed. Refer to “Scheduling a Job” on page 7-2 to schedule the distribution.

To send the list to specific registers:

1. Click **Individual Registers**.
2. Select a register number from the drop-down menu.
3. Click **Add**. The register number appears under “Registers included in distribution.” To remove a register, check the box next to the register number and click **Remove**.
4. Click **Next**. The Job Schedule screen is displayed.

Viewing Parameter Distributions

You can view parameters scheduled to be distributed to the registers.

To view parameters:

1. Click the **Admin** tab.
2. Select the **Parameter Maintenance** subtab.
3. Click the **Distributions** left navigation link. The Scheduled Exports screen is displayed.
4. You can edit any of the scheduled distributions. See Chapter 7, “Editing Scheduled Jobs” to edit the distribution schedules.

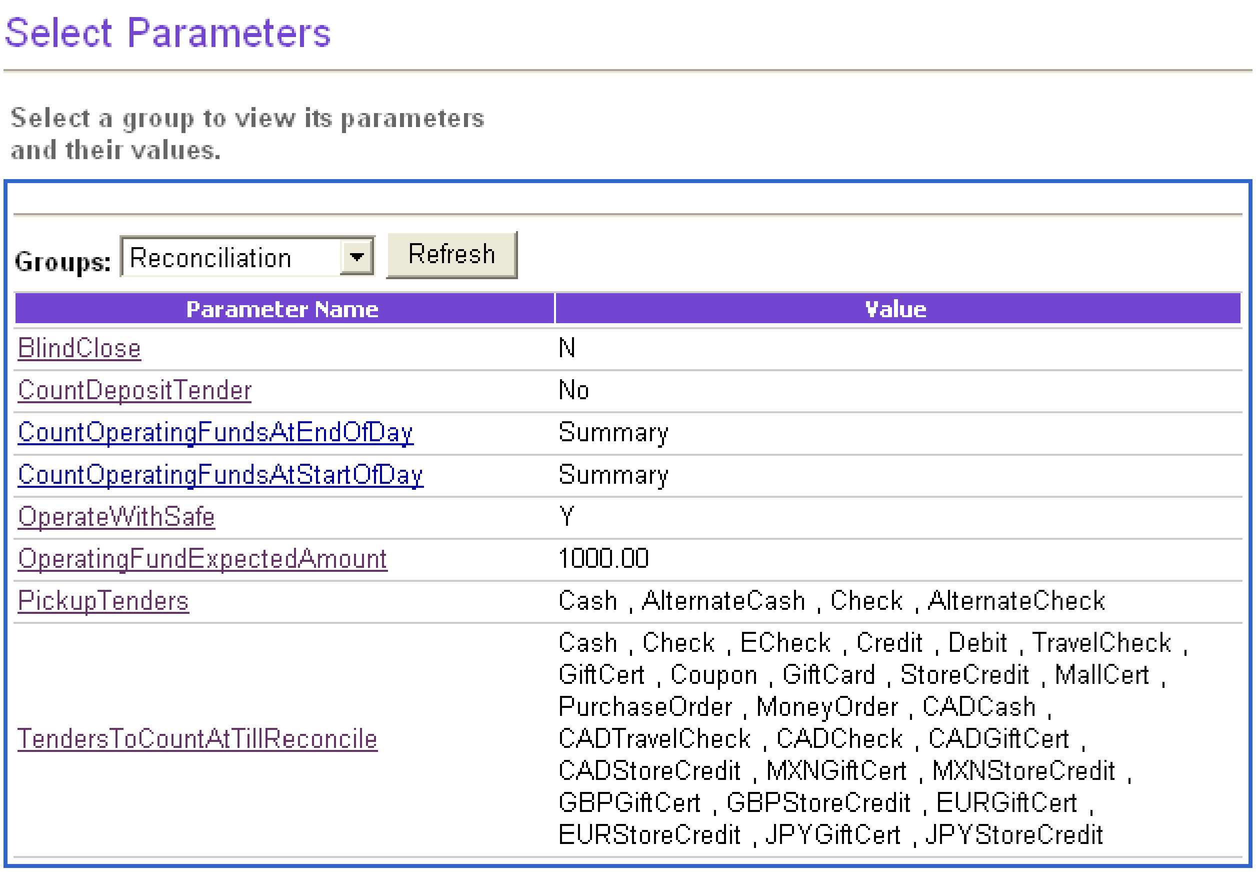
Setting Back Office Parameters

You may set the Back Office parameters that affect both Back Office and Point-of-Sale. To set a parameter, change or enter a new value for that parameter. This consists of choosing a value for each parameter.

To set parameters:

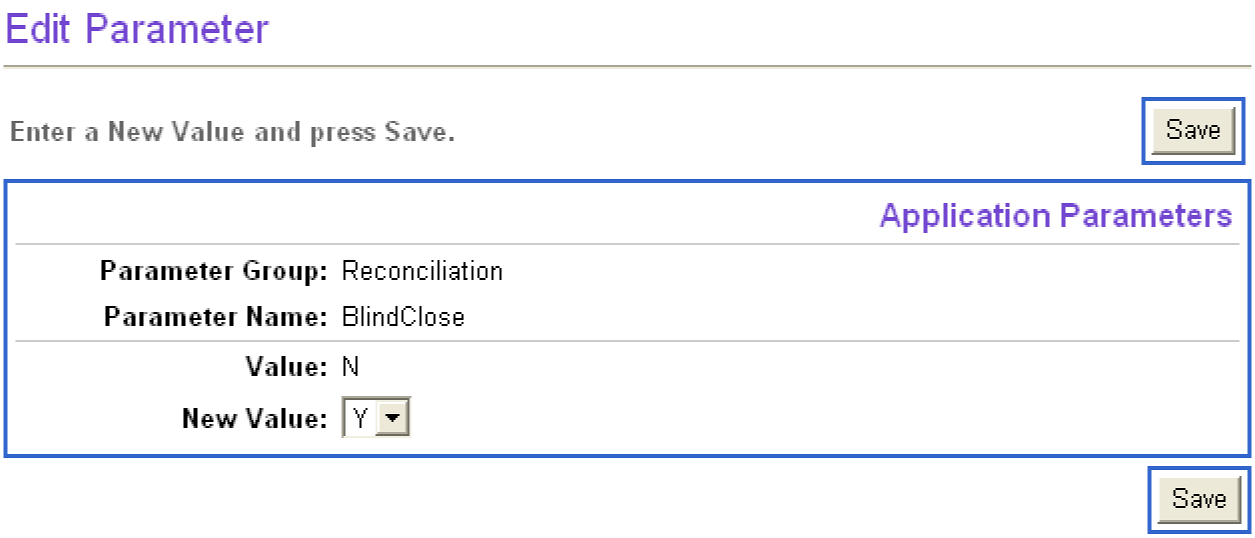
1. Click the **Admin** tab.
2. Click the **Back Office Parameter Maintenance** subtab. The Select Parameters screen is displayed.

Figure 7-11 Select Parameters Screen



3. Select a group from the drop-down menu to view the parameters within that group.
4. Click the parameter name link of the parameter you wish to view. The Edit Parameter screen is displayed.

Figure 7-12 Edit Parameter Screen



Note: Edit Parameter screen varies based on the chosen parameter.

5. Enter or select a new value for the parameter. You must enter a new value or select one or more values from the provided list.
6. Click **Save**. The Select Parameters screen is displayed. Select another link to view the details of that parameter.

Maintaining Exchange Rates

You may adjust exchange rates for foreign currency. Each type of currency is listed with the currency name, ISO, exchange rate, and the date last updated.

To adjust exchange rates:

1. Click the **Admin** tab.
2. Click the **Exchange Rate Maintenance** subtab. The Foreign Currency Exchange Rates screen is displayed.

Figure 7-13 Foreign Currency Exchange Rates Screen

Foreign Currency Exchange Rates

Select the appropriate ISO to set foreign currency's exchange rate

Currency	ISO	Exchange Rate	Last Updated
Canadian Dollars	CAD	0.650580	01/01/1990
Mexican Pesos	MXN	0.001062	01/01/1990
United Kingdom Pounds	GBP	1.777600	04/13/2005
European Union Euros	EUR	0.854700	01/01/1990
Japanese Yens	JPY	0.009030	12/01/2001

3. Click the ISO link of the exchange rate. The Set Exchange Rate screen is displayed.

Figure 7-14 Set Exchange Rate Screen

Set Exchange Rate

Enter exchange rate for Canadian Dollars.

Exchange Rate : 0.650580 *

Save

4. Enter a new exchange rate as a numerical value.
5. To save the new exchange rate, click **Save**. The new value and the current date is displayed on the Foreign Currency Exchange Rates screen.