Oracle® Retail Point-of-Service

User Guide

Release 12.0.11.1

May 2010

Oracle Retail Point-of-Service User Guide, Release 12.0.11.1

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Value-Added Reseller (VAR) Language

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Contents

9 Using Employee Options

10 Training Mode and Transaction Re-entry Mode

List of Figures

List of Tables

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Preface

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

Audience

This document is intended for cashiers, store managers, and sales associates who conduct daily store activities and process transactions.

Related Documents

For more information, see the following document in the Oracle Retail Point-of-Service Release 12.0.11.1 documentation set:

- *Oracle Retail Point-of-Service Release Notes*

Customer Support

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`https://support.oracle.com`

When contacting Customer Support, please provide the following:

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

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 12.0) or a later patch release (for example, 12.0.11). If you are installing the base release, additional patch, and bundled hot fix releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch and bundled hot fix 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

The following text conventions are used in this document:

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

1 Overview

This chapter contains introductory information for users of the Oracle Retail Point-of-Service application. The following topics are discussed:

- Application Overview
- Getting Started
- User Interface

> **Note:** The Oracle Retail Point-of-Service application may have been customized for your company. If changes were made from the default configuration, the application may look or behave differently than described in this guide.
>
> For example, the steps that describe how to tender a transaction include the franking of certain types of tender such as checks. In your configuration, however, you may not perform franking of checks when tendering a transaction.

Application Overview

Oracle Retail Point-of-Service is a next-generation point-of-sale application designed to enable customer-centric retailers to carry out day-to-day transactions. Industry-leading capabilities like fulfilling and returning web-generated orders and purchases, which includes saving customer information if the store is out of stock, are part of the application. Oracle Retail Point-of-Service is comprised of the following major component areas:

- Daily Operations
- Point-of-Service
- Administration
- Clock In/Out
- Service Alert
- Back Office

  The Back Office button is active and provides direct access to Oracle Retail Back Office if the application was purchased and implemented. See the Oracle Retail Back Office User Guide for more information.

- Training On
- Re-entry On

These components are available on the Main Options screen when Oracle Retail Point-of-Service is launched.

> **Note:** You can use Oracle Retail Point-of-Service wirelessly through the optional Mobile Point-of-Service module. See the Oracle Retail Mobile Point-of-Service User Guide for more information.

Getting Started

This section provides instructions on starting and logging in and out of the various components of Oracle Retail Point-of-Service.

Starting the Application

The application is loaded automatically when the register is turned on. The application is running all the time as long as the register is on. You do not start or stop the application. To exit the application, turn the register off.

Logging In and Out

The Main Options screen is displayed when Oracle Retail Point-of-Service is launched. If any of the components on the Main Options screen require you to log in, the application prompts you for a user ID and password. The login may be completed manually by typing the user ID and pressing **Enter/Next**, then typing the password and pressing **Enter/Next**. The login may also be completed by swiping a bar code or scanning a magnetic stripe card. In this case, you may or may not be prompted to enter the password.

If you enter a temporary password or a password that has expired, the Change Password screen is displayed. See Figure 1–1. You must change your password before you can access the application.

To logoff, you press **Escape/Undo** from the global navigation bar on the Sell Item screen. The Main Options screen is displayed. The Main Options screen is secure from unauthorized access since a user ID and password is required to access each of the components from this screen.

Changing Your Password

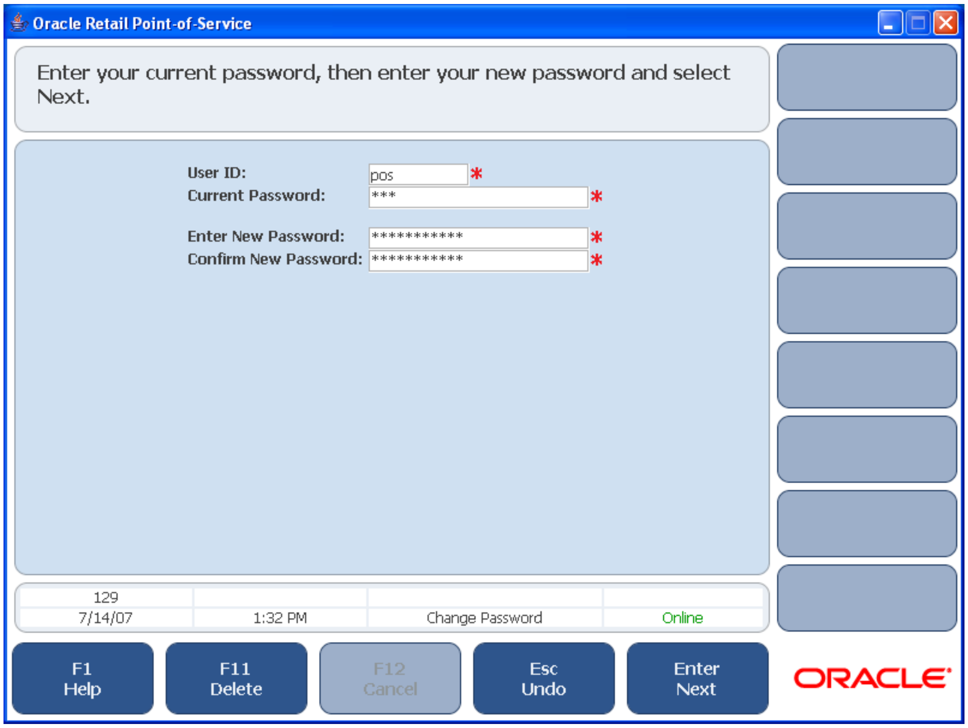
Passwords are used to restrict access to Oracle Retail Point-of-Service. The requirements for passwords are defined by the retailer. Requirements can include the definition of password length and content. For example, you may need to enter a password that is at least five but not more than ten characters and includes at least one numeric character. For information on your password requirements, consult your system administrator.

Passwords can be set to expire within a specific number of days after being set. During login, if you are warned that your password is about to expire, you can choose to change your password at that time. If you do not change your password before it expires, you may be locked out from logging into the application. If you are locked out, a system administrator must reset your password. You will be assigned a temporary password that you must change immediately at your next login. You may also be locked out after a specific number of invalid login attempts.

To change your password:

1. From the Identification screen, press **F2/Change Password**. The Change Password screen is displayed.

Figure 1–1 Change Password Screen



2. Enter your current password.
3. Enter your new password.
4. Enter your new password again to confirm the change. Press **Enter/Next**. The Identification screen is displayed.
5. To complete logging in, press **Enter/Next**.

User Interface

This section provides information regarding the standard screen regions, navigation, and the Main Options screen.

Screen Regions

The screens are divided into regions and are named for ease of description. Becoming familiar with these regions helps you to better utilize this guide when asked to reference specific areas of the screen.

Figure 1–2 Screen Regions

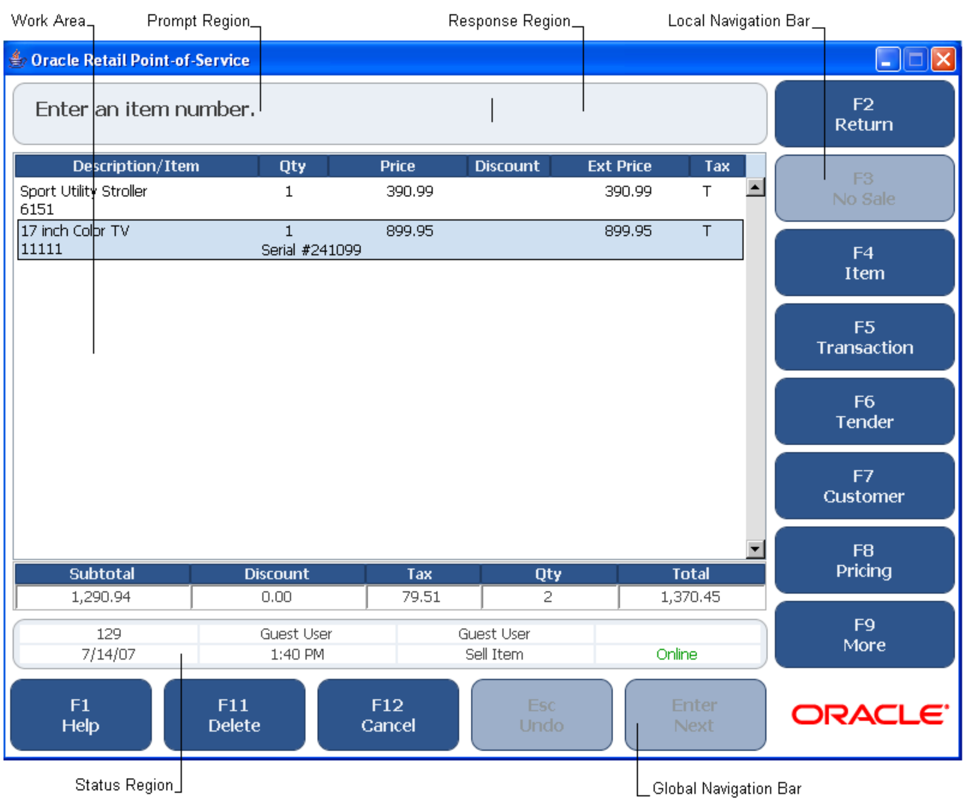


Table 1–1 describes the screen regions.

Table 1–1 Screen Region Descriptions

Region	Description
Prompt	Most screens contain instructions in the prompt region. Instructions may direct you to input data or press a button in the local or global navigation bar. You do not interact with the prompt region.
Response	The response area is used when one piece of data is required. You enter data in the response region. Input for the response region could be obtained manually as well as through external devices such as a magnetic stripe reader or a bar code scanner. If the field has a default value, it is displayed in the response region.

Table 1–1 (Cont.) Screen Region Descriptions

Region	Description
Status	The Status region is comprised of several fields: ■ Register ID - Displays the register ID which is a unique identifier for the register. ■ Current Business Date - Displays the current business date that is set during the Start of Day process. ■ Cashier Name - Displays the ID of the cashier working on the register. ■ Current Time - Displays the current time. ■ Sales Associate Name - Displays the name of the sales associate that is linked to the current transaction. ■ Screen Name - Displays the name of the current application screen. ■ Customer - Displays the name of the customer for the current transaction, if applicable. ■ Communications Status - Displays the communications status, which is determined from the last attempt by the application to communicate with the server or device. Possible values for this field are Online, Offline, and Training Mode.
Local Navigation Bar	The local navigation bar contains eight buttons that are used to select application functionality. Each button has a label and an associated function key on the keyboard that can be used to achieve the same result as clicking the button. For example, you can click the F4/Item button or press the F4 function key. Inactive or disabled buttons are grayed-out. Unused buttons are blank.
Global Navigation Bar	The global navigation bar contains five buttons that are used to select application functionality. The behavior of the buttons is repeated on all screens, where possible, to facilitate consistency and ease-of-use. Each button has a label and an associated function key on the keyboard that can be used to achieve the same result as clicking the button. Inactive or disabled buttons are grayed-out.
Work Area	The work area is the region of the screen where data for viewing or selection is presented. In some instances, this area is used to display or collect information from you and other times it is blank.
Dialog Boxes	Dialog boxes are used to present messages or to request verification of a requested action. When these boxes appear, you must provide the requested information and interact with the application by pressing keys or clicking buttons. These boxes have only an “on/off” state such as Enter, Yes, No, Cancel, Retry, Continue, and do not allow for data entry. All local and global navigation is disabled when a dialog is displayed.

The Navigation Bars

Navigation is divided into three sections: global navigation, local navigation, and other navigation keys. The global navigation bar provides access to functions that are constant throughout the application. The local navigation bar gives access to functions specific to the Oracle Retail Point-of-Service application, such as Item Modification, Transaction Modification, or Tender. To indicate that a function is disabled, the navigation or global button is grayed-out.

Global Navigation Bar

The global navigation bar provides access to global functions that are available on all screens. When a button is grayed-out, this indicates that its functionality is unavailable. Table 1–2 describes the functionality of these keys.

Figure 1–3 Global Navigation Bar

Table 1–2 Global Navigation Key Descriptions

Key	Description
F1/Help	The F1/Help key enables you to access help for the current screen. When you press F1/Help, the help screen is displayed. You may need to choose Page Up or Page Down to find help for the specific topic required. Press F1/Done to close the help screen.
F11/Delete	On most screens, the F11/Delete key is used to clear any information that has been typed or scanned in the current field. When you press F11/Delete, the field is cleared and ready for you to re-enter new information in the same field. For example, on the Sell Item screen, you can delete (or remove) an item from the transaction. To delete an item, select/highlight the item and press F11/Delete. The item is removed from the transaction. Note: If more than one item is to be removed, use the arrow keys to select the first item and press the space bar. Then use the arrow keys to move to the next item and press the space bar again. When all desired items are selected, press F11/Delete.
F12/Cancel	On most screens, the F12/Cancel key is used to cancel the current transaction or specific function. When you press the F12/Cancel key, you are prompted to verify whether you wish to cancel the current operation. If Yes is chosen, the transaction is cancelled or the specified function is cancelled.
Esc/Undo	The Esc/Undo key is used on most screens to back out of the current operation and return to the previous screen. Unlike the F12/Cancel key, the Esc/Undo key does not cancel the current transaction or specific function. When Esc/Undo is pressed, you lose all of the information that has been entered on that screen.

Table 1–2 (Cont.) Global Navigation Key Descriptions

Key	Description
Enter/Next	The Enter/Next key is used to complete the current operation. For example, if you enter an item number and press Enter/Next, the item number and its defaults (description, price, default quantity of 1, extended price, and tax code) are entered into the transaction and are displayed on the Sell Item screen. When the Enter/Next key is pressed after data has been entered in the work area, the required fields are validated for minimum/maximum characters and acceptable value ranges. If any of the data is invalid, an error message is displayed. Throughout this document, you are directed to "scan the item or enter the item number and press Enter/Next." You only need to press Enter/Next if you have manually entered the number. If you scan the item, the operation is completed automatically (an implied Enter).

Local Navigation Bar

The buttons on the local navigation bar change as you navigate through the various components in Oracle Retail Point-of-Service. The functions of the local navigation bars are described under their specific component. For example, the buttons shown in Figure 1–4 are available on the Sell Item screen. Typically, when you select another screen, a different set of options is displayed. Buttons that are grayed-out have been designated disabled and are currently unavailable. The F3/No Sale button is disabled in the following figure. If there are more options available than buttons that fit on the screen, the last button is the More option. Press More to view the additional options. Press More again to return to the original set of options.

Figure 1–4 Local Navigation Bar

Other Navigation Keys

Some key actions permit you to navigate the screen to scroll lists, move from field to field, or manipulate data in a data entry field. Other key actions result in changes in application flow that are specific to the context of the screen. Still others may have globally-defined behavior. Table 1–3 describes the keys.

Table 1–3 Other Navigation Key Descriptions

Key	Description
Up/Down Arrows	The up and down arrow keys can be used when a screen has more than one entry in a list. The up arrow moves to the entry above the current entry. The down arrow moves to the entry below the current entry.
Page Up/Down	The Page Up and Page Down keys are enabled for lists that exceed the viewable area of the screen. Press Page Up or Page Down to navigate these lists.
Tab/Shift-Tab	The Tab and Shift-Tab keys are enabled on screens with more than one field. The Tab key moves you to the next field on the screen (left to right, top to bottom, bottom to top). The Shift-Tab key moves you to the previous field on the screen (right to left, bottom to top, top to bottom).
Backspace	While entering information into a field, if the Backspace key is chosen, the character preceding the cursor is deleted and the characters following the cursor (if any) are backed-up to close the resulting gap.
Delete	While entering information into a field, if characters are highlighted and the Delete key is pressed, the highlighted characters are deleted. If no characters are highlighted when the Delete key is pressed, the character following the cursor is deleted and the characters following the deleted character (if any) are backed-up to close the resulting gap.
Spacebar	Some screens display a list of items from which you can select multiple items that receive the same action. For example, in a Return transaction if more than one item is to be returned, you can select multiple items by using the arrow keys to highlight the first item and pressing the space bar once. To choose additional items, use the arrow keys to move to the next item and press the space bar again. Repeat for each additional item to be chosen. To deselect an item, choose the item and press the space bar once.

Locale Support

Locale support means tailoring the information displayed on a screen and accepting user entered data in a format that meets the conventions of the locale, or geographic region, where the application is being used. In Oracle Retail Point-of-Service, limited locale support is provided to enable the date, time, currency, and calendar to be displayed in the default locale chosen for the application. For more information, see the Oracle Retail Point-of-Service Operations Guide. All screens and examples in this guide use the English - United States locale.

Note: Reports do not use the application default locale but are displayed in the English - United States locale.

Value Added Tax

Value added tax (VAT) is a tax added at various stages of production based on the value added to the product at that stage.

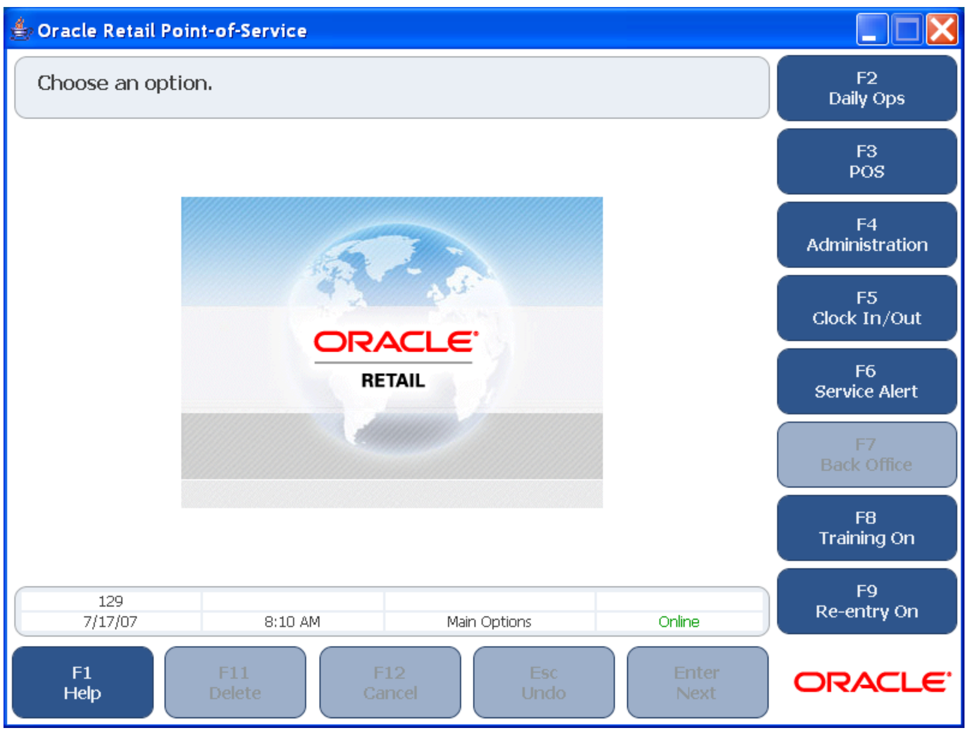
When VAT is enabled, all functionality to modify sales tax is unavailable. The following changes are made to the screens:

- The **F6/Tax** button is not available on the Item Options and Trans. Options screens.
- Some screens have a Tax field in the summary table at the bottom of the screen which shows the total tax for the transaction. This field is not displayed.

The Main Options Screen

When Oracle Retail Point-of-Service is launched, the Main Options screen is displayed. This screen provides access to the component areas. These components are arranged vertically on the right-hand side of the screen.

Figure 1–5 Main Options Screen



You utilize these components to perform various tasks. Table 1–4 describes the components:

Table 1–4 Application Components

Component	Description
Daily Operations	Enables you to access the Start of Day, Register Open, Till Options, Register Close and End of Day functions.
Point-of-Service	Enables you to conduct the Return, No Sale, Item, Transaction, Tender, Customer, Pricing, Special Order, House Account, Reprint Receipt, Till, Manager, Gift Card/Certificate, and Redeem operations.
Administration	Enables you to access the E-Journal, Reset Totals, Security, Manager, and About features. See the Oracle Retail Point-of-Service Operations Guide for more information.
Clock In/Out	Enables you to record your time via the Clock In/Out component.
Service Alert	Enables you to view web store order information with the Refresh, Orders, Web Store, and E-mail components.
Back Office	Enables direct access to Oracle Retail Back Office if the application was purchased and implemented. See the Oracle Retail Back Office User Guide for more information.
Training On	Enables you to learn the Point-of-Service and Administration components on live registers without affecting real transactions.
Re-entry On	Enables you to re-enter transactions at a later time.

Data Updates for the Register

During the business day, certain types of data may need to be updated for a register. For example, new items may have been added for the store.

Updates to register data only occur when the Main Options screen is being displayed. When an update is occurring, the Data Update dialog message is displayed and all of the buttons on the screen are unavailable. When the update is complete, the Main Options screen is displayed and the buttons are enabled.

2

Daily Operations and Time Tracking

The following functions are described in this chapter:

- Daily Operations
- Clocking In and Out

Daily Operations

The Daily Operations component is accessed from the Main Options screen. This component enables you to start and end a day (the same as opening and closing a store), open and close registers, and open and close tills. To access the Daily Operations function, press **F2/Daily Ops** from the Main Options screen. Enter login information and press **Enter/Next**. The Daily Ops screen is displayed.

Figure 2–1 Daily Operations Screen

The following topics are described in this chapter:

- Opening the Store
- Suspending and Resuming Tills
- Closing the Store

Opening the Store

The store must be opened every day because when the store is opened, the financials and totals are started for the day. There are two ways to open the store. The first is through the Daily Operations screen and the second is through the Daily Operations Wizard. For information on the Daily Operations Wizard, see The Daily Operations Wizard section.

When the store is opened through **F2/Daily Ops**, the Start of Day function is completed from one register, the register is opened, and the till is opened. Each of these tasks are described below.

Start of Day Function

The Start of Day function includes defining the business day and the amount of money in the store safe. This function must be completed before any registers can be opened.

To complete Start of Day:

1. From the Daily Ops screen, press **F2/Start of Day**. The Enter Business Date screen is displayed.
2. Enter the business date if the default date is not correct, and press **Enter/Next**. If the date entered is not what Oracle Retail Point-of-Service expected, the Later Date Confirmation screen is displayed.
   - If the business date entered is correct, press **No**.
   - To re-enter the business date, press **Yes**.

   The Summary Count screen is displayed.
3. Enter the total amount in the store safe and press **Enter/Next**. If the amount entered is not what Oracle Retail Point-of-Service expected, the Reconciliation Confirmation Notice is displayed.
   - If the amount entered is correct, press **Yes**.
   - To re-enter the correct amount, press **No**.

   The Store Open screen is displayed, notifying you that the store has been opened successfully. Press **Enter** to continue.

Register Open Function

The Start of Day function must be completed before one or more registers may be opened. In turn, registers must be opened before tills may be opened.

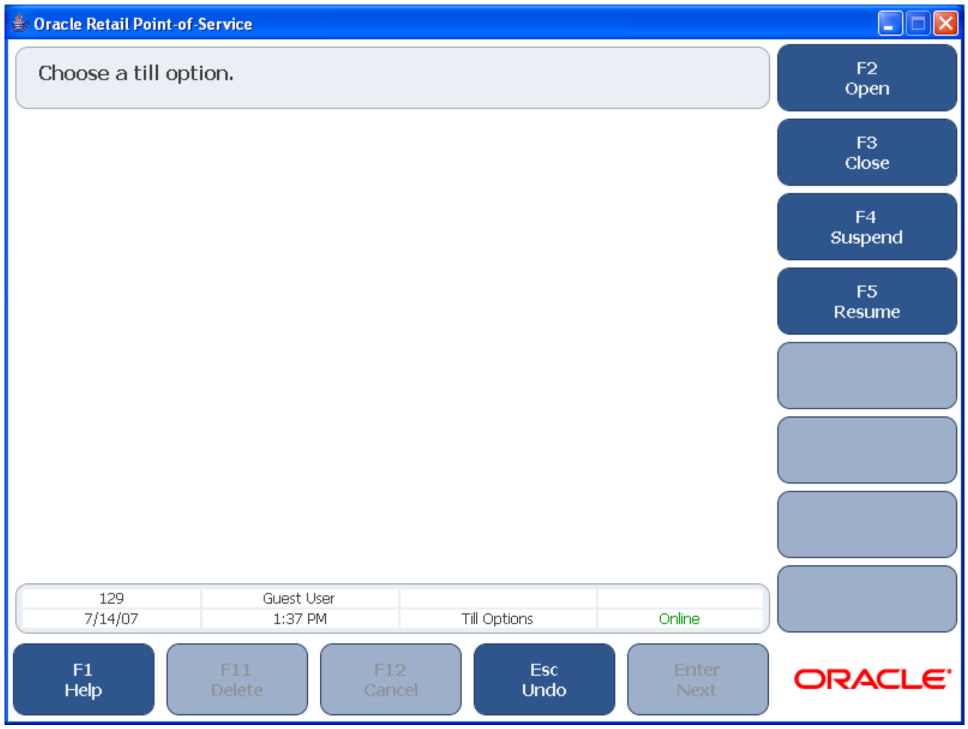
To open a register from the Daily Ops screen, press **F3/Register Open**. The Register Opened screen is displayed, notifying you that the register has been opened successfully. Press **Enter/Next** to continue. The Daily Ops screen is displayed.

> **Note:** If the Register Already Open Notice is displayed, the register has already been opened or it was not closed properly.

Opening Tills

A till is the cash drawer in the register. Float is the amount of money that is in the till when it is opened. The float travels with the till. A till has to be opened before performing a transaction. To perform till operations, press **F4/Till Options** from the Daily Ops screen. The Till Options screen is displayed.

Figure 2–2 Till Options Screen



Note: The Register must be opened before a till can be opened.

To open a till:

1. From the Till Options screen, press **F2/Open**. The Enter Till ID screen is displayed.
2. Enter the Till ID and press **Enter/Next**. The Summary Count screen is displayed.
3. Enter the total amount of the float and press **Enter/Next**. If the entered amount of the till was not what Oracle Retail Point-of-Service expected, the Reconciliation Confirmation Notice screen is displayed.
   - To verify the amount entered, press **Yes**.
   - To recount the till and re-enter the amount, press **No**.

The till is now open and ready for transaction processing. The Till Options screen is displayed.

The Daily Operations Wizard

The Daily Operations Wizard automatically launches if you attempt to open a till or register without opening the store first. The Daily Operations Wizard guides you through the steps needed to open the store, register, and till. The wizard walks you through the Enter Business Date screen, Summary Count screen, and the Enter Till ID screen. After the store is open through the Daily Operations Wizard, the Sell Item screen is displayed and you may proceed with a transaction.

Suspending and Resuming Tills

Suspend and resume are components available on the Till Options screen. You may suspend a till at one register and resume it at another register. This is called a Floating Till.

Suspending Tills

A till may be suspended so that you can move to another register and keep the current till. You have the option to remove the cash drawer. The financials travel with the till when it is used in another register. All suspended tills must be resumed and then closed before the register may be closed. To suspend the till, press **F4/Suspend** from the Till Options screen. The Remove Till Confirmation screen is displayed.

- To remove the till and close the cash drawer, press **Yes**. You are asked to close the cash drawer and the Till Options screen is displayed. The till is now suspended
- To leave the till in the drawer, press **No**. The Till Options screen is displayed.

Resuming Tills

Suspended tills on a register must be resumed before the register is closed.

To resume the till:

1. From the Till Options screen, press **F5/Resume**. The Enter Till ID screen is displayed.
2. Enter the till ID number and press **Enter/Next**.
3. You are prompted to close the cash drawer.
4. The Till Resumed Succeeded screen is displayed. Press **Enter** to continue.

   The till is resumed and the Till Options screen is displayed.

Closing the Store

Closing the store is equally important as opening the store. This is because this component closes the financials for the day. The store must be closed every night in Oracle Retail Point-of-Service. To close the store, the tills need to be reconciled and closed, each register needs to be closed, and the End of Day function needs to be completed from one register or through the Back Office application.

Table 2–1 shows the reports that are automatically generated during end of day processing.

Note: Reports are displayed in the United States locale; not in the default locale for the application.

Table 2–1 Automatic Reports

Event	Report Name	Description
Till is successfully closed	Till Summary Report	This report shows a summary of till information.
Register is successfully closed	Register Summary Report	This report shows a summary of register activity.
Store is successfully closed	Store Summary Report	This report shows a summary of store activity.

Reconciling Tills

Tills can be reconciled both in Oracle Retail Point-of-Service and Back Office. For more information on reconciling tills in Back Office, see the Oracle Retail Back Office User Guide.

> **Note:** Tills can only be closed in Oracle Retail Point-of-Service.

To reconcile a till:

1. Press **F6/Reconcile** from the Till Options screen. The Enter Till ID screen is displayed.
2. Enter the Till ID and press **Enter/Next**.
3. The Close Till Confirm screen is displayed, asking if you would like to close the till.
   - To close the till and continue, press **Yes**.
   - To Cancel, press **No**.
4. The Remove Till Confirmation screen is displayed, asking if you would like to remove the till at this time.
   - To remove the till, press **Yes**.
   - To leave the till in the drawer, press **No**.
5. The Summary Count screen is displayed. Enter the amount of float and press **Enter/Next**. If the entered amount of the float is not what Oracle Retail Point-of-Service expected, the Reconciliation Confirmation Notice screen is displayed.
   - To accept the amount entered and continue, press **Yes**.
   - To re-count the float and re-enter the amount, press **No**.
6. The Select Tender screen is displayed. This screen and the related screens vary in the detail required, based on how the application is configured. In addition, only tender types that had transactions for the day have values against them in the work area.

   For each tender type for which the button is enabled:

   a. Count each tender type in the till.

   b. Press the corresponding button on the navigation bar for the tender type counted.

c. Enter the amount and press **Enter/Next**. Some tender types require more detail. For example, Credit requires that the amounts for different credit card types are entered separately.

Note: If zero is entered for an amount or if the amount is not what Oracle Retail Point-of-Service expected, verification of the amount is requested.

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7. When all tender types have been entered, press **Enter/Next**.
8. If the total amount of the till is not what Oracle Retail Point-of-Service expected, the Reconciliation Confirmation screen is displayed.
   - To verify the amount, press **Yes**.
   - To modify the amount, press **No**.
9. The Foreign Currency Count screen is displayed.
   - To count foreign currency, press **Yes**.
   - To continue, press **No**.
10. If Yes was chosen in step 9, then follow these steps to count foreign currency, otherwise go to step 12.
    a. The Foreign Currency Count screen is displayed. Select the type of currency from the navigation bar.
    b. Select the tender in which the foreign currency was received.
    c. The Summary Count screen is displayed. Enter the amount and press **Enter/Next**.
11. The Discrepancy Confirm screen is displayed. To accept the entered amount and continue, press **Yes**. To count the till again, press **No**.

    The till has been reconciled and the Till Options screen is displayed.

Closing Tills

All tills have to be closed before closing the register. Tills are closed at the register in Oracle Retail Point-of-Service.

To close a till:

1. From the Till Options screen, press **F3/Close**. The Enter Till ID screen is displayed.
2. Enter the Till ID and press **Enter/Next**.
3. The Remove Till Confirmation screen is displayed, asking if you would like to remove the till at this time.
   - To remove the till, press **Yes**.
   - To leave the till in the drawer, press **No**.
4. The Till Reconcile Location screen is displayed, asking if you want to reconcile the till at the workstation. If the screen is not displayed, follow step 6.
   - To reconcile the till at the workstation, press **Yes**.
   - To close the till without reconciling, press **No**.

5. If you selected Yes in step four, then follow steps four through eleven in Reconciling Tills.
6. If you selected No in step four, the till is closed and the Till Options screen is displayed.

Closing the Register

All tills associated with a register must be closed and reconciled before the register can be closed. All registers must be closed before the store can be closed.

To close the register:

1. From the Daily Ops screen, press **F5/Register Close**.
2. The Register Close Successful Notice is displayed. Press **Enter** to continue.
3. A Register Summary Report is automatically printed.

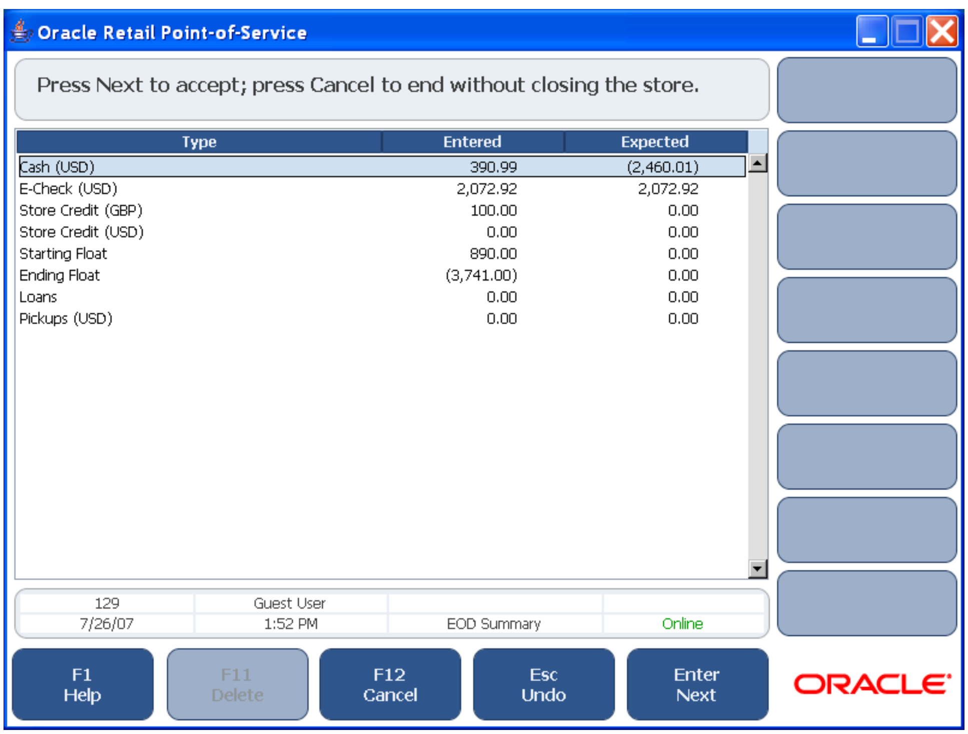
End of Day Function

The End of Day function is completed to close a store. All tills and registers must be closed before the End of Day function may be completed.

To close the store:

1. From the Daily Ops screen, press **F6/End of Day**. The EOD Summary screen is displayed.

Figure 2–3 EOD Summary Screen



2. To accept the balance and close the store, press **Enter/Next**. To end the operation without closing the store, press **F12/Cancel**.
3. If you accept the balance, the Summary Count screen is displayed.

4. Enter the total amount in the store safe and press **Enter/Next**.
5. If the total amount of the store safe is not what Oracle Retail Point-of-Service expected, the Discrepancy Confirmation screen is displayed.
   - To verify the amount, press **Yes**.
   - To modify the amount, press **No**.
6. The store is now closed and the Daily Ops screen is displayed.
7. To return to the Main Options screen, press **Esc/Undo**.

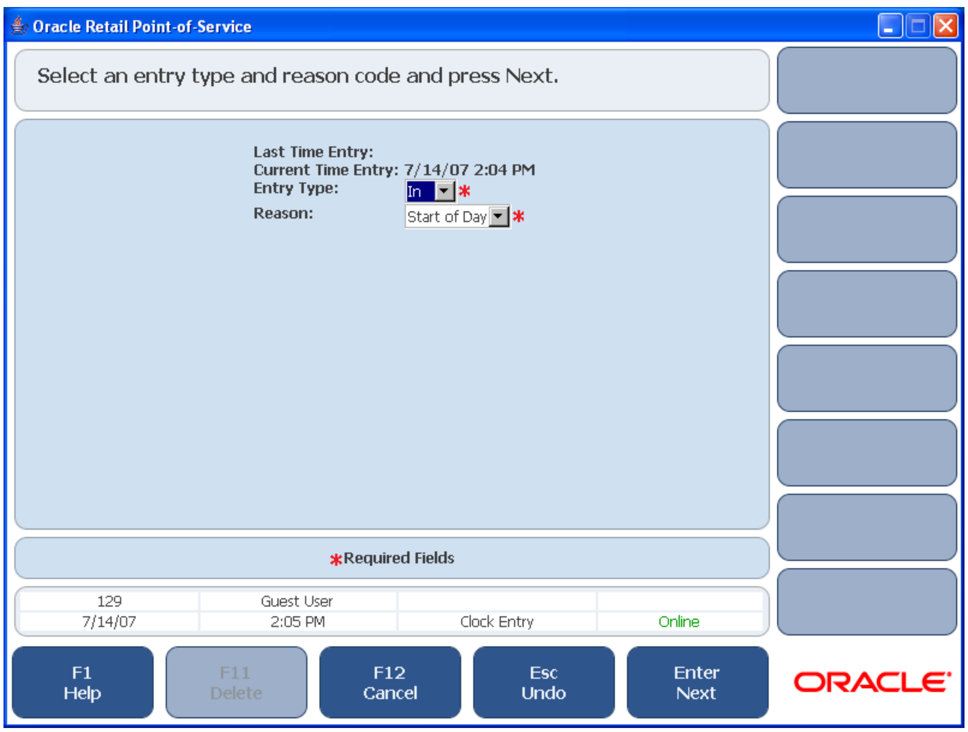
Clocking In and Out

The Clocking In and Out option is available on the Main Options screen.

To clock in or out:

1. Press **F5/Clock In/Out** from the Main Options screen.
2. Enter your user ID and password, and press **Enter/Next**. If the login is successful, the Clock Entry screen is displayed.

Figure 2–4 Clock Entry Screen



3. Verify the time entry, select an entry type and reason from the menus, and press **Enter/Next**. A message indicating the entry was successful is displayed.
4. Press **Enter/Next** to continue. The Main Options screen is displayed.

   For security, when you select another component, you are required to login again.

3

Completing Transactions

A transaction is an interaction with a customer in which merchandise is exchanged for a tender of value. Performing transactions is part of the POS component selected on the Main Options screen. All transactions begin from the Sell Item screen. A transaction is started when an item number is entered on the Sell Item screen. The item number can be entered manually or by scanning a bar code. Additional items can be added to the transaction. A transaction can be suspended and resumed. After all items have been added, the payment process begins. A customer can pay with multiple tenders. The transaction completes when the balance is zero. Return and No Sale are transaction types that begin by selecting a button on the Local Navigation Bar.

For more information on transactions, see the following sections:

- The Sell Item Screen
- Handling a Gift Card/Certificate
- Handling Age Restricted Sales
- Handling Related Items
- Tendering a Transaction
- Performing a Return
- Performing Item Options
- Performing Transaction Options
- Handling Special Orders
- Reprinting Receipts
- Till Functions
- Redeeming Tender
- No Sale Option

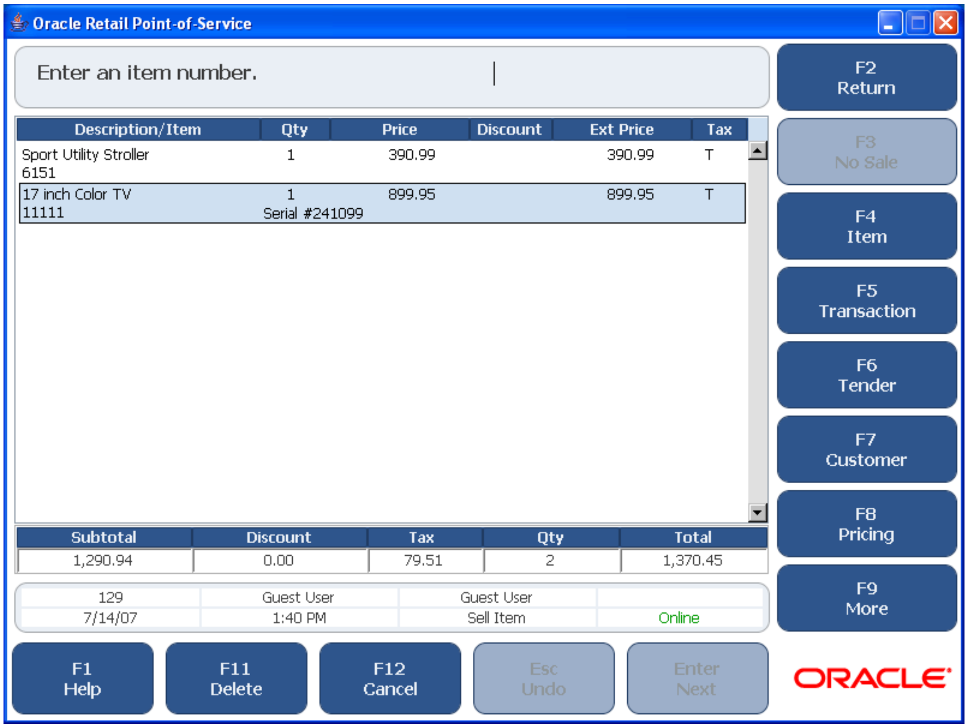
The Sell Item Screen

When selling items to customers, the Sell Item screen is the home base. It is where all transactions begin and it is displayed again when a transaction ends. Like other screens with a Local Navigation Bar, you may choose one of the function buttons on the right. Beginning a transaction to sell to a customer is an implied function. This can be done by entering an item number.

To access the Sell Item screen:

1. From the Main Options screen, press **F3/POS**.
2. Enter login information. The Sell Item screen is displayed.

Figure 3–1 Sell Item Screen



Handling a Gift Card/Certificate

Oracle Retail Point-of-Service supports selling gift cards and gift certificates. Gift cards are plastic cards with magnetic strips that hold an amount of value that can be used as tender. A Gift certificate is a piece of paper that holds an amount of value that can be used as a form of tender.

Selling a Gift Card

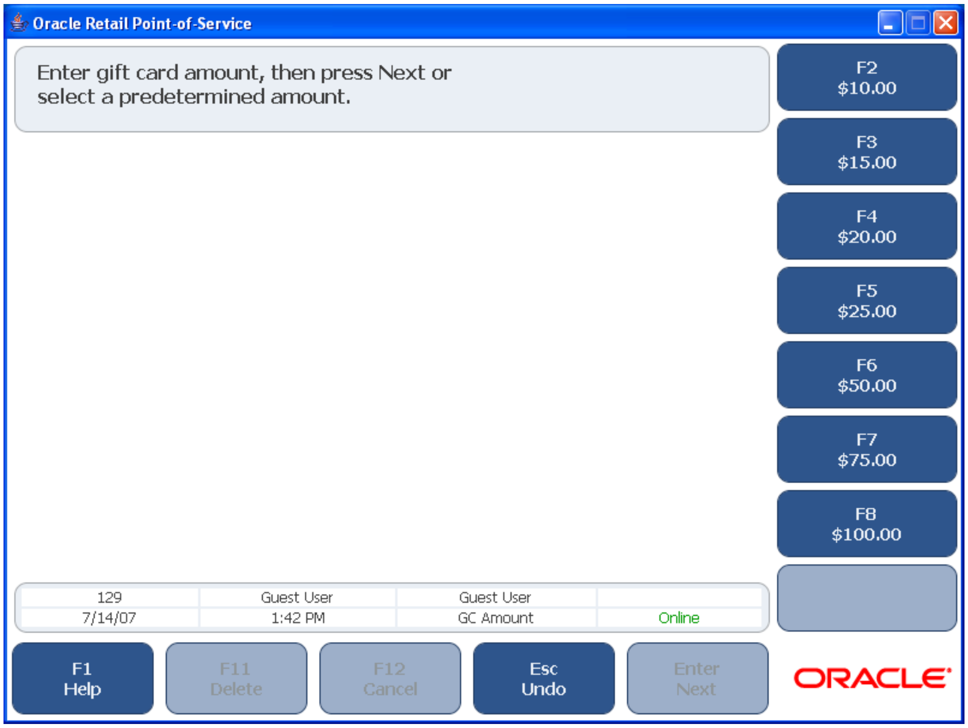
Oracle Retail Point-of-Service supports selling gift cards and using gift cards as a form of payment. A Gift Card does not hold actual value until it is purchased and activated by the Oracle Retail Point-of-Service application. Gift card purchases are not eligible for discounts other than employee discounts, price overrides, or tax adjustment. The quantity cannot be changed as each gift card has its own unique number. If the gift card is returned or the transaction that included the gift card purchase is voided, then the activation is canceled and the gift card can be reused. If a transaction that used a gift card is post voided, the amount is credited back to the gift card. If the total value of the gift card is used during a transaction, it is deactivated.

To sell a gift card:

1. From the Sell Item screen, press **F9/More** and then **F7/Gift Card/Cert**. The Gift Options screen is displayed.
2. Press **F2/Gift Card**. The GC Options screen is displayed.

3. Press **F2/Issue**. The GC Amount screen is displayed.

Figure 3–2 GC Amount Screen



4. Enter the gift card amount or select an amount. Press **Enter/Next**. The Sell Gift Card screen is displayed.
5. Enter the gift card number of the Sell Gift Card screen. The gift card number can be entered manually or by swiping the card or scanning the bar code. The Sell Item screen is displayed.
6. To begin the payment process, press **F6/Tender**. See Tendering a Transaction to tender a transaction.
7. After tendering the transaction is complete, the Activation screen is displayed. The gift card is activated.

Reloading a Gift Card

A gift card is reloaded when you add monetary value to an existing gift card.

To reload a gift card:

1. Press **F9/More** and then **F7/Gift Card/Cert** from the Main Options screen. The Gift Options screen is displayed.
2. Press **F2/Gift Card**. The GC Options screen is displayed.
3. Press **F3/Reload**. The GC Amount screen is displayed.
4. Follow steps 4 through 7 in Selling a Gift Card.

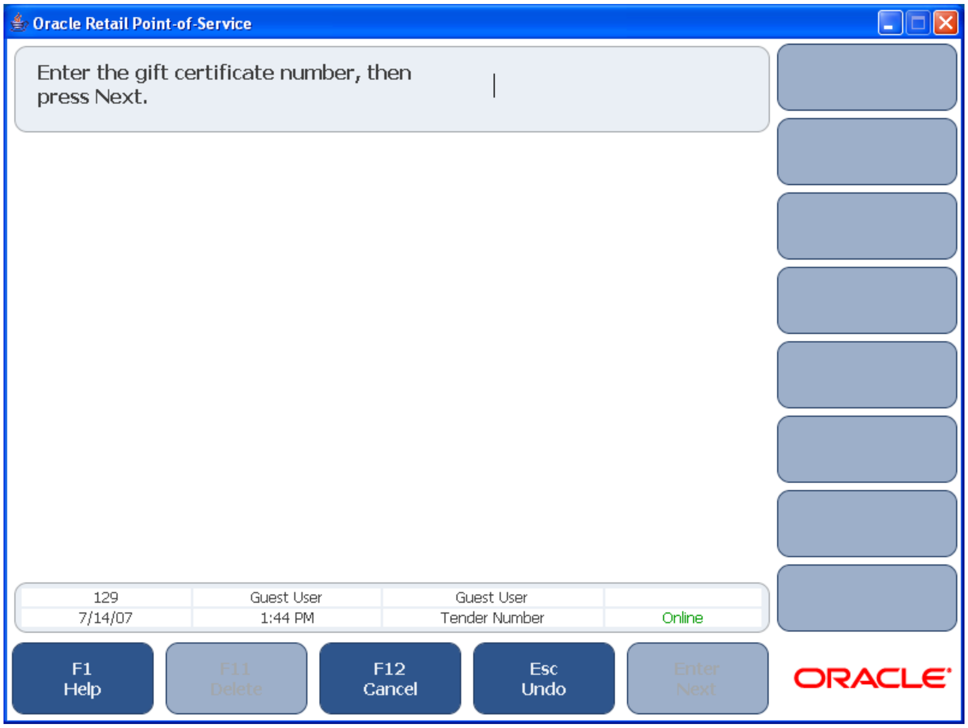
Selling a Gift Certificate

A gift certificate has to be sold at the store before it used as tender.

To sell a gift certificate:

1. Press **F9/More** and then **F7/Gift Card/Cert** from the Main Options screen. The Gift Options screen is displayed.
2. Press **F3/Gift Cert**. The Tender Number screen is displayed.

Figure 3–3 Tender Number Screen



3. Enter the gift certificate number and press **Enter/Next**. The Issue Amount Entry screen is displayed.
4. Enter the gift certificate amount or select a predetermined amount. Press **Enter/Next**. The Sell Item screen is displayed.
5. To start the payment process, press **F6/Tender**. See Tendering a Transaction for more information on tendering. After the transaction is tendered, Oracle Retail Point-of-Service franks and prints the gift certificate and returns to the Sell Item screen.

Linking an Item to a Gift Registry

A gift registry is a list of items that the registrant desires to receive as gifts for a registered occasion. When selling an item, the item can be marked as a Gift Registry item and the Gift Registry number can be entered. A Gift Receipt is automatically printed.

After an item is added to the transaction, you can link it to a Gift Registry.

To link an item to a gift registry:

1. Select the item using the up and down arrow keys.
2. Press **F4/Item** and then **F5/Gift Registry**. The Gift Registry screen is displayed.
3. Scan the Gift Registry number or manually enter it. Press **Enter/Next**.

   The Sell Item screen is displayed. A Gift Reg. annotation is appended to the item entry. A Gift Receipt is automatically printed for the items associated with a Gift Registry.

Gift Receipt

A customer may request a gift receipt with no prices shown to provide with the gift. The person receiving the gift can return the item using the gift receipt.

To request a gift receipt:

1. From the Sell Item screen, select the item or items to be printed on the gift receipt.

   > **Note:** If you need to select multiple items, select an item and press the spacebar. Repeat this for each item to be selected. As each item is selected, the line item becomes shaded.

2. Press **F4/Item**. The Item Options screen is displayed.
3. Press **F9/More** and then **F2/Gift Receipt**. The Sell Item screen is displayed.
4. Press **F6/Tender** to tender the transaction. For more information see Tendering a Transaction. The receipt is annotated *Gift Receipt*.

Handling Age Restricted Sales

For any item, the retailer can define the minimum age a customer must be in order to purchase the item. When an item with an age restriction is added to a transaction, you are prompted to enter the customer's date of birth. Oracle Retail Point-of-Service calculates the customer's age and determines if the item can be sold to the customer. Age verification is done for an item when it is added to a sale, layaway, or special order transaction. You can bypass the age verification if this is allowed by the application configuration.

If multiple items in a transaction require age verification, you are prompted to enter the customer's date of birth only for the first item that has an age restriction. If the first age verification was skipped and an item with a more restrictive age requirement is then added, you are again prompted to enter a date of birth.

If an item has an age restriction, the Date of Birth screen is displayed.

To handle the age restriction:

- Enter the date of birth and press **Enter/Next**. If the age of the customer meets or exceeds the required age, the item is allowed in the transaction. If the item cannot be purchased because the customer's age does not meet the minimum age requirement, the item is removed from the transaction.
- To bypass the age verification, press **F2/Skip**.

Handling Related Items

An item, known as the primary item, can have a set of other items or fees associated with it. These other items or fees are known as related items. Related items can be automatically or optionally added to a transaction when the primary item is added. For example, when a customer purchases a car battery, a mandatory environmental disposal fee is automatically added to the transaction and the cashier is prompted to offer the customer the option to select a 12, 24, or 36 month warranty.

A primary item can have multiple groups of related items defined for it. Table 3–1 explains the different groups of related items.

Table 3–1 Related Group Items

Group	Description
Automatic	These related items are automatically added to the transaction.
Optional	You are prompted to select one or more of the related items from the list. You can decline to add any of the items.
Optional-Pick One	You are prompted to select one of the related items from the list. You can decline to add an item.

If a related item is flagged as non-saleable, it can only be added to a transaction when the primary item has already been added. If the primary item is deleted from the transaction, any of its related items are also deleted.

If a related item has an age restriction, the customer's age is verified. If the customer is not allowed to purchase the related item, the primary item remains in the transaction but the related item is not added. For more information on age restrictions, see Handling Age Restricted Sales.

To handle related items:

- If an item has Automatic related items, the related items are automatically added to the transaction. Each related item is shown in the list on the Sell Item screen.
- If an item has Optional related items, the Related Items screen is displayed. Select the items and press **F2/Add**. To choose no items, press **F3/Decline** without any items selected. The Sell Item screen is then displayed.

> **Note:** If you need to select multiple related items, select an item and press the spacebar. Repeat this for each item to be selected. As each item is selected, the line item becomes shaded.

- If an item has Optional-Pick One related items, the Pick One Related Item screen is displayed. Select an item and press **Enter/Next**. To choose no item, press **Enter/Next** without an item selected. The Sell Item screen is then displayed.

Tendering a Transaction

When all items have been entered in the Sell Item screen, the transaction is ready for the tender process. This is the process of accepting one or more types of payment to pay for the balance of the transaction. To tender a transaction, you press **F6/Tender** from the Sell Item screen. The following Tender options are available:

- Cash
- Check
- Credit/Debit
- Gift Card
- Gift Certificate
- Traveler's Check
- Coupon
- Store Credit
- Mall Certificate
- Purchase Order
- Money Order
- Foreign Currency
- Instant Credit

See the individual sections below for details on the different Tender options. The following steps assume that items have already been entered into Oracle Retail Point-of-Service and you are ready to tender the transaction.

> **Note:** The Instant Credit option on the Tender Options screen lets you enroll a customer for a house account. A house account is a credit card issued by the retailer. For more information on house accounts see Enrolling for a House Account in Chapter 6.

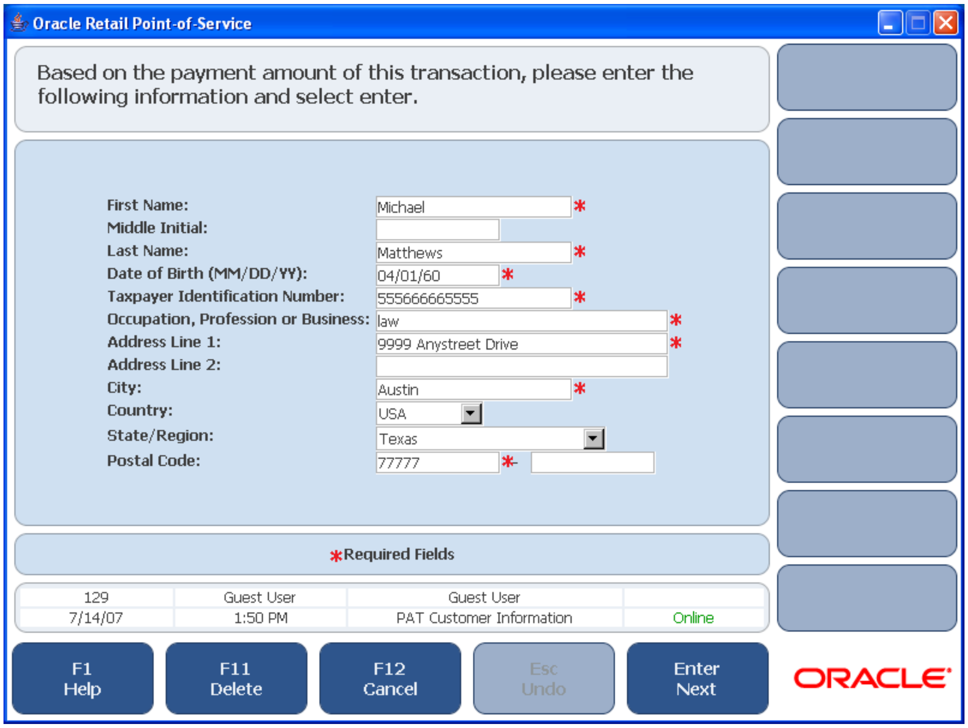
Handling Patriot Act Compliance

In compliance with the Patriot Act (PAT), the IRS requires that certain customer information must be captured when the tender collected for a transaction is over $10,000 in specific types of tender. The specific types of tender are defined by the IRS:

- Coins and currency of the United States
- Coins and currency of any country whose currency can be converted to United States currency
- Money orders whose face value is $10,000 or less
- Traveler's checks whose face value is $10,000 or less

If the tender amount for a sale, exchange, layaway payment, or special order payment transaction meets the requirement for PAT compliance, the PAT Customer Information screen is displayed. Any customer information that has already been linked to the transaction is defaulted on the screen.

Figure 3–4 PAT Customer Information Screen



To enter customer information:

1. Enter the information and press **Enter/Next**. The Enter ID screen is displayed.
2. Select the ID Type from the menu and press **Enter/Next**. The Swipe ID screen is displayed.
3. Swipe or manually enter the ID number and press **Enter/Next**. The ID Origin field is displayed. Select the ID Country and the ID State/Region from the menu. Press **Enter/Next**. The Sell Item screen is displayed.

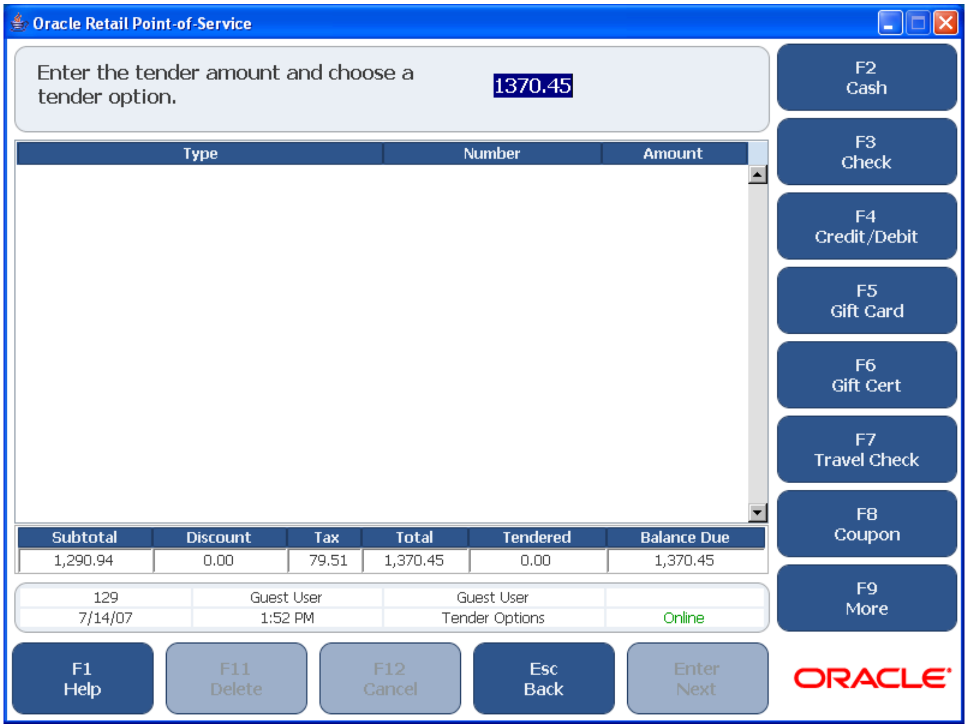
If you do not want to enter the customer information, press **F12/Cancel**. The Sell Item screen is displayed. The items for the transaction remain but the tenders are discarded.

Tendering with Cash

To tender a transaction using cash:

1. Press **F6/Tender**. The Tender Options screen is displayed.

Figure 3–5 Tender Options Screen



2. Enter the amount of the tender and press **F2/Cash**.

   - If the amount of the tender is more than the balance due, the Issue Change screen is displayed, prompting you to issue the indicated amount of change. If the tender amount meets the requirement for PAT compliance, the PAT Customer Information screen is displayed. After the customer information is entered, you are prompted to close the drawer and the Sell Item screen is displayed.
   - If the amount of the cash tender is less than the balance due, the Tender Options screen is displayed to complete the tender.
   - If the cash tender is for the entire amount due, the cash tender is completed. If the tender amount meets the requirement for PAT compliance, the PAT Customer Information screen is displayed. After the customer information is entered, the Sell Item screen is displayed.

Tendering with Check

Oracle Retail Point-of-Service can accept both deposit checks as well as e-checks. E-check is a term used when a check has been converted to an electronic fund transfer and has been directly deposited to the retailer’s account. With an e-check tender, there is no paper check deposited at the bank.

To tender a transaction with a check:

1. On the Tender Options screen, the balance due is displayed. Enter the amount of the check and press **F3/Check**. The Enter ID screen is displayed.
2. Select the ID Type from the menu and press **Enter/Next**. The Enter ID Number screen is displayed.
3. Swipe or manually enter the ID number and press **Enter/Next**. If a driver's license number was entered, the ID Origin field is displayed. Select the ID Country and the ID State/Region from the menus. Press **Enter/Next**.

   The Enter Phone screen is displayed.
4. Enter the customer's phone number and press **Enter/Next**. The Check Entry Scan screen is displayed.
5. Scan the check through the MICR device or enter the bank information and press **Enter/Next**. The Check Number screen is displayed.
6. Enter the check number and press **Enter/Next**.
   - If referred, the Check Referral screen is displayed. Enter the approval code and press either **F2/Approved** or **F3/Declined**.
   - If **F2/Approved** is pressed, the Close Drawer, Franking Insert, and Franking Remove screens are displayed. If the check is a deposit check, the Place Deposited Check screen is displayed. To place the deposited check in the drop safe, press **Enter**. If the check presented is an e-check, the Return E-check to Customer screen is displayed. The Sell Item screen is then displayed.
   - If **F3/Declined** is pressed, the Tender Options screen is displayed to select another tender option.

Table 3–2 describes how each result of check authorization is handled.

Table 3–2 Check Authorization Results

Result	Process
Request Approved	You are prompted to insert the check for franking and then to remove the check. The Sell Item screen is then displayed.
Request Declined	An error message is displayed. You are returned to the Tender Options screen to choose another tender type. Press **Enter/Next** to clear the message.
Request Referred	The authorizer requires additional information. The Check Referral screen is displayed. Respond to the request by typing the required information, or follow the instructions on the screen. ■ If approval is obtained, enter the approval code and press **F2/Approved**. You are returned to the Tender Options screen and a check tender line is added to the transaction. ■ If approval is declined, press **F3/Declined**. You are returned to the Tender Options screen to select another tender type.
Request Soft Declined	A Soft Decline message is displayed indicating that the check may be at risk. You can choose to decline or accept the check. The first <ARG> can be one of the following: ■ The customer has exceeded the maximum check velocity. ■ Check approval requires confirmation of a positive ID. The second <ARG> is replaced with the authorization code.

Table 3–2 (Cont.) Check Authorization Results

Result	Process
Time-out	The Authorization Retry dialog is displayed. You can choose to retry the authorization or to cancel. If cancel is selected, the Check Referral screen is displayed.
Offline	The Check Authorization Offline dialog is displayed. Press **Enter**. The Check Referral screen is displayed.
Positive ID	The Check Warning dialog is displayed. ■ To accept the check, press **Yes**. You are returned to the Tender Options screen and a check tender line is added to the transaction. ■ To decline the check, press **No**. You are returned to the Tender Options screen to select another tender type.

Tendering with Credit/Debit Card

Transactions can be tendered with both credit and debit cards in Oracle Retail Point-of-Service. The flow changes depending on whether the card swiped is a credit or debit card.

To tender using a credit/debit card:

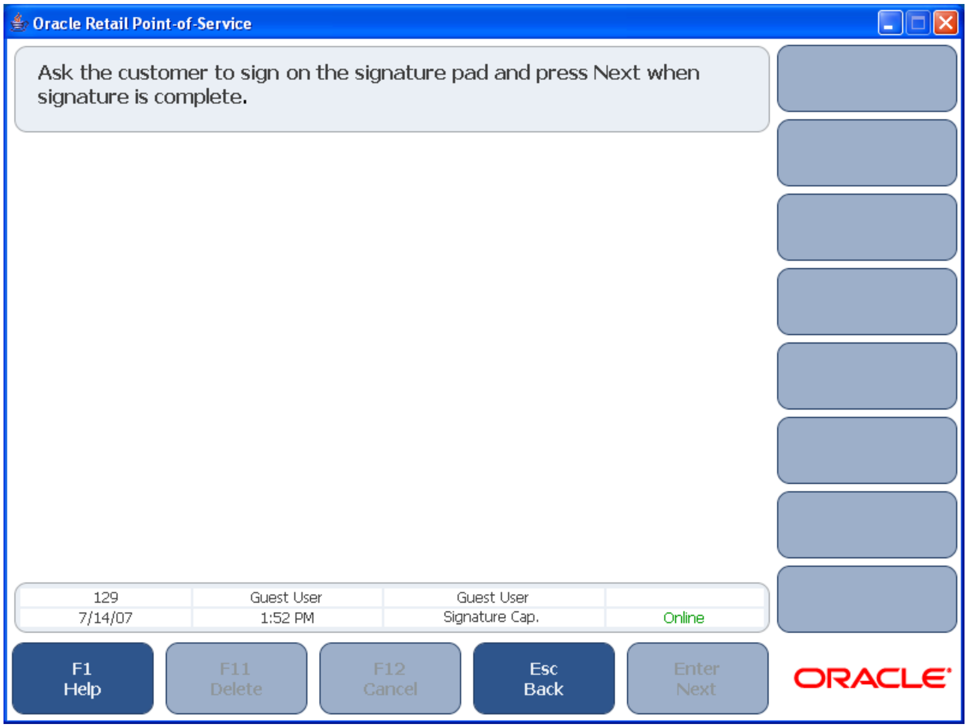
1. Press **F4/Credit/Debit** from the Tender Options screen. The Credit/Debit card screen is displayed.

   Note: Depending on your application configuration, either the **F4/Credit/Debit** button or the **F4/Credit** and **F5/Debit** buttons are displayed.

2. Swipe or manually enter the card number.

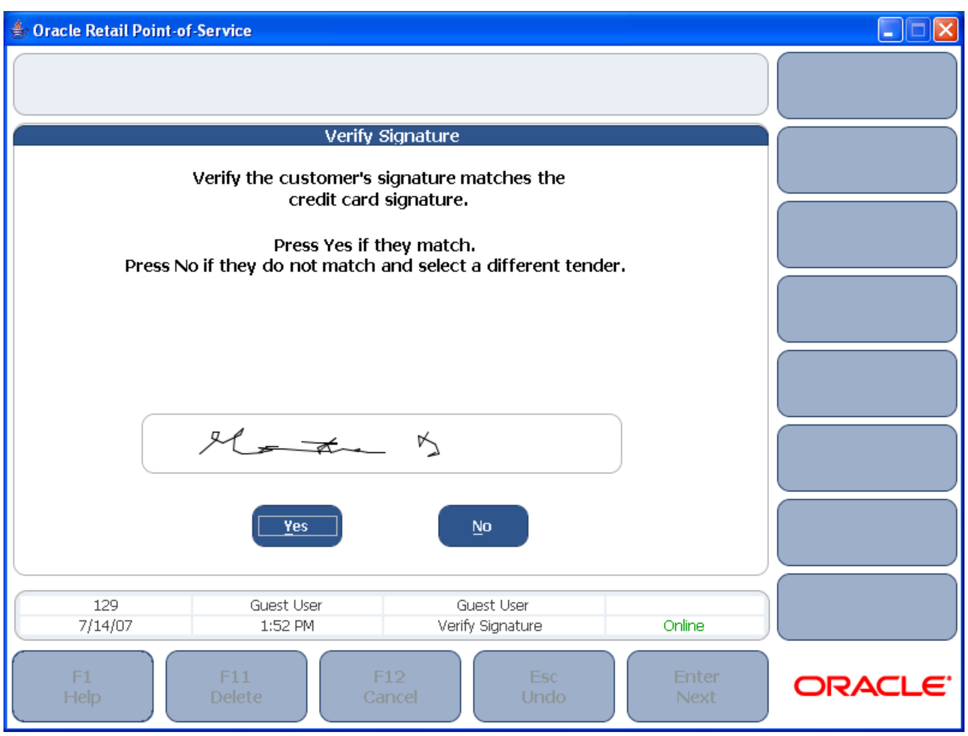
   - If the card is a debit card, the Pin Entry screen is displayed. Wait for the customer to enter their pin number on the pin pad and ask them to press the Enter key. The authorization process begins automatically. You are returned to the Tender Options screen to complete the tender if the debit tender is less than the balance due. After the tender is complete, the Close Drawer screen is displayed and you are returned to the Sell Item screen.
   - If the card swiped is a credit card, the authorization process begins automatically. The Signature Capture screen is displayed.

Figure 3–6 Signature Capture Screen



a. Ask the customer to sign on the signature pad. When the signature is complete, press **Enter/Next**. The Verify Signature screen is displayed.

Figure 3–7 Verify Signature Screen



b. To accept the signature, press **Yes**. To reject it, press **No**. If the signature is rejected, you return to the Tender Options screen to select another Tender Option to complete the tender.

   If Yes is selected, and the credit tender is equal to the balance due, the Close Drawer screen is displayed and then the Sell Item screen is displayed. If multiple tenders were used, authorization is done for the next tender.

Table 3–3 describes how each result of credit card authorization is handled.

Table 3–3 Credit Card Authorization Results

Result	Process
Request Approved	If the Credit Card authorization is accepted, the Signature Capture screen is displayed. You are prompted to have the customer sign the signature capture device. Press **Enter/Next**. If the signature capture was successful, the Verify Credit Card screen is displayed. You are prompted to compare the signature on the credit card with the electronic signature. If the signatures match, press **Yes**. If the signatures do not match, press **No**. You are returned to the Tender Options screen to select another tender. The signature is printed on the credit slip and on the customer receipt. You are returned to the Sell Item screen.
Request Declined	If the credit card authorization is declined, and the application is configured to allow a manager to override the decline, the Credit Auth. Declined dialog is displayed. If you press **No**, you are returned to the Tender Options screen to select a different tender type. If **Yes** is pressed, the Security Access screen is displayed. You (if authorized) or your manager must login to override the declined authorization.
Request Referred	If the Credit Card Authorization is referred, the Credit Referral screen is displayed. The screen displays a referral phone number and prompts you to call the number for authorization. If the authorization is approved, you are prompted to enter the authorization code and press **F2/Approved**. The approval information is added to the transaction and the Signature Capture screen is displayed. If the authorization is declined, you are prompted to press **F3/Declined**. The credit card information is discarded. If the application is configured to allow a manager to override the referral, you (if authorized) or your manager must login to override the referral.
Positive ID	If the Credit Card authorization requests a positive ID, the Verify POS ID screen is displayed. This screen notifies you to check another form of identification and prompts for confirmation. If you press **Yes**, the approval information is added to the transaction and the Signature Capture screen is displayed. If **No** is pressed, you are returned to the Tender Options screen to select a different tender. The credit card information is discarded.

Table 3–3 (Cont.) Credit Card Authorization Results

Result	Process
Time-out	If the Credit Card authorization times out, the wait time has been exceeded. You must try again or select a different tender. If the credit tender amount is equal to or less than the offline credit floor limit, an authorization code is assigned, the approval information is added to the transaction, and the Signature Capture screen is displayed. If the credit tender amount is greater than the limit, a message is displayed regarding the offline status, and the transaction becomes a Request Referred response.
Offline	If the Credit Card Authorization is off-line, Oracle Retail Point-of-Service is off-line to the authorization service. If the credit amount is equal to or less than the offline credit floor limit, an authorization code is assigned, the approval information is added to the transaction, and the Signature Capture screen is displayed. If the credit tender amount is greater than the limit, a message is displayed regarding the off-line status, and the transaction becomes a Request Referred response.

Tendering with a Gift Card

Note: A gift card has to be activated before it can be used as a tender option.

To tender a transaction using a Gift Card, on the Tender Options screen, press **F5/Gift Card**. Swipe/scan the gift card or manually enter the number (minimum 13 digits), and press **Enter/Next**. The Gift Card Authorization screen is displayed, and *Please wait: Authorizing Gift Card* is displayed while the authorization proceeds.

- If the amount of the gift card is more than the amount of the purchase or is a partial tender, the gift card remaining balance is shown on the customer receipt. You are returned to the Sell Item screen.
- If the amount of the gift card is less than the amount on the transaction receipt, you are returned to the Tender Options screen to complete the tender.

Tendering with a Gift Certificate

Note: Gift certificates have to be issued in Oracle Retail Point-of-Service before they can be used to tender a transaction.

To tender a transaction using a Gift Certificate:

1. On the Tender Options screen, enter the amount of the gift certificate and press **F6/Gift Cert**. The Store Number screen is displayed.
2. Enter the store number where the gift certificate was issued and then press **Enter/Next** or press **F2/Corporate Issued**. The Tender Number screen is displayed.

3. Scan the barcode or manually enter the gift certificate number and press **Enter/Next**. Oracle Retail Point-of-Service checks the database to approve the validity of the certificate based on amount and certificate number.

   - If the gift certificate tender is greater than the balance due, Oracle Retail Point-of-Service evaluates the difference and the Change Due Options screen is displayed. Select a change option and press **Enter/Next**. The Close Drawer, Franking Insert, and Franking Remove screens are displayed and you are returned to the Sell Item screen.
   - If the gift certificate tender is less than the balance due, the gift certificate amount is displayed and the Tender Options screen is displayed for you to complete the tender. Once the tender is completed, the Close Drawer, Franking Insert, and Franking Remove screens are displayed.
   - If the amount of the gift certificate is equal to the balance due, the Close Drawer, Franking Insert, Franking Remove, and Sell Item screens are displayed.

Tendering with a Traveler's Check

To tender a transaction using a traveler's check:

1. On the Tender Options screen, enter the total amount of all traveler's checks presented if the amount is different from the balance due and press **F7/Travel Check**. The Traveler's Check screen is displayed.
2. Enter the number of traveler's checks presented and press **Enter/Next**.

   - If the amount of the traveler's checks is greater than the balance due, the Issue Change screen is displayed, prompting you to issue change. If the tender amount meets the requirement for PAT compliance, the PAT Customer Information screen is displayed. The Franking Insert and Franking Remove screens are displayed and you are returned to the Sell Item screen.
   - If the traveler's check tender is less than the balance due, you are returned to the Tender Options screen to select another tender type to complete the transaction. Once you have tendered the entire transaction amount, if the tender amount meets the requirement for PAT compliance, the PAT Customer Information screen is displayed. The Franking Insert and Franking Remove screens are displayed and you are returned to the Sell Item screen.

Tendering with a Non-store Coupon

Note: When coupons are used as the form of tender, overtendering is not permitted. Overtendering is when the coupon amount is greater than the balance due.

To tender a transaction using a non-store coupon:

1. On the Tender Options screen enter the tender amount, if less than the balance due, and press **F6/Tender** and then **F8/Coupon**.

2. The Coupon Entry screen is displayed. Scan or manually enter the coupon number (minimum 3 digits) and press **Enter/Next**.

   - If the non-store coupon tender amount is greater than the balance due, the Coup. Overtender screen is displayed. To select a different tender option on the Tender Options screen, press **Enter/Next**.
   - If the non-store coupon tender amount is less than the balance due, the non-store coupon tender item is displayed on the Tender Options screen and the coupon amount is deducted from the tender. You are returned to the Tender Options screen to select an additional tender type to complete the tender. When the tender is complete, a receipt prints, and you are returned to the Sell Item screen.

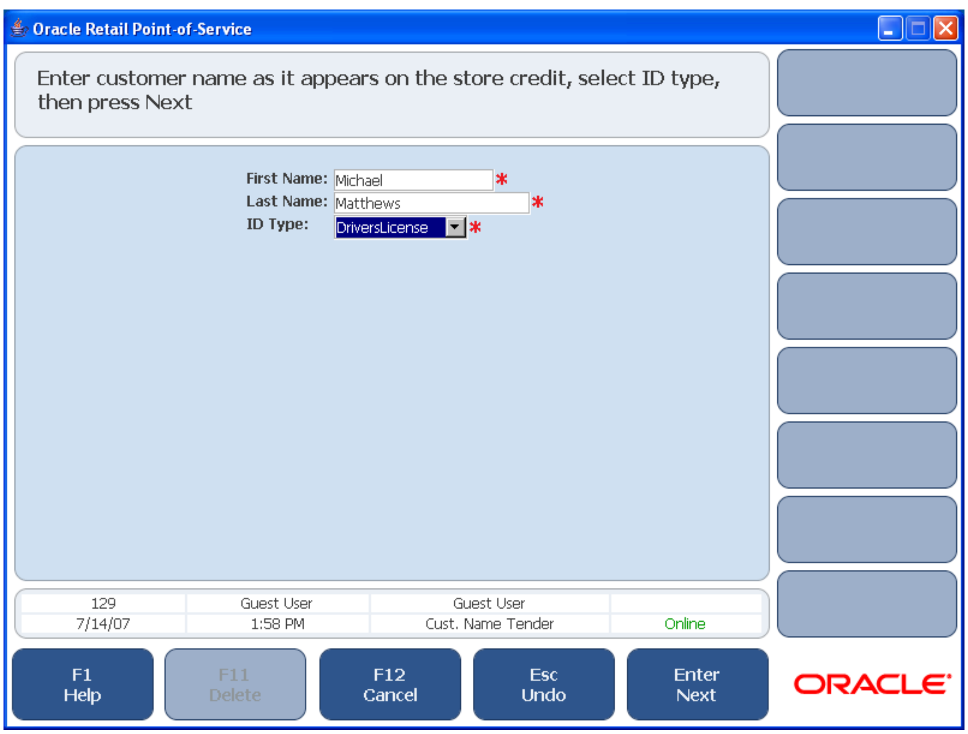
Tendering with Store Credit

Store credit is a type of tender that is valid only for the retailer who issued it. When a customer return or exchange results in a negative balance due, you can issue a store credit, which can be redeemed toward the purchase of other merchandise.

To use a store credit as tender:

1. From the Tender Options screen, enter the transaction amount and press **F9/More** and then **F2/Store Credit**. The Cust. Name Tender screen is displayed.

Figure 3–8 Cust. Name Tender Screen



2. Enter the customer's first name, last name, and ID type in the required fields. Press **Enter/Next**. The Tender Number screen is displayed.

3. Enter the store credit number and press **Enter/Next**.
   - If the store credit amount is more than the transaction amount, the Change Due Options screen is displayed prompting you to select a change option. The Franking Insert and Franking Remove screens are displayed and you are returned to the Sell Item screen.
   - If the store credit amount is less than the transaction amount, the Tender Options screen is displayed prompting you to select another tender option to complete the tender. After the tender is complete, the Franking Insert and Franking Remove screens are displayed, and you are returned to the Sell Item screen.
   - If the store credit amount is equal to the transaction amount, the Close Drawer, Franking Insert, and Franking Remove screens are displayed. You are then returned to the Sell Item screen.

Tendering with a Mall Certificate

To tender a transaction with a mall certificate:

1. Enter the amount of the mall certificate tender in the Tender Options screen and press **F9/More** and then **F3/Mall Cert**. The Mall Gift Cert. Options screen is displayed.
2. Select the option for the certificate. Press **F2/MGC as Check** or **F3/MGC as PO**. Both of these options have the same flow.
   - If the mall certificate tender amount is greater than the transaction amount, the Issue Change screen is displayed, prompting you to issue change. The Franking Insert and Franking Remove screens are displayed and you are returned to the Sell Item screen.
   - If the mall certificate tender amount is less than the transaction amount, the Tender Options screen is displayed to complete the tender. Once the tender is complete, the Close Drawer, Franking Insert, and Franking Remove screens are displayed and you are returned to the Sell Item screen.
   - If the mall certificate tender amount is equal to the transaction amount, the Close Drawer, Franking Insert and Franking Remove screens are displayed, and you are returned to the Sell Item screen.

Tendering with a Purchase Order

In Oracle Retail Point-of-Service, you can accept a business purchase order as a tender option.

To tender a transaction with a purchase order:

1. From the Tender Options screen, enter the purchase order amount and press **F9/More** and then **F4/Purchase Order**. The Agency Select screen is displayed.
2. Select the agency.
   - Select the agency name from the menu and press **Enter/Next**.
   - To enter an agency that is not in the list, select **Other** and press **Enter/Next**. The Agcy/Bus Name screen is displayed. Enter the agency or business name. If the transaction is taxable, select **Yes** from the menu. If the transaction is not taxable, select **No**. Press **Enter/Next**.

   The P.O. Number screen is displayed.

3. Enter the last five digits of the purchase order number and press **Enter/Next**. The P.O. Amount screen is displayed.
   - If the purchase order amount is more than or equal to the transaction amount, the Close Drawer, Franking Insert, and Franking Remove screens are displayed and you are returned to the Sell Item screen.
   - If the purchase order amount is less than the transaction amount, you are returned to the Tender Options screen to complete the tender. Once the tender is completed, the Close Drawer, Franking Insert, and Franking Remove screens are displayed and you are returned to the Sell Item screen.

Tendering with Money Orders

Money orders issued by banks or other financial institutions can also be used as tender in Oracle Retail Point-of-Service.

To use a money order as a form of tender:

1. From the Tender Options screen, enter the money order amount, press **F9/More** and then **F5/Money Order**.
   - If the money order amount is more than the transaction amount, the Issue Change screen is displayed, prompting you to issue change. If the tender amount meets the requirement for PAT compliance, the PAT Customer Information screen is displayed. The Close Drawer, Franking Insert, and Franking Remove screens are displayed and you are returned to the Sell Item screen.
   - If the money order amount is less than the transaction amount, the Tender Options screen is displayed, prompting you to complete the tender. Once the tender is completed, if the tender amount meets the requirement for PAT compliance, the PAT Customer Information screen is displayed. The Close Drawer, Franking Insert, and Franking Remove screens are displayed, and you are returned to the Sell Item screen.
   - If the money order amount is equal to the transaction amount and if the tender amount meets the requirement for PAT compliance, the Pat Customer Information screen is displayed. The Close Drawer, Franking Insert, and Franking Remove screens are displayed and you are returned to the Sell Item screen.

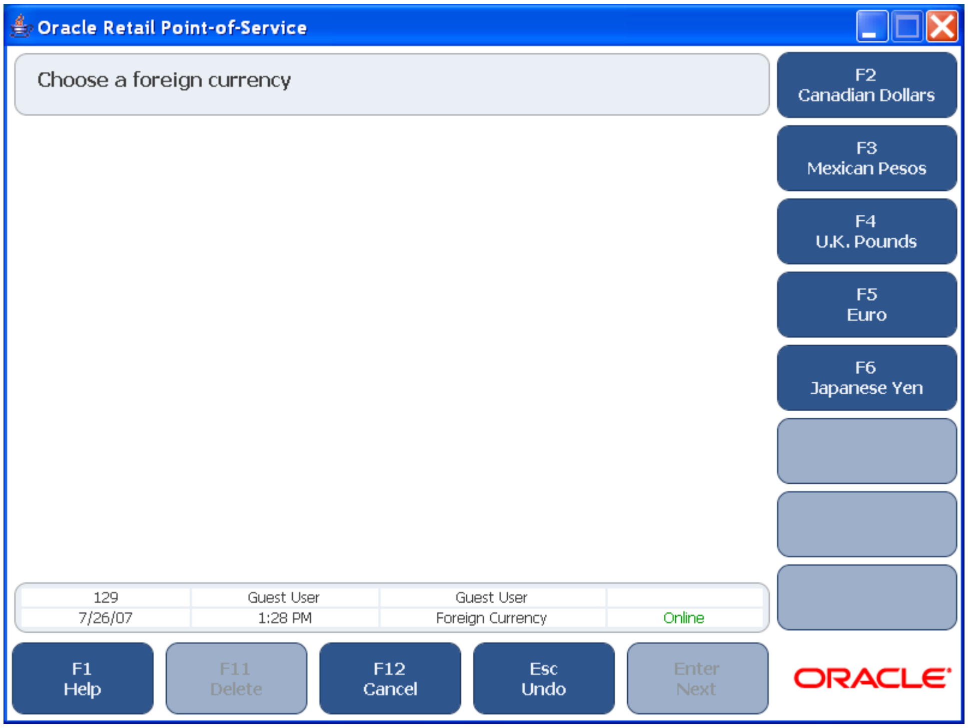
Tendering with Foreign Currency

Oracle Retail Point-of-Service can accept foreign currencies as tender if this is allowed by the application configuration.

To tender using foreign currency:

1. Press **F9/More** and then **F6/Foreign Currency** from the Tender Options screen. The Foreign Currency screen is displayed.

Figure 3–9 Foreign Currency Screen

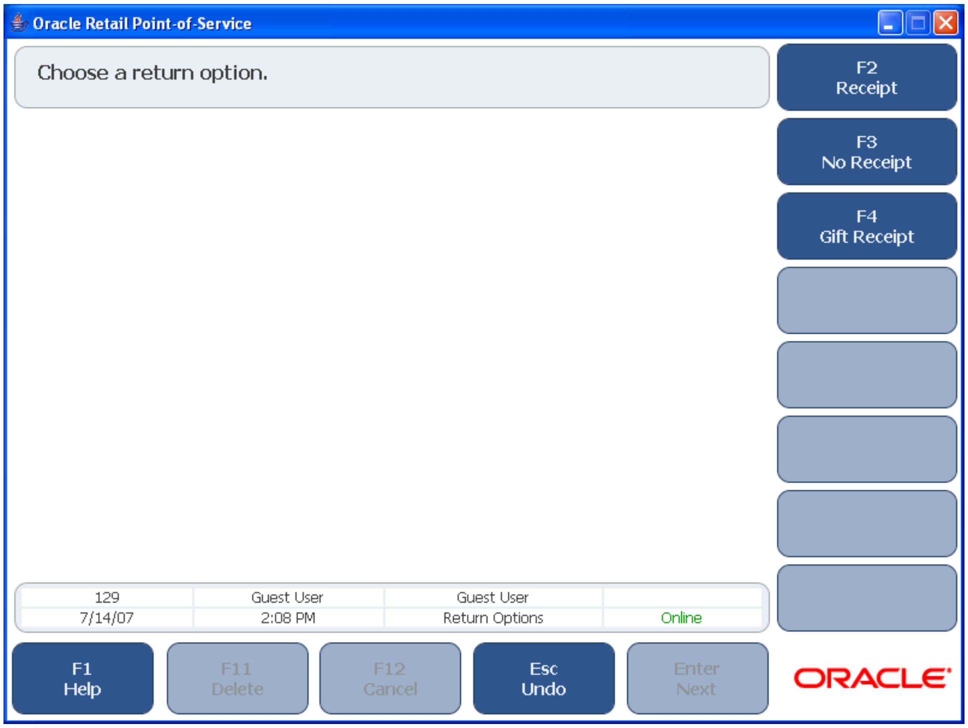


2. Select the foreign currency. The tender options available for that currency are displayed. Not all tender options are available for every foreign currency.
3. Enter the amount of foreign currency and select a tender option. Depending on the exchange rate, Oracle Retail Point-of-Service calculates the amount due in foreign currency.
   - If the amount of foreign currency is less than the transaction amount, Oracle Retail Point-of-Service calculates the difference in the base currency and returns to the Tender Options screen for the tender to be completed. Once the tender is completed, if the tender amount meets the requirement for PAT compliance, the PAT Customer Information screen is displayed. The Close Drawer screen is displayed and you are returned to the Sell Item screen.
   - If the amount of foreign currency is more than the transaction amount, the Issue Change screen is displayed, prompting you to issue change. Change is issued in the base currency. If the tender amount meets the requirement for PAT compliance, the PAT Customer Information screen is displayed. You are then returned to the Sell Item screen.
   - If the amount of foreign currency is equal to the transaction amount and if the amount meets the requirement for PAT compliance, the PAT Customer Information screen is displayed. The Close Drawer screen is displayed and you are returned to the Sell Item screen.

Performing a Return

Return enables the customer to return merchandise for an exchange or refund. To access the Return option from the Sell Item screen, press **F2/Return** to display the Return Options screen. A return can be performed if a receipt is available, a receipt is not available, or a gift receipt is available. Each of these options are described below.

Figure 3–10 Return Options Screen

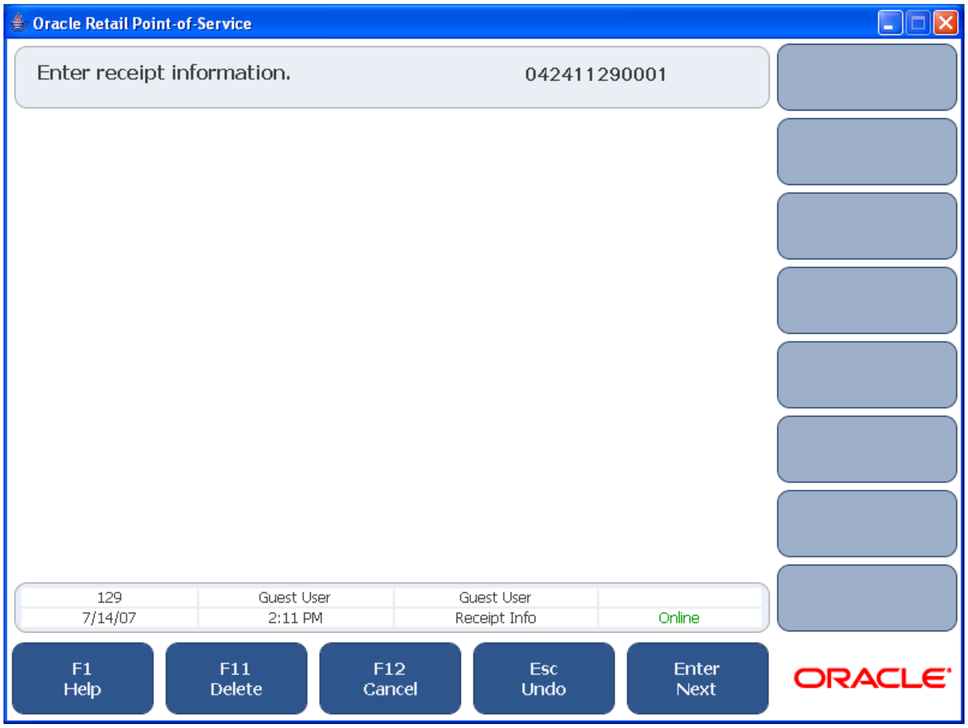


Performing a Return with a Receipt

To perform a return transaction with a receipt available:

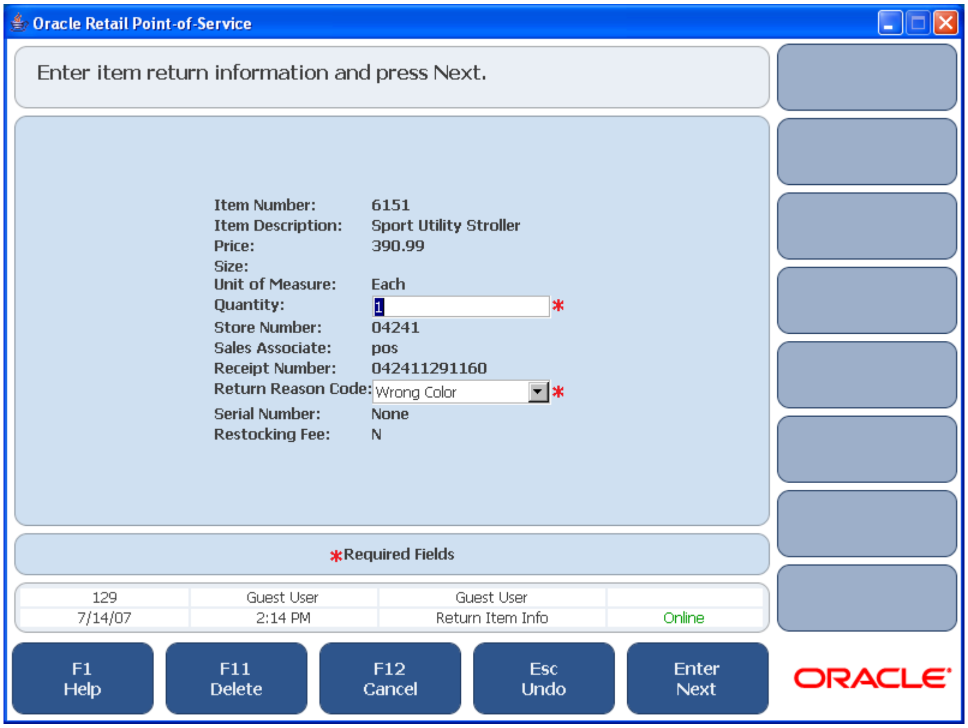
1. Press **F2/Receipt** from the Return Options screen. The Receipt Info screen is displayed.

Figure 3–11 Receipt Info. Screen



2. Enter the receipt information or scan the receipt barcode to enter the information. Press **Enter/Next**. The Select Item screen is displayed.
3. Enter the items to be returned. To view all items in the particular transaction, press **F2/Trans Detail** and select the items to be returned on the receipt. To select more than one item, select the first item and press the space bar. Select the other items to be returned. Press **Enter/Next**. The Return Item Info screen is displayed.

Figure 3–12 Return Item Info Screen



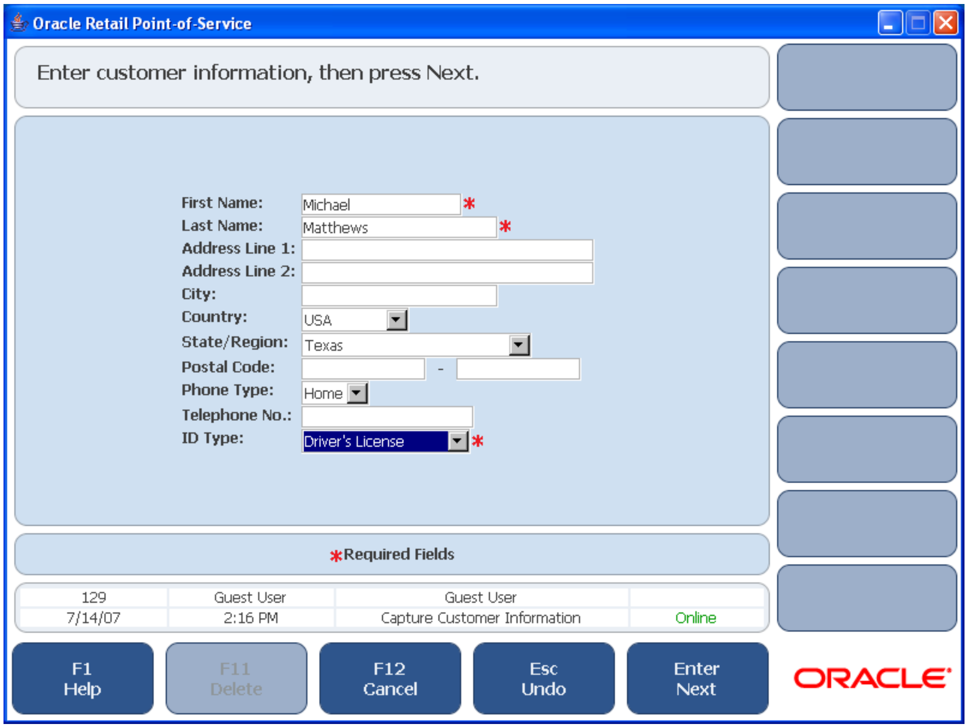
4. Enter the item return information and select a return reason from the menu. Press **Enter/Next**.

5. If the item has a restocking fee, the Restocking Fee dialog box is displayed. To accept the restocking fee, press **Yes**. To decline the restocking fee, press **No**. The Sell Item screen is displayed with the quantity to be returned in parenthesis and the Ext. price as a negative number.

6. Press **F6/Tender**. The Refund Options screen is displayed.

7. Select a refund option. The Capture Customer Information screen is displayed.

Figure 3–13 Capture Customer Information Screen for an Item Return



8. Enter the customer information in the required fields and press **Enter/Next**. The Issue Refund screen is displayed and you are returned to the Sell Item screen.

Performing a Return Without a Receipt

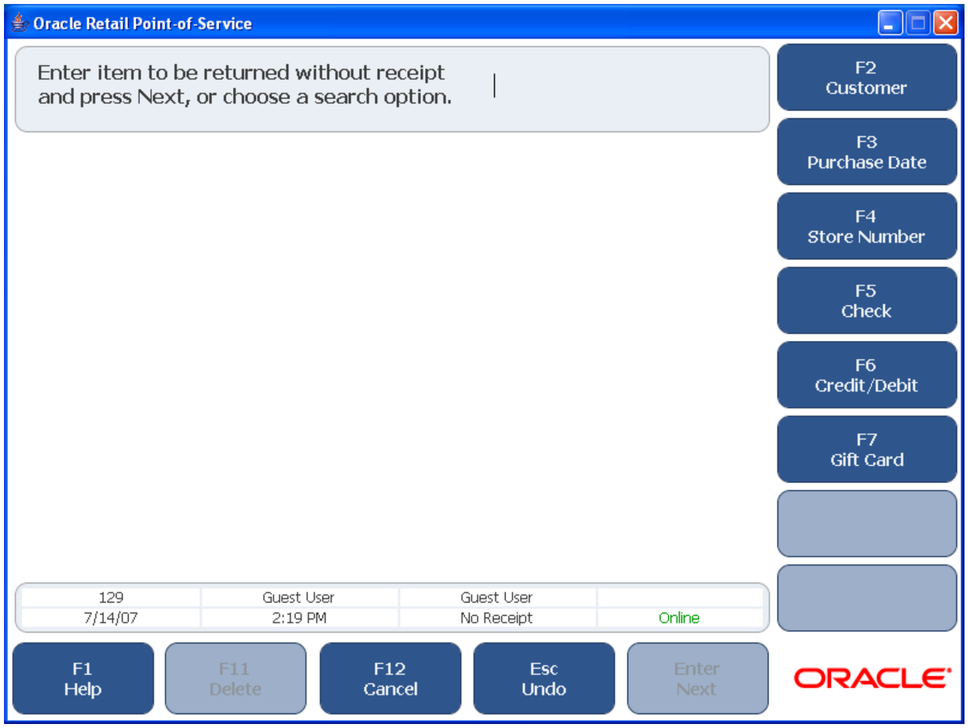
Items can be returned without receipts. These returns can be done by using the item number or by searching for the transaction. Transactions on which the items were purchased can be searched by customer, purchase date, store number, check, credit/debit card number, or gift card number.

Performing a Return via the Item Number

To return an item without a receipt via the item number:

1. Press **F3/No Receipt** from the Return Options screen. The No Receipt screen is displayed.

Figure 3–14 No Receipt Screen



2. Enter the item number to be returned and press **Enter/Next**. The No Recpt. Items screen is displayed.
3. When all the items to be returned have been selected, press **Enter/Next**. The Return Item Info screen is displayed. To complete the return, see steps 4 through 8 in Performing a Return with a Receipt.

Performing a Return by Searching for the Transaction

You can perform a return by searching for the transaction. There are several search options to search for the transaction number:

- Searching for a transaction by the customer number
- Searching for a transaction via the purchase date
- Searching for a transaction via the store number
- Searching for a transaction via the check number
- Searching for a transaction via the credit/debit/gift card number

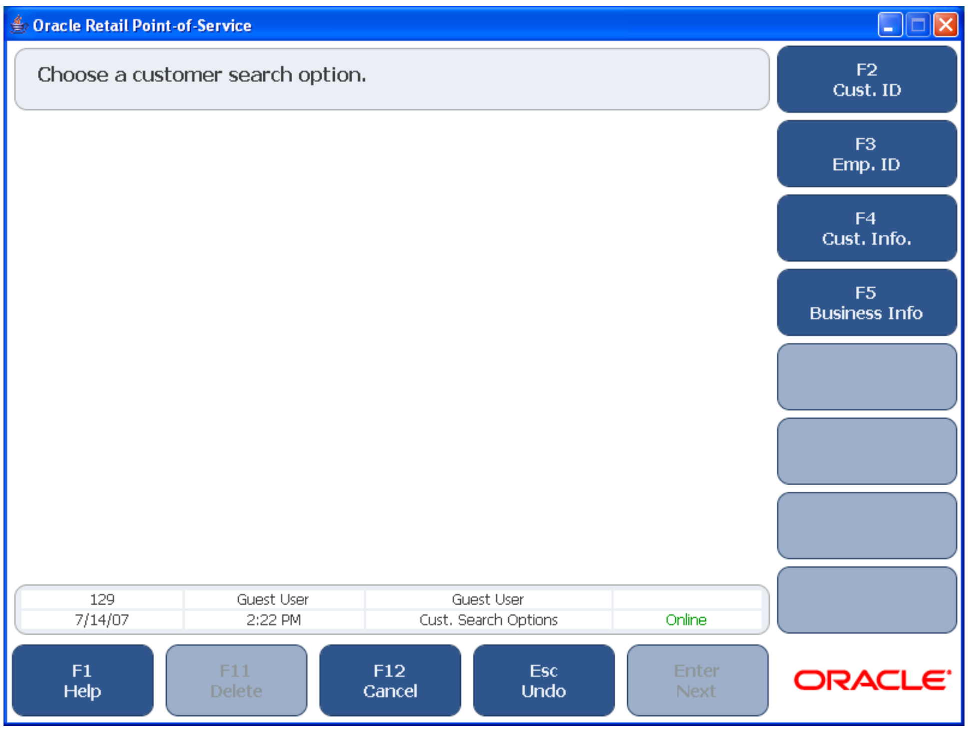
When searching by the customer, the search can be done via the customer ID number or the Cust. Search Options screen.

Searching for a Transaction by the Customer ID To search for a transaction via the customer IDs:

1. Press **F2/Customer** from the No Receipt screen. The Customer Options screen is displayed.
2. Enter the customer ID. The Display Trans. screen is displayed.
3. Select a transaction and press **Enter/Next**. The Select Item screen is displayed. To complete the return, see steps 3 through 8 in Performing a Return with a Receipt.

Searching for a Transaction using the Customer Search Options Screen The Customer Search Options screen is displayed when **F2/Find** is pressed from the Customer Options screen.

Figure 3–15 Cust. Search Options Screen



This screen has multiple options through which a transaction can be searched. They are Customer ID, Employee ID, Customer Information, and Business Information. Each of these options has a different flow.

- If **F2/Cust. ID** is pressed, the Search by Customer ID screen is displayed. Enter the customer ID and press **Enter/Next**. The Customer Information screen is displayed. Press **F3/Link**. The Display Trans screen is displayed. Select a transaction number and press **Enter/Next**. The Select Item screen is displayed. To complete the return, see steps 3 through 8 in Performing a Return with a Receipt.
- If **F3/Emp ID** is pressed, the Search By Emp. ID screen is displayed. Enter the employee ID and press **Enter/Next**. The Customer Information screen is displayed. To complete the return, see the above section on searching via Customer ID.

- If **F4/Cust. Info** or **F5/Business Info** is pressed, the Search By Customer Info screen is displayed. Enter the required information and press **Enter/Next**. The Customer Information screen is displayed. To complete the return, see the above section on searching a transaction via Customer ID.

Searching for a Transaction via the Purchase Date Transactions can be searched for via the purchase date if no receipt is available. A customer must be linked to the transaction in order to complete a search by purchase date.

To search for a transaction via the purchase date:

1. Press **F3/Purchase Date** from the No Receipt screen. The Purchase Date screen is displayed.
2. Enter the start and end dates and press **Enter/Next**. The Customer Options screen is displayed.
3. Press **F2/Find**. The Cust. Search Options screen is displayed. See Searching for a Transaction using the Customer Search Options Screen to complete the return.

Searching for a Transaction via the Store Number Transactions can be searched for via the store number where it was purchased if no receipt is available. A customer must be linked to the transaction in order to complete a search by store number.

To search via the store number:

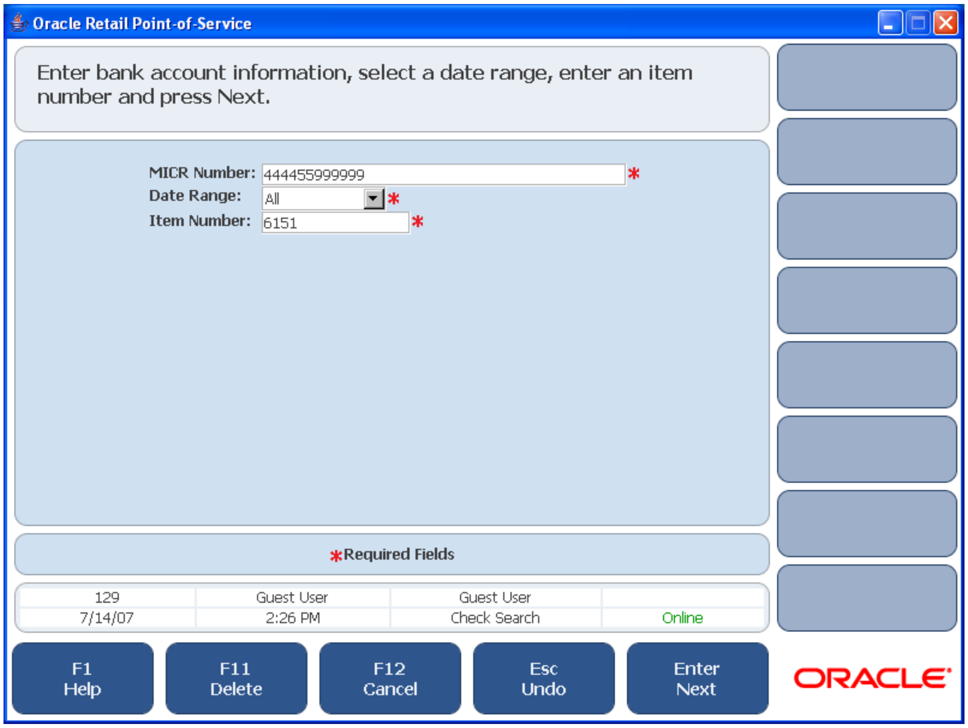
1. Press **F4/Store Number** from the No Receipt screen. The Store Number screen is displayed.
2. Enter the store number and press **Enter/Next**. The Customer Options screen is displayed.
3. Press **F2/Find**. The Cust. Search Options screen is displayed. See Searching for a Transaction using the Customer Search Options Screen to complete the return.

Searching for a Transaction via the Check Number A transaction can be searched for via the check details that were used to tender the transaction.

To search for a transaction via a check:

1. Press **F5/Check** from the No Receipt screen. The Check Search screen is displayed.

Figure 3–16 Check Search Screen



2. Enter the required information and press **Enter/Next**. If transactions are found for the check tender, the Select Item screen is displayed. See steps 3 through 8 in "Performing a Return with a Receipt".

Searching for a Transaction via the Credit/Debit Card Number A transaction can be searched for using the credit or debit card that was used to tender the transaction.

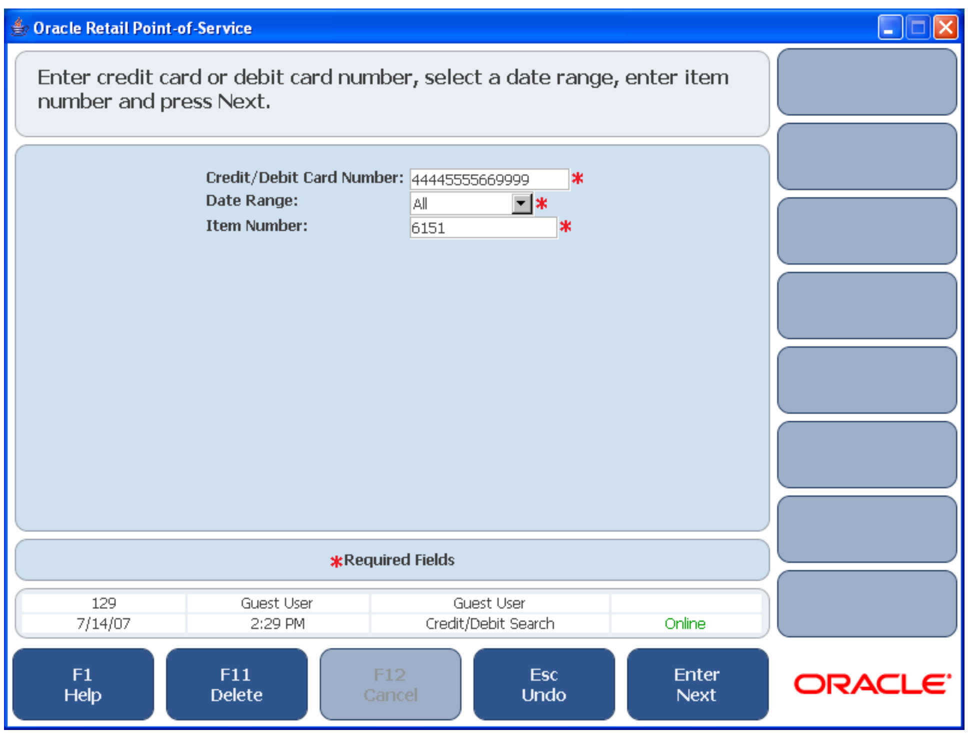
Note: A transaction can also be searched for by the gift card used to tender the transaction. The GiftCard Search screen is displayed instead of the Credit/Debit screen.

To search for a transaction via the credit/debit card number:

1. Press **F6/Credit/Debit** from the No Receipt screen. The Credit/Debit Search screen is displayed.

Note: Depending on your application configuration, either the **F6/Credit/Debit** button or the **F6/Credit** and **F7/Debit** buttons are displayed.

Figure 3–17 Credit/Debit Search Screen



2. Enter the required information and press **Enter/Next**. If transactions are found for the card, the Select Item screen is displayed. To complete the return, see steps 3 through 8 in Performing a Return with a Receipt.

Performing a Return with a Gift Receipt

Returns can also be performed via the gift receipt. To make a return via a gift receipt, press **F4/Gift Receipt** from the Return Options screen. The Receipt Info screen is displayed. To complete the return, see steps 2 through 8 in Performing a Return with a Receipt.

Performing Item Options

Functions that apply at the item level are performed on the Item Options screen. To display the Item Options screen, manually enter or scan at least one item number on the Sell Item screen and press **F4/Item**. The Item Options screen is displayed.

Note: If you need to select multiple items, select an item and press the spacebar. Repeat this for each item to be selected. As each item is selected, the line item becomes shaded.

Figure 3–18 Items Options Screen

Figure 3–19 Item Options Screen after Selecting F9/More

The options displayed on the local navigation bar of this screen are the different functions that can be applied to an item. The following options are available:

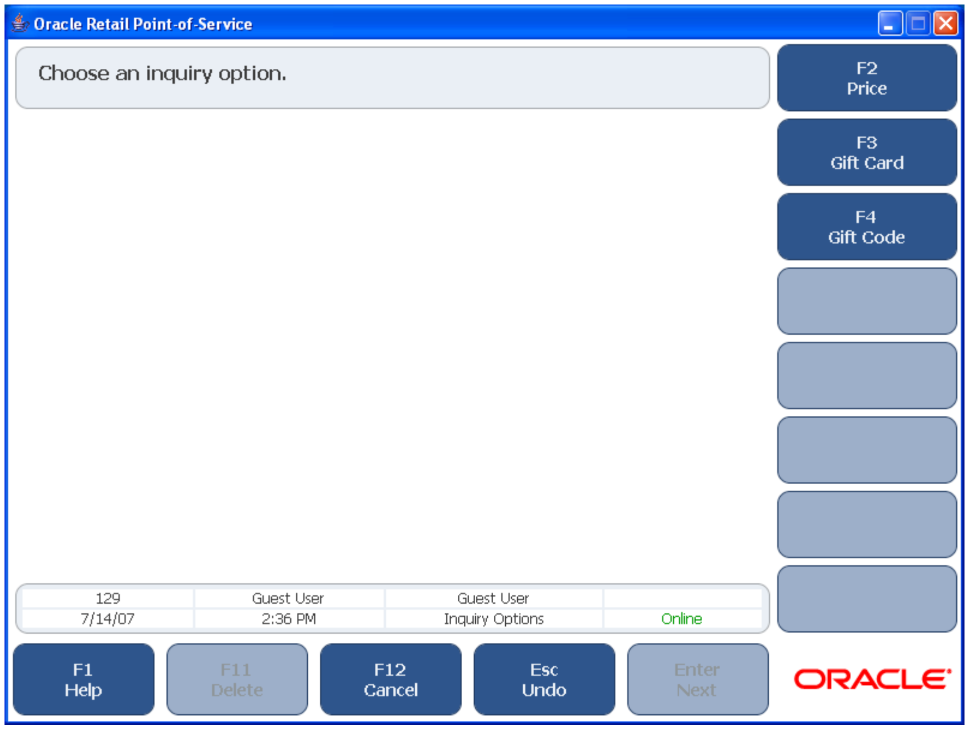
- Making an Item Inquiry
- Changing an Item Quantity
- Linking an Item to s Sales Associate
- Linking an Item to a Gift Registry
- Changing Tax on an Item
- Performing Item Services
- Adding a Serial Number to an Item
- Issuing Gift Receipts for Items
- Performing an Item Send
- Viewing Item Components
- Performing Alterations

See the individual sections below for details on the various item options.

Making an Item Inquiry

Item inquiry options are made from the Inquiry Options screen. To display the Inquiry Options screen, press **F2/Inquiry** from the Item Options screen. The Inquiry Options screen has several options.

Figure 3–20 Inquiry Options Screen



Price Inquiry

To do a price inquiry:

1. Press **F2/Price** from the Inquiry Options screen. The Price Inquiry screen is displayed.
2. Enter an item number and press **Enter/Next** or select an option. The two available options are **F2/Gift Code** and **F3/ADV Search**.
   - If the item number is entered and **Enter/Next** is pressed, the Item Display screen is displayed. Enter a new item number and press **F2/Search** to get price information on the item. To add the item to the transaction, press **F3/Add**. When finished, press **Enter/Next**. The Sell item screen is displayed.
   - If **F2/Gift Code** is pressed, the Gift Code Inquiry screen is displayed. Enter the gift code and press **Enter/Next**. The Gift Price screen is displayed. When finished, press **Enter/Next**. The Sell Item screen is displayed.
   - If **F3/ADV Search** is pressed, the Advanced Inquiry screen is displayed. Enter the item search information and press **Enter/Next**. The Item Display screen is displayed. To complete a price inquiry from the Item Display screen, see the first bullet in this section.

Gift Card Inquiry

To perform a gift card inquiry:

1. Press **F3/Gift Card** from the Item Options screen. The Gift Card screen is displayed.
2. Enter or swipe the gift card number and press **Enter/Next**. The GC Inquiry screen is displayed. The gift card number, the initial balance and the remaining balance are displayed.
   - To get gift card inquiry information on another gift card, manually enter or swipe another gift card and press **Enter/Next**.
   - To exit the gift card inquiry option, press **F2/Done**. The Inquiry options screen is displayed.
   - To print the GC Inquiry screen, press **F3/Print**.

Gift Code Inquiry

To perform gift code inquiries:

1. Press **F4/Gift Code** from the Item Inquiry screen. The Gift Code Inq. screen is displayed.
2. Enter the price code and press **Enter/Next**. The Gift Price screen is displayed. The item's extended price is shown.
   - Enter another price code and press **F2/Search**. The Gift Price screen is displayed for the item entered.
   - Press **Enter/Next**. The Sell Item screen is displayed.

Changing an Item Quantity

You can change the quantity of an item after it is added to the transaction.

To change the quantity of an item:

1. Select the item on the Sell Item screen and press **F4/Item**. The Item Options screen is displayed. Press **F3/Quantity**. The Item Quantity screen is displayed.
2. Enter the quantity and press **Enter/Next**. The Sell Item screen is displayed with the updated quantity for the item.

Linking an Item to a Sales Associate or Gift Registry

To link an item to a sales associate:

1. Select the item on the Sell Item screen and press **F4/Item**. The Item Options screen is displayed. Press **F4/Sales Assoc.** The Item Sales Assoc. screen is displayed.
2. Enter the sales associate's ID and press **Enter/Next**. The Sell Item screen is displayed. The sales associate name is displayed next to the item.

For information on linking the item to the gift registry, see Linking an Item to a Gift Registry.

Changing Tax on an Item

Note: When VAT is enabled, this functionality is not available.

After an item is added to the transaction, you can override or remove the tax. When one of these operations is performed, the tax status indicator on the Sell Item screen is changed for the item. The tax status indicators and their corresponding statuses are shown below:

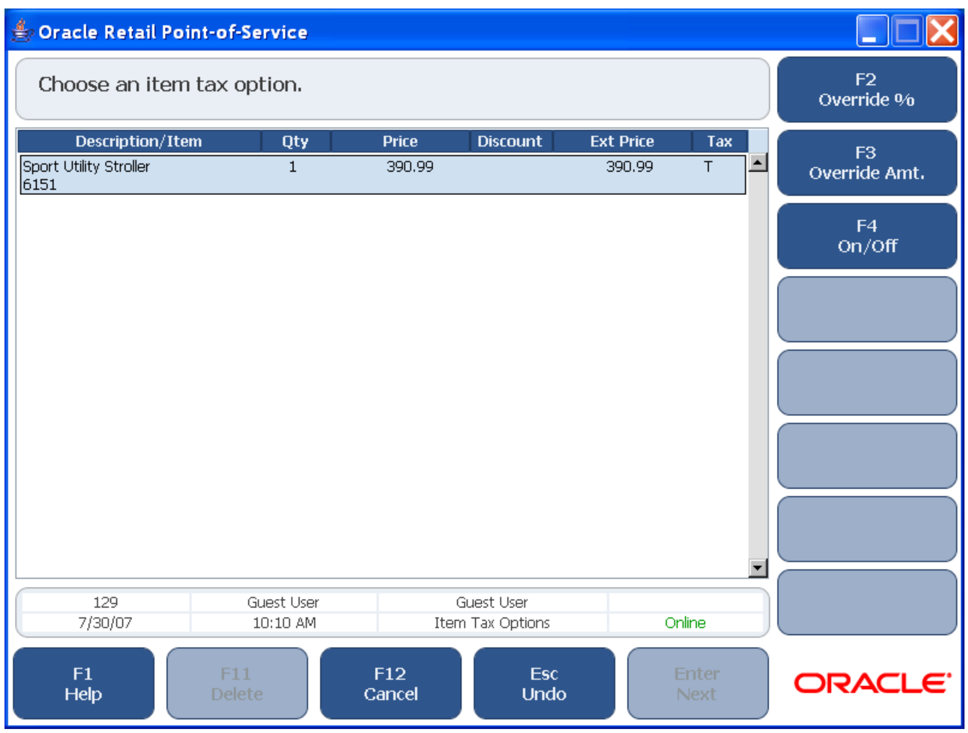
- T—Taxable
- N—Non-taxable
- O—Tax off
- R—Override Tax

Overriding Tax for an Item

To override the tax for a particular item:

1. Press **F6/Tax** from the Item Options screen. The Item Tax Options screen is displayed.

Figure 3–21 Item Tax Options Screen



2. Select an option.
   - To override the tax percentage, press **F2/Override %**. The Item Tax % screen is displayed. Enter the tax percentage, select the Reason Code from the list, and press **Enter/Next**. The new tax rate is set for the item and you are returned to the Sell Item screen.
   - To override the tax amount, press **F3/Override Amt**. The Item Tax Amount screen is displayed. Enter the Override Tax amount, select the Reason Code from the list, and press **Enter/Next**. The new tax amount for the item is set and you are returned to the Sell Item screen.
   - To remove or add tax to an item, press **F4/On/Off**. The Item Tax On/Off screen is displayed. Select On or Off, and a reason code from the list. Press **Enter/Next**. A T (taxable) or O (tax off) is displayed in the Tax column on the Sell Item screen to indicate the change.

Performing Item Services

You can add services and other non-merchandise items like delivery and alterations to a transaction by scanning or typing the item number from the Sell Item screen, or by navigating to the Non-Merchandise screen.

To add services or non-merchandise items to a transaction:

- From the Sell Item screen, scan the barcode or enter the item number of the service. If the item number finds a match, the service is displayed on the Sell Item screen and it is flagged as a non-merchandise item.
- If the item number is unknown, press **F7/Services** from the Item Options screen. The Non-Merchandise screen is displayed with a selection list box. Select the non-merchandise item from the list box and press **Enter/Next**.

> **Note:** Some non-merchandise items, such as Assembly, require you to enter a price. If an additional screen is displayed, enter the price and press **Enter/Next**.

You are returned to the Sell Item screen, and the non-merchandise item is added to the transaction.

> **Note:** A service or non-merchandise item quantity cannot be changed.

Adding a Serial Number to an Item

Some items have serial numbers for warranty or other tracking reasons; therefore, the serial numbers must be recorded by item.

To add a serial number to an item:

1. Press **F8/Serial Number** from the Item Options screen. The Serialized Item screen is displayed.
2. Enter the serial number and press **Enter/Next**. You are returned to the Sell Item screen and the serial number is added to the item.

Issuing Gift Receipts for Items

A customer may request a gift receipt to provide with a gift. The gift receipt does not show any prices. The person receiving the gift can return the item using the gift receipt. To issue a gift receipt, press **F9/More** and then **F2/Gift Receipt** from the Item Options screen. The Sell Item screen is displayed annotated with Gift Receipt. When the transaction is completed, a gift receipt prints for each selected item.

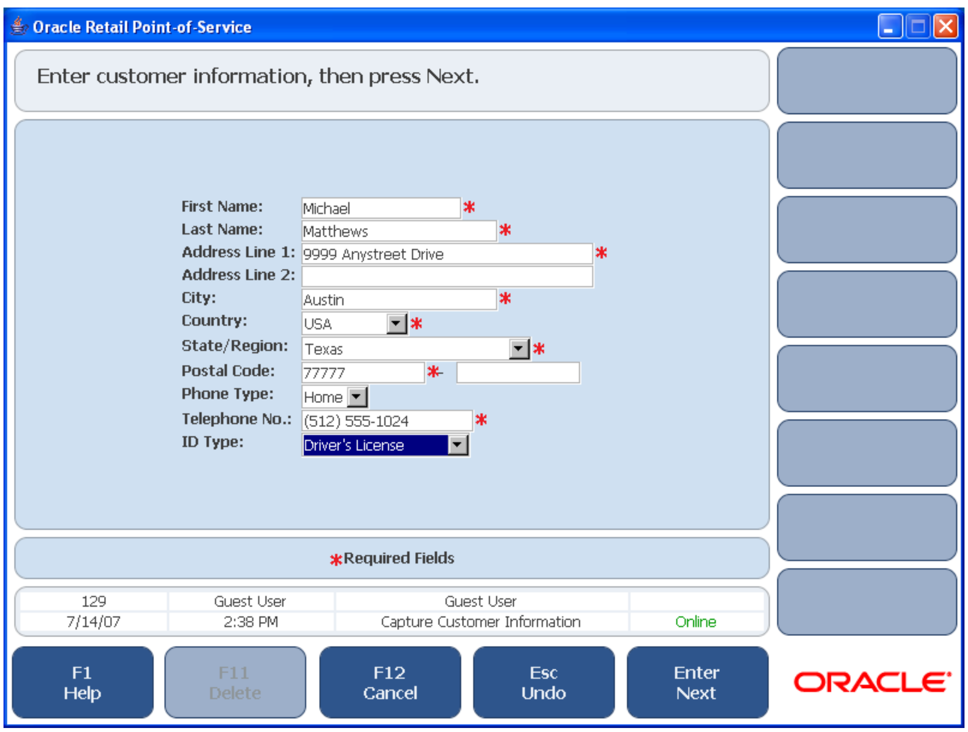
Performing an Item Send

You may want to ship an entire transaction or only selected items in the transaction. Different items can be shipped to different addresses on the same transaction.

To ship items:

1. Select an item on the Sell Item screen and press **F4/Item**. The Item Options screen is displayed.
2. Press **F9/More** and then **F3/Send**. The Customer Present screen is displayed.
3. If the customer is present, press **Yes**. If the customer is not present, press **No**. The Capture Customer Information screen is displayed.

Figure 3–22 Capture Customer Information Screen for an Item Send



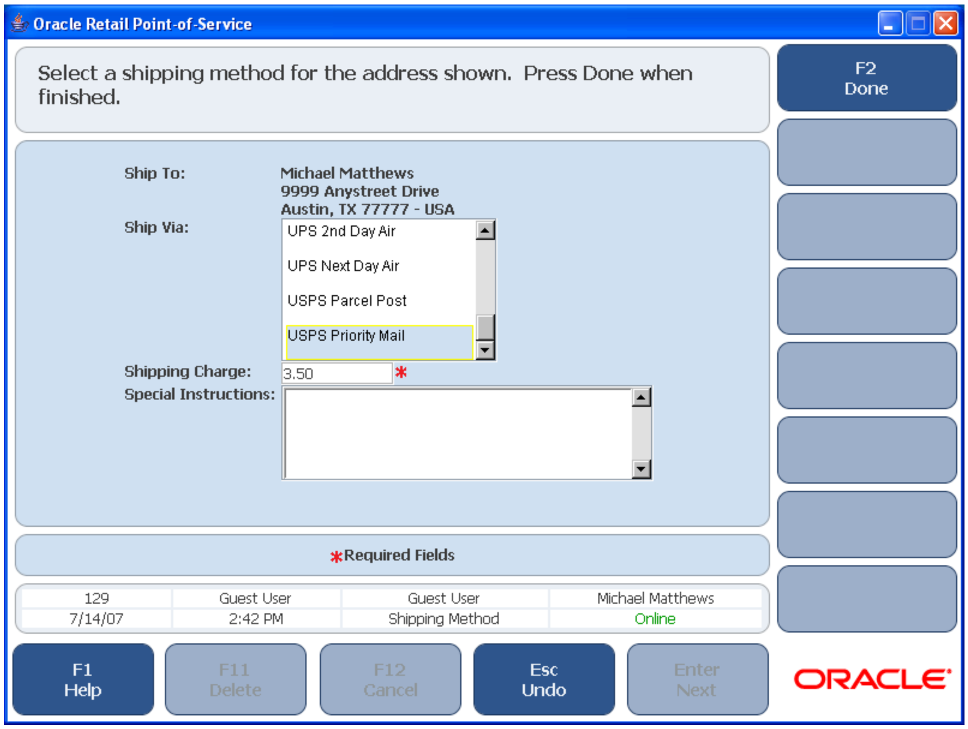
4. Enter the information in the required fields and press **Enter/Next**. The Same as Customer screen is displayed.

5. Select the ship-to address.

   - If the ship-to address is the same as the bill-to address, press **Yes**.
   - To enter another ship-to address, press **No**. The Ship-To Address screen is displayed. Enter the information in the required area and press **Enter/Next**.

     The Shipping Method screen is displayed.

Figure 3–23 Shipping Method Screen



6. Select the mode for shipping from the selection list and press **F2/Done**. The shipping charges are added to the transaction. You are returned to the Sell Item screen and the item is annotated with Send.

Viewing Item Components

The kit feature provides the ability to scan one item that is comprised of multiple items. For example, a kit could be a tire, a valve stem, and the labor to mount and balance the tire. Components are the items that comprise a kit.

To view the components contained in a kit:

1. Select the item on the Sell Item screen and press **F4/Item**. The Item Options screen is displayed.
2. Press **F9/More** and then **F4/Components**. The Component Options screen is displayed.
3. To override the price, apply a discount, override the tax, or change serial numbers, modify the items in the kit.
4. When all of the components have been viewed or changes have been made to the kit items, press **Enter/Next**. The kit line item is displayed with the applicable changes shown in the Sell Item screen.

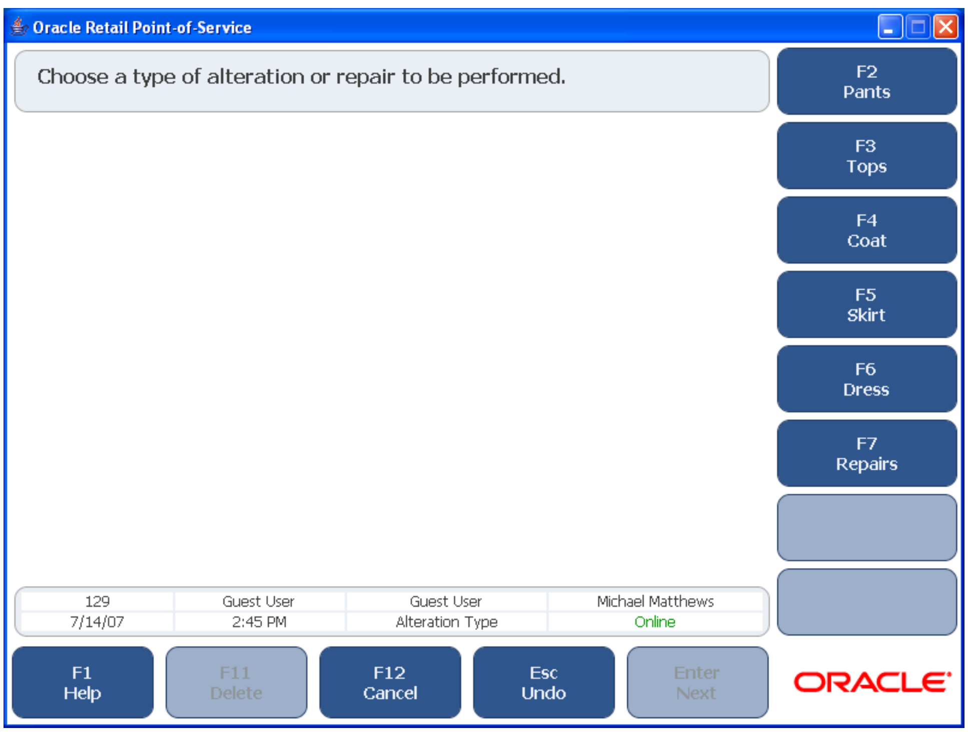
Performing Alterations

Alterations is a service through which you are able to enter instructions specific to the type of garment to allow the customer, store, and tailor to know how the garment needs to be altered. Alterations is a service that you can perform from the Non-Merchandise screen.

To perform an alteration:

1. Select an item on the Sell Item screen and press **F4/Item**. The Item Options screen is displayed.
2. Press **F9/More** and then **F7/Services**. The Non-Merchandise screen is displayed.
3. Select Alterations from the Non-Merchandise Item menu and press **Enter/Next**. The Customer Options screen is displayed.
4. Enter a customer ID or select an option to link a customer to the transaction. For more information on linking customers see Linking Customers to Transactions. Once a customer has been linked to the transaction, the Alteration Type screen is displayed.

Figure 3–24 Alteration Type Screen



5. Select an alteration type. Depending on the type selected, the particular alteration screen is displayed. Enter the alteration information and press **Enter/Next**. The Enter Price screen is displayed.
6. Enter the price of the alteration and press **Enter/Next**. You are returned to the Sell Item screen.

Performing Transaction Options

To access the functions that affect an entire transaction, press **F5/Transaction** from the Sell Item screen. The Trans. Options screen is displayed.

For information on transaction options, see the following sections:

- Changing Tax on a Transaction
- Linking a Transaction to a Sales Associate
- Linking a Transaction to a Gift Registry
- Issuing a Gift Receipt for a Transaction
- Performing a Transaction Layaway
- Performing a Transaction Send
- Post Voiding a Transaction
- Suspending a Transaction
- Retrieving a Transaction
- Cancelling a Suspended Transaction

Note: The Changing Tax on a Transaction, Linking a Transaction to a Sales Associate, Linking a Transaction to a Gift Registry, Issuing a Gift Receipt, and Performing an Item Send in the Trans. Options screen are similar to those in the Item Options screen. The difference is that they only apply to the particular item in the Item Options screen, whereas in the Trans. Option screen they apply to the entire transaction. See Performing Item Options for more information on these options.

Performing a Transaction Layaway

A layaway is created by placing items on hold, reserving them in a customer's name, and allowing the customer to make periodic payments until the total balance is paid. When the balance due is paid, the customer receives the items. There are several layaway options that can be performed. They are creating a new layaway, finding an existing layaway, and deleting a layaway. They are each described below.

Creating a New Layaway

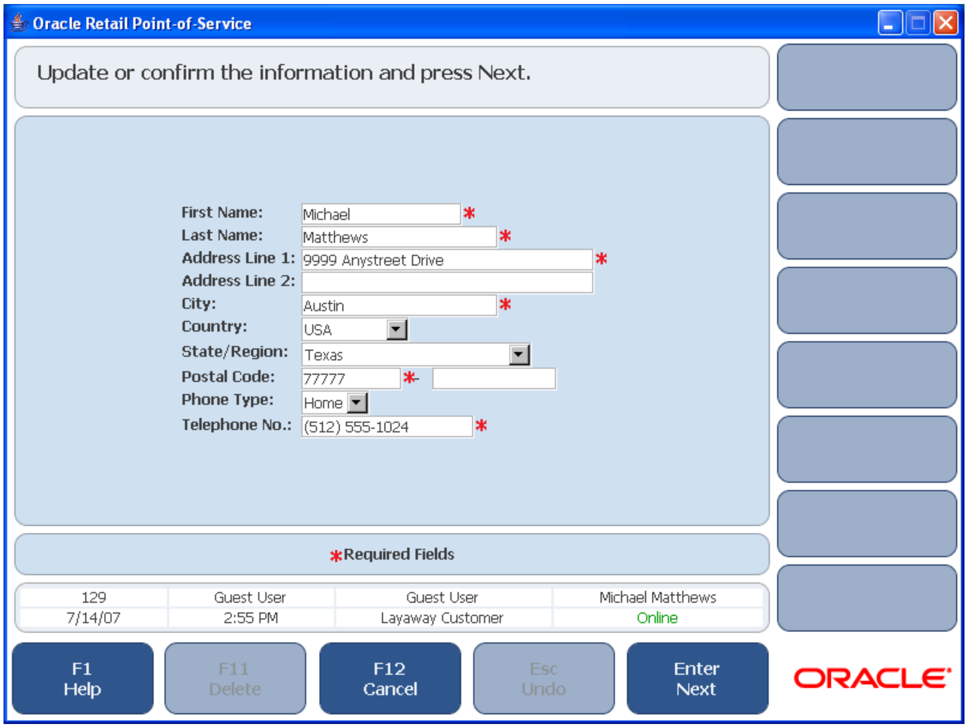
Layaways are created from the Layaway Option screen. You can create a new layaway or find an existing layaway.

To create a new layaway:

1. Press **F6/Layaway** from the Trans. Options screen. The Layaway Options screen is displayed.
2. Press **F2/New**. The Customer Options screen is displayed.

3. Enter a customer's ID or select an option to link a customer to the layaway. See Linking Customers to Transactions for more information. Once a customer is linked to the transaction, the Layaway Customer or Layaway Business screen is displayed.

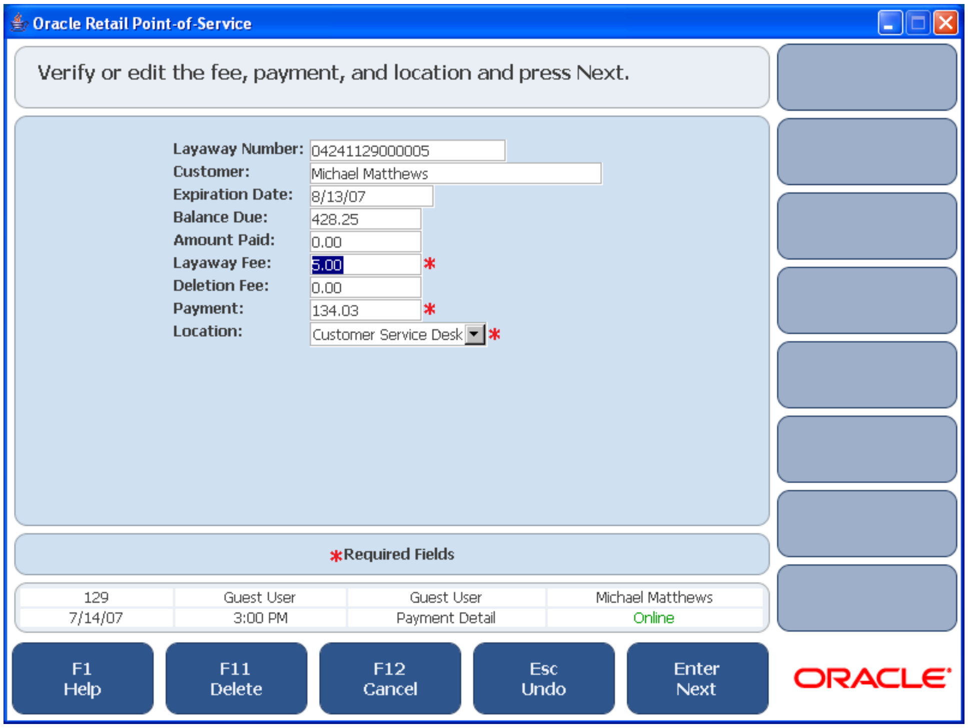
Figure 3–25 Layaway Customer Screen



4. Enter the information in the required fields and press **Enter/Next**. The Layaway Item screen is displayed. A layaway number is added to the transaction.

5. Enter the Item number and press **F6/Tender**. The Payment Detail screen is displayed.

Figure 3–26 Payment Detail Screen



6. Enter the information and press **Enter/Next**. The Tender Options screen is displayed. Tender the transaction normally. See Tendering a Transaction for more information.

Finding an Existing Layaway

To find an existing layaway:

1. Press **F6/Layaway** from the Trans. Options screen. The Layaway Options screen is displayed.
2. Press **F3/Find**. The Find Layaway screen is displayed.
3. Select a layaway search option.
   - If **F2/Layaway Number** is pressed, the Layaway Number screen is displayed. Enter the layaway number and press **Enter/Next**. The Layaway List screen is displayed.
   - If **F3/Customer** is pressed, the Customer Options screen is displayed. Enter the customer ID number or press **F2/Find** to search for the customer. Once a customer number is entered or the customer is found through a search option, the Layaway list screen is displayed.

Figure 3–27 Layaway List Screen

4. Select one of the options:

- To make a layaway payment, press **F2/Payment**. The Payment Detail screen is displayed. Enter the payment amount and select Enter/Next. The Tender Options screen is displayed. For more information on tendering a transaction see Tendering a Transaction.

- To perform a layaway pickup, press **F3/Pickup**. The Payment Detail screen is displayed. Enter the balance amount due and tender the transaction. When the total balance due is paid, the layaway pickup receipt prints.

Deleting a Layaway

To delete a layaway:

1. Press **F4/Delete**. The Confirm Delete screen is displayed.

2. To delete the layaway, press **Yes**. The Refund Detail screen is displayed.

3. Verify or edit the fees and press **Enter/Next**. The Refund Options screen is displayed.

4. Select a refund option and press **Enter/Next**. You are returned to the Sell Item screen.

Post Voiding a Transaction

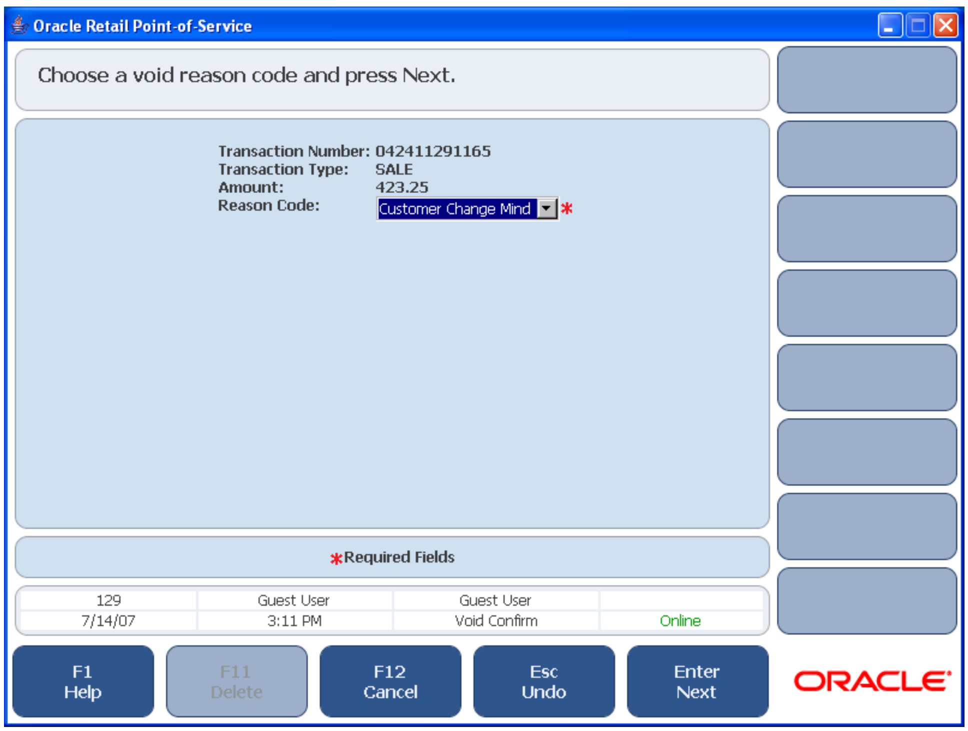
A post void is a cancellation of a transaction after it has been completed. The tender accepted on the transaction is reversed and the original transaction is updated and marked as being post voided. Once a transaction is post voided, it is no longer available for retrieval.

Note: A completed transaction can be post voided only on the same business day and only from the same till. Transactions that have been modified or completed on Oracle Retail Mobile Point-of-Service cannot be post voided.

To post void a transaction:

1. Press **F8/Post Void** from the Trans. Options screen. The Void Transaction screen is displayed.
2. Enter the transaction number and press **Enter/Next**. The Void Confirm screen is displayed.

Figure 3–28 Void Confirm Screen



3. Select the reason code from the menu and press **Enter/Next**. The Close Drawer screen is displayed and you are returned to the Sell Item screen.

Suspending a Transaction

If a sale, exchange, return, layaway, or special order is interrupted for any reason and you do not want to cancel it, you can suspend the transaction for as long as the store is open. A transaction can be suspended at any time before tender is completed.

To suspend a transaction from the Sell Item screen:

1. Press **F5/Transaction**. The Trans. Options screen is displayed.
2. Press **F9/More** and then **F2/Suspend**. The Reason Code screen is displayed.

3. Select a reason code from the list and press **Enter/Next**. The transaction is suspended and the Suspend Saved screen is displayed. Press **Enter**. The suspended transaction receipt is printed and you are returned to the Sell Item screen.

Retrieving a Transaction

A suspended transaction can be retrieved from any register or terminal in the store if no other transaction is active on that register. A completed transaction may also be retrieved. If a transaction is active, it must be suspended or completed before you can retrieve the desired transaction.

To retrieve a transaction:

1. Press **F9/More** and then **F3/Retrieve** from the Trans. Options screen. The Enter Transaction screen is displayed.
2. Select the transaction.
   - Scan or enter the transaction number and press **Enter/Next**.
   - To see a list of suspended transactions, press **F2/List**. The Suspend List screen is displayed. If more than one transaction is listed, select the transaction to be retrieved and press **Enter/Next**.

   The suspended transaction is retrieved and the transaction details are displayed on the Sell Item screen. You can complete, change, or cancel the transaction.

Cancelling a Suspended Transaction

> **Note:** All suspended transactions must be resolved before closing the store each day.

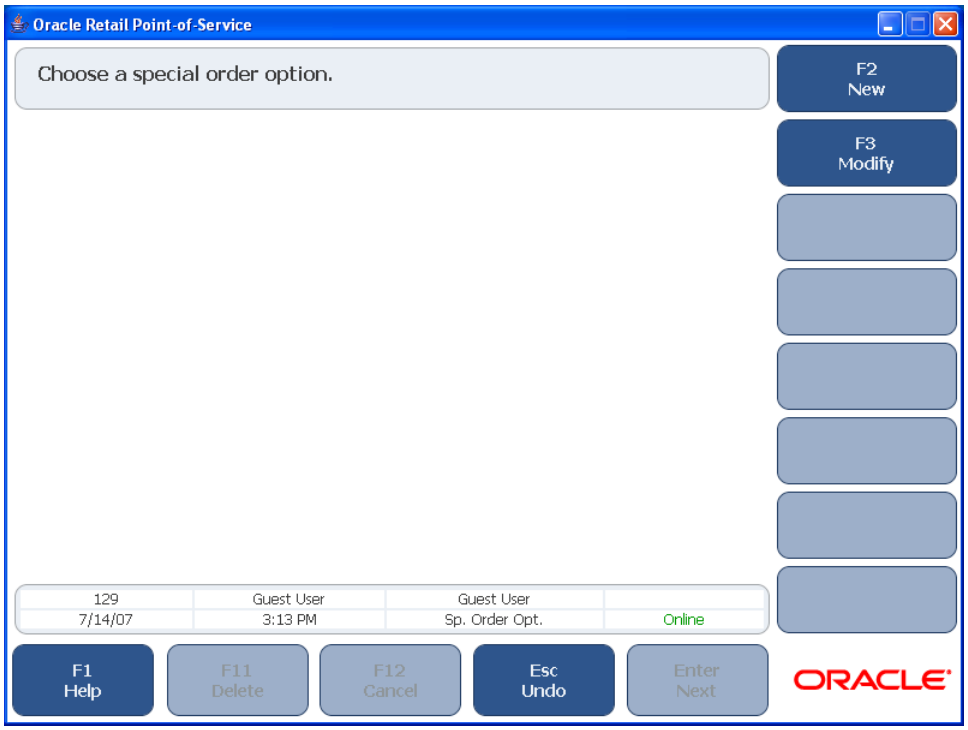
To cancel a suspended transaction during the business day:

1. Press **F3/Retrieve** from the Trans. Options screen. The Enter Transaction screen is displayed.
2. To scan or enter the transaction number and press **Enter/Next**. To see a list of suspended transactions, press **F2/List**. The Suspend List screen is displayed.
3. Select the transaction to be cancelled from the list, and press **Enter/Next**. The Sell Item screen is displayed.
4. To cancel the transaction, press **F12/Cancel**.
5. To confirm and cancel the suspended transaction, press **Yes**. The receipt annotated ** Cancelled Transaction ** prints. You are returned to the Sell Item Screen.

Handling Special Orders

A special order is a type of transaction used to sell items that are not currently available in the store because either they are out of stock, custom, or back ordered. Retailers may special order items that are not available in the store. To create a special order, press **F9/More** and then **F2/Special Order** from the Sell Item screen. The Sp. Order Opt. screen is displayed. You can create a new special order or modify an existing special order.

Figure 3–29 Sp. Order Opt. Screen



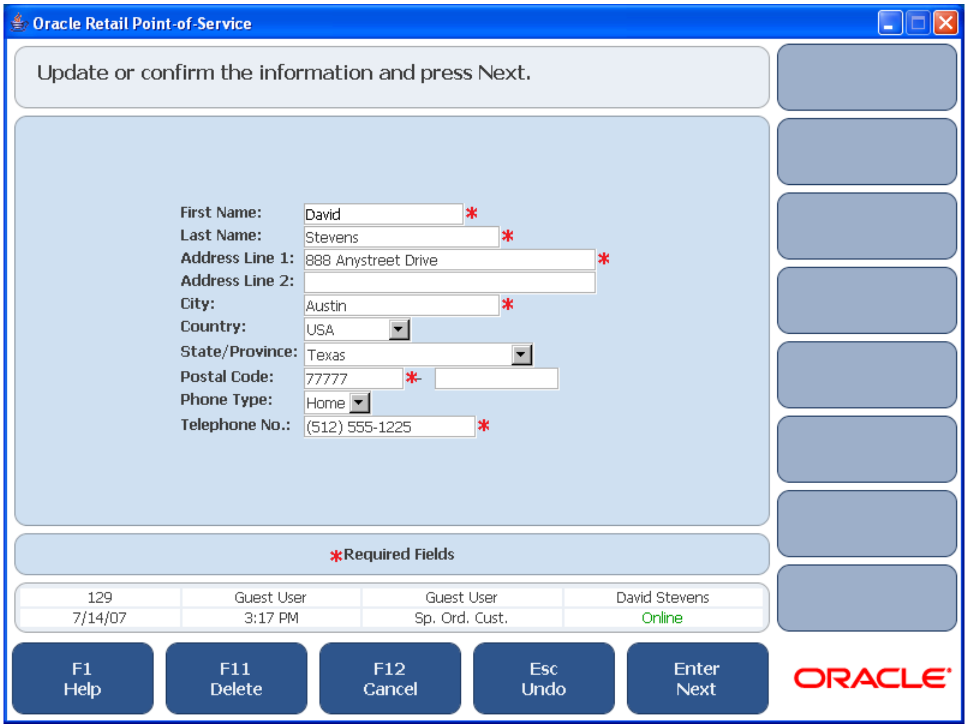
Creating a New Special Order

To create a new special order:

1. Press **F2/New** from the Sp. Order Opt. screen. The Customer Options screen is displayed.

2. Enter the customer ID or use the search options to link the customer to the transaction. For more information on finding a customer, see Linking Customers to Transactions. Once a customer is linked to the transaction, the Sp. Ord. Cust. screen is displayed.

Figure 3–30 Sp. Ord. Cust. Screen



3. Enter the information required and press **Enter/Next**. The Sp. Ord. Item screen is displayed.

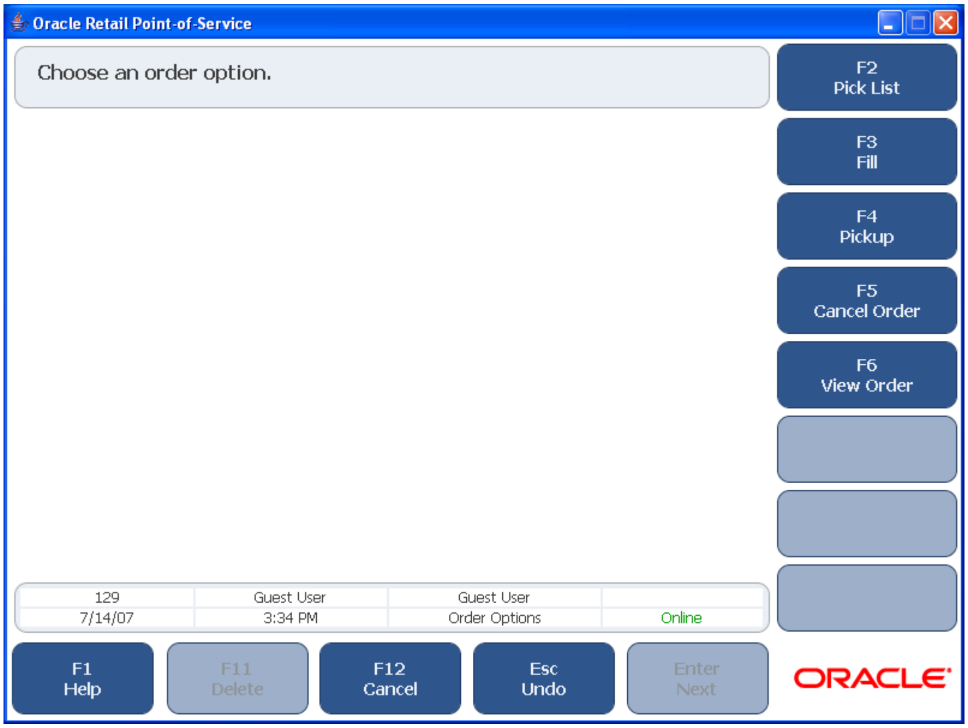
4. Scan or manually enter the item numbers. When all items have been entered, press **F6/Tender**. The Sp. Order Deposit screen is displayed.

5. Enter the Deposit Amount if greater than the Minimum Deposit Due, and press **Enter/Next**. The Tender Options screen is displayed. Complete the tender normally. A Special Order receipt prints and you are returned to the Sell Item screen.

Modifying a Special Order

To modify an existing special order, press **F3/Modify** from the The Sp. Order Opt. screen.

Figure 3–31 Order Options Screen



The Order Options screen is displayed. The following options are available:

- Printing a Pick List
- Filling a Special Order
- Picking Up a Special Order
- Cancelling a Special Order
- Viewing a Special Order

Printing a Pick List

To print a pick list:

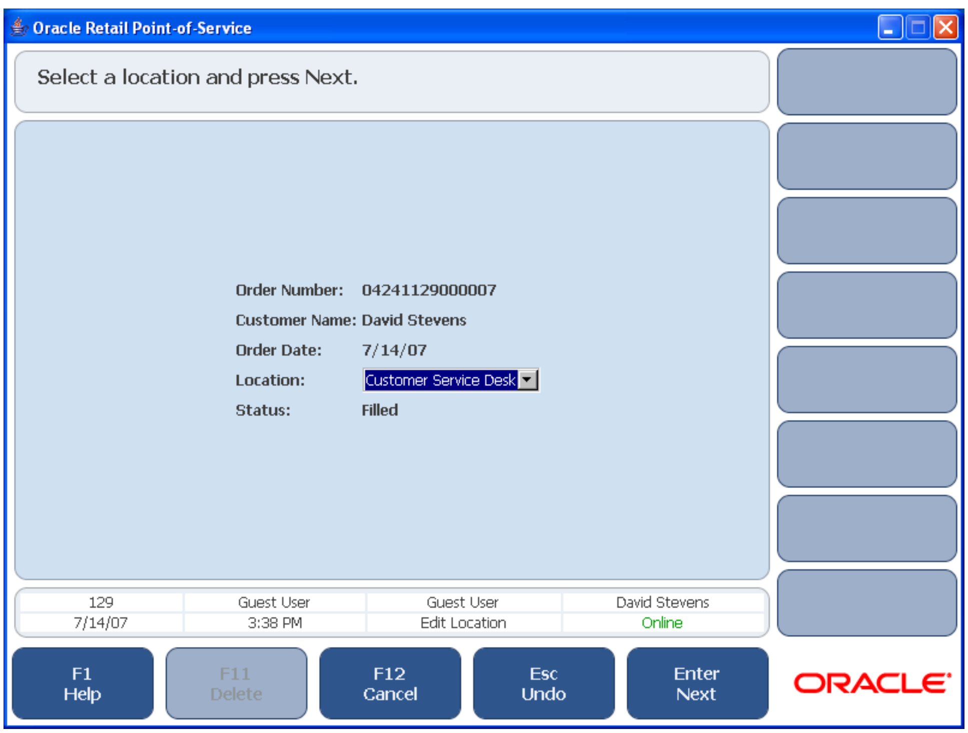
1. Press **F2/Pick List** from the Order Options screen. The Order List screen is displayed.
2. Select the order to print by using the up and down arrow keys and press **Enter/Next**. The Print Order screen is displayed.
3. Press **F2/Print**. The order prints and you are returned to the Order List screen.

Filling a Special Order

To fill a special order:

1. Press **F3/Fill** from the Order Options screen. The Order Search screen is displayed.
2. Enter the order number or search for the order either by Customer or Status.
   - To search via the customer, press **F2/Customer** from the Order Search screen. The Customer Options screen is displayed. Enter the customer ID number or use the options to search for the customer. For more information on linking customers, see Linking Customers to Transactions. The customer is linked to a transaction.
   - An order status can be new, filled, printed, partial, cancelled, or completed. To search via the status, press **F3/Status** from the Order Search screen. The Status Search screen is displayed. Enter the information in the required fields and press **F2/Search**.
3. If one order is found, the Edit Item Status screen is displayed. If multiple orders are found, the Order List screen is displayed. Select the order to be filled with the up and down arrows and press **Enter/Next**. The Edit Item Status screen is then displayed.
4. Select the items to be filled and press **F2/Filled**. The item's status is changed to filled. To continue, press **Enter/Next**. The Edit Location screen is displayed.

Figure 3–32 Edit Location Screen



5. Select the location from the drop-down selection list and press **Enter/Next**. The Order Printing screen is displayed, and the order details print. You are returned to the Sell Item screen.

Picking Up a Special Order

To pick up a special order:

1. Press **F4/Pickup** from the Order Options screen. The Order Search screen is displayed.
2. Enter the order number in the response field or select an order search option. For more information on searching for an order number, see step 2 in Filling a Special Order.
3. If one order is found, the Edit Item Status screen is displayed. If more than one order is found, the Order List screen is displayed. Select the order to be picked up with the up and down arrows and press **Enter/Next**. The Edit Item Status screen is then displayed.
4. Select the items the customer wants to pick up and press **F4/Pick Up**. Press **Enter/Next**. The Order Location screen is displayed.
5. Verify the order information and press **Enter/Next**. The Confirm Selection screen is displayed.
6. Press **F2/Tender**. Tender the transaction normally to complete the transaction. You are returned to the Sell Item screen.

Cancelling a Special Order

To cancel a special order:

1. Press **F5/Cancel Order** from the Order Options screen. The Order Search screen is displayed.
2. Enter or search for the order number. See step 2 in Filling a Special Order for more information on searching for an order number.
3. If one order is found, the Cancel Order screen is displayed. If more than one order is found, the Order List screen is displayed. Select the order to be cancelled with the up and down arrows and press **Enter/Next**. The Cancel Order screen is then displayed.
4. Press **F2/Cancel Order**. The Cancel Confirm screen is displayed.
5. To confirm cancellation, press **Yes**. The Confirm Selection screen is displayed.
6. Press **F2/Tender**. The Issue Change and Close Drawer screens are displayed. You are returned to the Sell Item screen.

Viewing a Special Order

To view a special order:

1. Press **F6/View Order** from the Order Options screen. The Order Search screen is displayed.
2. Enter or search for the order number. See step 2 in Filling a Special Order for more information on searching for an order number. The Order List screen is displayed.
3. Select the order to be viewed and press **Enter/Next**. The Order Details screen is displayed.
4. To print the order details, press **F2/Print**. To view the Order Location screen, press **Enter/Next**.
5. To return to the Order Options screen, press **Enter/Next**.

Reprinting Receipts

For various reasons, a receipt may need to be reprinted for a previous purchase. To reprint a receipt from the Sell Item screen, press **F9/More** and then **F4/Reprint Receipt**. The Reprint Options screen is displayed. This screen has the following options:

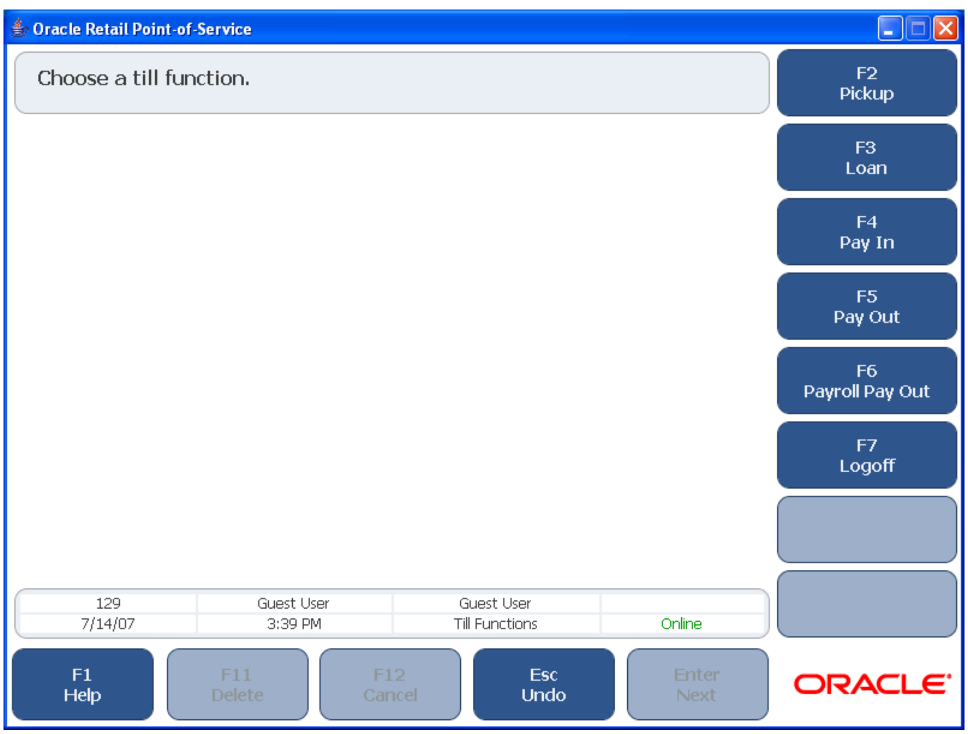
- To reprint the receipt of the previous transaction, press **F2/Last Trans**. The receipt from the last transaction prints.
- To reprint a receipt by transaction number, press **F3/Trans. Number**. The Trans. Search screen is displayed. Enter the transaction number and press **Enter/Next**. The Reprint Select screen is displayed.
  - To print a gift receipt, select the items and press **F2/Gift Receipt**. A gift receipt prints.
  - To print a copy of the original receipt, select **F3/Print Orig.** A copy of the original receipt prints with *Duplicate Receipt* on it.
  - To print a copy of the original receipt with a VAT summary, select **F4/Print VAT Receipt**. A copy of the original receipt prints with *Duplicate Receipt* on it and the VAT summary included.

  When done printing receipts, press **Esc/Undo**.

Till Functions

To perform till functions from the Sell Item screen, press **F9/More** and then **F5/Till Functions**. The Till Functions screen is displayed. You may pickup, loan, pay in, pay out, payroll payout, or log-off of a till.

Figure 3–33 Till Functions Screen



Till Pickup

A till pickup gathers cash from the till.

To complete a till pickup:

1. Press **F2/Pickup** from the Till Functions screen. The Tender Type screen is displayed.
2. Select the type of tender that needs to be picked up. The Summary Count screen is displayed.
3. Enter the amount of tender pickup and press **Enter/Next**. The Close Drawer screen is displayed. You are returned to the Till Functions screen.

Till Loan

A till loan is used to enter cash into the till for making change.

To complete a till loan:

1. Press **F3/Loan** from the Till Functions screen. The Summary Count screen is displayed.
2. Enter the amount of cash loan and press **Enter/Next**. The total amount of the loan is displayed on the screen, the loan information is recorded, and a receipt prints showing the amount of the loan. The loan transaction is complete. The Close Drawer screen is displayed and you are returned to the Till Functions screen.

Till Pay-in

A till pay-in is used to enter cash into the till, for instance when a customer wants to pay restitution on a returned check.

To complete a till pay-in:

1. Press **F4/Pay-in** from the Till Functions screen. The Pay In screen is displayed.
2. Enter the amount of the pay-in, select a reason code from the list, and press **Enter/Next**. The Close Drawer screen is displayed and you are returned to the Till Functions screen.

Till Pay-out

A till pay-out is used to pay cash for something such as stamps or to pay a supplier for goods delivered.

To complete a till pay-out:

1. Press **F5/Pay-out** from the Till Functions screen. The Pay-out screen is displayed.
2. Enter the amount of the pay-out, and enter valid information in the other required fields, and press **Enter/Next**. The Close Drawer screen is displayed and you are returned to the Till Functions screen.

Payroll Pay Out

Payroll Pay Outs are performed for advances or to deliver final pay to an employee.

To perform a payroll payment:

1. Press **F6/Payroll Pay Out** from the Till Functions screen. The Payroll Pay Out screen is displayed.

2. Enter the payroll pay out information and select a reason code. Press **Enter/Next**. The Close Drawer screen is displayed and you are returned to the Till Functions screen.

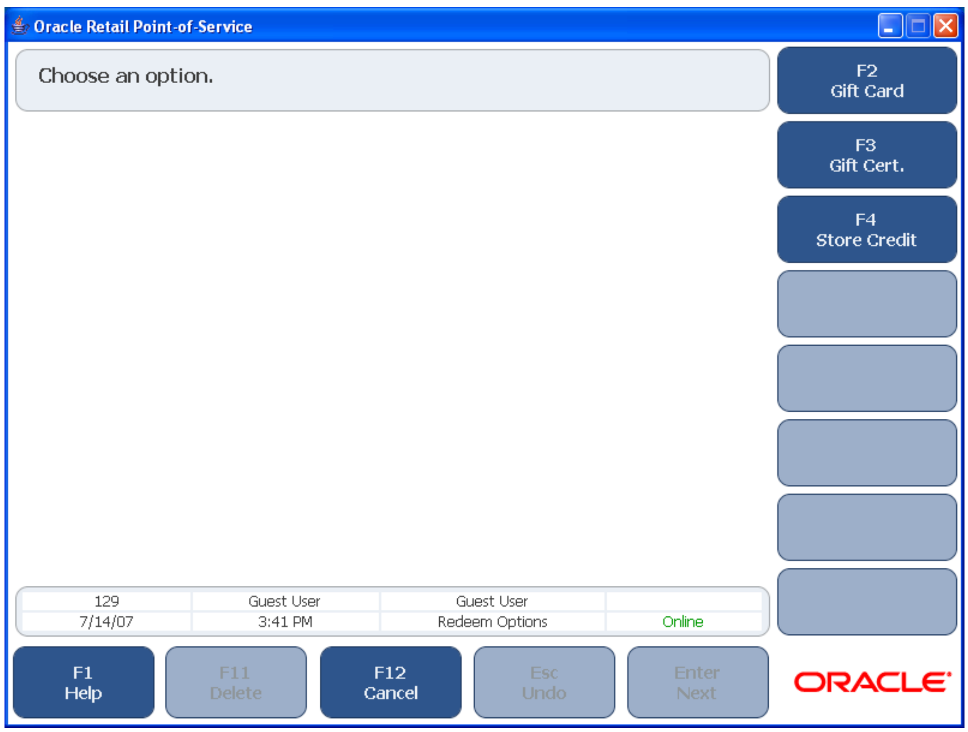
Till Log Off

A till can be logged off through the till close procedure. See Closing Tills in Chapter 2 for more information.

Redeeming Tender

Gift cards, gift certificates and store credits can be redeemed for a refund. To redeem a tender option from the Sell Item screen, press **F9/More** and then **F8/Redeem**. The Redeem Options screen is displayed. From this screen, you can redeem a gift card, gift certificate, or store credit.

Figure 3–34 Redeem Options Screen



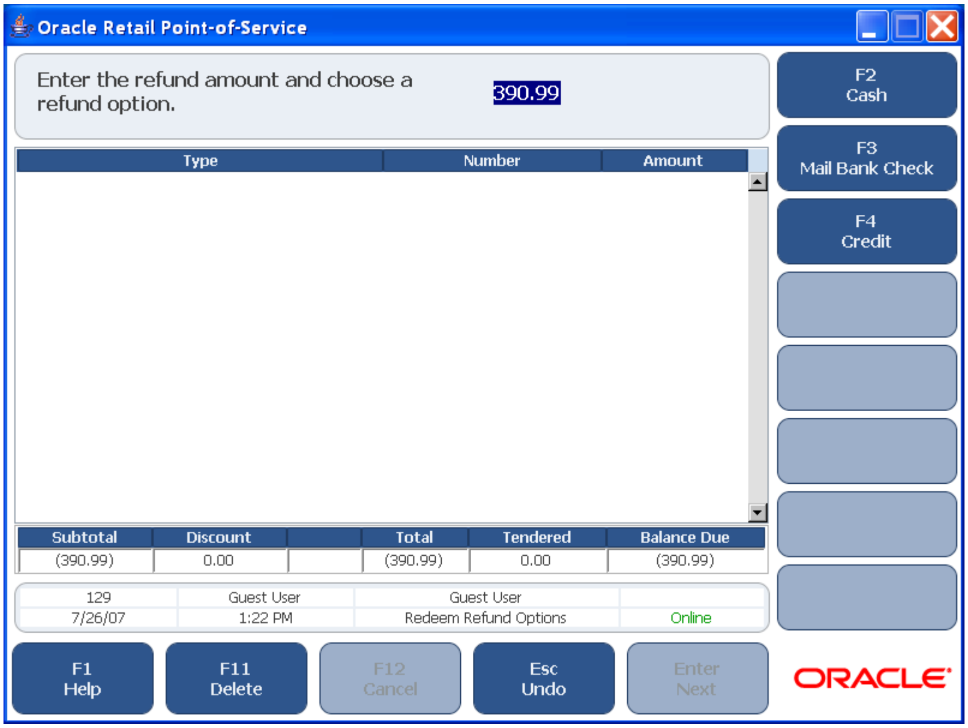
Redeeming a Gift Card

To redeem a gift card:

1. Press F2/Gift Card and then **Enter/Next**. The Gift Card screen is displayed.
2. Swipe or manually enter the gift card number and press **Enter/Next**. The GC Redeem screen is displayed.
3. Press **Enter/Next**. The Capture Customer screen is displayed.

4. Enter the required information and press **Enter/Next**. The Redeem Refund Options screen is displayed.

Figure 3–35 Redeem Refund Options Screen



5. Select a refund option.
   - To obtain a cash refund, press **F2/Cash**. The Issue Refund and Close Drawer screen is displayed and you are returned to the Sell Item screen.
   - To obtain a check refund, press **F3/Mail Bank Check**. The Capture Customer Information screen is displayed. Enter the required information and press **Enter/Next**. The Franking Insert and Franking Remove screens are displayed and you are returned to the Sell Item screen.
   - To obtain a credit refund, press **F4/Credit**. The Credit/Debit screen is displayed. Swipe or manually enter the card number and press **Enter/Next**. You are returned to the Sell Item screen.

Redeeming a Gift Certificate

To redeem a gift certificate:

1. Press **F3/Gift Cert.** from the Redeem Options menu. The Redeem Amount screen is displayed.
2. Enter the amount of the gift certificate and then press **Enter/Next**. The Store Number screen is displayed.
3. Enter the store number where the gift card was issued or press **F2/Corporate Issued**. The Redeem Number screen is displayed.

4. Enter the gift certificate number or press **F2/Foreign**. The Discount Applied dialog box is displayed.
   - If a discount was applied at the time of purchase, press **Yes**. The Discounted Amount screen is displayed. Enter the gift certificate discount amount and press **Enter/Next**. The Capture Customer screen is displayed.
   - To redeem the full value of the gift certificate, press **No**. The Capture Customer screen is displayed.
5. Enter the information and press **Enter/Next**. The Redeem Refund Options screen is displayed. To complete the redeem, see steps 3 through 5 in Redeeming a Gift Card.

Redeeming Store Credit

To redeem store credit:

1. Press **F4/Store Credit** from the Redeem Options screen. The Redeem Amount screen is displayed.
2. Enter the amount of store credit to be redeemed and press **Enter/Next**. The Redeem Number screen is displayed.
3. Enter the store credit number or press **F2/Foreign**. The Capture Customer screen is displayed. To complete the redeem, see steps 3 through 5 in Redeeming a Gift Card.

No Sale Option

No Sale is used to open the cash drawer for non-financial transactions. An example of a non-financial transaction would be to make change for a customer or register.

To complete a no sale:

1. On the Sell Item screen, press **F3/No Sale**. The No Sale Reason screen is displayed.
2. Select the reason code from the list and press **Enter/Next**. The cash drawer closes. You are returned to the Sell Item screen.

4

Linking Customers and Sales Associates

This chapter describes how to search for a customer, add a new customer, modify or delete customer information, and link a customer or sales associate to a transaction.

The following benefits and functionality result from linking a customer or sales associate to a transaction:

- Customer information is available for future transactions.
- Customer transactions can be viewed.
- Customer purchase history is updated.
- Sales productivity of sales associates can be determined.
- Sales associate transactions can be viewed.

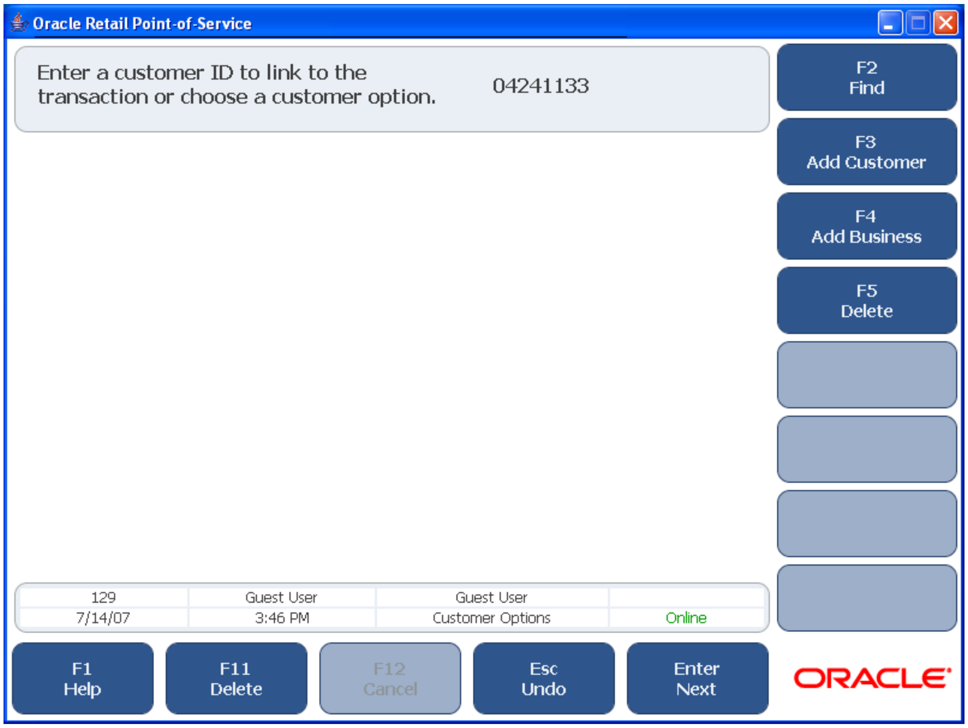
The following functions are described in this chapter:

- Using Customer Options
- Linking Customers to Transactions
- Linking Sales Associates to Transactions

Using Customer Options

The Customer Options screen is used to find, add, edit, or delete customer information. To access the Customer Options screen, press **F3/POS** from the Main Options screen and then **F7/Customer**. The Customer Options screen is displayed.

Figure 4–1 Customer Options Screen



From this screen, you can search for a customer, add an individual or business customer, edit customer information, and delete a customer.

Searching for a Customer

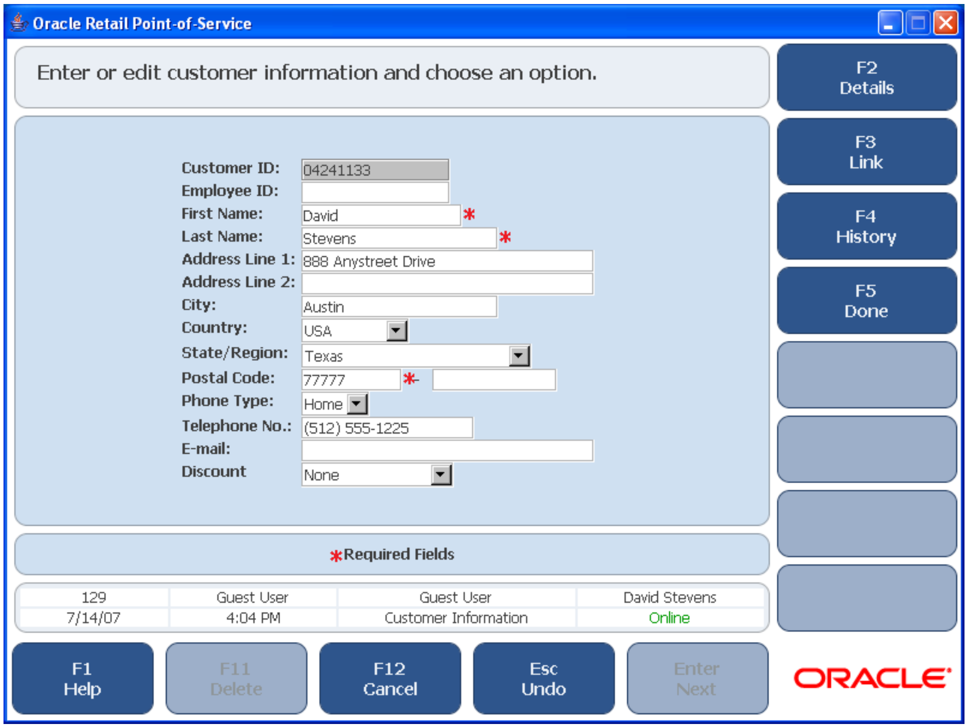
There are different ways to search for a customer. To initiate the search for a customer, press **F2/Find** from the Customer Options screen. Table 4–1 describes the customer search options that are available.

Table 4–1 Customer Search Options

Function Key	Options	Screen	Description
F2/Cust. ID	Customer ID	Search by Customer ID	If the Customer ID is known, enter the customer ID.
F3/Emp. ID	Employee ID	Search by Emp. ID	Customers associated with an employee ID can be found by searching by employee ID.
F4/Cust. Info.	Customer Information	Search by Customer Info.	If customer information other than the Customer ID is known, the information can be entered for the search. The minimum information needed to perform a search is the first two letters of the customer's first name, the first two letters of the customer's last name, and the postal code. Additional information can be entered to limit possible matches. A list of matching customers is displayed. The correct customer may be selected from this list.
F5/Business Info	Business Information	Search by Customer Info.	If the customer is a Business Customer, the search can be based on business information including Business Name and Postal code. A list of matching customers is displayed. The correct customer may be selected from this list.

The Customer Information screen is displayed after a search for a customer is completed successfully.

Figure 4–2 Customer Information Screen



From this screen, you can edit customer details, directly link the customer to a transaction, and view customer history.

- To edit customer information, enter the new information in the Customer Information screen. To edit customer details, press **F2/Details**. The Customer Details screen is displayed. When you are finished making changes in this screen, press **Enter/Next** to return to the Customer Information screen.

  When you have completed your changes, press **F5/Done**. You are prompted to confirm the changes. To confirm the changes, press **Yes**. The customer information is updated and you are returned to the Customer Options screen. To return to the Customer Information screen, press **No**.

- To link a customer to a transaction, press **F3/Link**. The Sell item screen is displayed with the customer name in the status region.

- To view a customer's history, press **F4/History**. The History List screen is displayed. This screen displays the transaction number, date, location, type and the total amount for each transaction in the customer's history. To view the details of a particular transaction, select the transaction number, and press **Enter/Next**. The History Detail screen is displayed. When finished viewing the transaction details, press **F2/Done** to return to the Customer Information screen.

Editing a Customer

To edit information for an existing customer, enter the new information in the Customer Information screen and press **F5/Done**. The customer information is updated and you are returned to the Customer Options screen.

Adding an Individual/Business Customer

To add an individual or business customer:

1. Select one of the following options on the Customer Options screen:
   - To add an individual customer, press **F3/Add Customer**.
   - To add a business customer, press **F4/Add Business**.

   The Add customer screen is displayed.
2. Enter the required information and press **F5/Done**. The customer is added to the database.

   During the Customer Add process, if you choose to cancel before pressing Done or Link, none of the customer information is saved.

Note: If a customer discount type is selected while adding a customer, the discount type is saved as part of the customer information. When an item that is eligible for discount is scanned and the customer is linked, the discount is applied, based on the discount type, to the transaction.

Deleting a Customer

To delete a customer from the database:

1. Press **F5/Delete** from the Customer Options screen. The Cust. Search Options screen is displayed.
2. Select a search option. For more information on searching for customers see Searching for a Customer. Once a customer has been searched, the Delete Customer screen is displayed.
3. Enter the information and press **F2/Delete**. The Confirm Delete dialog is displayed.
4. To delete the customer, press **Yes**. The customer is deleted and you are returned to the Customer Options screen.

Linking Customers to Transactions

Some transactions must be linked to a customer. Whereas, others can be optionally linked. The must-link transactions are those transactions that have to be linked to a customer.

To link a customer to a transaction, begin by searching for a customer. For more information see Using Customer Options. From the Customer Information screen, press **F3/Link**. The Sell Item screen is displayed with the customer's name in the status region, indicating the customer has been linked to the transaction. Enter or scan items to be purchased and tender the transaction normally.

Must-Link Transactions

Certain types of transactions, may require a customer to be linked. At various points in the Oracle Retail Point-of-Service application, you are prompted to input customer information which is then attached to the transaction. The Sell Item screen is displayed with the customer's name in the status region, indicating that the customer has been linked to the transaction. Listed below are examples of transactions that require a customer to be linked.

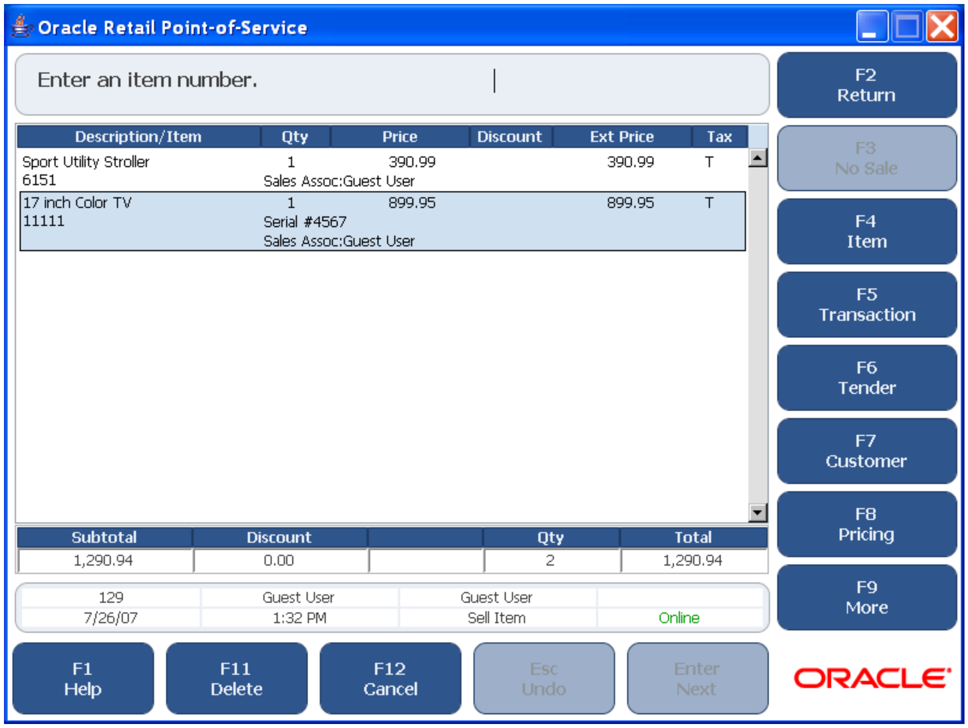
- Send
- Special Order
- Return
- Price Adjustment
- Tender Redeem
- Transaction with Mail Back Check as the tender type
- Layaway
- Tax Exempt
- Alterations

Linking Sales Associates to Transactions

To link a sales associate to a transaction:

1. Press **F5/Transaction** from the Sell Item screen. The Trans. Options screen is displayed.
2. Press **F3/Sales Assoc**. The Trans. Sales Assc. screen is displayed.
3. Enter sales associate ID and press **Enter/Next**. The transaction is linked to the sales associate. You are returned to the Sell Item screen. The sales associate's name appears in the status region and underneath each item indicating the sales associate is linked to the transaction.

Figure 4–3 Sell Item Screen with the Sales Associates Displayed



Note: Items can also be linked to sales associates. See Linking an Item to a Sales Associate or Gift Registry in Chapter 3 for more information.

Only one sales associate can be linked to an item and only one sales associate can be linked to a transaction.

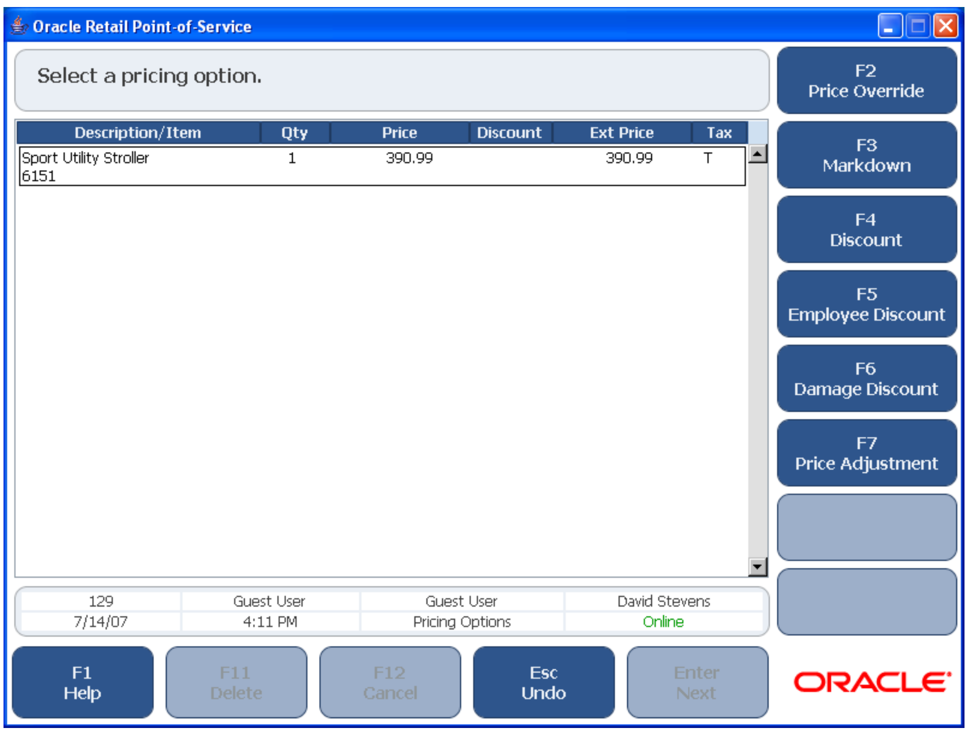
A sales associate can be linked to an item in a transaction where other sales associates are already linked to items. To link another sales associate to an item:

1. Press **F5/Transaction** and then **F3/Sales Assoc** from the Sell Item screen. The Mult Sales Assoc dialog is displayed.
2. To link this sales associate to all items in the transaction, press **Yes**. To link only to items currently without a sales associate, press **No**. You are returned to the Sell Item screen.

5 Adjusting Price

The Pricing options allow you to manually perform price overrides, markdowns, and discounts for an item or transaction at the register. The price adjustment feature provides the ability to adjust the price of an item that has been reduced after it was purchased. To access the Pricing options screen, press **F8/Pricing** from the Sell Item screen.

Figure 5–1 Pricing Options Screen



The following functions are described in this chapter:

- Performing a Price Override
- Performing Markdowns
- Applying Manual Discounts
- Performing Price Adjustments

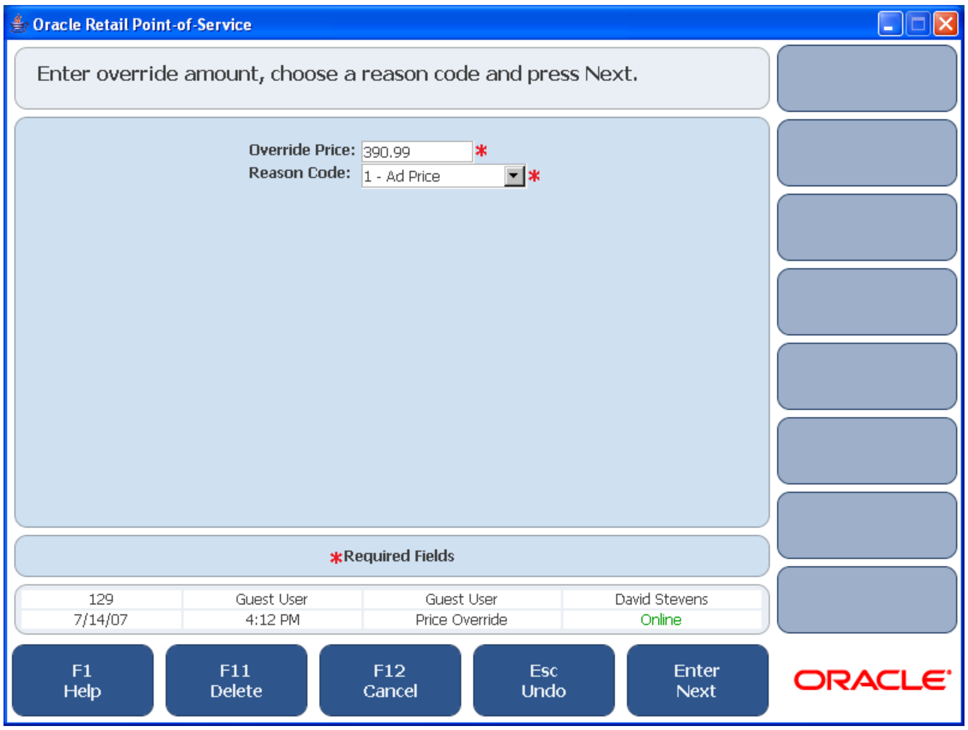
Performing a Price Override

After an item is added to the transaction, you can change the default price by pressing **F2/Price Override**. Price override applies to a specific item and remains in effect until another price override is applied during one transaction. When a new price for an item is entered, any previously applied discounts or markdowns for that item are removed and any applied transaction discounts are applied against the new price.

To change the price for an item:

1. From the Sell Item screen, select an item within the transaction.
2. Press **F8/Pricing**. The Pricing Options screen is displayed.
3. Press **F2/Price Override**. The Price Override screen is displayed.

Figure 5–2 Price Override Screen



4. Enter the new price on the Price Override screen and select a reason code from the menu. Press **Enter/Next**. The price is changed and you are returned to the Sell Item screen. You can repeat a price override to change the price on another item. You can also restore the original price of an item by re-selecting the item and performing another price override.

Performing Markdowns

After an item is added to the transaction, you can manually change the price of an item by pressing **F3/Markdown** from the Price Options screen. A markdown is a reduction in the amount a customer pays for an item either by an amount or percent. Markdowns are applied in addition to automatic discounts.

To markdown an item:

1. Press **F3/Markdown** from the Pricing Options screen. The Markdown Options screen is displayed.

Figure 5–3 Markdown Options Screen

Markdowns can be performed by marking down the amount or by marking down the percentage amount.

2. Select an option.

   - To perform a percent markdown, press **F2/% Item**. The Markdown Percent screen is displayed. Enter the markdown %, select a reason code, and press **Enter/Next**.
   - To perform an amount markdown, press **F3/AMT Item**. The Markdown Amount screen is displayed. Enter the markdown amount and reason code, and press **Enter/Next**.

   The Sell Item screen is displayed. The markdown is displayed in the Discount column and reflected in the Extended (Ext) Price column. The discount total is displayed for the total transaction including all deals, discounts, and markdowns at the bottom of the screen.

Applying Manual Discounts

After an item is added to the transaction, you can apply a manual discount. A discount can be in the form of an amount or percent for an item or transaction. There are several types of discounts that can be applied to an item or transaction. This section describes transaction discounts, item discounts, employee discounts, and damage discounts.

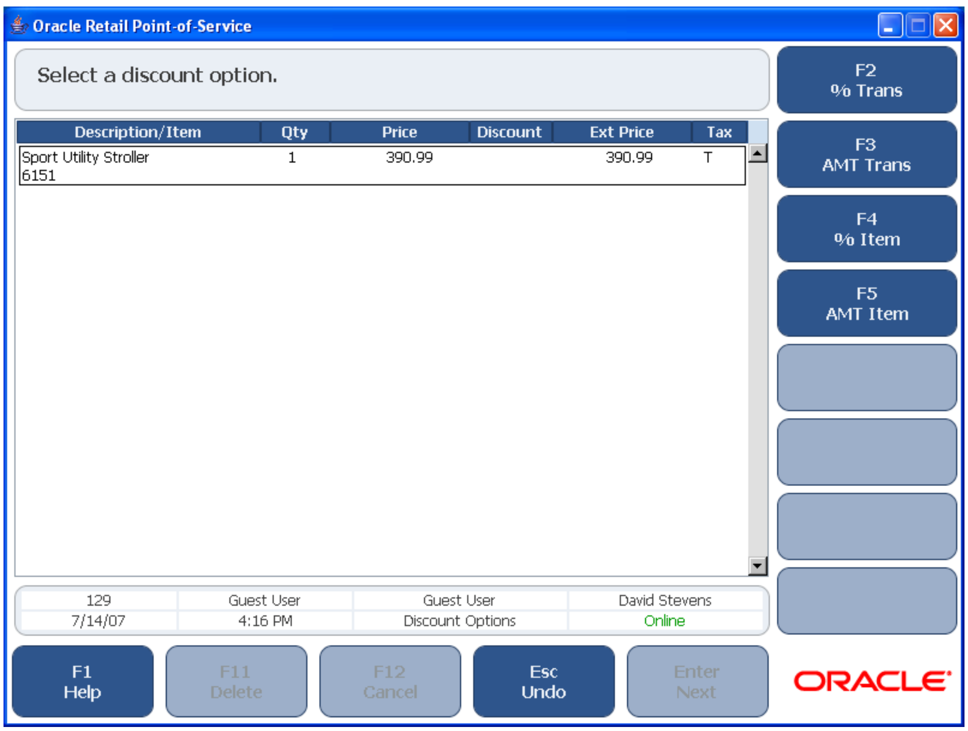
Applying a Transaction Discount

Transaction discounts can be applied both as a percentage or an amount.

To apply a transaction discount:

1. Press **F4/Discount** from the Pricing Options screen. The Discount Options screen is displayed.

Figure 5–4 Discount Options Screen



2. Select an option.

   - To perform a percentage discount on the transaction, press **F2/% Trans**. The Trans. Disc. screen is displayed. Enter the discount percent, select a reason code, and press **Enter/Next**.
   - To perform an amount discount on the transaction, press **F3/AMT Trans**. The Trans. Amt. Disc screen is displayed. Enter the discount amount, select a reason code, and press **Enter/Next**.

   The discount is prorated across all items in the transaction. The discount amount is displayed in the Discount column and reflected in the Extended (Ext) Price column. You are returned to the Sell Item screen.

Applying an Item Discount

To apply a percentage or amount discount for an item, see Applying a Transaction Discount. The only difference is that when applying an item discount, only pricing for that item is changed.

> **Note:** If one or more of the items have a previously applied (same type) discount, the "old" discount is automatically overridden and the "new" discount is applied.

Applying an Employee Discount

Employee discounts allow you to reduce the amount paid for an item by amount or a percent. You may discount one, multiple, or all items by a percentage or amount. After an item is added to the transaction, you can apply an employee discount.

To apply an employee discount for an item or transaction:

1. Press **F5/Employee Discount** from the Pricing Options screen. The Employee Number screen is displayed.
2. Scan or manually enter the employee number and press **Enter/Next**. The Discount Options screen is displayed. To complete the discount application, see step 2 in Applying a Transaction Discount.

Applying a Damage Discount

Damage discounts allow you to reduce the amount paid for an item either by amount or a percent. This discount enables you to sell an item that is damaged or defective. After an item is added to the transaction, you can apply a damage discount.

> **Note:** Damaged items cannot be returned.

To apply a damage discount for an item:

1. Press **F6/Damage Discount** from the Pricing Options screen. The Damage Options screen is displayed.
2. Select an option.
   - To perform a percentage discount, press **F2/% Item**. The Damage Percent screen is displayed. Enter the discount percent and press **Enter/Next**.
   - To perform an amount discount, press **F3/AMT Item**. The Damage Amount screen is displayed. Enter the discount amount and press **Enter/Next**.

   The discount is applied and you are returned to the Sell Item screen. The discount amount is displayed in the Discount column and reflected in the Extended (Ext) Price column.

Performing Price Adjustments

The price adjustment feature provides the ability to adjust the price of an item that has been reduced after it was purchased. The following is an example of a price adjusted transaction:

- A customer buys an item for $25.00 on Wednesday.
- The item goes on sale for $15.00 on Friday.
- The customer presents the original receipt showing the $25.00 purchase price.
- Oracle Retail Point-of-Service retrieves the original transaction, compares the purchase price of $25.00, with the current price of $15.00 and issues a refund for the difference to the customer for $10.00.

Price adjustments may be processed at any time within a sale, return, or exchange transaction, if the purchase date is within the price adjusted time limit and the transaction is eligible for a price adjustment.

To perform a price adjustment:

1. Press **F7/Price Adjustment** from the Pricing Options screen. The Receipt Info screen is displayed.
2. Scan the receipt barcode or enter the required information and press **Enter/Next**. The price is adjusted and the information is displayed on the Sell Item screen. A refund of the difference is shown on the customer's receipt.

> **Note:** If an item has been price adjusted, it is considered to be an exchange. The item is returned at the higher price and sold at the current price. If the customer returns a price adjusted item, it is considered to be sold during the exchange transaction. Therefore, the price paid is the price adjusted final price.
>
> If a price adjustment is done on a sell item with a discount amount applied and the discount amount is greater than the current price, the customer is charged the current price.

The following should be kept in mind while performing price adjustments:

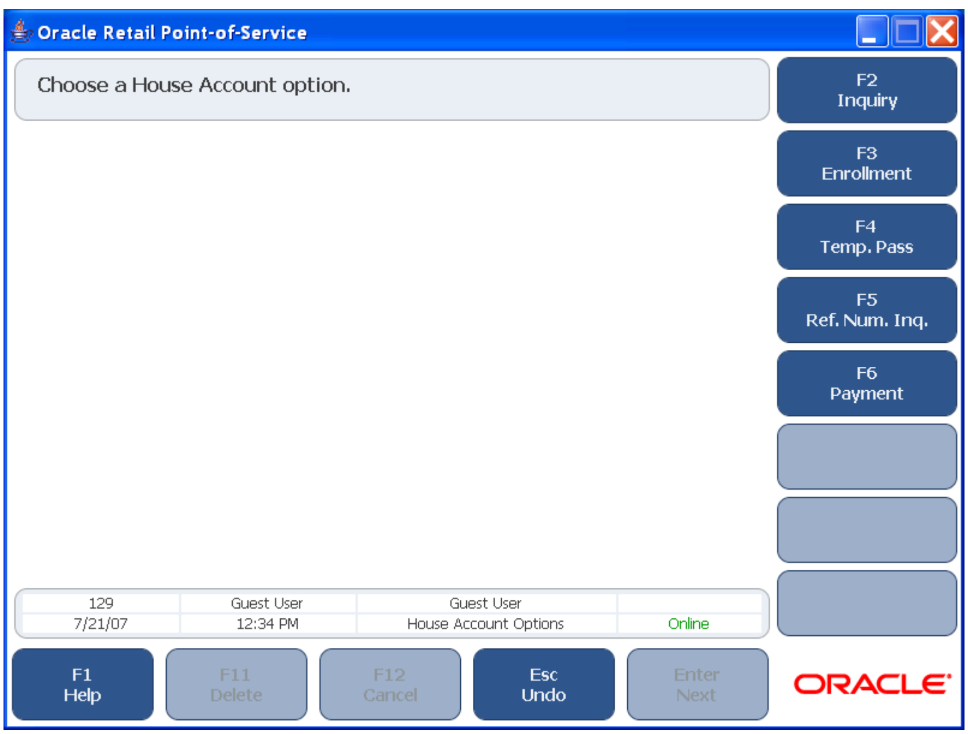
- A receipt is required.
- An item cannot be price adjusted more than once.
- Return items cannot be price adjusted.
- Items that have an employee or damage discount applied cannot be price adjusted.
- Price adjustments from multiple receipts can be conducted in the same transaction.
- If a discount was originally applied to an item that is being adjusted, the discount is also applied to the current price of the item.
- If an amount discount is applied to a sell item, when the price adjustment is performed on the item, the exact discount amount that was applied to the sell item is applied to the current price.
- Gift Certificates issued can not be price adjusted.
- Web orders are not eligible for automatic price adjustments.

6 Handling House Accounts

A house account is a credit card account issued by a retailer at a store. A house account is also referred to as an instant credit card. You can access the House Account Options screen two ways:

- From the Sell Item screen, press **F9/More** and then **F3/House Account**.
- During transaction processing, press **F6/Tender**, then **F9/More**, and then **F7/Instant Credit**.

Figure 6–1 House Account Options Screen



The following functions are described in this chapter:

- Performing a House Account Inquiry
- Enrolling for a House Account
- Printing a Temporary Pass
- Performing a Reference Number Inquiry
- Accepting a House Account Payment

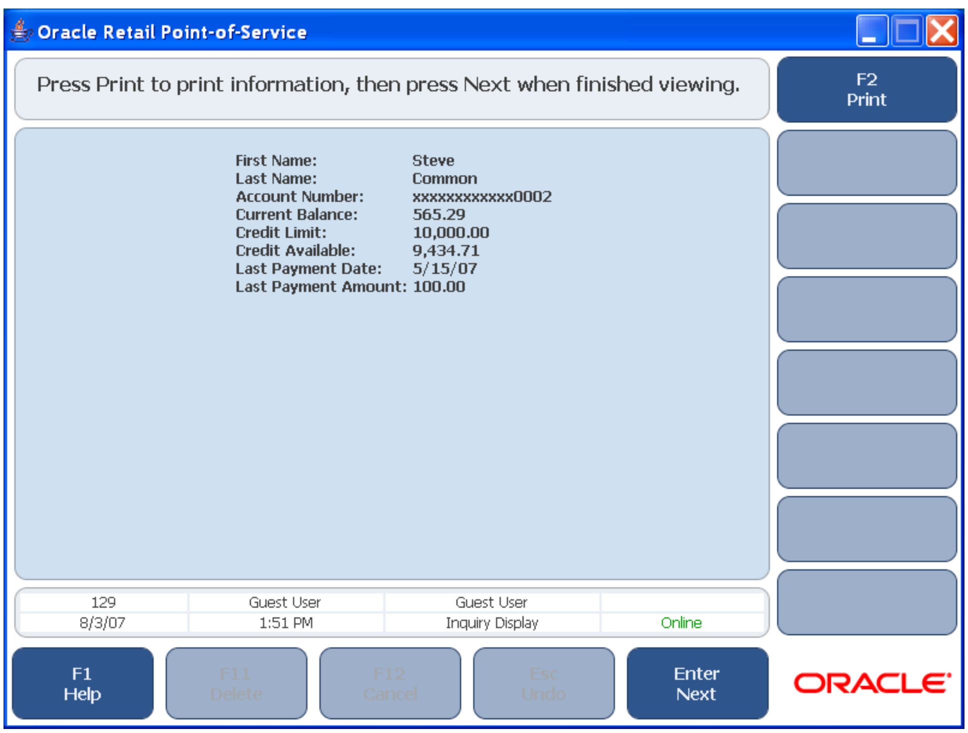
Performing a House Account Inquiry

A house account inquiry is performed to obtain information on an existing house account.

To perform a house account inquiry:

1. Press **F2/Inquiry** from the House Account Options screen. The Card Inquiry screen is displayed.
2. Swipe or manually enter the card number. To search by social security number, press **F2/Search**. The Inquiry Display screen is displayed.

Figure 6–2 Inquiry Display Screen



3. To print the information on the Inquiry Display screen, press **F2/Print**. When finished viewing, press **Enter/Next**. You are returned to the House Account Options screen.

Enrolling for a House Account

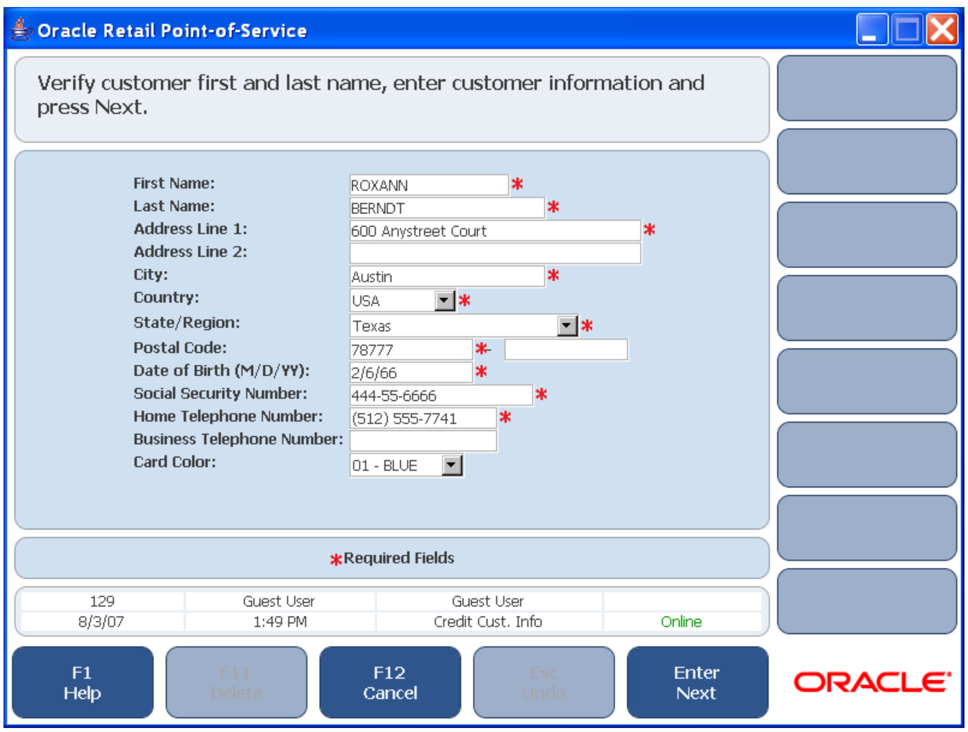
The enrollment process is done when you are opening a new house account. Enrollment can be performed either during the tender function or through the House Account Options screen.

Enrolling through the Tender Function

At least one item must have been added to the transaction in order to enroll for a house account through the tender function. To enroll through the tender function:

1. From the Sell Item screen, press **F6/Tender**, then **F9/More**, and **F7/Instant Credit**. The Item Sales Assc. screen is displayed.
2. Enter the sales associate's ID. Press **Enter/Next**. The Instant Credit Enroll screen is displayed.
3. Swipe the credit card. The Credit Cust. Info screen is displayed.

Figure 6–3 Credit Cust. Info Screen



4. Enter the customer information and press **Enter/Next**. The authorization process begins automatically. Oracle Retail Point-of-Service authorizes the card and returns to the Sell Item screen. If Oracle Retail Point-of-Service does not authorize the card, the Instant Credit Card Error dialog is displayed and you are returned to the Tender Options screen to select another tender option.

Enrolling through the House Account Options Screen

To enroll for a house account through the House Account Options screen, press **F3/Enrollment**. The Item Sales Assc. screen is displayed. To complete the enrollment, see steps two to four Enrolling through the Tender Function.

Printing a Temporary Pass

A temporary shopping pass is a form of tender that is printed when a customer does not have their physical house account card with them. The temporary shopping pass prints in a receipt form with the customer's house account number on it.

To print a temporary shopping pass:

1. Press **F4/Temp. Pass** from the House Account Options screen. The Enter SSN screen is displayed.
2. Enter the customer's social security number and press **Enter/Next**. The temporary shopping pass is printed.

Performing a Reference Number Inquiry

A reference number is the number assigned to a customer who wishes to open a house account but does not get approved immediately. You can check the approval status through the reference number.

To perform a reference number inquiry:

1. Press **F5/Ref. Num. Inq.** from the House Account Options screen. The Identification screen is displayed.
2. Enter a user ID and password and press **Enter/Next**. The Ref. Number Inq. screen is displayed.
3. Enter the reference number and press **Enter/Next**. Oracle Retail Point-of-Service goes through the Authorization process and the Enroll Response screen is displayed. There are four possible responses:
   - Approved
   - Declined
   - Reference Number Not Found
   - System Offline so Call Error Number.
4. To continue, press **Enter/Next**. The Franking Insert and Franking Remove screens are displayed and then you are returned to the House Account Options screen.

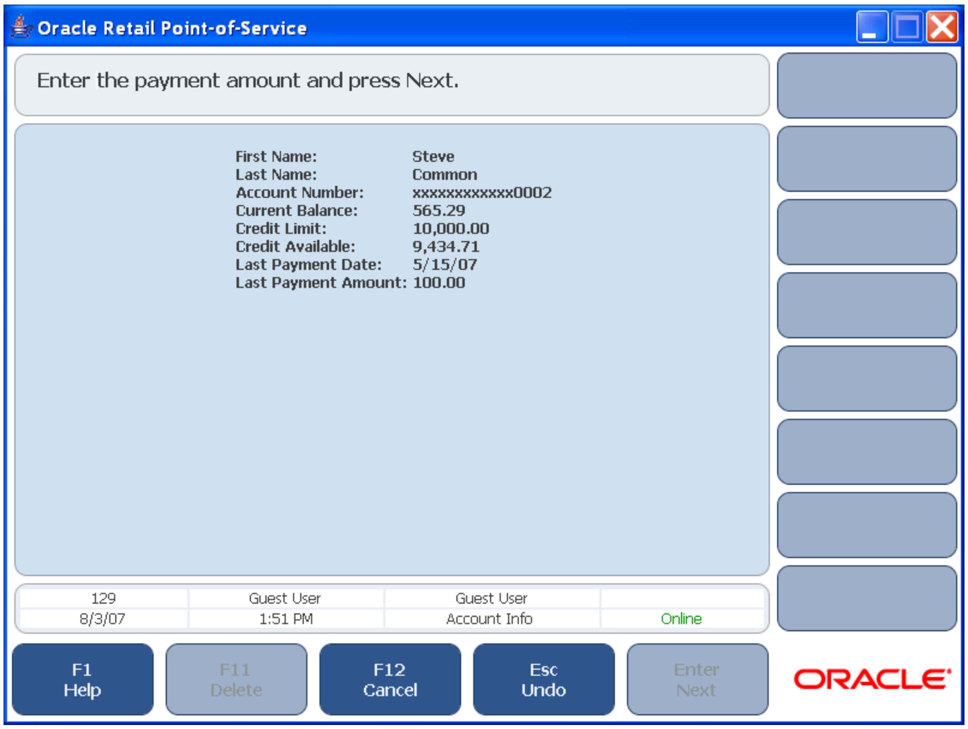
Accepting a House Account Payment

A house account payment is done when a payment is made against a house account.

To accept a house account payment:

1. Press **F6/Payment** from the House Account Options screen. The Account Entry screen is displayed.
2. Swipe or manually enter the house account number. To search the house account by customer information, press **F2/Search**. The Account Info screen is displayed.

Figure 6–4 Account Info Screen



3. Enter the payment amount and press **Enter/Next**. The Tender Options screen is displayed. Tender the transaction. For more information on tendering, see Tendering a Transaction in Chapter 3. Once the tender is complete, a house account payment receipt prints.

7 Using Manager Options

Manager Options enable you to access information about a register or check the status of a device, register, or till. These reports are only for the register that you are working on. You can access the Manager Options screen two ways:

- From the Sell Item screen, press **F9/More** and then **F6/Manager**.
- From the Main Menu screen, press **F4/Administration**, enter the user ID and password, and press **F5/Manager**.

Figure 7–1 Manager Options Screen

The following functions are described in this chapter:

- Reports
- System Status
- Register Status
- Till Status

Reports

Reports provides a way to track sales and statistics for a till, register, store, and orders on a daily basis. A report can be printed at any time with the displayed data.

To access the reports, press **F2/Reports** from the Manager Options screen. The Report Options screen is displayed. Table 7–1 shows the different types of reports, the corresponding function key, the input data required to generate the report, and a description of each report.

Table 7–1 Report Options

Function Key	Report Name	Input Data	Description
F2/Summary	Summary	Date Type (store, register, orders or till) Till or register number	A summary report can be printed for a store, register, or till. This report covers all tender information (in and out) by type, a transaction summary, a house account enrollment summary, and a statistical summary. **Note:** These reports are displayed in the United States locale; not in the default locale for the application.
F3/Dept. Sales	Department Sales	Starting Business Day Ending Business Day	A department sales report can be printed for a given date range. This report summarizes amount of nontaxable and taxable sales by department.
F4/Assoc. Prod.	Associate Productivity	Starting Business Day Ending Business Day	An associate productivity report can be printed for a given date range. This report summarizes an associate's amount of nontaxable and taxable sales.
F5/Hourly Sales	Hourly Productivity	Starting Business Day Ending Business Day	An hourly productivity report can be printed for a given date range. This report summarizes sales, returns, net sales, and percent of net total by the hour.
F6/Queue Trans.	Queued Transactions	<none>	A queued transaction report can be printed to show the number, type, and date and time of queued transactions.
F7/Suspend Trans.	Suspended Transactions	<none>	A suspended transaction report can be printed to show the number, cashier ID, till ID, and total of suspended transactions for the current business day.
F8/Order Status	Order Status	Status (New, Printed, Partial, Filled, Cancelled, Completed) Starting Business Day	An order status report can be printed for new, printed, partial, filled, cancelled, and completed orders for a given date range. The report shows the status, order number, date of the transaction, and the amount of the orders.
F9/Orders Sum.	Orders Summary	Starting Business Day	An orders summary report can be printed for a given date range. The report summarizes the number of orders by status and the amount of each order type.

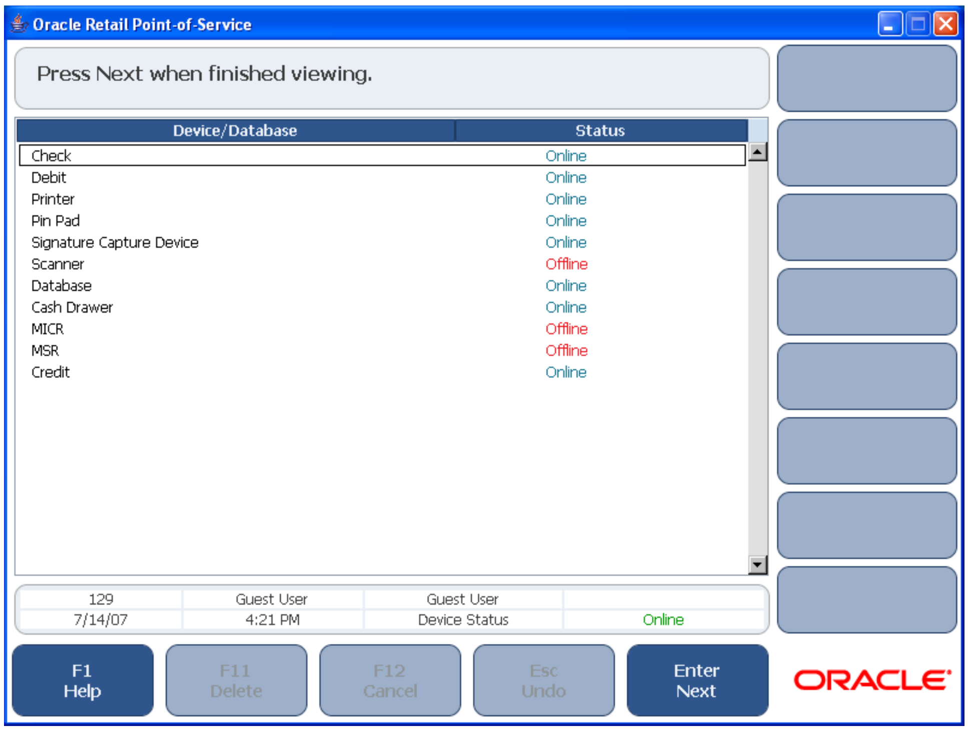
System Status

System status enables you to view the last reported status of hardware devices.

To check device status:

1. Press **F3/System Status** from the Manager Options screen. The Device Status screen is displayed. The list of devices and/or databases and their online/off-line status is displayed. The status text is shown in red for off-line and green or black for online.
2. When finished viewing the information, press **Enter/Next** to return to the Manager Options screen.

Figure 7–2 Device Status Screen



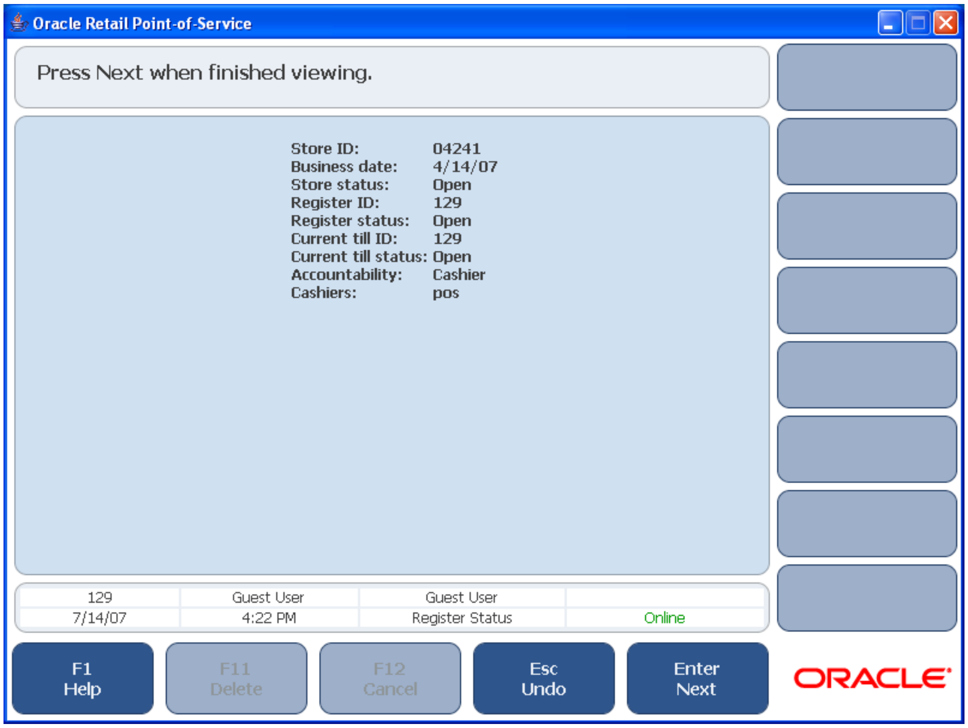
Register Status

Register Status enables you to view the status of the register.

To check register status:

1. Press **F4/Register Status** from the Manager Options screen. The Register Status screen is displayed. The list of registers and their online/off-line status is displayed.
2. When finished viewing the information, press **Enter/Next** to return to the Manager Options screen.

Figure 7–3 Register Status Screen



The register status fields are described in Table 7–2.

Table 7–2 Register Status Fields

Field	Description
Store ID	Unique identifier for a store.
Business date	Date to which all new transactions entered on the register are posted.
Store status	Status can be open or closed.
Register ID	Unique identifier for the register.
Register status	Status can be open, closed, or suspended.
Current till ID	Unique identifier for the till. An alphanumeric character ID up to 3 characters long.
Current till status	Status can be open, closed, or suspended.
Accountability	Determines when one or more operators can be assigned to a till on a given business day. Accountability is either register or cashier. Cashier means only one operator can be assigned to a till. Register means one or more operators can be assigned to a till.
Cashiers	An operator of a till.

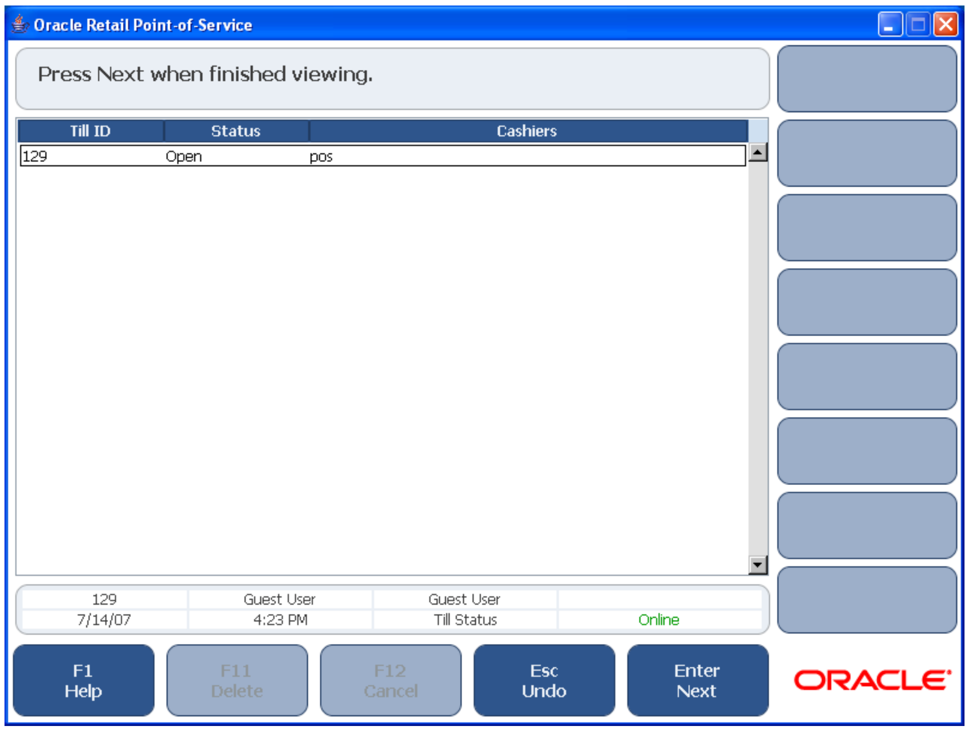
Till Status

Till Status enables you to view the status of tills. It displays an entry for all tills that have been opened in the current register on the current business day.

To check till status:

1. Press **F5/Till Status**. The Till Status screen is displayed. The list of open tills and their status is displayed.
2. When finished, press **Enter/Next** to return to the Manager Options screen.

Figure 7–4 Till Status Screen



The till status fields are described in Table 7–3.

Table 7–3 Till Status Fields

Field	Description
Till ID	The ID number ordered for the till when it is opened or resumed at the register.
Status	Status can be open, close, reconciled, or suspended.
Cashier	An operator of the till.

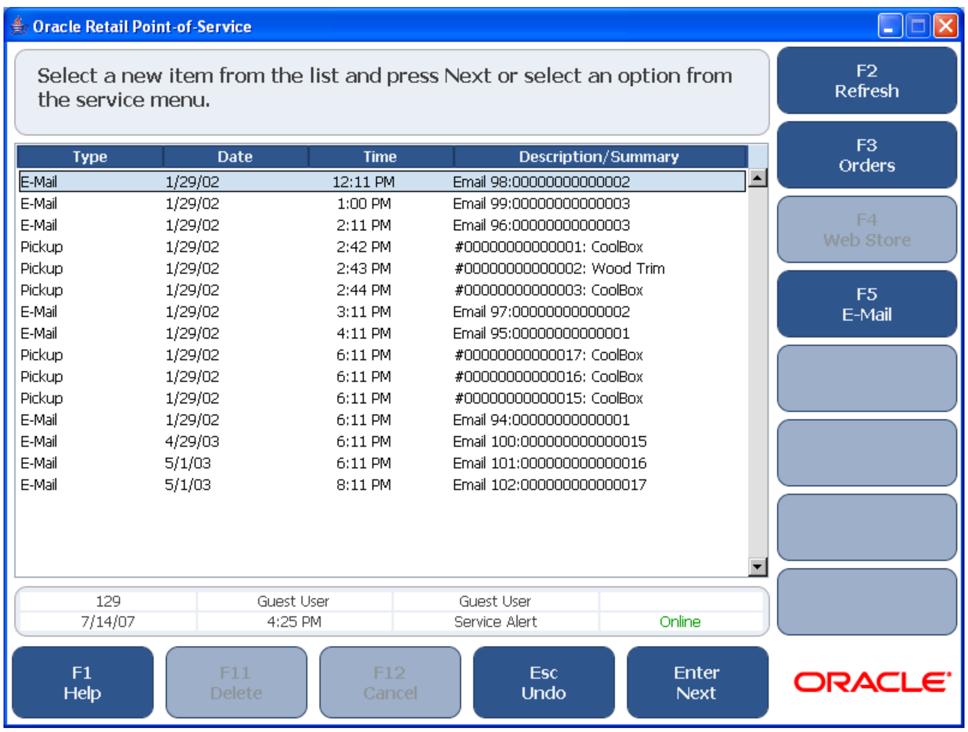
8

Handling Service Alerts

The Service Alert functionality enables you to pick up, complete, or cancel orders, as well as provide order updates to customers in a timely manner via the use of e-mail communication.

To access the Service Alert screen, press **F6/Service Alert** from the Main Options screen. You are prompted to log in. See Logging In and Out in Chapter 1 for more information. After logging in the Service Alert screen is displayed.

Figure 8–1 Service Alert Screen



The following functions are described in this chapter:

- Processing Orders
- Web Store
- E-mail

Note: The till must be open before you can access the Service Alert functionality. If the till is not open, you are prompted to open the till before you can proceed to the Service Alert screen.

Once logged in, the Service Alert screen displays new e-mail messages and new orders.

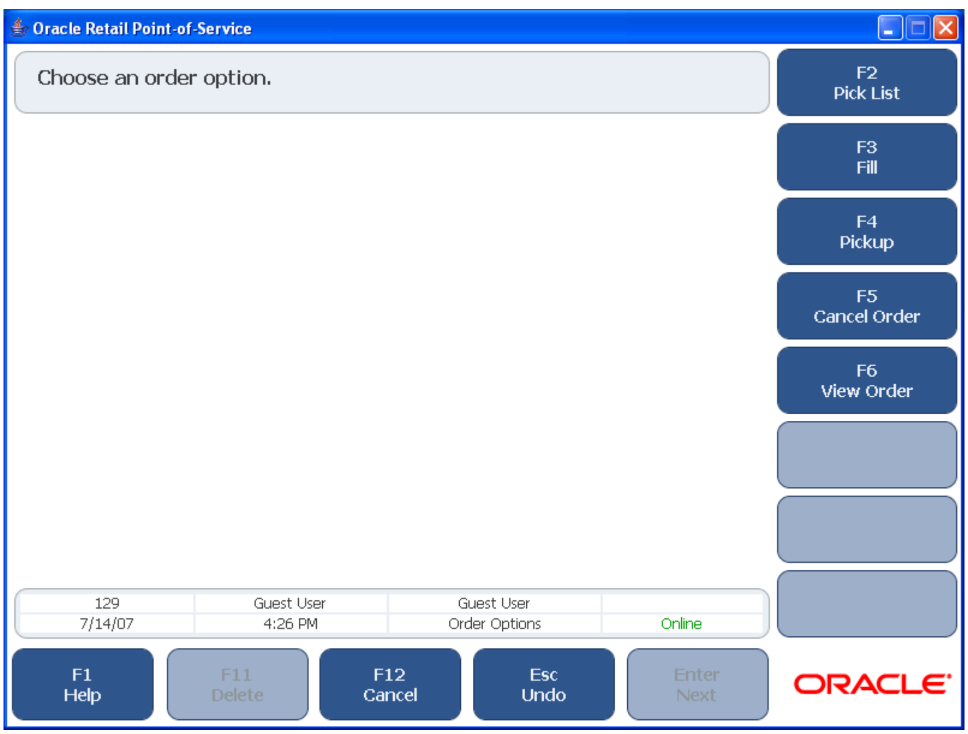
To refresh the Service Alert screen after changes are made, or to check for any new items or e-mails, press **F2/Refresh**.

Processing Orders

Orders are typically placed over the web by customers requesting items which they will pick up from a chosen store location. Processing an order means locating all requested items from store inventory. Once all the items from an order are retrieved, the order is ready to be picked up by the customer.

To manage orders, press **F3/Orders** on the Service Alert screen. The Order Options screen is displayed.

Figure 8–2 Order Options Screen



The following functions are available:

- Printing a pick list
- Filling an order
- Picking up an order
- Cancelling an order
- Viewing an order

Printing a Pick List

The Pick List option enables you to print a pick list. The pick list is a list of items that need to be retrieved from inventory to complete an order.

To print a pick list:

1. From the Order Options screen, press **F2/Pick List**. The Order List screen is displayed with a list of available orders.
2. Select the order to be printed and press **Enter/Next**. The Print Order screen is displayed. The order number to be printed is displayed.
3. To print the order, press **F2/Print**. The order is printed and you are returned to the Order List screen. The printed order is automatically removed from the order list.
4. To return to the Order Options screen, press **Esc/Undo**.

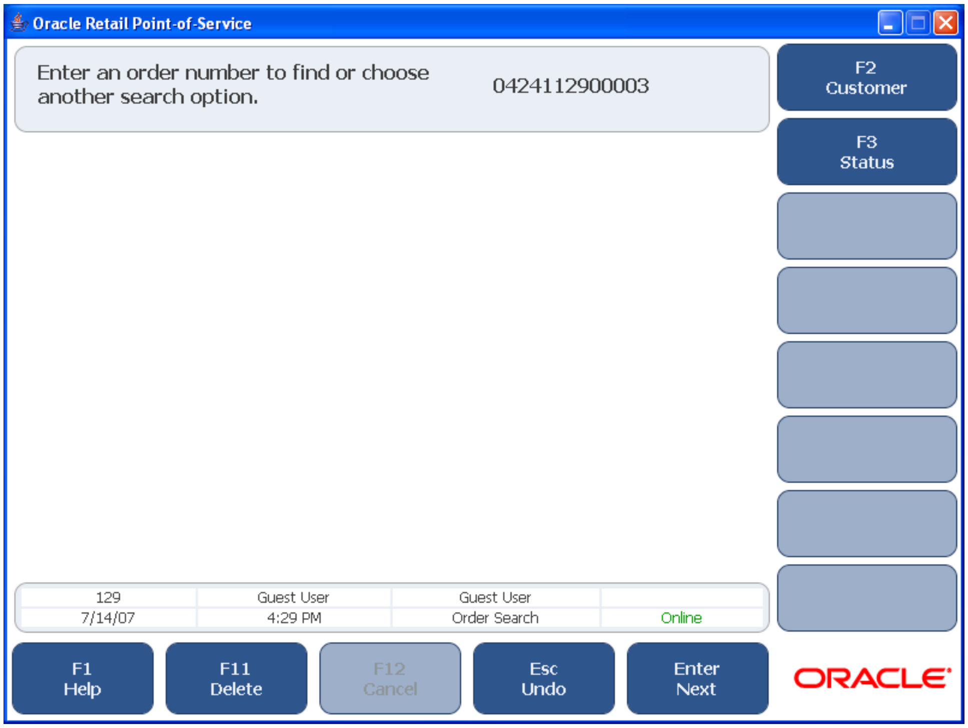
Filling an Order

The Fill Order option is used to fulfill orders. Once all the items specified in the order are located and retrieved from inventory, the order is considered filled and ready to be picked up.

To fill an order:

1. From the Order Options screen, press **F3/Fill**. The Order Search screen is displayed.

Figure 8–3 Order Search Screen



2. If you know the order number, enter it into the prompt region and press **Enter/Next**. To search for an order, press either **F2/Customer** or **F3/Status**.

   - If you press **F2/Customer**, the Customer Options screen is displayed. You can enter the customer ID if you know it. For more search options, press **F2/Find**. The Cust Search Options screen is displayed. See Searching for a Customer in Chapter 4 for more information.

   - If you press **F3/Status**, the Status Search screen is displayed. You can search for any orders by their date range or status.

   The Order List screen is displayed.

3. Select the order that needs to be filled and press **Enter/Next**. The Edit Item Status screen is displayed.

4. Select the items you want to fill, and then press **F2/Filled** to change the status to filled.

   > **Note:** You can also change the status of items to something other than filled. If all items are filled, the status of the order is automatically changed to filled. If some items are not filled (e.g. their status is changed to pending), then the order status is automatically changed to partial. A status search returns only new orders sorted by the original order date. If the status has changed, the end date of the date range should be the current date.

5. Press **Enter/Next** to continue. The Edit Location screen is displayed.

6. From the menu, select the location, and press **Enter/Next**. You are returned to the Service Alert screen.

Pick Up Order

Once an order has been physically 'picked up' by a customer, then it is considered completed.

To complete an order:

1. From the Order Options screen, press **F4/Pickup**. The Order Search screen is displayed.
2. If you know the order number, enter it and press **Enter/Next**. To search for an order, press either **F2/Customer** or **F3/Status**. For more information, see step two in the section Filling an Order. The Order List screen is displayed.
3. Select the order that contains the items for pickup and press **Enter/Next**. The Edit Item status screen is displayed.
4. Select the items you want to pick up, and then press **F4/Pickup**. You can also change the status to Pending (F3) or Cancelled (F5).

> **Note:** If all items are picked up, the status of the order is automatically changed to completed. If some items are not picked up, the status is changed to partial. If there are other items in the order that are pending or filled, you can change those items to cancelled.

5. Press **Enter/Next** to continue. The Edit Location screen is displayed.
6. Note the location of the item and press **Enter/Next**. The Confirm Selection screen is displayed.
7. To confirm the selection and continue, press **F2/Tender**. Tender the transaction normally. For more information on tendering, see Tendering a Transaction in Chapter 3. You are then returned to the Service Alert screen.

Cancelling an Order

To cancel an order:

1. From the Order Options screen, press **F5/Cancel Order**. The Order Search screen is displayed.
2. Enter the order number. To search for the order, press either **F2/Customer** or **F3/Status**. For more information, see step two in Filling an Order. The Order List screen is displayed.
3. Select the order that needs to be cancelled and press **Enter/Next**. The Cancel Order screen is displayed with all items on the order changed to Cancelled.
4. Press **F2/Cancel Order**. The Cancel confirmation dialog is displayed.
5. To confirm the order cancellation, press **Yes**. To return to the Cancel Order screen, press **No**.
6. If you confirmed the order cancellation, the Confirm Selection screen is displayed.
7. To tender the transaction, press **F2/Tender**. Tendering the transaction completes the order. For more information on tendering, see Tendering a Transaction in Chapter 3. After tendering is complete, you are returned to the Service Alert screen.

Viewing an Order

To view the details for an order:

1. Press **F6/View Order** from the Order Options screen. The Order Search screen is displayed.
2. Enter the order number. To search for the order, press either **F2/Customer** or **F3/Status**. For more information, see step two in Filling an Order. The Order List screen is displayed.
3. Press **Enter/Next**. The Order Details screen is displayed.
   - To print the order, press **F2/Print**. The order prints and you are returned to the Order Details screen.
   - To view more order information, press **Enter/Next**. The Order Location screen is displayed. This screen displays the order details such as order number and location. Press **Enter/Next** to return to the Order Options screen.

Web Store

The Web Store functionality enables you to access the store's web site. Oracle Retail Point-of-Service does not provide any web browsers. You must have an integrated browser in order to access the web site.

To access the Web Store functions, press **F4/Web Store** on the Service Alert screen. The browser opens the Web Store screen to the designated home page.

For navigation, use the local navigation bars within Oracle Retail Point-of-Service. As shown in Table 8–1, the buttons on the local navigation bar serve as the described web browser functions.

Table 8–1 Web Store Navigation Buttons

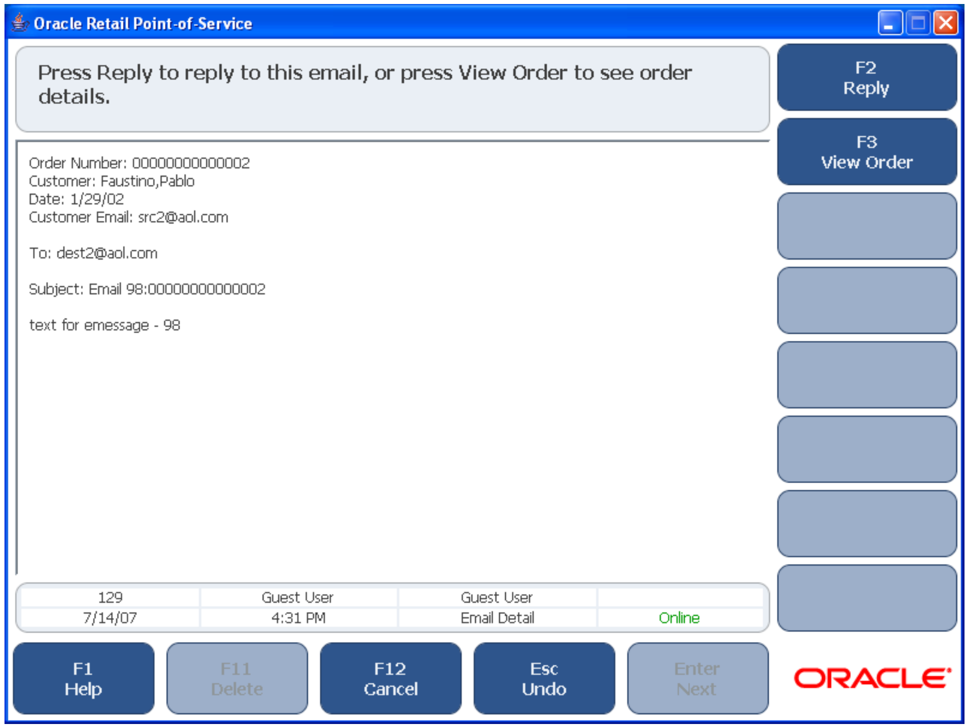
Button	Description
F2/Back	Return to the previous page.
F3/Forward	Return to a page you visited previously.
F4/Close	Close the browser and return to the Service Alert screen.
F5/Stop	Stop loading the current page.
F6/Refresh	Refresh the current page.
F7/Home	Return to the store home page.

E-mail

The e-mail functionality provides a method to communicate with customers during the order process. E-mails are typically sent by customers concerning specific orders. You can reply to any e-mails sent to the store, but you cannot create new e-mails. Any e-mail replies are sent via the order process.

By default, the Service Alert screen displays all messages with a status of New. To read or reply to these messages, select a message and press **Enter/Next**. The Email Detail screen is displayed. You can either reply to the e-mail or view the order that the message is about.

Figure 8–4 Email Detail Screen



Replying to E-mails

To respond to a message:

1. Press **F2/Reply** from the Email Detail screen. The Email Reply screen is displayed.
2. Enter your response. To send the reply, press **F2/Send**. You are returned to the Service Alert main screen.

Viewing Orders

To view the specific order related to the e-mail:

1. Press **F3/View Order** from the Email Detail screen. The Order Details screen is displayed.
2. To print the order, press **F2/Print**. To return to the Service Alert screen, press **Esc/Undo**.

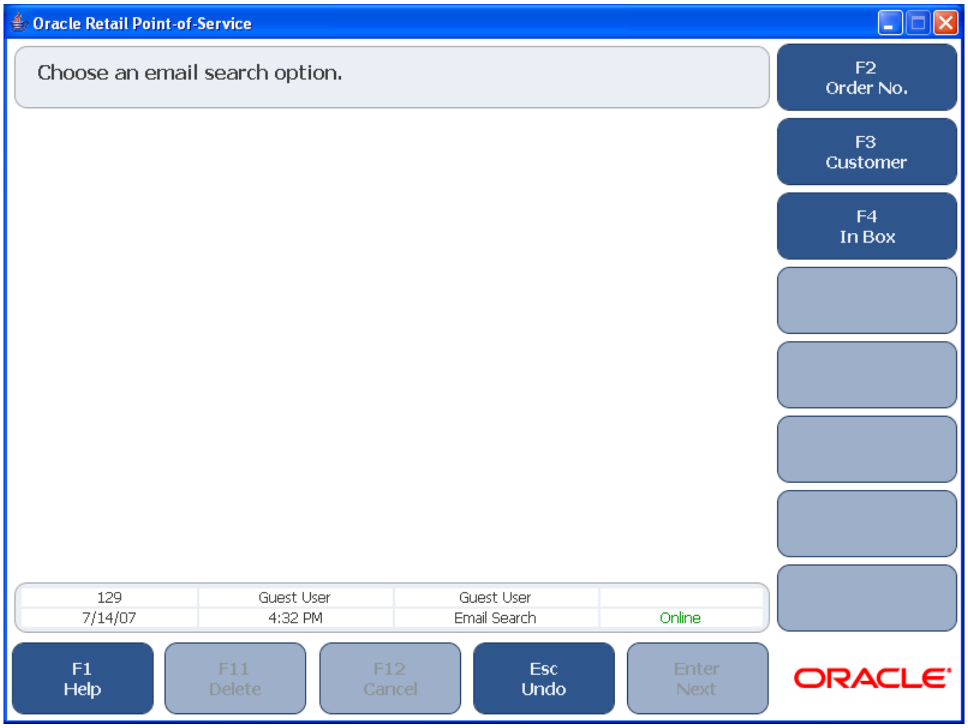
Searching for E-mails

Although the Service Alert screen displays messages under the New status, you can also search for messages with other statuses.

To search for a message, press **F5/E-Mail** on the Service Alert screen. The Email Search screen is displayed. For information on the search options, see the following sections:

- Searching by Order Number
- Searching by Customer
- Searching by In Box

Figure 8–5 Email Search Screen



Searching by Order Number

To search by order number:

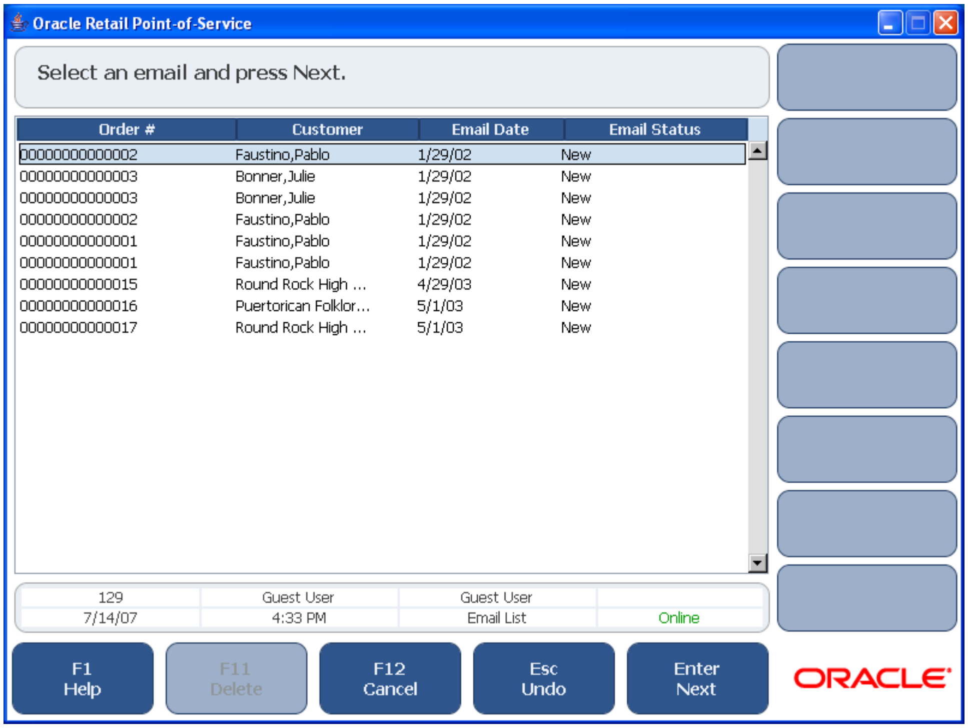
1. Press **F2/Order No**. The Enter Order No. screen is displayed.
2. Enter an order number and press **Enter/Next**.
   - If one message is found, the Email Detail screen is displayed.
   - If more than one message is found, the Email List screen is displayed. Select a message form the list and press **Enter/Next**. The Email Detail screen is displayed.
3. To reply to the message, press **F2/Reply**. To view the order related to the message, press **F3/View Order**.

Searching by Customer

To search by customer information:

1. Press **F3/Customer** on the Email Search screen. The Customer Options screen is displayed.
2. Enter the customer ID if you know it. To search for the customer, press **F2/Find**. The Customer Search Options screen is displayed. For more information see Searching for a Customer in Chapter 4. Once the customer is located and chosen, the Email List screen is displayed.

Figure 8–6 Email List Screen



3. Select the desired message and press **Enter/Next**. The Email Detail screen is displayed.
4. To reply to the message, press **F2/Reply**. To view the order related to the message, press **F3/View Order**.

Searching by In Box

You can browse through all messages in the inbox that have a status of New.

To search through the in box:

1. Press **F4/InBox** from the Email Search Screen. The Email List screen is displayed.
2. Select the desired message and press **Enter/Next**. The Email Detail screen is displayed.
3. To reply to the message, press **F2/Reply**. To view the message, press **F3/View Order**.

Automated E-Mail Messages

Service Alert automatically creates e-mail messages to customers when certain conditions are met. Each transaction has a status associated with it. As each step in the order process is completed, the status is automatically updated to reflect these changes.

Whenever the order status changes to Filled, Partial, Completed, or Cancelled, an automatic e-mail is sent. The order information is inserted into an e-mail file and sent to the server. The following table lists the parameter that defines the e-mail message sent for each status:

Status	Parameter
Filled Order	Automatic Email Filled Order
Partial Order	Automatic Email For Partial Order
Picked Up Order	Automatic Email For Picked Up Order
Cancelled Order	Automatic Email For Canceled Order

9

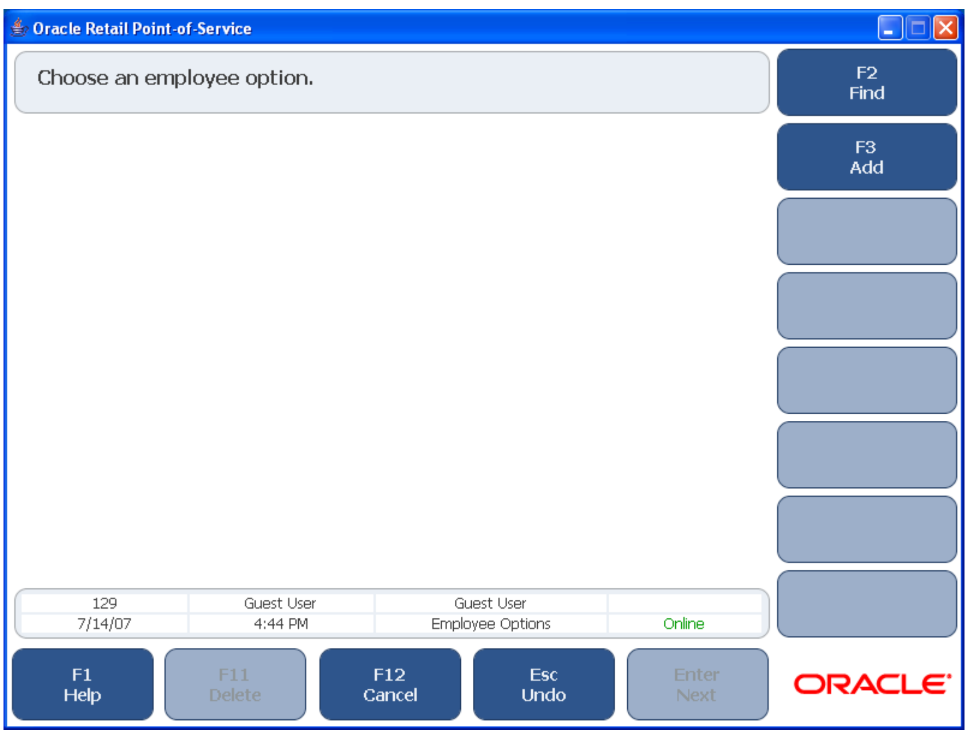
Using Employee Options

Employee Options enable you to access information about employees, add new employees, and reset employee passwords.

To access the Employee Options screen:

1. Press **F4/Administration** from the Main Options screen. You are prompted to log in. See Logging In and Out in Chapter 1. After logging in, the Admin Options screen is displayed.
2. Press **F4/Security**. The Security Options screen is displayed.
3. Press **F2/Employee**. The Employee Options screen is displayed.

Figure 9–1 Employee Options Screen



The following functions are described in this chapter:

- Find Employee
- Add Employee

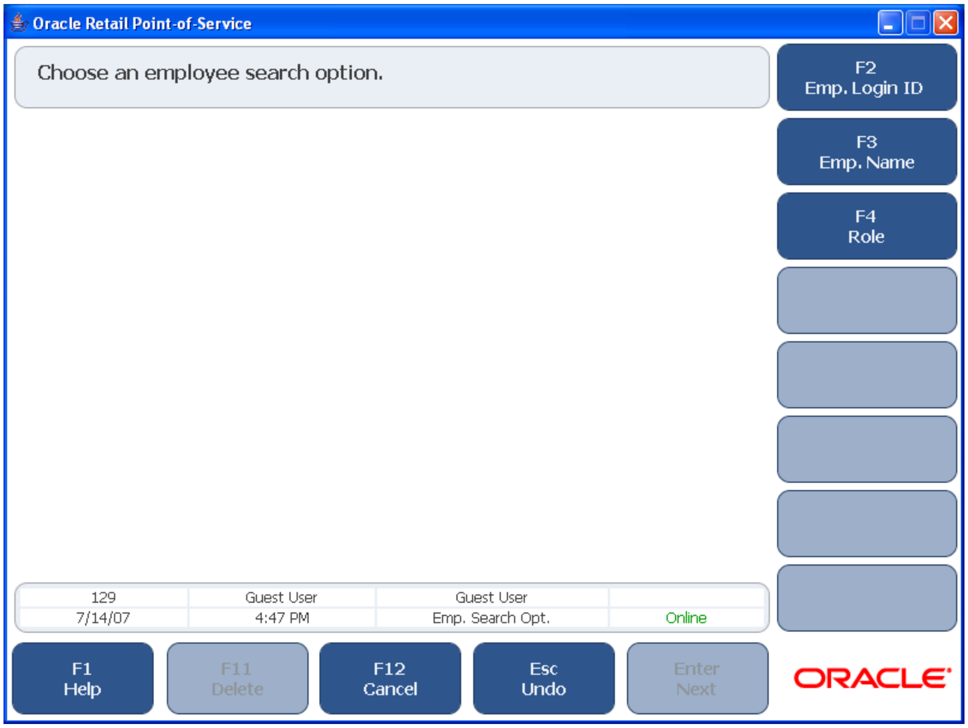
Find Employee

Find Employee enables you to search for an existing employee. You can edit the employee information including resetting the employee's password.

To search for an employee:

1. Press **F2/Find**. The Emp. Search Opt. screen is displayed.

Figure 9–2 Emp. Search Opt. Screen



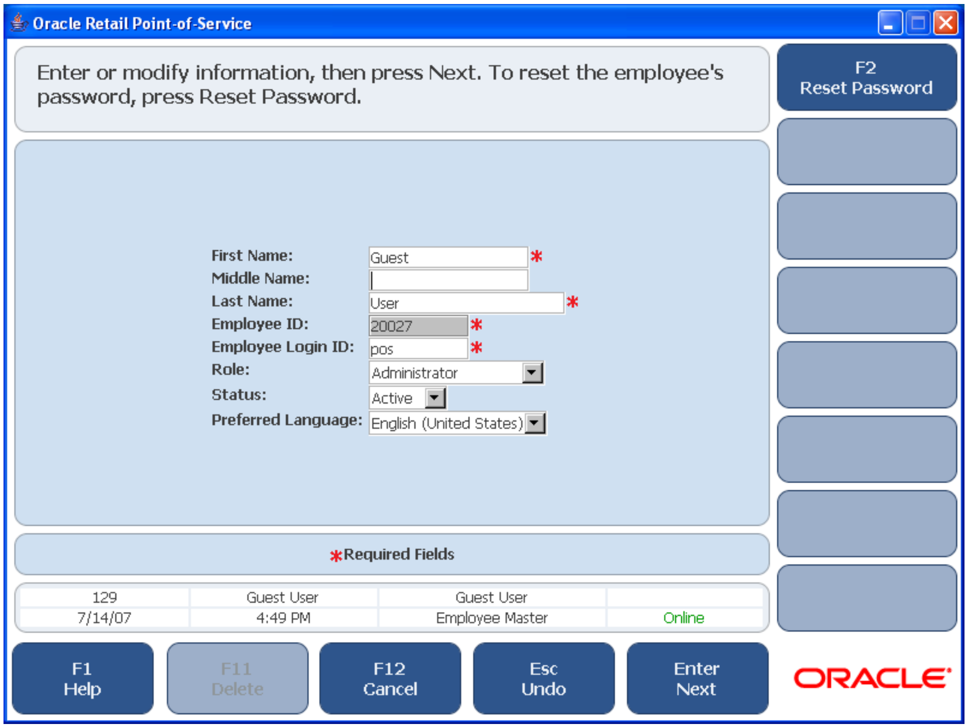
2. Select the criteria for the search:

   - To search by employee ID, press **F2/Emp. Login ID**. The Find Employee ID screen is displayed. Enter the employee ID and press **Enter/Next**.
   - To search by employee name, press F3/**Emp. Name**. The Find Emp. Name screen is displayed. Enter a first and last name and press **Enter/Next**.
   - To search by role, press **F4/Role**. The Find Emp. Role screen is displayed. Select a role from the menu and press **Enter/Next**.

   If more than one employee is found that matches the selection criteria, the Employee Select screen is displayed. Choose the employee form the list and press **Enter/Next.**

   The Employee Master screen is displayed.

Figure 9–3 Employee Master Screen



Changing Employee Information

To change the employee information:

1. Enter any changes to the employee name or login ID. Select a different role, status, or preferred language from the menus.

> **Note:** The only language currently supported for the preferred language is English (United States).

2. To reset the password, press **F2/Reset Password**. The Reset Password dialog is displayed.
   - To confirm the password reset, click **Yes**. The temporary password is displayed. It should be written down and given to the new employee. This is the only time the password is displayed.
   - To not reset the password, click **No**.
3. To save the changes, press **Enter/Next**.

Add Employee

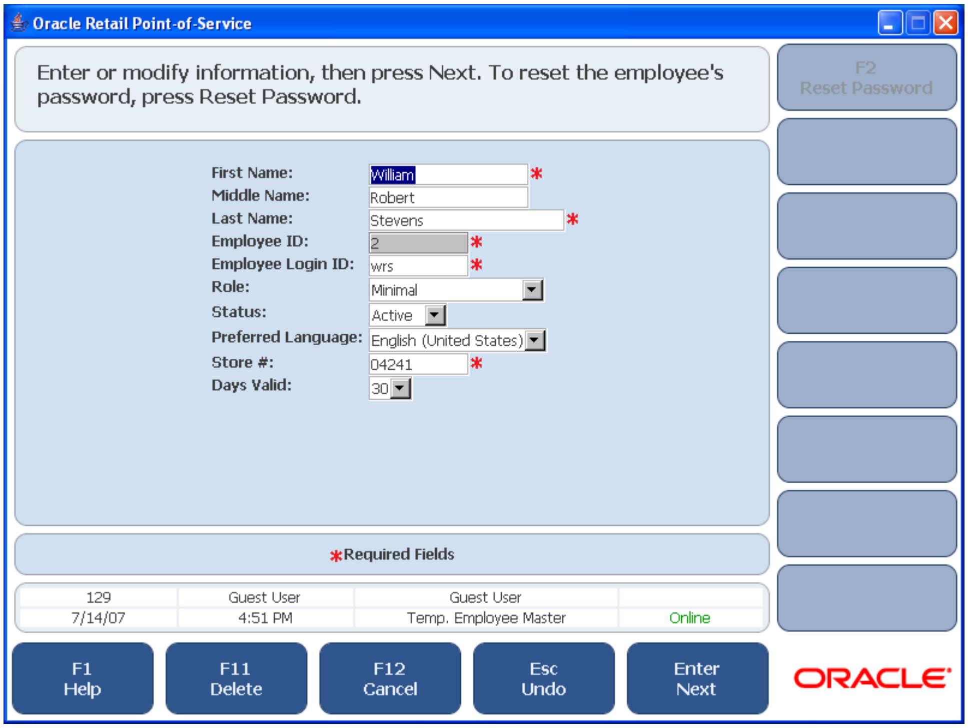
A new permanent or temporary employee can be added.

To add a new employee:

1. Press **F3/Add**. The Emp. Add Opt. screen is displayed.

2. Select the type of employee to add:
   - To add a permanent employee, press **F2/Standard**. The Employee Master screen is displayed. See Figure 9–3.
   - To add a temporary employee, press **F3/Temp**. The Temp. Employee Master screen is displayed.

Figure 9–4 Temp. Employee Master Screen



3. Add the employee information:
   - Enter the employee name and login ID.
   - Select the role, status, and preferred language from the menus.

   Note: The only language currently supported for the preferred language is English (United States).

   - Enter the store number.
   - Select the number of days the employee will be working from the menu.
4. Press **Enter/Next**.
   - If the information matches an existing employee, the Emp. Select Add screen is displayed. The list shows any employees with the same name as the employee being added. You can choose to save the information for the new employee or select an existing employee.
   - The temporary password is displayed. It should be written down and given to the new employee. This is the only time the password is displayed.

10

Training Mode and Transaction Re-entry Mode

Training mode and transaction re-entry mode are two functions that can be enabled to access Oracle Retail Point-of-Service operations in a different way. Training mode provides the ability to train sales associates on certain Oracle Retail Point-of-Service functions without affecting business information. Transaction re-entry mode enables you to re-enter any transactions that could not be entered into Oracle Retail Point-of-Service at the time the transaction occurred. Both functions are available from the Main Menu Options screen.

Note: It is important to know that while in training mode, transaction data is not stored in the database, whereas in re-entry mode all transaction data is written to the database.

The following functions are described in this chapter:

- Using Training Mode
- Using Transaction Re-entry Mode

Using Training Mode

The training mode component gives you the opportunity to train on a register without affecting Oracle Retail Point-of-Service. For example, a new cashier can use this feature to practice completing transactions, and a new manager can learn how to add new employees into the database.

To operate in training mode, a regular transaction must not be in process and the register must be opened. When in training mode, the annotation *Training Mode* is displayed in the status communication region of each screen, and the screen colors are different to make you fully aware that training mode is on.

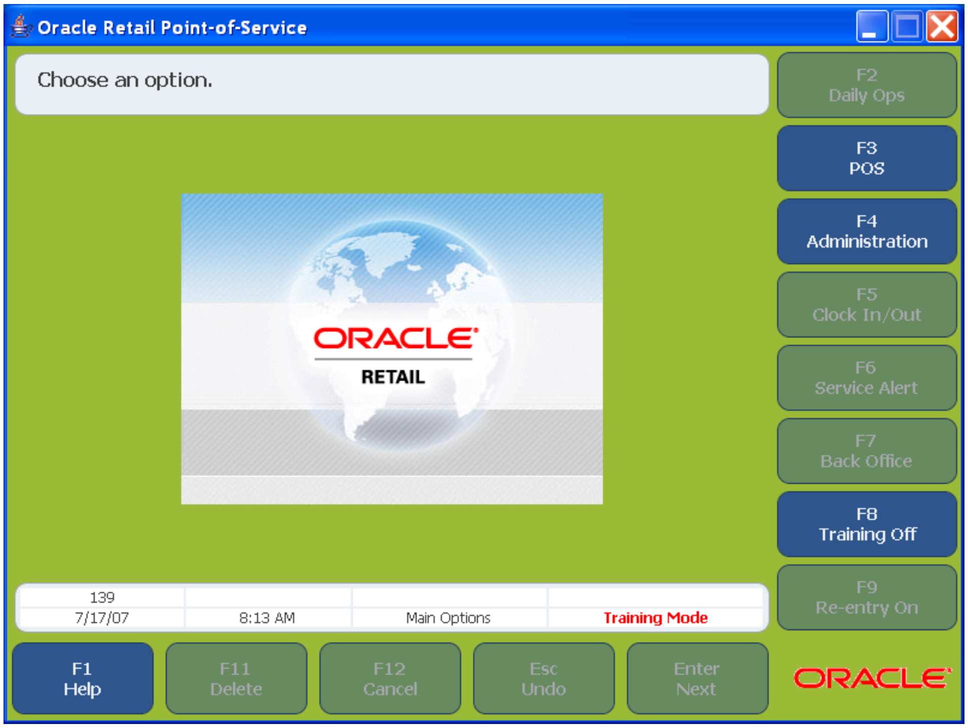
To activate the training mode option:

1. Press **F8/Training** on the Main Options screen. The Identification screen is displayed.
2. You are prompted to log in. See Overview in Chapter 1 for more information. After logging in, the screen changes color and Training Mode is displayed in the communication status region.

> **Note:** When in training mode, only **F3/POS**, **F4/Administration**, and **F8/Training Off** are available.

3. Press **F3/POS** or **F4/Administration** to train on these components.

Figure 10–1 Main Options Screen in Training Mode



To set training mode to off:

1. Press **F8/Training Off** from the Main Options screen.
2. Enter your user ID and password.
3. Press **Enter/Next**. The screen color changes, the application returns to the Main Options screen, and the communication status region is Online.

Training Mode Functionality

In training mode, you are welcome to perform various tasks in order to fully familiarize yourself with the Oracle Retail Point-of-Service application functions. None of the transactions or changes affect Oracle Retail Point-of-Service or the database. After exiting training mode, all new/altered data is deleted from Oracle Retail Point-of-Service. You can still print receipts and slips while in training mode. However, receipts have *Not a Receipt, Training Mode* annotated at the bottom. Similarly, slip prints have *Training Mode* annotated at the bottom when printed.

Table 10–1 describes the key differences for the POS and Administration functions while operating in Training Mode.

Table 10–1 Key Differences for POS and Administration Functions in Training Mode

Function	Key Differences
F3/POS	■ Gift Certificate/Store Credit Validation are not executed when Oracle Retail Point-of-Service is in training mode. ■ All gift cards sold in training mode are automatically activated, and the simulation value is $10. ■ All authorization steps are skipped for credit, debit, check, and gift cards when Oracle Retail Point-of-Service is in training mode.
F4/Administration	■ The parameters, reason codes, and reset totals functions are not available in training mode.

Security and Parameter Settings

Security is enforced in training mode. While in training mode, you are not allowed to access any functionality that you would not be able to access during normal operation.

Training mode transactions use only existing parameter settings and values. Table 10–2 describes the three key parameter settings that can be set before entering training mode. You do not have access to these parameters while you are in training mode.

Table 10–2 Parameter Settings and Definitions

Parameter	Definition
Open Drawer In Training Mode	This parameter setting enables and disables drawer opening when in training mode. If set to Y, the drawer opens for all transactions that use this parameter. If set to N, the drawer does not open in training mode. The default setting for this parameter is N.
Send Training Mode Transaction to Journal	This parameter determines whether transactions created during training mode are added to the e-journal. If set to N, training mode transactions are not be added to the e-journal. If set to Y, training mode transactions are added to the e-journal and are annotated with *Training Mode*. The default setting for this parameter is Y.
Send Training Mode Transactions to POSlog	This parameter indicates whether transactions created during training mode are added to the POSlog. If set to N, training mode transactions are not added to the POSlog. If set to Y, training mode transactions are added to the POSlog. The default setting for this parameter is Y.

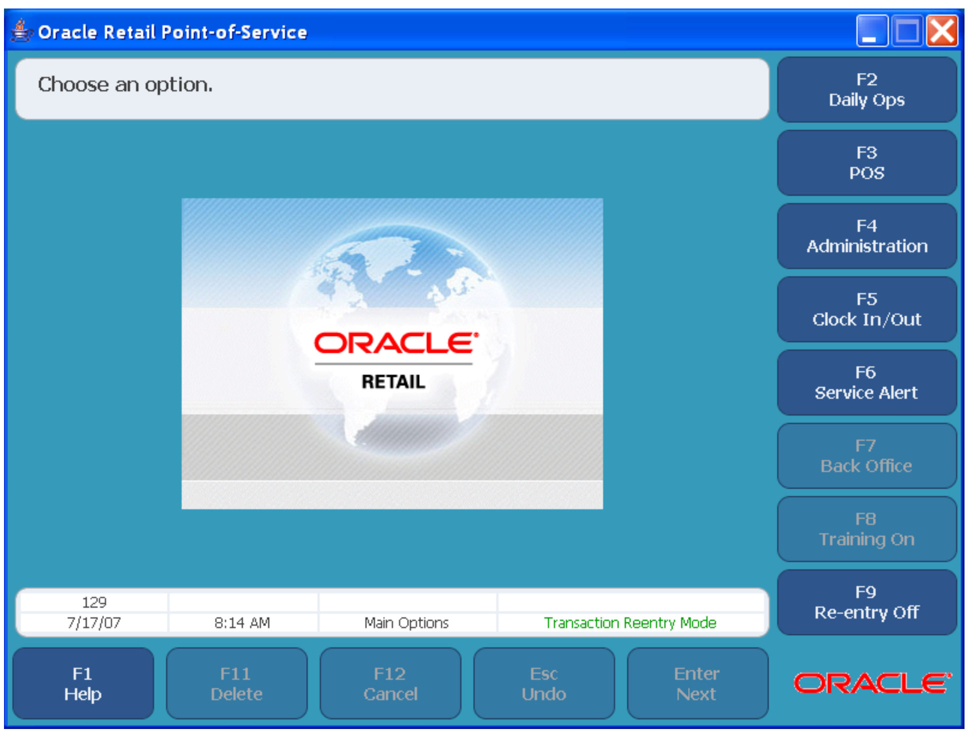
Using Transaction Re-entry Mode

When something occurs during a business day that makes it physically impossible for the sales associates to enter transactions in Oracle Retail Point-of-Service (for example, when there is a power outage), you can re-enter those transactions at the end of the day using the transaction re-entry mode. When in re-entry mode, the annotation *Transaction Re-entry Mode* is displayed on the status communication region of each screen, and the screen colors change to make it clear that transaction re-entry mode is turned on.

To activate transaction re-entry mode:

1. Press **F9/Re-entry On** from the Main Options screen. The Identification screen is displayed.
2. You are prompted to log in. For more information on logging in, see Logging In and Out in Chapter 1. After logging in, the Transaction Reentry On dialog is displayed. The dialog informs you that re-entry mode is now enabled.
3. To continue, press **Enter**. The Main Options screen in the re-entry mode is displayed. The screen changes color and the annotation *Transaction Reentry Mode* is displayed in the communication status region.

Figure 10–2 Main Options Screen in Re-entry Mode



To set re-entry mode to off:

1. Press **F9/Re-entry Off** from the Main Options screen. The Identification screen is displayed.
2. Enter your user ID and password. After you enter them, the Transaction Reentry Off dialog is displayed. The dialog informs you that transaction re-entry mode is now disabled.

3. To continue, press **Enter**. The screen colors change, the application returns to the Main Options screen, and the communication status region is Online.

Re-entry Mode Functionality

While in re-entry mode, all the Oracle Retail Point-of-Service components are available to you with the exception of training mode and access to Oracle Retail Back Office. Security is enforced in re-entry mode. You are not allowed to access any functionality that you would not be able to access during normal operation.

While the register is in re-entry mode, Oracle Retail Point-of-Service does not dial out for authorization on tenders that require authorization. This includes authorization for deposited checks, credit, and gift cards. Instead of authorization requests, each transaction is authorized by Oracle Retail Point-of-Service. No authorization number is printed on the receipt and journal.

All transactions entered in re-entry mode are flagged as re-entry transactions. They all count toward the current business day. All receipts printed while in re-entry mode have *Transaction Re-entry* annotated at the bottom. Slips, however, are printed as normal.

While in re-entry mode, keep the following in mind:

- Debit cards and foreign currency are not accepted in re-entry mode.
- Although all gift certificates and store credits are accepted in re-entry mode, Gift Certificate and Store Credit validations are not executed.
- The price adjustment option is not available in re-entry mode.
- The cash drawer does not open in re-entry mode.