Oracle® Retail Point-Of-Service

User Guide Addendum

Release 12.0.9IN

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Oracle® Retail Point-Of-Service User Guide Addendum, Release 12.0.9IN

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Value-Added Reseller (VAR) Language

Oracle Retail VAR Applications

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Contents

Preface

This document explains the enhancements and modifications made to Oracle Retail Point-Of-Service (POS) Release 12.0.9IN to support India specific business requirements.

Audience

This document is intended for business and technical users to understand the new functionality. This document only explains the changes made to the POS application, it is suggested that you refer the *POS User Guide* to understand the base functionalities.

Related Documents

For more information, see the following documents in the Oracle Retail Point-Of-Service documentation set:

- *Oracle Retail Point-Of-Service Release Notes*
- *Oracle Retail Point-Of-Service Online Help*
- *Oracle Retail Point-Of-Service Installation Guide*
- *Oracle Retail Strategic Store Solutions Data Model*
- *Oracle Retail Point-Of-Service Operations Guide*

See also:

- Oracle Retail Merchandising System 12.0.10IN documentation
- Oracle Retail Integration Bus12.0.9IN documentation
- Oracle Retail Invoice Matching 12.0.8.4IN documentation
- Oracle Retail Store Inventory Management 12.0.10IN documentation
- Oracle Retail Price Management 12.0.10IN documentation
- Oracle Retail Back Office 12.0.9IN documentation
- Oracle Retail Strategic Store Solutions 12.0.9IN documentation
- Oracle Retail Central Office 12.0.9IN documentation
- Oracle Retail Security Manager 12.0.4 documentation

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

https://metalink.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

If you are installing the application for the first time, you install either a base release (for example, 12.0) or a later patch release (for example, 12.0.10IN). If you are installing a software version other than the base release, be sure to read the documentation for each patch release (since the base release) before you begin installation. Patch documentation can contain critical information related to the base release and code changes that have been made since the base release.

Oracle Retail Documentation on the Oracle Technology Network

In addition to being packaged with each product release (on the base or patch level), all Oracle Retail documentation is available on the following Web site:

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

Documentation should be available on this Web site within a month after a product release. Note that documentation is always available with the packaged code on the release date.

Conventions

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

> **Note:** This is a note. It is used to call out information that is important, but not necessarily part of the procedure.

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

A hyperlink appears like this.

Disclaimer

The User Guide addendum has been documented based on the current understanding of the product requirements. These requirements are subject to change based on review during subsequent stages by various stakeholders during review of the functional specifications.

1
India Localization Overview

Oracle Retail Point-of-Service (POS) is an application designed to enable customer-centric retailers to carry out day-to-day transactions. Oracle Retail Point-of-Service is comprised of Daily Operations, POS, Administration, Clock In/Out, Service Alert, Back Office (Back Office button is not enabled), Training On, and Item Inquiry component areas.

With India Localized version of POS, some of the major changes are:

- New Address Format
- Configurable Tax
- MRP Changes
- Receipt Layout
- Rounding Logic

New Address Format

POS captures the address as per the Indian format. You can add customers, search customers on the basis of customer ID or customer address, link transactions to customers, and perform returns on the basis of customer ID.

Configurable Tax Logic

With India Localization patch applied, Tax information such as tax category, VAT code, VAT rate, application order and applied on is downloaded from RMS. Tax is calculated at an item line level for a sale transaction based on tax category associated to it. Taxes are applied on selling retail or tax value. The Selling Retail, downloaded from RMS, is tax inclusive.

For every transaction, the tax category is used to determine the tax amount based on the tax assignment data for the tax category. Each tax category may have multiple tax assignments. The tax assignment data is used to calculate the tax primarily comprises of the following:

- Tax Region – The region in which the store is located. Stores belonging to same Tax Region have same Tax Assignment for a given Tax Category.
- Tax Code - VAT, Cess, Surcharge etc.
- Tax Rate - Vat rate, Cess rate etc.
- Application order - sequence in which the taxes are applied, if multiple taxation is required for the item.
- Applied on – The taxable base, for example Retail, VAT amount etc.

The formula to calculate the tax exclusive value is

```
selling retail = tax inclusive selling retail / (1 + total tax)
```

> **Important**: In POS, for a store the **From Tax Region** and **To Tax Region** is same. Hence POS will not be able to support taxation related to scenario when the item from a store is being delivered to a location with a different tax region.

If the tax category of an item is not associated to any tax assignment, tax is not calculated for that item. Such item will have zero tax amounts.

For example, if the VAT on Retail value is 10% and Cess on VAT is 5%, and the Selling Retail is Rs. 1000, then the tax exclusive selling retail is

1000/ (1+ (10/100) + ((10/100)*(5/100))) = Rs. 904.97

VAT applied to the tax exclusive selling retail is 904.97 * 10 /100 = Rs.90.49.

Cess tax amount applied to VAT is 90.49 * 5 /100 = Rs. 4.52.

Total tax applied to the Item sale = Rs. 95.02.

Note: No modifications are made to the tax override functionality and screens. As per base application, when VAT is enabled the Tax Override functionality is disabled.

MRP Changes

The primary MRP and the non-primary MRP for an item are uploaded to POS from RPM. The MRP is reflected in Sell Item screen, Item screen, Tender screen, Pricing screen, Item Inquiry screen and others.

Multiple MRP and Selling Price less than MRP indicators in POS, downloaded from RMS, indicates whether an item supports Multiple MRP and whether the selling price of an item should always be less than MRP of the item respectively.

Receipt Layout

The Sales Receipt has been modified to display complete transactional details. New fields have been added to the Sales receipt which helps the consumer in identifying line item sale transactions. New fields such as MRP of the item, Retail Selling of the item, **T** indicating item is taxable, Total payable Amount, Total Rounded amount, Total Savings, Rounded Off Amt (Rounded Amt and the Rounded Off Amt is displayed, only if the rounding logic is enabled in the POS installation or configuration), and Tax Breakup Details.

Tax Registration Details, downloaded from RMS, can also be printed on the sales receipt.

Rounding Logic

New Rounding Logic has been introduced to ensure the tender balance is rounded and maintained as per the configuration settings. The Rounding parameter is defined in POS to provide the flexibility for rounding to suggested denomination and is performed for all tender types.

2

Enabling India Localization

The Indian Localization is applied through installer option, where in the locale, select the Indian locale **en_IN**. The Indian Localization cannot be disabled once the installation has been made with India locale.

> **Note**: In case of third party POS integration, the new code should be integrated with POS.

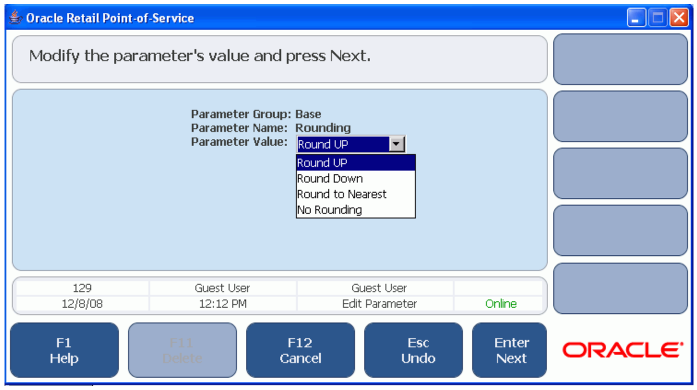
Administration and Configuration

Rounding Logic

New Rounding Logic has been introduced to ensure the tender balance is rounded and maintained as per the configuration settings. The Rounding parameter is defined in POS to provide the flexibility for tender rounding to suggested denomination.

The rounding logic can be enabled or disabled using a parameter Rounding Logic. If Rounding Logic is enabled, the rounding will be defined by the Rounding Denominations parameter. The rounded value of the total sale value depends on the values defined for the Rounding Denomination. The Rounding parameter has four values in the drop-down list:

- **No Rounding** - No rounding logic is applied on the transaction total sale, if the Rounding parameter is set to No Rounding.
- **Round Up** - The actual total amount is rounded up to the nearest rounding denomination. For example, the actual total value is Rs.500.79, if the denomination value is set to Round Up to multiples of 25, the total will be rounded up to a value of Rs. 501.
- **Round Down** - The actual total amount is rounded down to the nearest rounding denomination. For example, if the subtotal value is Rs.500.79, if the denomination value is set to round Down to multiples of 50, the total will be rounded down to Rs.500.50.
- **Rounding to Nearest** - The actual total amount is rounded up or rounded down to the nearest rounding denomination. For example, the actual total value is Rs.500.79, if the denomination value is set to Rounding to Nearest to multiples of 100, the total will be rounded to Rs.501.



Parameter Value Setting

Table 1 – Table showing the Rounding Logic Applied to the Actual Total Value

Scenario	Actual Total	Denominations	Rounding	Rounded Amount	Rounded off Amount
1	79.40	25, 50, 75, 100	Round Up	79.50	+0.10
2	79.40	25, 50, 75, 100	Round Down	79.25	-0.15
3	79.40	25, 50, 75, 100	Rounding Nearest	79.50	+0.10
4	79.32	25, 50, 75, 100	Rounding Nearest	79.25	-0.07
5	79.40	100	Rounding Nearest	79.00	-0.40
6	79.60	100	Rounding Nearest	80.00	+0.40

POS publishes two sales amount values for every transaction - the actual sale amount and the rounded sale amount. The rounded sale amount is the final amount that the customer pays.

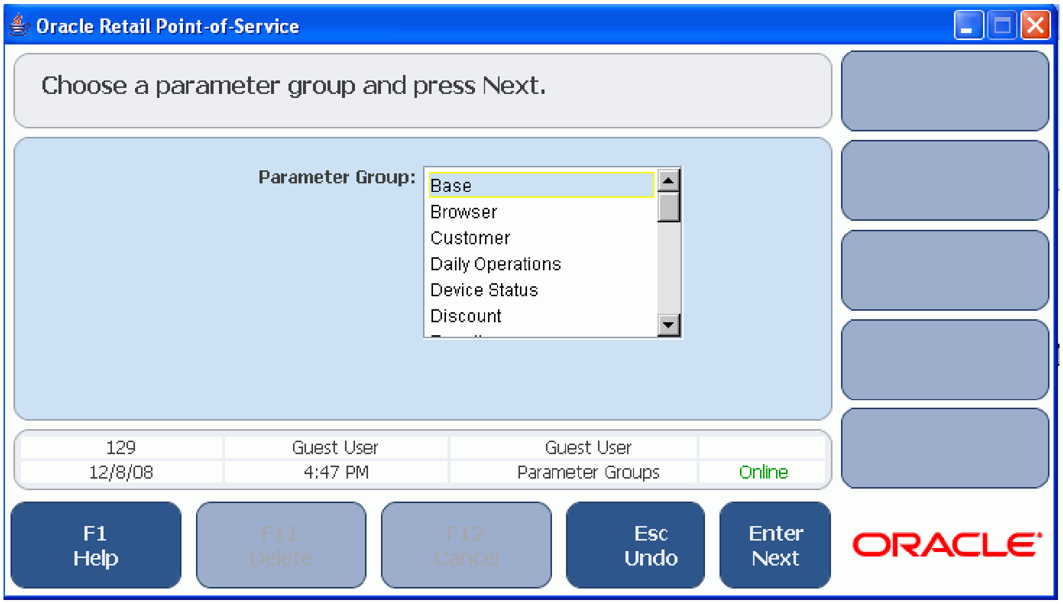
Parameter Maintenance Screen

New parameters for the rounding logic have been introduced in the **Base** Parameter group. The **Rounding** and **Rounding Denominations** parameters decide how the rounding logic will be applied to the total value.

Rounding Parameter

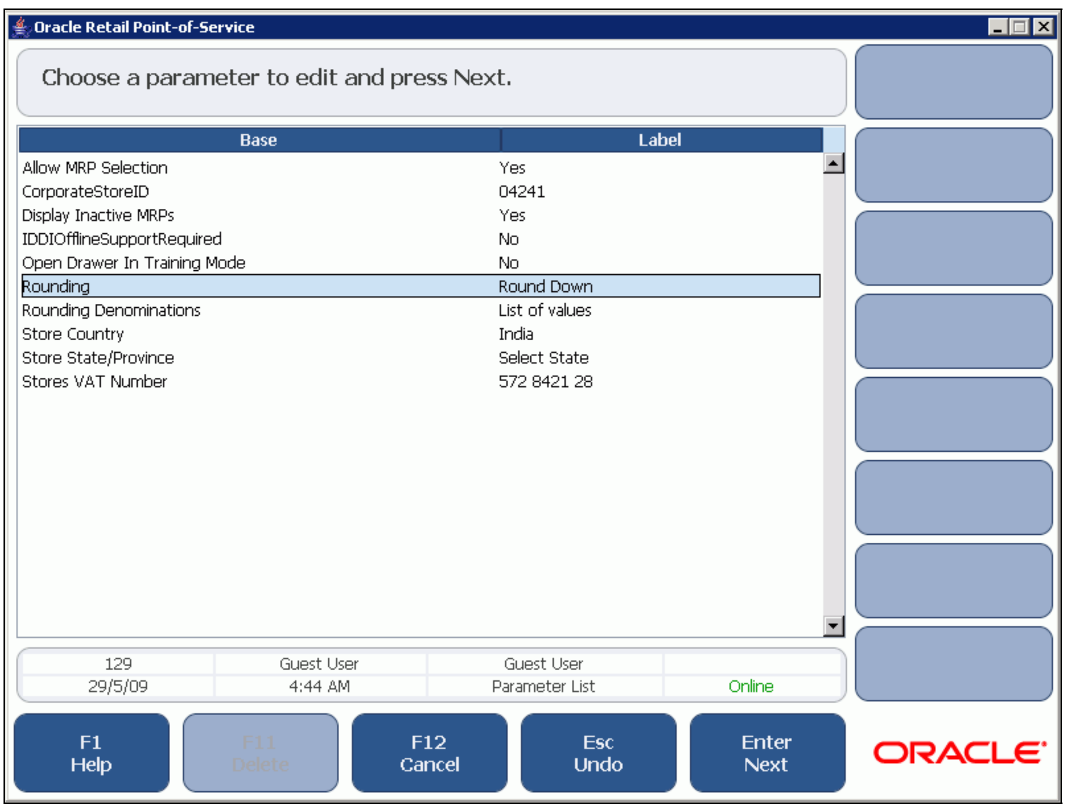
To configure the parameters:

1. From the Main Options, click **Administration**.
2. Enter user ID and password.
3. Click **F4/Security**.
4. Click **F4/Parameters**. The Parameter Group maintenance screen appears.



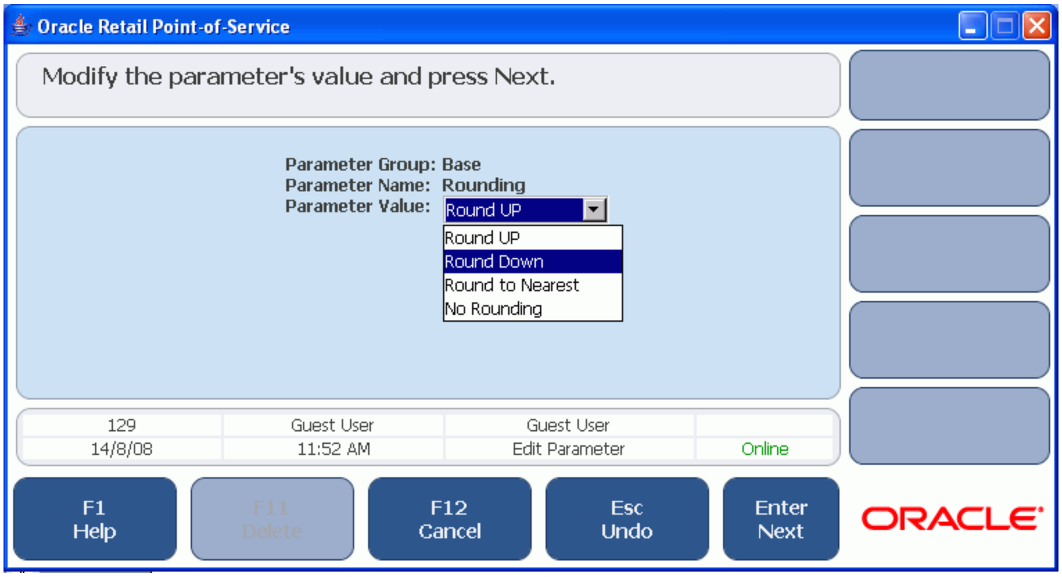
Parameter Group Maintenance Screen

5. Select **Base** from the Parameter Group.
6. Click **Enter/Next**. The Parameter Maintenance screen is displayed.



Parameter Maintenance Screen

7. Select Rounding and click **Enter/Next**. The parameter edit screen appears.



Parameter Edit Screen

8. From the **Parameter Value** drop-down list, select the parameter value as explained in the Rounding Logic section above.
9. Click **Enter/Next** to continue. The Base Parameters screen is returned.

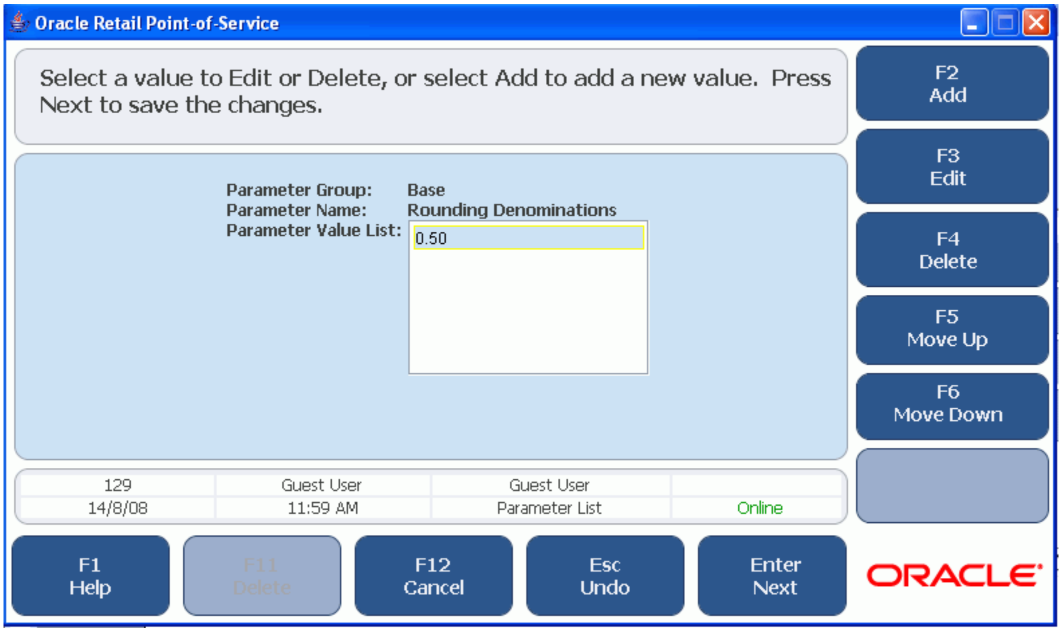
Rounding Denomination Parameter

The Rounding Denomination parameter can have any number of user-entered values. You may add a new value, delete an old value, edit a value, select a value and move it up or down the list.

Adding Denomination Value

To add a denomination value:

1. Select **Rounding Denominations** and click **Enter/Next**. The Edit parameter value screen appears.



Edit Parameter Value Screen

2. Click **F2/Add**.
3. Enter denomination value and click **Enter/Next** to save changes. To add more denominations, again click **F2/Add** and enter denomination value.

Deleting Denomination Value

To delete the existing denomination value:

1. From the **Parameter Value List** drop-down list, select the denomination value.
2. Click **F4/Delete**. A confirmation message appears.
3. Click **Yes**. The selected denomination is deleted from the values list.

Editing Denomination Value

To edit the existing denomination value:

1. From the **Parameter Value List** drop-down list, select the denomination value.
2. Click **F3/Edit**. The Edit value window appears.
3. Enter the new value in the **Enter New Valu**e field.
4. Click **Enter/Next**. The new value is displayed in the denomination value list.

Allowing MRP Selection

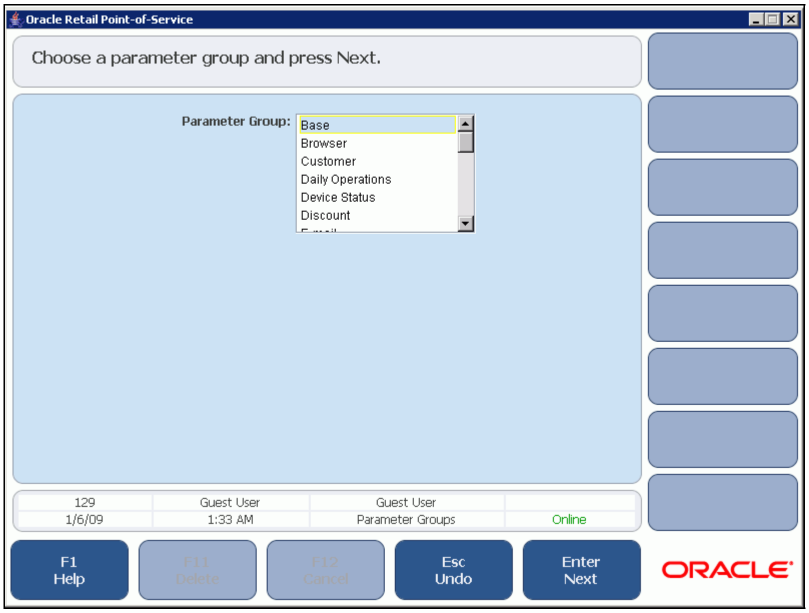
New parameters for multiple MRP selection have been introduced in the Base parameter group. The “Allow MRP Selection” and the “Display Inactive MRPs” parameters allow Multiple MRP Selection for a particular item during sale/return.

Allow MRP Selection Parameter

To configure the parameter:

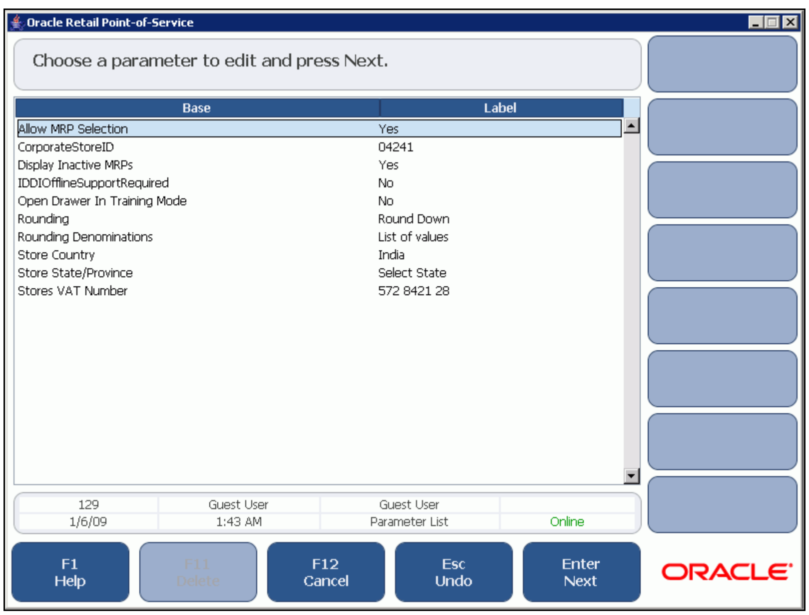
1. From the Main Options, click **Administration**.
2. Enter the ID and password.
3. Click **F4/Security**.

4. Click **F4/Parameters**. The Parameter Groups maintenance screen appears.



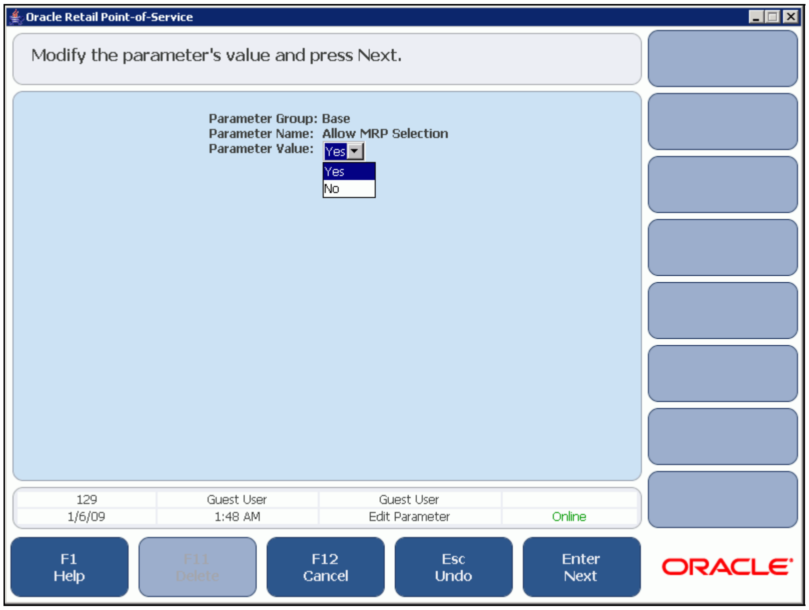
Parameter Group Screen

5. Select **Base** from the Parameter Group.
6. Click **Enter/Next**. The Parameter List screen is displayed.



Parameter List Screen

7. Select **Allow MRP Selection** from the Parameter List screen. Click **Enter/Next**.
8. The Edit Parameter screen appears.



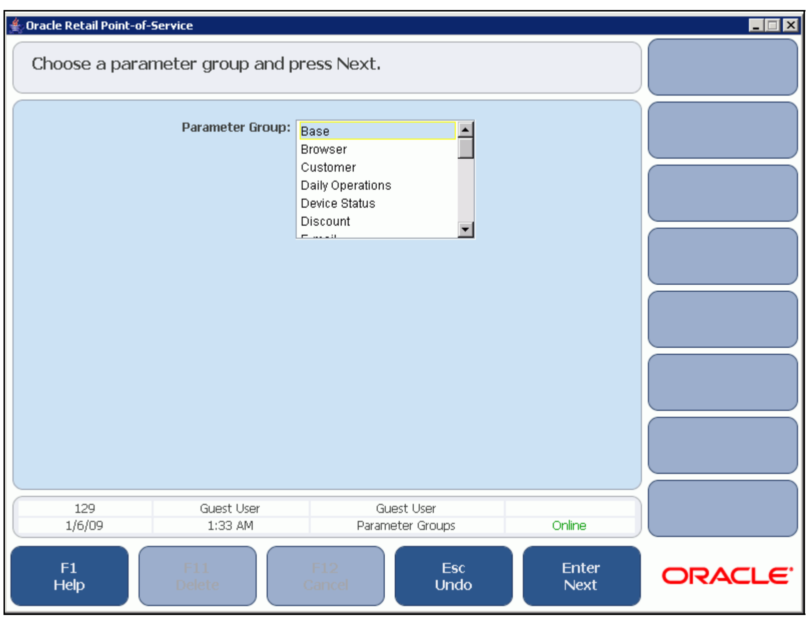
Edit Parameter Value Screen

9. Select 'Yes' or 'No' from the list. Click **Enter/Next** to continue. The Parameters List screen displays the value set in the Edit Parameter screen of the POS application.

Display Inactive MRPs

To configure the parameter:

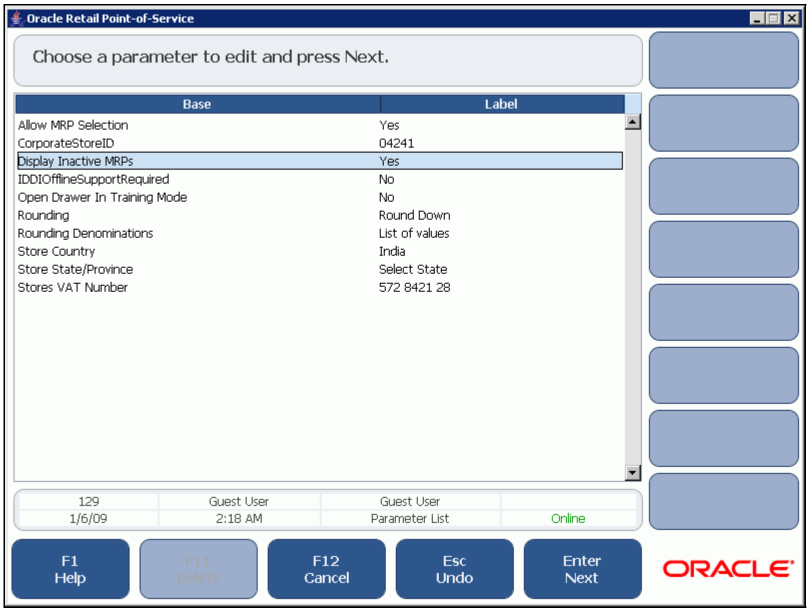
1. From the Main Options, click **Administration**.
2. Enter the ID and password.
3. Click **F4/Security**.
4. Click **F4/Parameters**. The Parameter Group maintenance screen appears.



Parameter Groups Screen

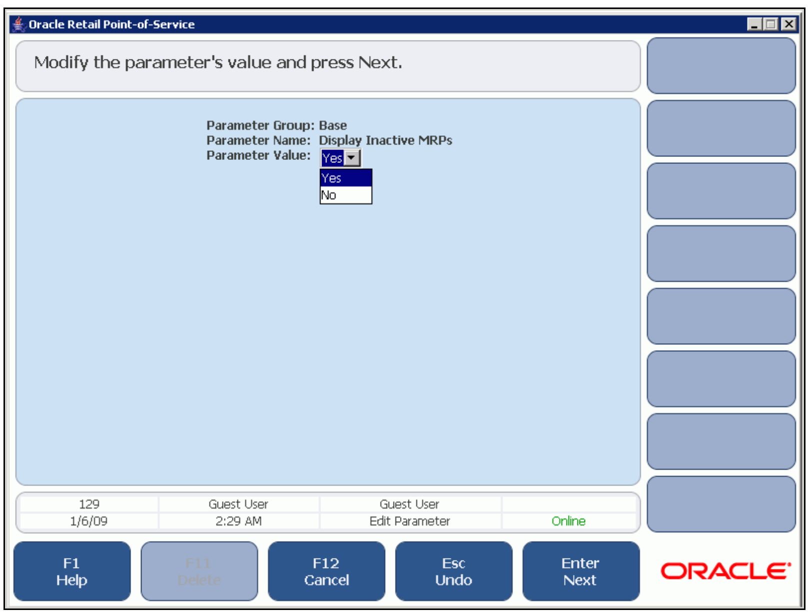
5. Select Base from the Parameter Group.

6. Click **Enter/Next**. The Parameter List screen is displayed.



Parameter List Screen

7. Select Display Inactive MRPs. Click **Enter/Next**. The Edit Parameter window opens.



Edit Parameter Value Screen

8. From the parameter value drop-down list, select 'yes' or 'no.

9. Click **Enter/Next** to continue. The Parameters List screen displays the value set in the Edit Parameter screen of the POS application.

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.

This chapter explains the modifications made to the following sections

- Sell Item Screen
- Sales Receipt Layout
- Returns
- Performing a Item Send (Home Delivery)

Sell Item Screen

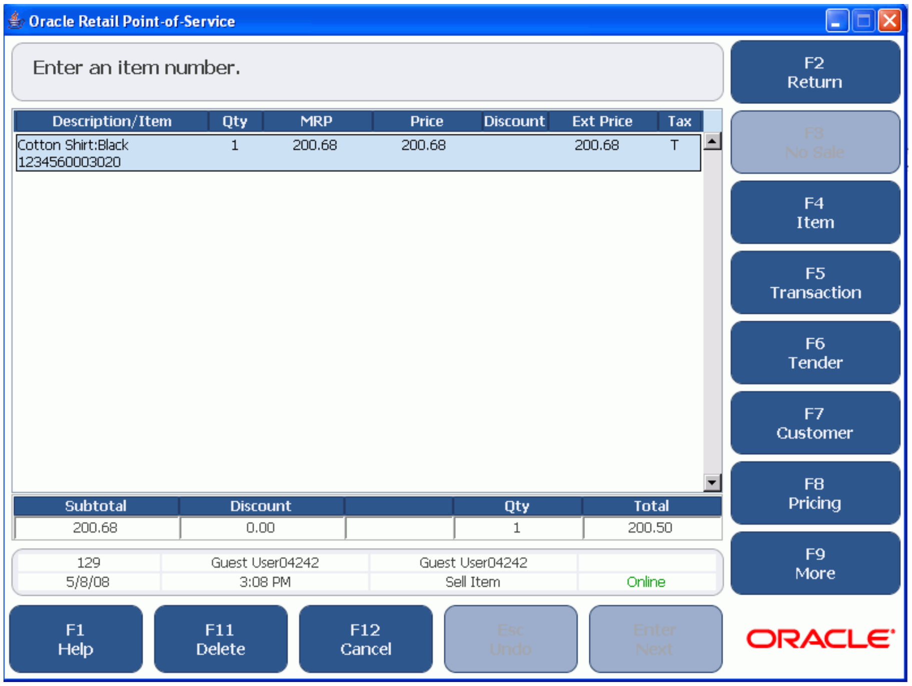
All transactions begin from the Sell Item screen. A transaction is started when an item number is entered on the Sell Item screen. The item number can be entered manually or by scanning a bar code. After all items have been added, the payment process begins. A customer can pay with multiple tenders. The transaction completes when the balance is zero.

With India Localized version installed, the Sell Item screen displays the MRP field. The MRPs for an item are uploaded to POS using the RMS-POS DIMP process. To understand the DIMP process, refer the *Strategic Store Solutions Implementation Guide.*

> **Note**: The Primary MRP flows from RMS only for the first time when the item is created and subsequently it comes from RPM along with non primary MRPs. All the MRPs associated with that item are downloaded to POS. In POS, if the two parameters - Allow MRP Selection and Display Inactive MRPs are set to 'yes', then the multiple MRPs associated with that item are displayed. Else, only the primary MRP is displayed for a sale transaction.

To view the Sell Item screen (only Primary MRP):

1. From the Main Options screen, press **F3/POS**.
2. Enter login information. The Sell Item screen displays the Primary **MRP** of the item.



Sell Item Screen

In the above figure, the **Total** field in the footer displays the rounded amount and the **Price**, **Ext Price** and the **Subtotal** fields display the actual amounts. The Primary MRP of the item is also displayed, which is uploaded to POS using the RMS-POS DIMP process.

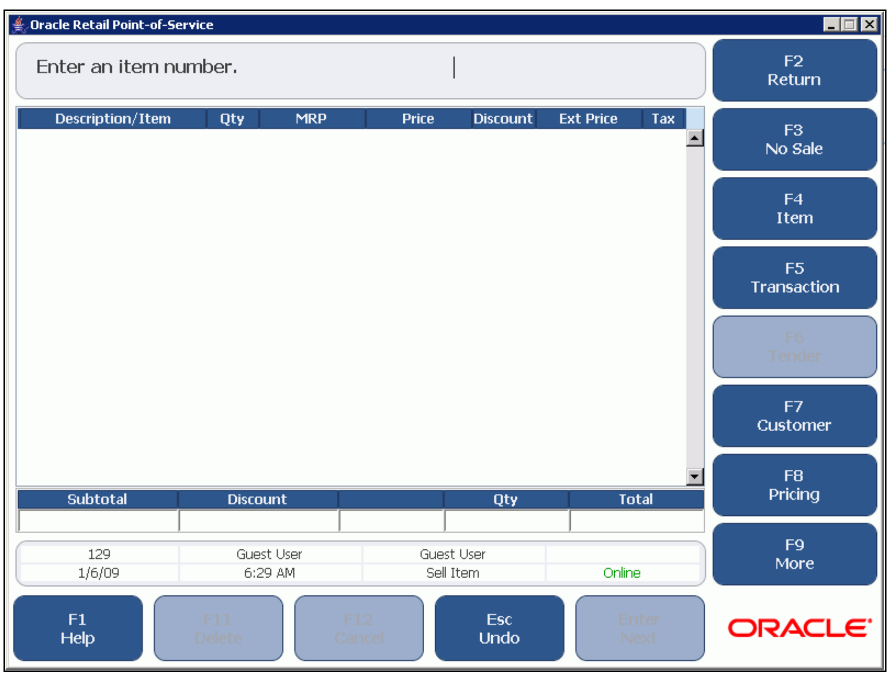
The Item screen (Figure number 7) and the Pricing screen (Figure number 8) displays the MRP of the item as shown in the figures below:

Item Screen

Pricing Screen

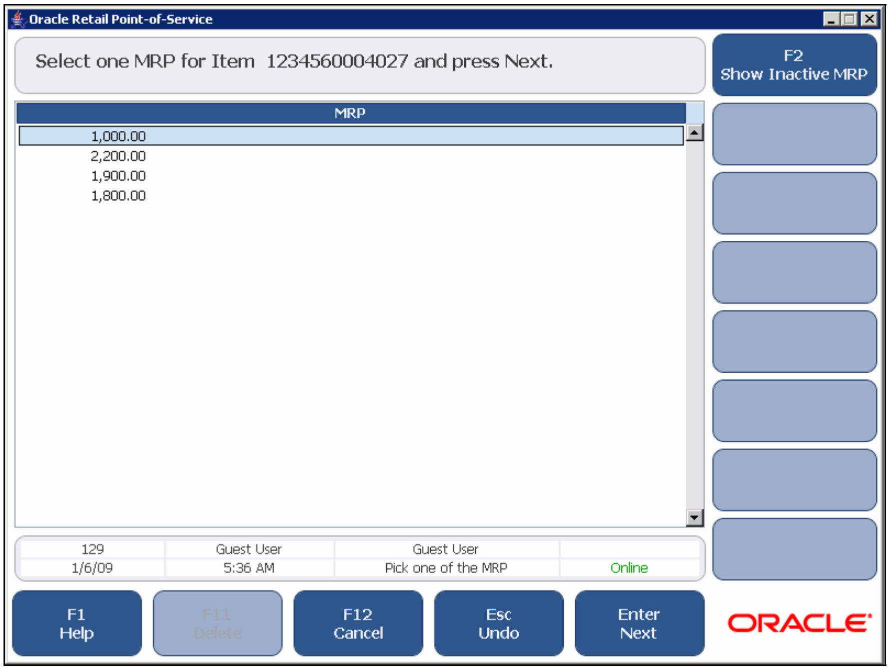
Multiple MRP

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



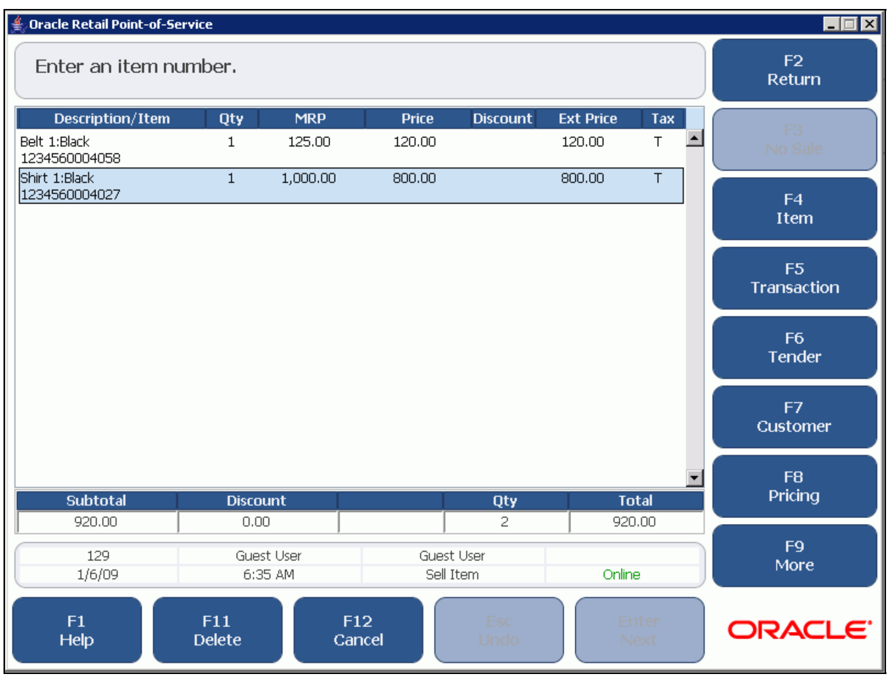
Sell Item Screen

3. Enter the item number. If the item has multiple MRPs associated with it, multiple MRPs are displayed. In the multiple MRP selection screen, the primary MRP is at the top followed by the non primary MRP sorted with the activation date in the reverse chronological order.

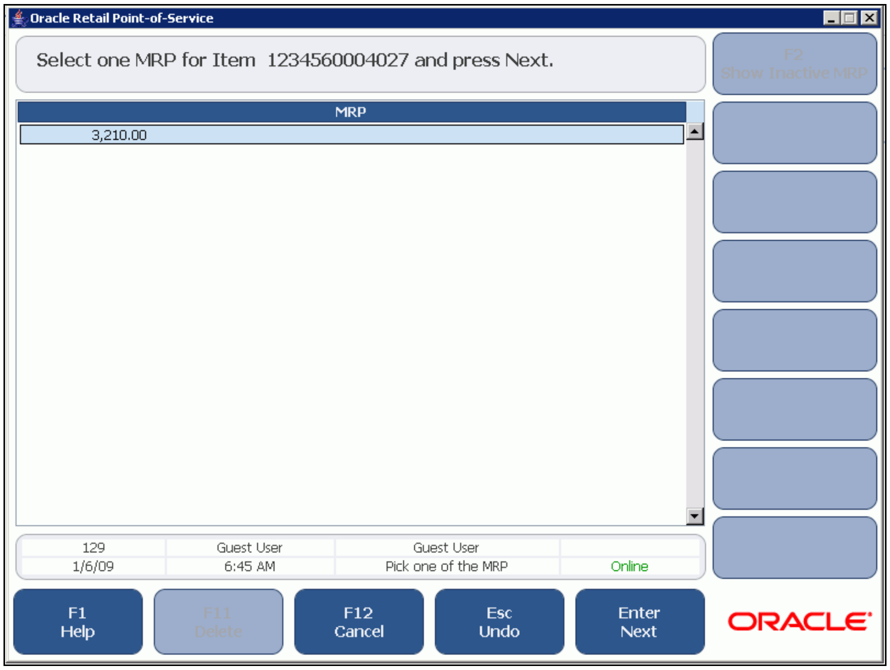


Multiple MRP Screen

4. Select any one of the MRPs, and click **Enter/Next**. The Sell Item screen displays the price for that particular MRP.



5. If you want to see the inactive MRPs, click **F2/Show Inactive MRP** on the Pick one of the MRP Screen. The Inactive MRP associated with that item is displayed.



Pick one of the MRP Screen

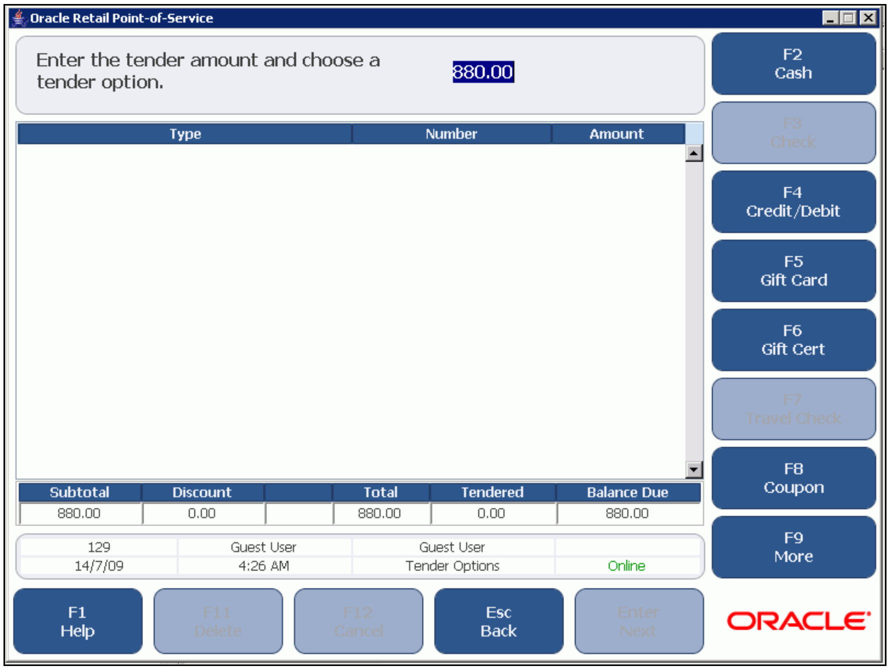
> **Note**: No promotions or discounts are applicable for inactive MRP.

Tender Screen

On the Tender screen, new fields

To access the tender screen:

1. From the Main Options, click **F3/POS**.
2. Enter login credentials.
3. Enter an Item number and click **Enter/Next**.
4. Click **F6/Tender**. The tender screen appears with Tender options.



Tender Screen

On this screen, the following changes have been implemented:

- **Tender Amount** – Field at the header displays the rounded amount.
- **Total** – Total field displays the rounded amount.
- **Balance Due** – Balance Due field displays the rounded amount.
- **Subtotal** – Field at the footer displays the actual total amount.

Sales Receipt Layout

The Sales Receipt has been modified to display complete transactional details. New fields have been added to the Sales receipt which helps the consumer in identifying line item sale transactions. The new fields that are displayed on the Sales Receipt are:

- **Item** – name if the item being sold.
- **MRP** – MRP value of the item which is tax (VAT and tax-on-tax) inclusive.
- **Retail** – Selling retail value of the item which is tax (VAT and tax-on-tax) inclusive.
- **T** appended to the Selling Retail value of the item, indicating item is taxable.
- **Total Amt** – total payable amount of the transaction.
- **Total Rounded** – total amount after rounding off.
- **Rounded Off Amt** – rounded off amount is the difference between the total actual amount and the rounded amount. The Rounded Amt and the Rounded Off Amt is displayed, only if the rounding logic is enabled during POS installation or configuration. The rounded amount value is the amount calculated after applying rounding logic to the total sale transaction value.
- **Tax Breakup Details** contain the following fields:
  - **Tax Name** – Different applicable tax names such as VAT, Cess etc.
  - **Rate%** – rates at which the taxes are applicable.
  - **Taxable** – the total taxable amount on which the tax rate is applied.

– **Tax –** the tax amount.

The taxes are grouped based on the tax code. The taxable amount and the tax amount for all the items in a sale transaction with the same tax code is added and displayed as a single line item. The total of the taxes (calculated by adding tax amount of all the line item) is displayed below the last line item in the Tax Breakup Details section.

- **Total Savings** - the total savings on the sale transaction is calculated using the formula:

  ```
  Total of MRPs for all line items – Total Rounded Amount after all
  discounts
  ```

> **Note:** Items with no MRP and returned items are ignored.

> **Note:** The 5 tax registration numbers will be interfaced to POS from RMS as part of the RMS-POS DIMP process. The assumption is that the tax registration numbers is available in RMS and the integration between RMS and POS with respect to tax registration number exists.
> The printing of the TIN number will not be provided in this scope.

```
                 ORACLE
           500 Oracle Parkway
    Redwood Shores, California 94066
              (650)506-0024
________________________________________
Customer: 31835147


ITEM         MRP   Discount%      Retail
Cotton Shirt:Black
1234560003020
1         200.68        0.00    200.68 T


Total Amt                     200.68

Total Rounded                 200.50

Rounded Off Amt                -0.18

  Cash                        200.50

Total Tender                  200.50

Change Due                      0.00

Total Number of Items/Qty:           1/1
________________________________________

          Tax Breakup Details

TxDesc    Rate %     Taxable         Tax
xxx cess       5        9.53        0.48
xxx VAT 5      5      190.67        9.53
                                    ----
                                   10.01
________________________________________
Till:20 Trans:0042 12:46:50 04-Aug-2008
      StoreID:31835 Reg:129
                  SALE
Barcode 318351290042
Total Savings :  0.00
________________________________________
         Thank you for visiting

                 ORACLE
          17 out of the top 20
         Retailers in the World
        Run Oracle Applications
             www.ORACLE.com

             Customer Copy
________________________________________
Cashier: 20083
Tin No/CST       2222222
```

Sample Sales Receipt Layout

Returns

Return enables the customer to return merchandise for an exchange or refund. A return can be performed if a receipt is available, a receipt is not available, or a gift receipt is available.

You may perform a return on the basis of the following options:

- Item Number
- Customer ID
- Customer Address

- Business Address
- Purchase Date
- Store Number
- Check Number
- Credit Card Number

This document describes performing a return on the basis of customer ID, customer and business address. For other types of returns, refer the *POS User Guide*.

Performing a Return on the Basis of Customer Address Information

While making a Return transaction without a receipt and customer ID, the sales associate can search for a customer based on the first name, last name and address information of the customer in order to link the return to the customer.

To search for a transaction based on the customer Address:

1. From the Main Options, select **POS**.
2. Enter the login information.
3. Select **F2/Return** and then select **F3/No Receipt** option. The Return No Receipt Prompt window appears.
4. Select **F2/Customer** to perform the return using the customer information.
5. Enter the customer ID and click Enter **Next**. The Display Trans. screen is displayed.
6. Select a transaction and press **Enter/Next**. The Select Item screen is displayed.
7. Select **F2/Trans. Detail** and select the transaction that needs to be returned.
8. Enter **Next**.
9. On the Return Information window, enter the quantities that need to be returned.
10. Enter the **Reason Code** from the drop-down list.
11. Select **F6/Tender** and in the next screen, select the mode of payment.
    a. Cash – Select Cash and POS completes the transaction after tendering the cash.
    b. Mail Bank Check – Select Mail Bank Check, POS prints the Mail Bank Check.
    c. Gift Card – Select Gift Card, enter the gift card number.
    d. Store Credit – Select Store Credit, enter the Customer information, POS generates a Store Credit for the customer.

    The transaction is complete when the balance amount is zero.

Performing a Return on the Basis of Business Address Information

To search for a transaction based on the business Address:

1. From the Main Options, select **POS**.
2. Enter the login information.
3. Select **F2/Return** and then select **F3/No Receipt** option. The Return No Receipt Prompt window appears.
4. Select **F2/Customer** to perform the return using the customer information.
5. Select **F2/Find** and then select to find the customer on the basis of **F5/Business Info**.
6. Enter the business information and click **Enter**/**Next**. The customer information is displayed.
7. Select **F2/Link** to link the return to the customer. The transaction detail is displayed.
8. Select a transaction and click **Enter/Next**. The Select Item screen is displayed.

9. Select **F2/Trans. Detail** and select the transaction and click **Next**. The return information screen is displayed.
10. Modify the **Quantities**, if need to, and provide a **Return Reason Code** by choosing the drop-down list.
11. Select **F6/Tender** and then select the mode of payment.
    a. Cash – Select Cash and POS completes the transaction after tendering the cash.
    b. Mail Bank Check – Select Mail Bank Check, POS prints the Mail Bank Check.
    c. Gift Card – Select Gift Card, enter the gift card number.
    d. Store Credit – Select Store Credit, enter the Customer information, POS generates a Store Credit for the customer.

    The transaction is complete when the balance amount is zero.

Linking Returns to Customer ID

1. From the Main Options, select **POS**.
2. Enter the login information.
3. Select **F2/Return** and then select **F3/No Receipt** option. The Return No Receipt Prompt window appears.
4. Select **F2/Customer**.
5. Select **F2/Find** and then select to find the customer on the basis of **F2/Customer ID**.
6. Enter the customer ID and click **Enter/Next**. The customer information is displayed.
7. Updated the customer information and select **F2/Link** to link the return to the customer.

Performing a Return

Return enables the customer to return merchandise for an exchange or refund. A return can be performed if a receipt is available, a receipt is not available, or a gift receipt is available.

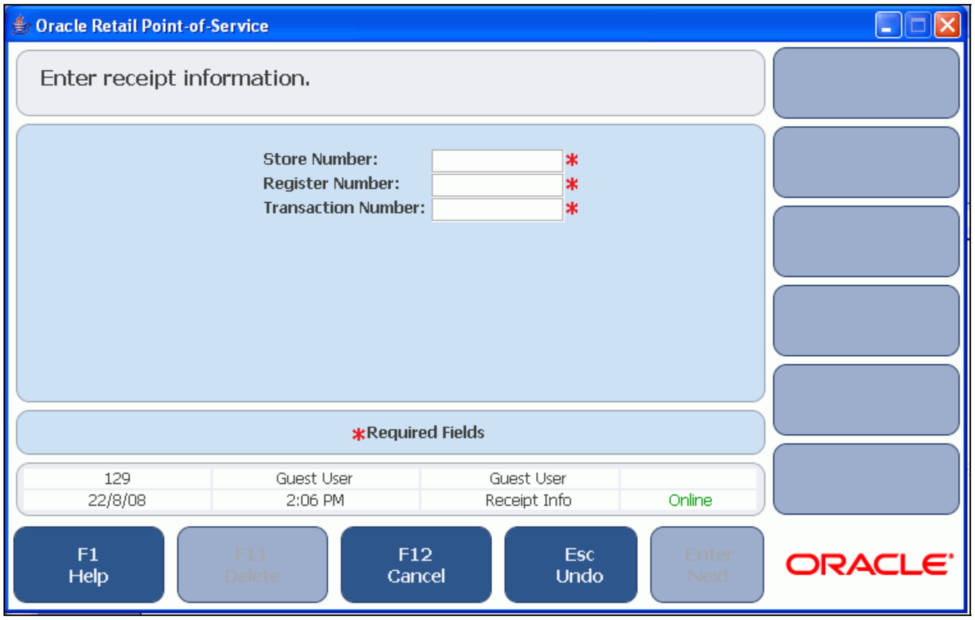
With India Localization changes, the return with receipt screen has been modified to include MRP. POS can calculate tax for a return item based on the persisted transaction data. Transaction data is persisted for a time period as per the return policy. For example, if the return policy is to accept returns with receipt within a period of 6 months from the date of purchase, then the transaction data should be persisted for a period of 6 months.

> **Note:** For returns without receipt, the latest tax assignment data for the return item is applied. Any change in the tax data between the date of purchase and date of return for the return item is not accounted for. Hence there might be a difference between the tax applied on date of purchase and tax applied on date of return.

Returns with Receipt

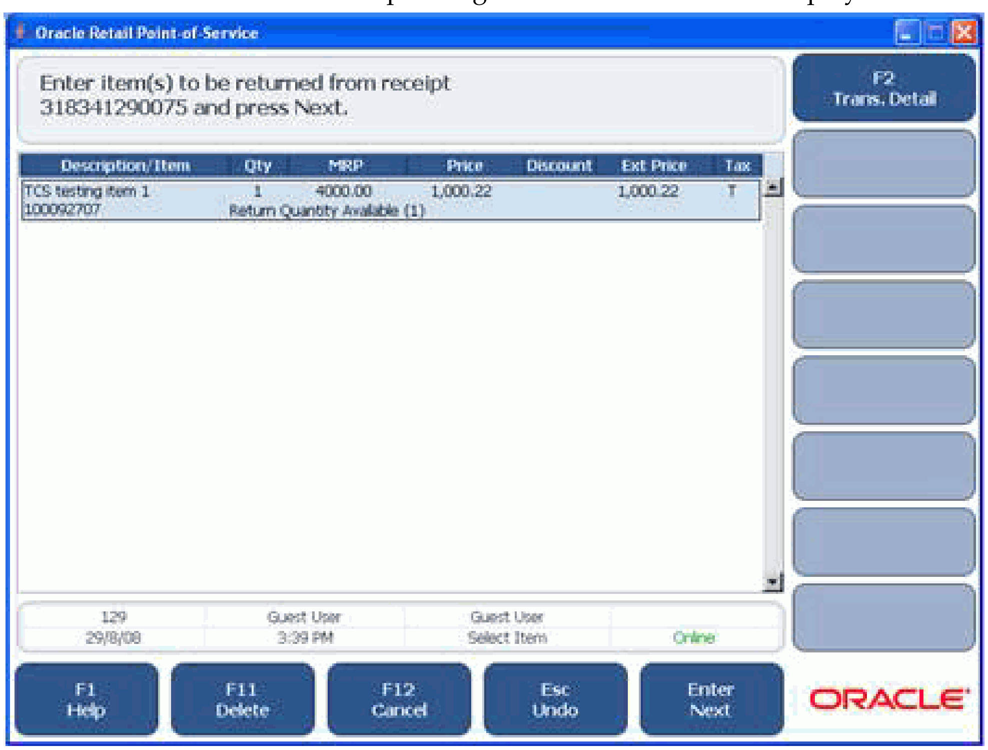
To perform a return with receipt:

1. From the Main Options, select F3/**POS**.
2. Enter the login information.
3. Select **F2/Return** and then select **F2/ Receipt** option. The Receipt Prompt window appears.



Receipt Prompt Screen

4. Enter the **Store Number**, **Register Number,** and **Transaction Number** to search the receipt. All the three fields are mandatory to search the receipt.
5. Click **Enter/Next**. The corresponding Transaction Details are displayed.



Return with Receipt

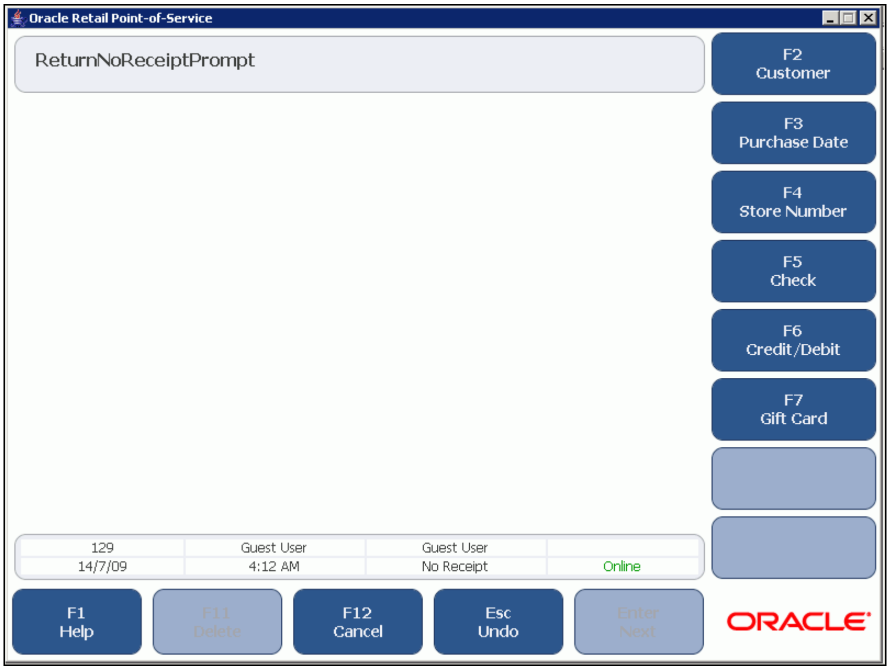
In the above screen, the MRP field is added to the Transaction Details, when performing returns with receipt.

Returns without 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.

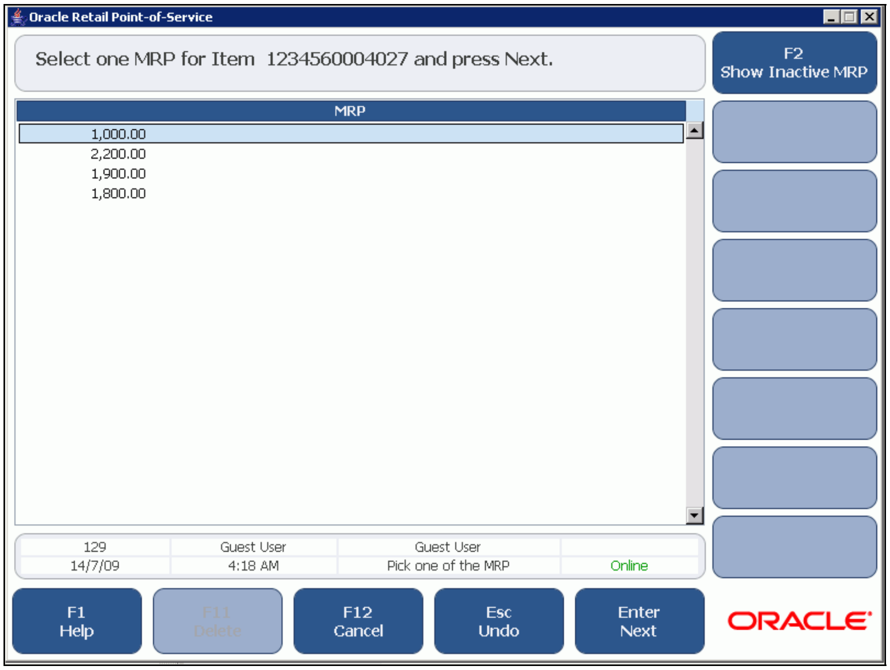
To perform a return without receipt via a item number

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



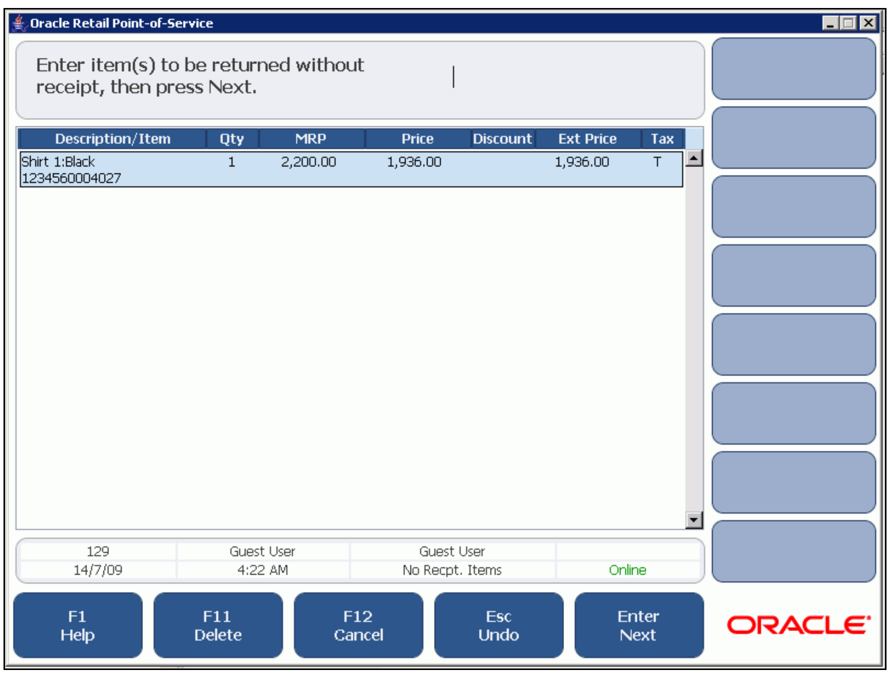
No Receipt Screen

2. Enter the item number to be returned and press **Enter/Next**. If multiple MRPs are present for that particular item, then the Pick one of the MRP screen is displayed.



Pick one of the MRP Screen

3. Select the MRP, and click **Enter/Next**. The selling price for the selected MRP is displayed as shown below



Return Screen

4

Linking Customers to Transactions

Linking customers to transactions enables the sales associate to refer and view Customer information for future transactions. It also helps sales associates with an updated history of the Customer purchase.

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.

Capturing Indian Address Format

POS is enabled to list Indian business and customer address in the format that suits the Indian address requirement. The screens where new address format has been implemented are as follows:

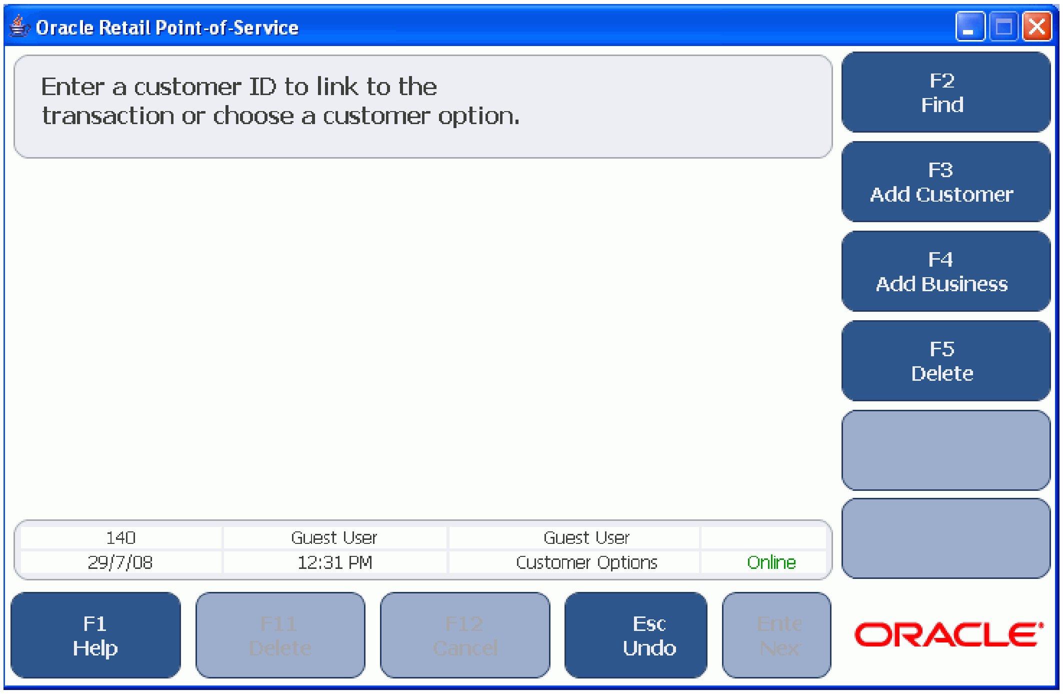
- Capture Customer Address
- Capture Business Address
- Finding Customer information based on Address
- Finding Business information based on Address
- Finding Customer address based on customer ID
- Finding Customer Address Information for Returns
- Finding Business Address Information for Returns
- Returns Linked to Customer based on Customer ID
- Home Delivery of Items

You can now link the returns transaction to the customer ID in the absence of a sales receipt. The customer address is displayed as per Indian address format. You can search for the customer using the customer address in the absence of sales receipt or customer ID.

Adding Customer / Business Address

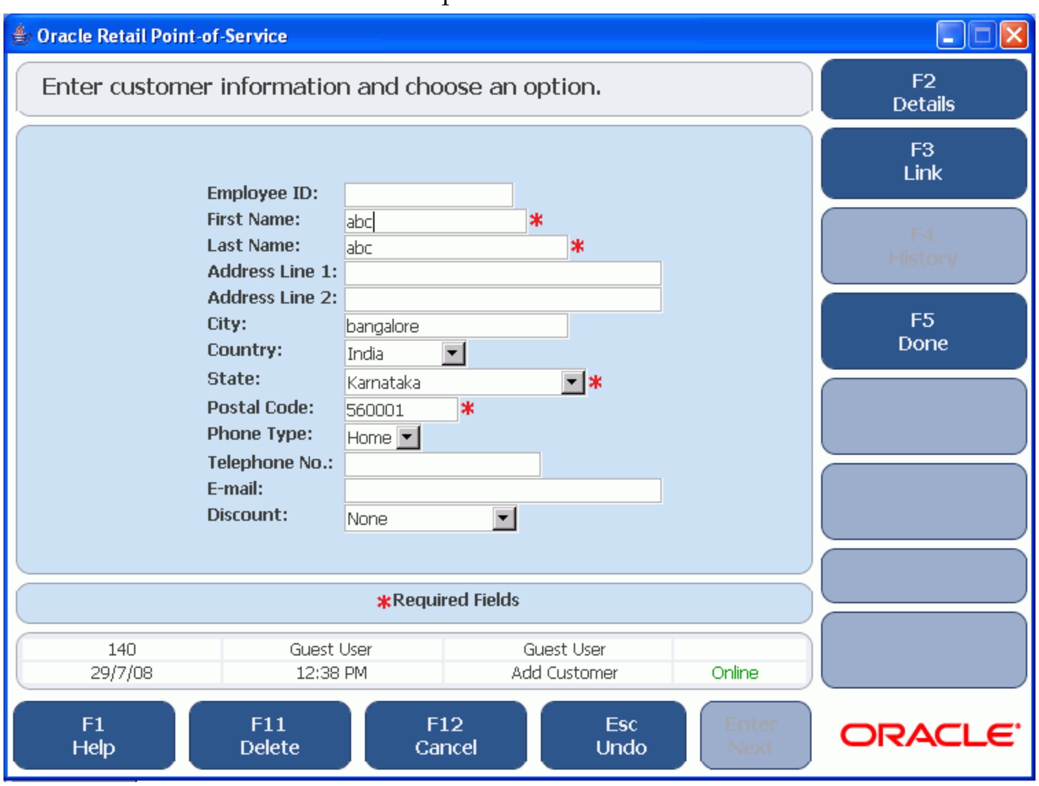
To add customer address:

1. From the Main Options screen, press **F3/POS**.
2. Enter login information. The Sell Item screen is displayed.
3. Enter an item number and press **Enter/Next**. The item is added to the list and the transaction totals at the bottom of the screen are updated.
4. Add more items by entering the item numbers as in step 3.
5. Click **F7/Custmer** to link the customer to this transaction. A new window opens where you can link the transaction to the existing customer or add a new customer.



Link transaction to the Customer

6. If the customer exists in the POS database, you can search by clicking **F2**.
7. If customer ID does not exists in POS, select **F3** to add a new customer. The Customer information window opens.



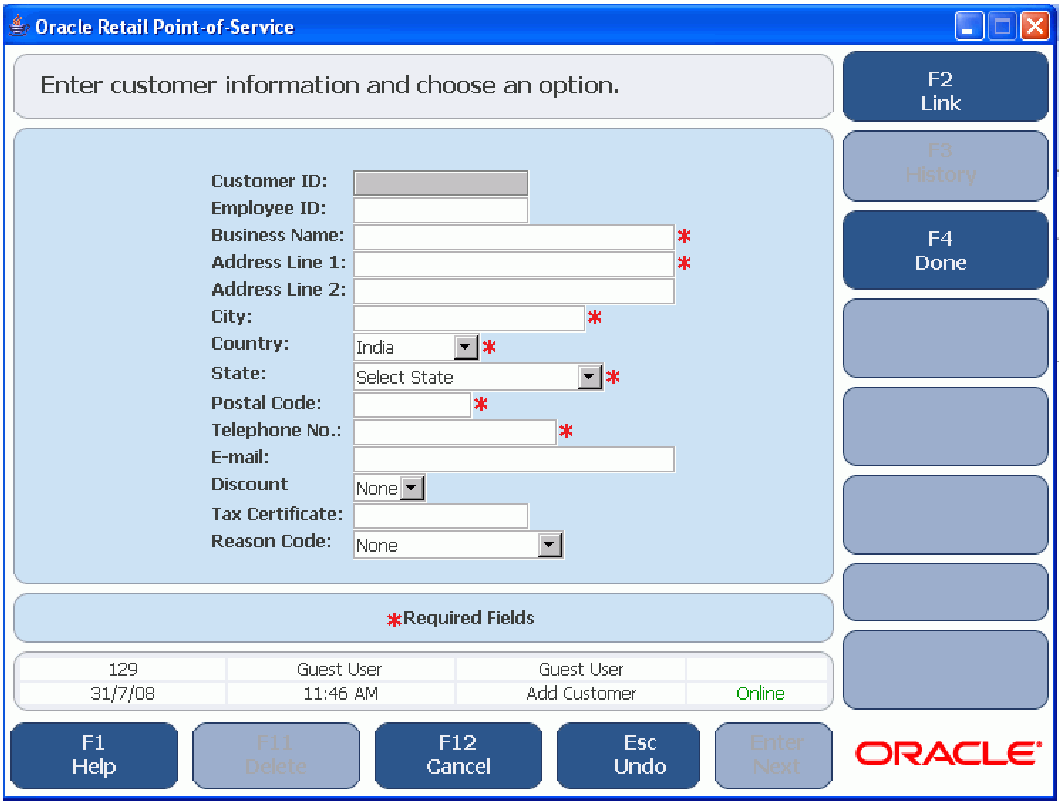
Add Customer Address

8. Enter the customer information as follows:
   a. Employee ID – Enter the employee ID.
   b. First Name – Enter the customer's first name. It is a mandatory field.
   c. Last Name – Enter the customer's last name. It is a mandatory field.
   d. Address Line 1 and 2 – Add the customer's address.
   e. City – Enter the city name.
   f. Country – Select India in the drop-down list. The country displayed depends on the selected locale during installation.
   g. State – Select the State name. It is a mandatory field.
   h. Postal Code – Enter the zip code. It is a mandatory field and validation is done to verify the code depending on the country selected.
   i. Phone Type – Select from the drop-down list.
   j. Telephone No. – Enter a 10-digit phone number. The country code 91 is appended to the number. Validations are done to verify the 10-digit phone number.
   k. E-mail – Enter the e-mail ID of the customer.
   l. Discount – Select from the drop-down list.
9. After entering the required information, click **Link**.
10. In case of an existing customer, you can find a customer by searching Customer ID, Employee ID, or Customer Info. Else if the customer is new click **Add Customer**.
11. Enter the required customer details.
12. Click **Link**. The newly added customer is linked to the transaction.
13. Click **Enter** to continue.

Adding Business Address

To add a business address:

1. From the **Main** Options screen, press **F3/POS**.
2. Enter login information. The Sell Item screen is displayed.
3. Click **F7/Custmer** to add a new Business address. A new window opens where you can add the business details.



Adding Business Address

4. Enter data in the required fields:
   a. Customer ID – auto generated by POS.
   b. Employee ID – enter the employee ID.
   c. Business Name – Name of the new Business.
   d. Address Line 1 and 2 – Add details in the address line.
   e. City – Name of the city where the Business is.
   f. Country – Name of the county.
   g. State – name of the state.
   h. Postal Code – enter valid 6-digit postal code.
   i. Telephone No. – Enter valid 10-digit phone number. The county code 91 is automatically appended to the number.
   j. E-mail – Enter the e-mail of the business.
   k. Discount – Not applicable.
   l. Tax Certificate – Not applicable.
   m. Reason Code – Not applicable.
5. Click **Done** to exit the window.

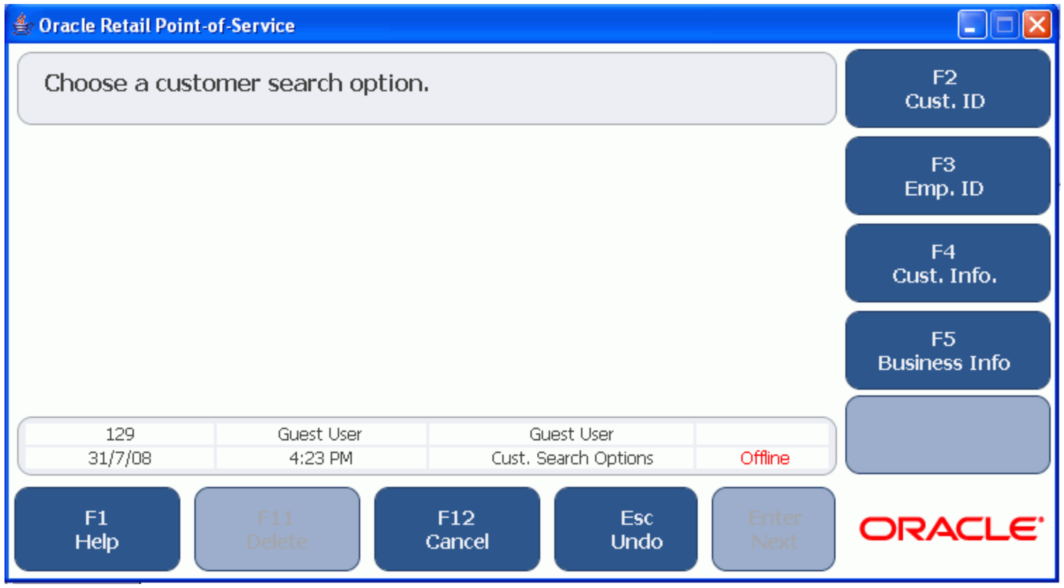
Searching Customer Information

You can search for the newly added customer information on the basis of the address or the customer ID.

Search Based on Address

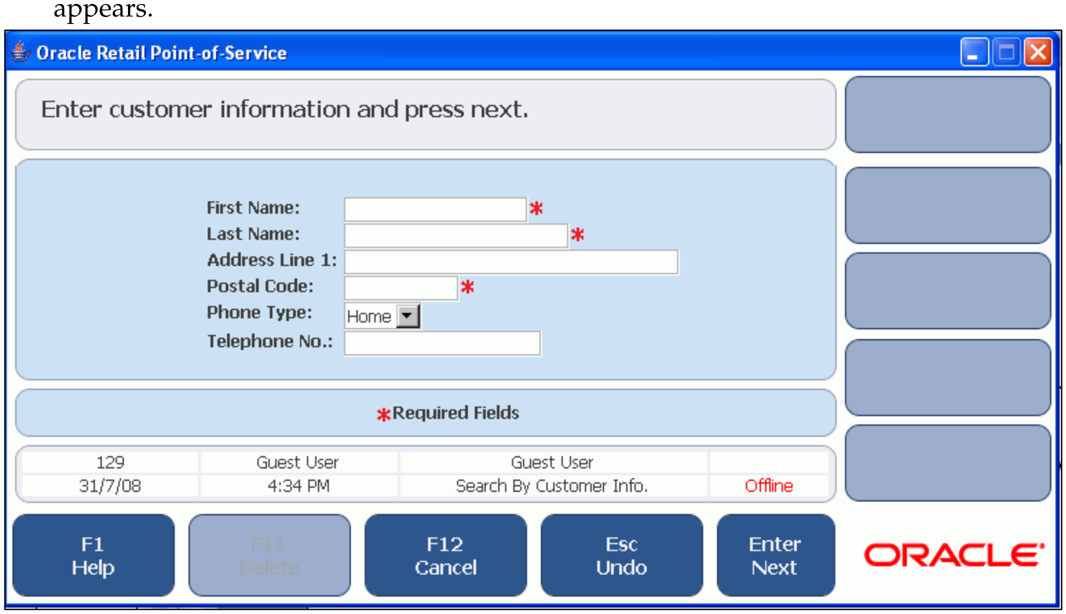
To search for the customer information base on address:

1. From the Main Options screen, press **F3/POS**.
2. Enter login information. The Sell Item screen is displayed.
3. Click **F7/Customer** and then select the **F2/Find** option to search customer information.



Searching Customer Information Based on Address

4. Click **F4/Cust. Info.** to search on the basis of Customer address. A new window appears.



Customer Address

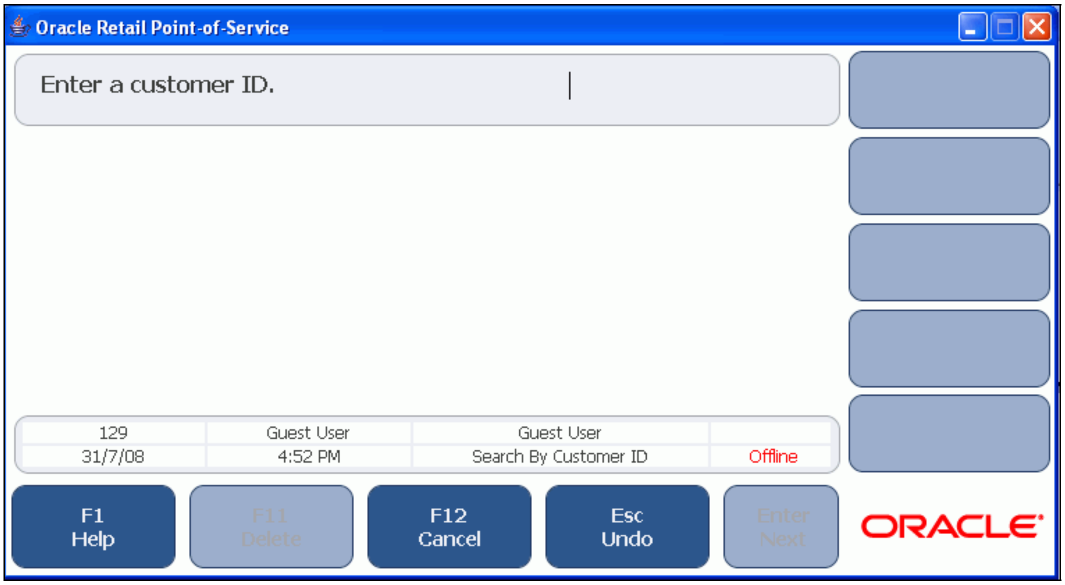
5. Enter the required details on the screen and click **Next**.

> **Note:** The fields that display a red asterisk (*) against its name are mandatory fields.

6. The customer information appears on the screen. You can either link this customer information to a transaction or click **Done** to exit the screen.

Search Based on Customer ID

1. From the **Main** Options screen, press **F3/POS**.
2. Enter login information. The Sell Item screen is displayed.
3. Click **F7/Custmer** and then select the **F2/Find** option to search for customer information.
4. Click **F2/Cust. ID** to search on the basis of Customer information. A new blank window appears.



Searching By Customer ID

5. Enter customer ID and Next. The customer information corresponding to the customer ID entered by you is displayed on the screen.
   You can either link the customer to a transaction by selecting **F3/Link** button or view the history of the customer by clicking the **F4/History** button. You can see the customer detail information by selecting the **F2/Details** option.
6. Click **Done** to exit the window.

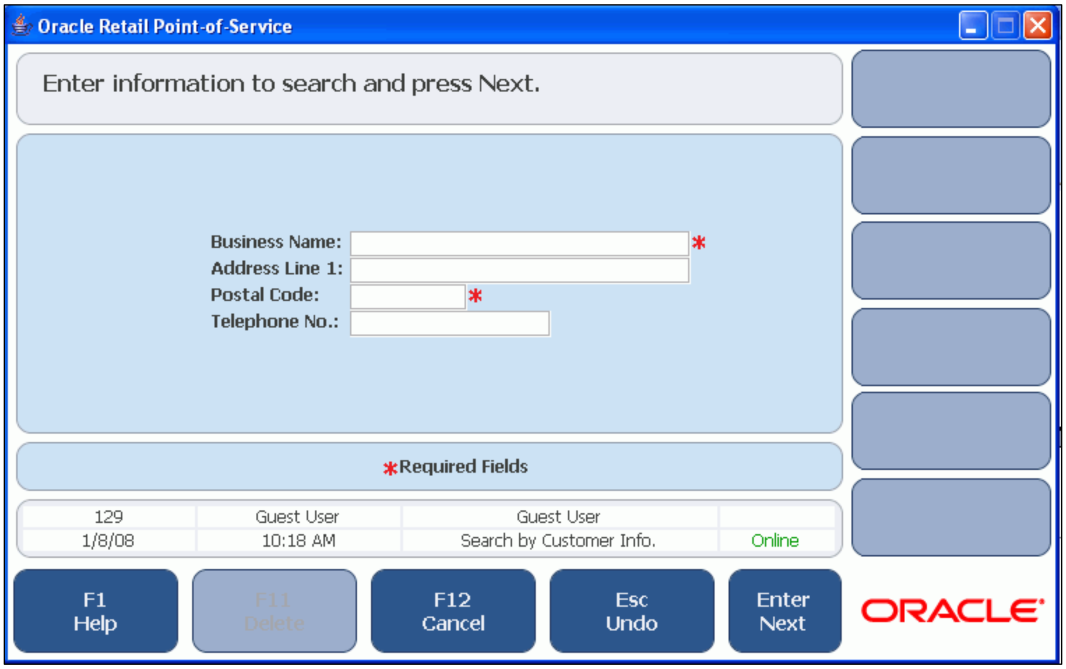
Searching Business Information

You can search for the newly added business information on the basis of the address or the customer ID.

Search Based Address

To search for the customer information base on address:

1. From the **Main** Options screen, press **F3/POS**.
2. Enter login information. The Sell Item screen is displayed.
3. Click **F7/Custmer** and then select the **F2/Find** option to search customer information.
4. Select **F5/Business Info** to search on the basis of business information. A blank window appears.



Search Based on Customer Address

5. Enter the business name and postal code.
   The business name and postal code are mandatory fields to search for information. If either one is empty, an **Invalid Data Notice** appears. Click **Enter** to search again.

   Note: The fields that display a red asterisk (*) against its name are mandatory fields.

   ---

6. Click **Enter Next**.
   The customer information associated with the business information you provided is displayed. You can either Link this customer to a transaction by selecting the **F2/Link** button or select **F3/History** to view the customer history.
7. Click **Done** to exit the window.

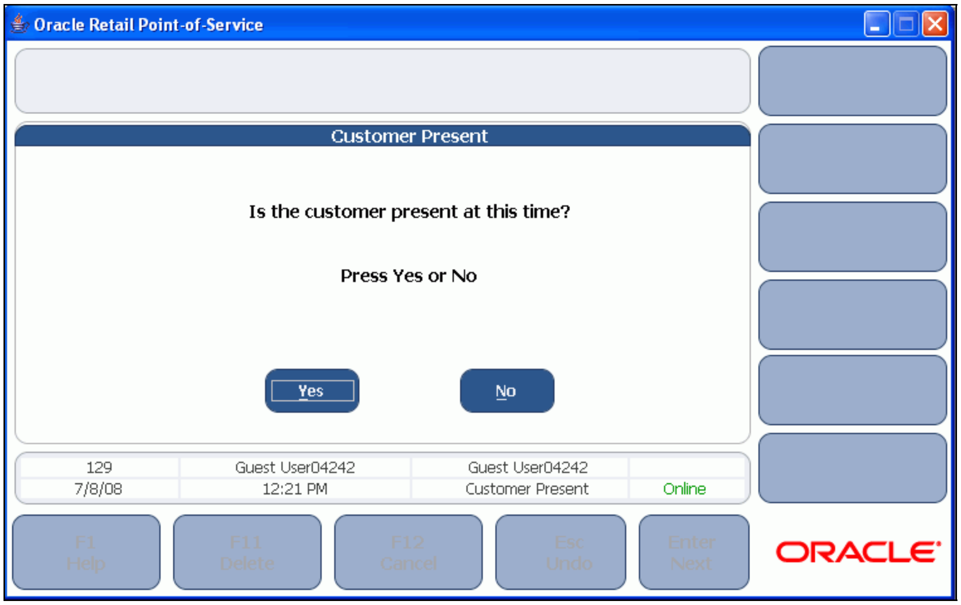
Search Based on Customer ID

1. From the Main Options screen, press **F3/POS**.
2. Enter login information. The Sell Item screen is displayed.
3. Click **F7/Custmer** and then select the **F2/Find** option to search for customer information.
4. Click **F2/Cust. ID** to search on the basis of Customer information. A new blank window appears as shown in Figure 6.
5. Enter customer ID and click **Enter Next**. The customer information corresponding to the customer ID entered by you is displayed on the screen.
6. You can either link the customer to a transaction by selecting **F3/Link** button or view the history of the customer by clicking the **F4/History** button. You can see the customer detail information by selecting the **F2/Details** option.
7. Click **Done** to exit the window.

Performing a Item Send (Home Delivery)

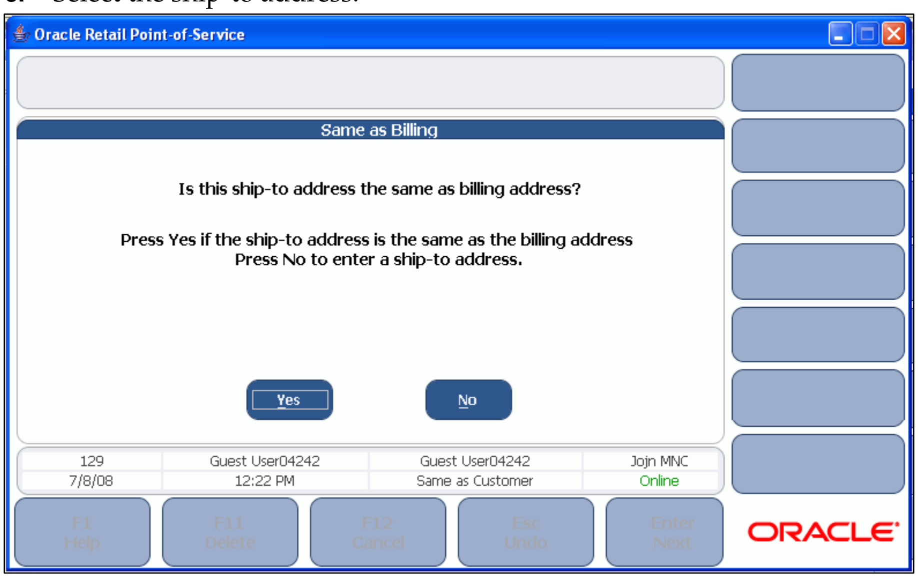
You can ship an entire transaction or only selected items in the transaction to the shipping address as mentioned in the customer address.
To ship items to customer address:

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.



Customer Present Screen

3. If the customer is present, click **Yes**. If the customer is not present, press **No**. The Capture Customer Information screen is displayed.
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.

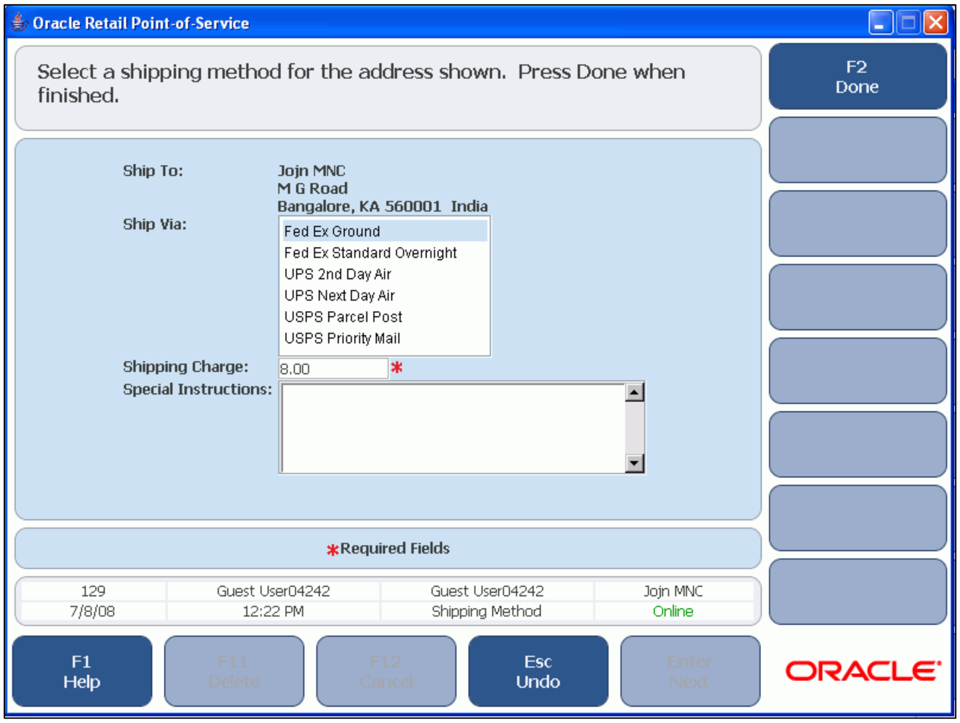


Shipping Billing Information screen

- If the ship-to address is the same as the bill-to address, click **Yes**.
- To enter another ship-to address, click **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.

6. Select the mode for shipping from the selection list and press **F2/Done**.



Shipping Method screen

The shipping charges are added to the transaction. You are returned to the Sell Item screen and the item is sent to the shipping address.

Note: Taxes on the shipping charges are out of scope for this release.

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. The chapter explains the Performing a Price Override function.

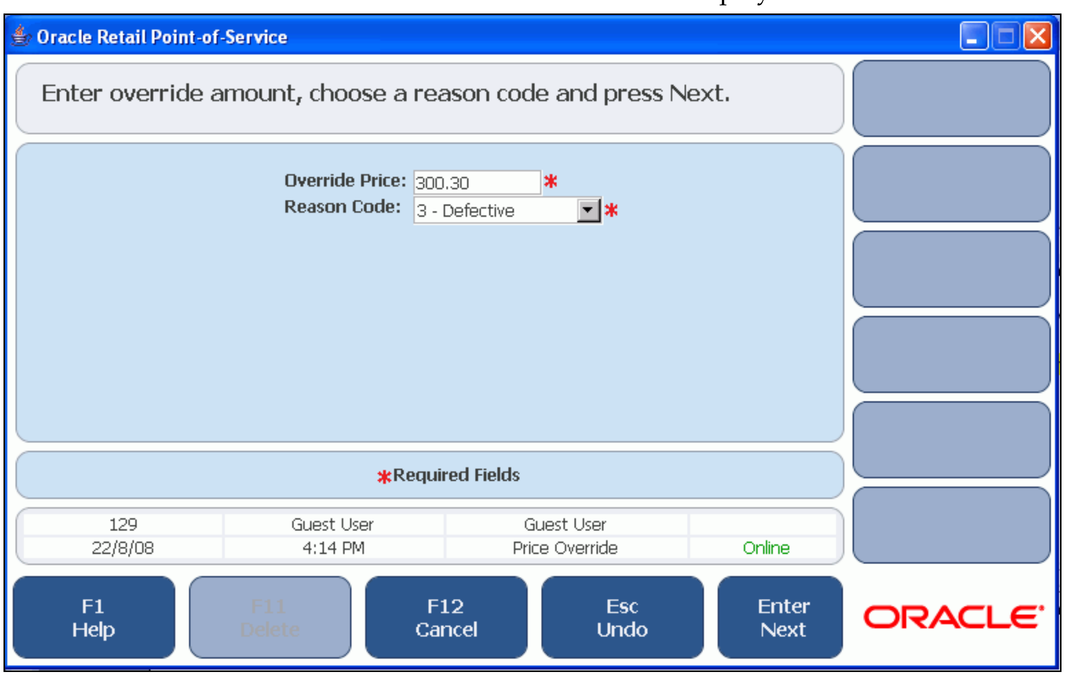
Performing a Price Override

After an item is added to the transaction, you can change the default price of the item. 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.

The Price Override screen has been modified to validate Price Override being less than the MRP for an item with the indicator Selling Price Less than MRP set to true.

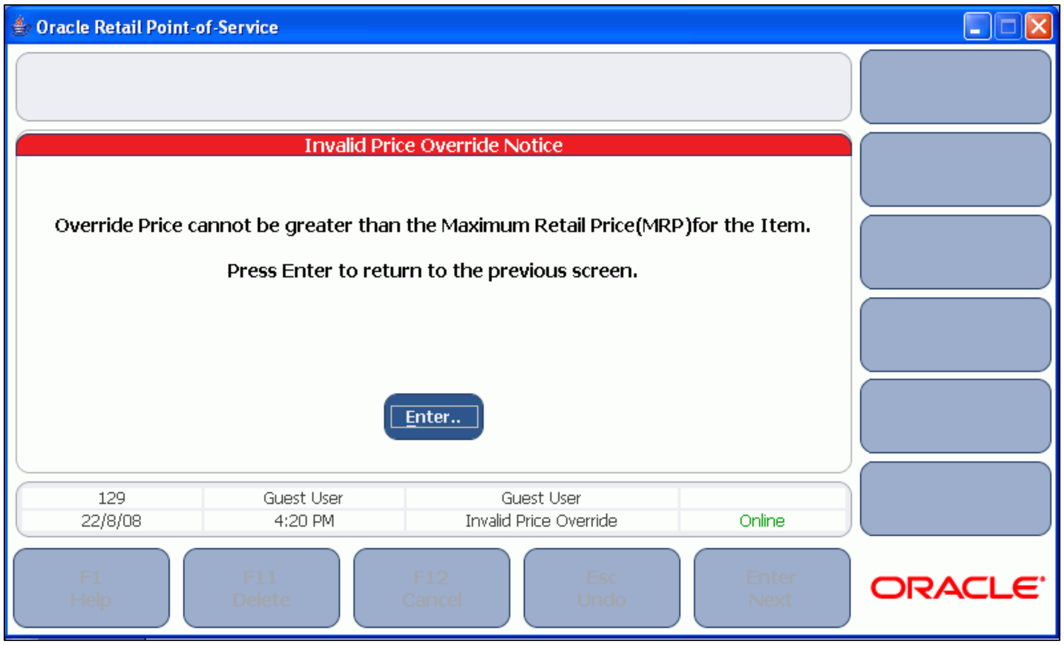
To change the price for an item:

1. From the **Main** Options, click **F3/POS**. Alternatively from the Sell Item screen; select an item within the transaction.
2. Enter login credentials.
3. Enter Item Number and click **Enter/Next**.
4. Press **F8/Pricing**. The Pricing Options screen is displayed.
5. Press **F2/Price Override**. The Price Override screen is displayed.



Price Override Screen

6. Enter the new price change. POS validates the new price to be less than the MRP if the **Selling Price Less than MRP** indicator is set to true.
   If the overridden price is more than the MRP of the item, POS displays a validation error as follows.



Validation Error

7. Click **Enter** to modify the price override value.
8. Enter a new Override Price and select a **Reason code,** click **Enter/Next**. The new price of the item is displayed in the Sell Item screen.

6 Using Item Inquiry

Item inquiry enables you to request inventory information on an item. Oracle Retail Store Inventory Management must be implemented in order to use item inquiry.

> **Note:** Item Inquiry is disabled in transaction re-entry mode. Item Creation is disabled as you cannot enter Tax Category which is a mandatory field.

Item Master now captures the following indicators as part of the India Localization enhancements:

- **Multiple MRP** indicator - This attribute indicates whether the item supports Multiple MRP.

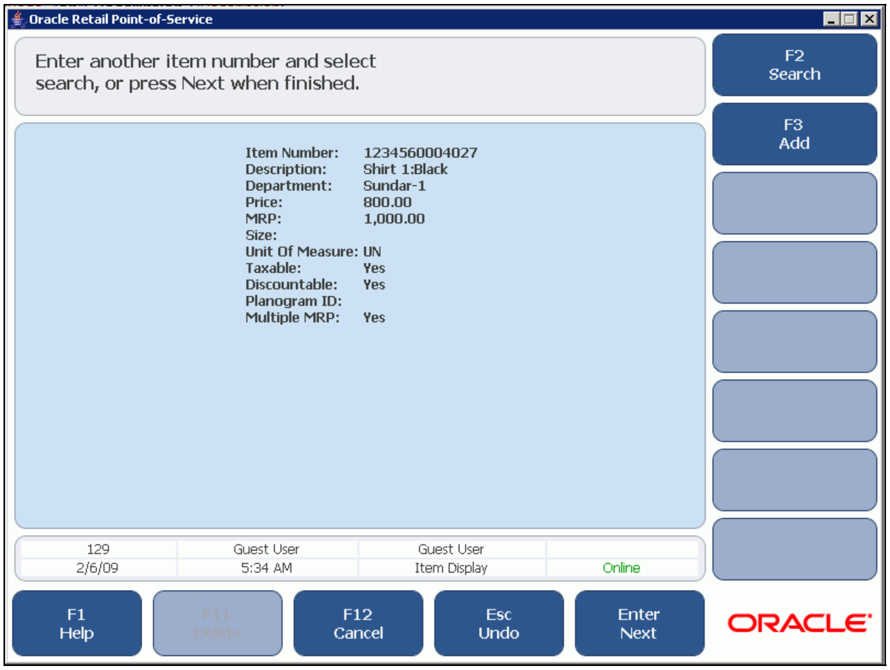
> **Note:** As part of the localization changes, the Primary MRP is available in POS from RMS using the DIMP process. POS can accept and store multiple MRPs for an item. The Primary MRP flows from RMS only for the first time when the item is created and subsequently it will come from RPM along with non primary MRPs.

Item Inquiry Screen

The Item Inquiry screen now displays the MRP of the item.

To view the item Inquiry screen:

1. From the **Main Options,** click **F3/POS**.
2. Enter valid userid and password and click **Enter/Next**.
3. Select **F4/Item** and then click **F2/Inquiry**.
4. Select **F2/Price**.
5. Enter an item number and click **Enter/Next**. The Item Inquiry screen appears.

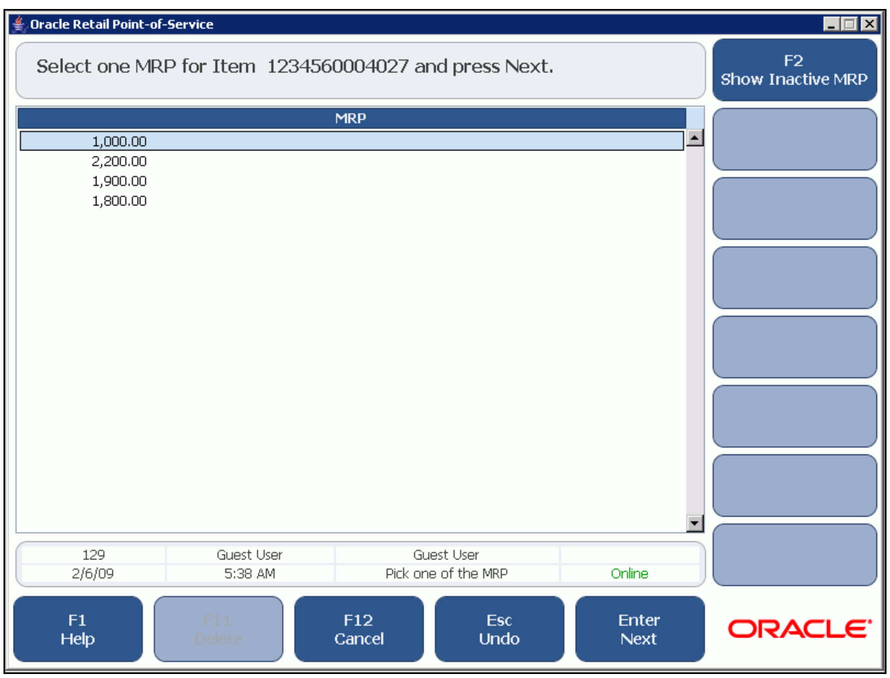


Item Inquiry Screen

On this screen, you can view the new fields have been added:

- **Multiple MRP** – the indicator is un-editable on this screen.
- **MRP** – The value of the MRP field is the primary MRP value of the item.

6. Click F3/Add. The screen with multiple MRPs is displayed.

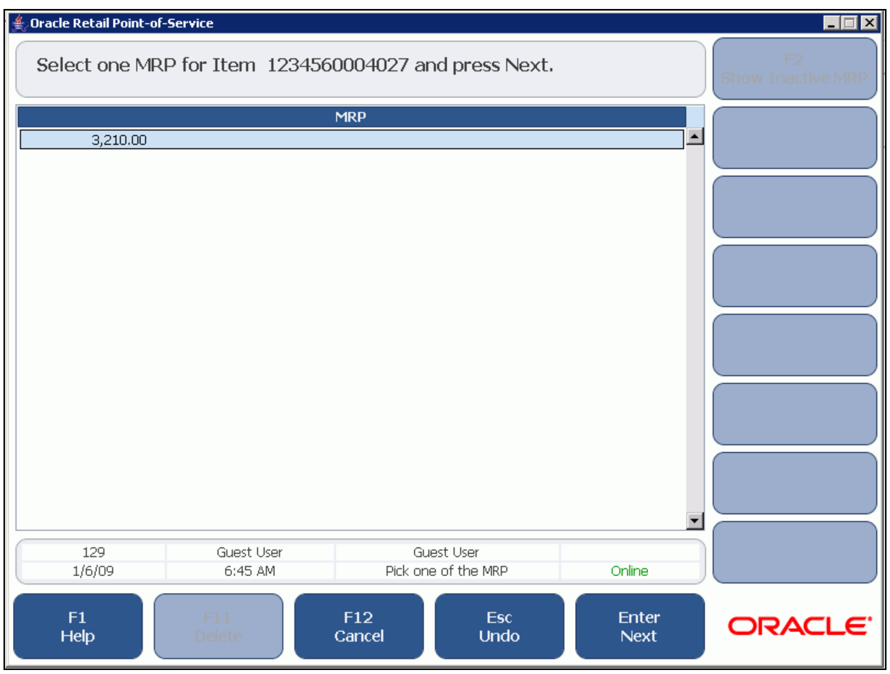


Multiple MRP Screen

7. Select the MRP and click Enter/Next. The Sell Item screen is displayed. It shows the price associated with that selected MRP.

Sell Item Screen

8. In the Multiple MRP screen, click F2/Show Inactive MRP. The Inactive MRP for that item are displayed as shown below:

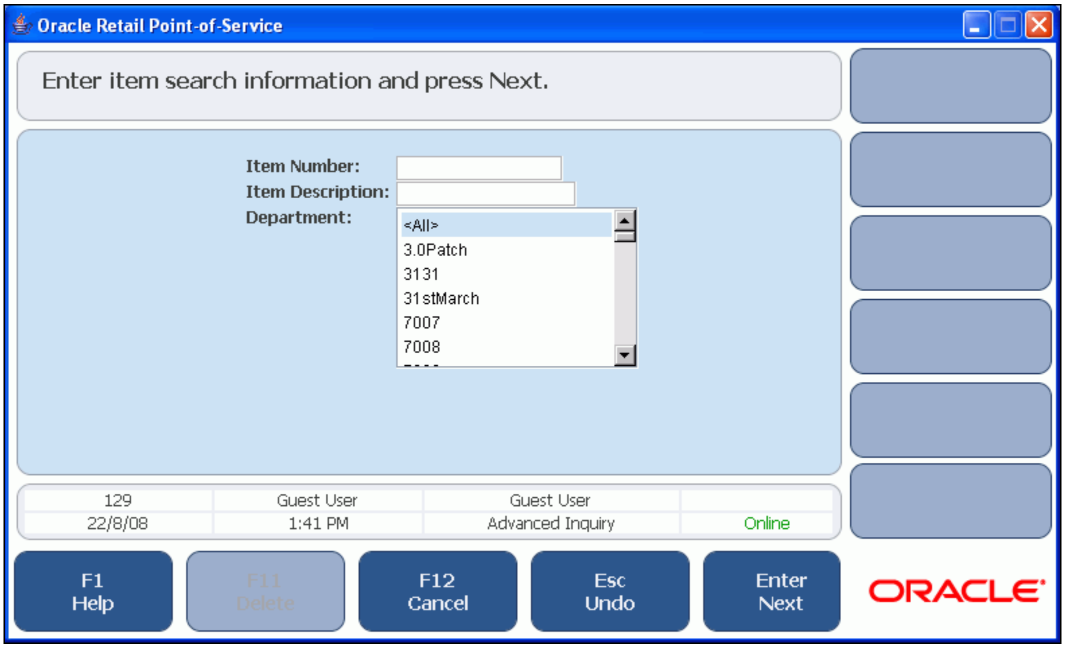


Advanced Price Search

To advanced search:

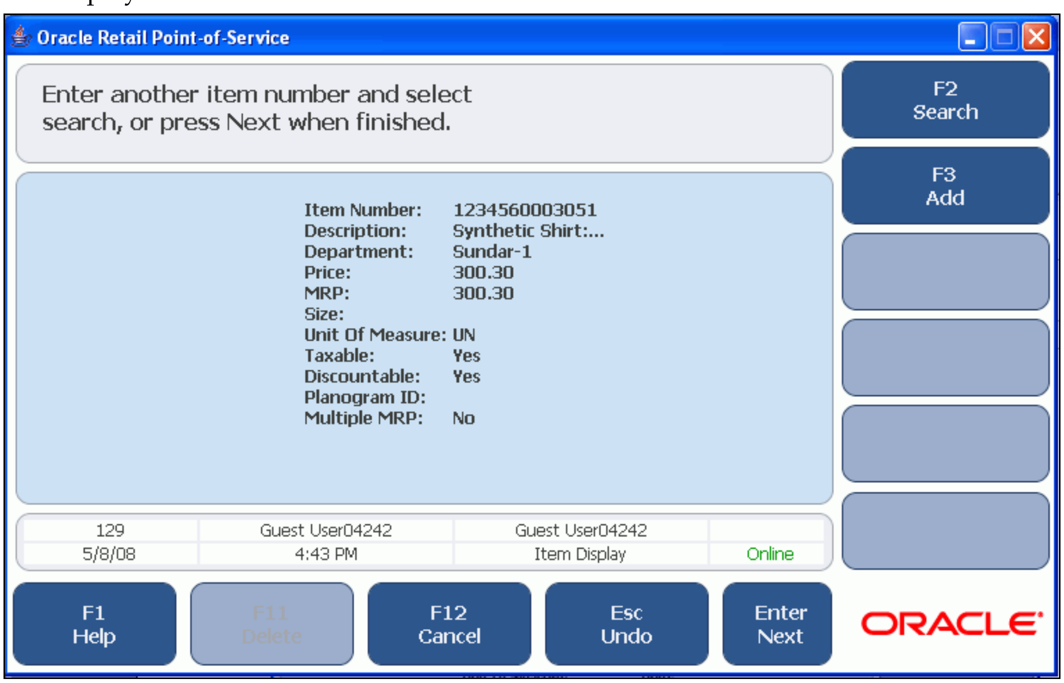
1. From the **Main Options,** click **F3/POS**.
2. Enter a valid Item ID and click **Enter/Next**.
3. Select **F4/Item** and then click **F2/Inquiry**.

4. Select **F2/Price**.
5. Select **F3/Adv Search**. The Item Search Window appears.



Item Search Screen

6. Enter the **Item Number** and **Description**.
7. Select the **Department** from the list and click **Enter/Next**. The Search result is displayed on the screen.



Search Result

The screen displays the **MRP** and the **Multiple MRP** indicator.

8. Click **Enter/Next** to exit the screen.

A
Appendix: Central Office

The Oracle Retail Central Office (CO) application is used at the corporate office to provide timely and correct sale information that helps in optimizing store sales and profitability. The Central Office makes it easy to manage data movement and access real-time information.

With India Localized version of CO installed, the Transaction Tracker feature has been enhanced to accommodate the new address format.

Transaction Tracker

The Transaction Tracker feature provides enterprise-wide accumulation of transaction, electronic journal, and signature data. The use of a centralized corporate database gives retailers the ability to resolve credit disputes quickly, reduce paper storage and handling, and decrease general auditing efforts.

You can search for the transaction by Item, Transaction and Tender information, Sales Associate, Customers, Signatures Captured, and Electronic Journals.

This document explains the search option using the customer details. For information on other types of search, refer the *Central Office User Guide*.

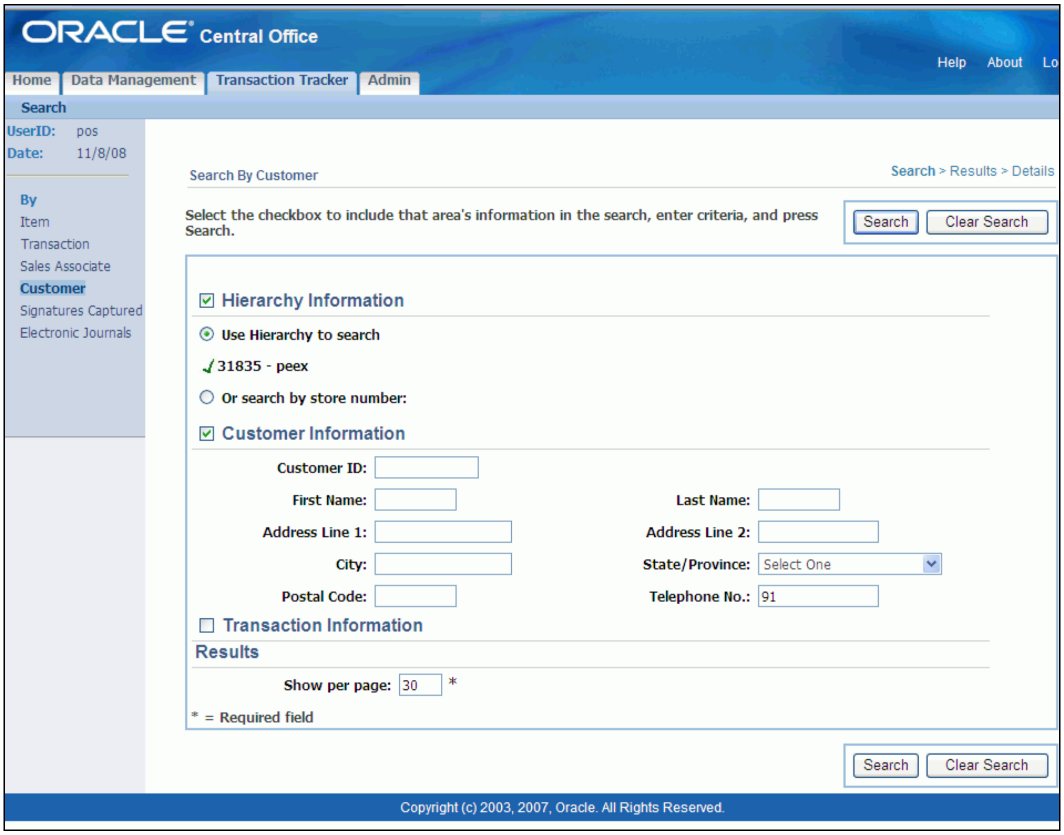
Searching by Customer

A transaction can be tracked using the customer address information. You can search using the following customer information:

- Customer ID
- First and last name
- Address
- Telephone number

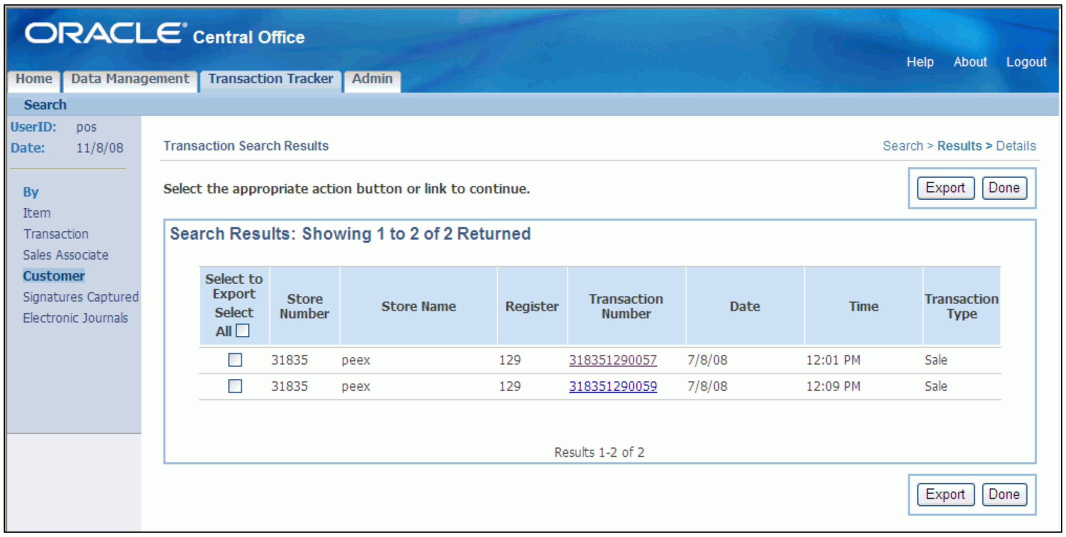
To search for a transaction using the customer information:

1. From the Main Options, click the **Transaction Tracker** tab.
2. Click **Customer** on the **By** options.
3. On the **Search By Customer** options, select to search by **Customer Information.**
4. Enter any of the following customer criteria:
   - Customer ID
   - First and last name
   - Address
     - City – Enter the city name of the customer.
     - Postal code – Enter a valid 6-digit number postal code.
     - State/Province – The State/Province display the Indian state names. Select one state name.
   - Telephone number – Enter a 10-digit telephone number. The number is prefixed with +91.



Search By Customer Option

5. Click **Search**. The search result is displayed with all the entries matching the user-entered customer criteria.



Search Results

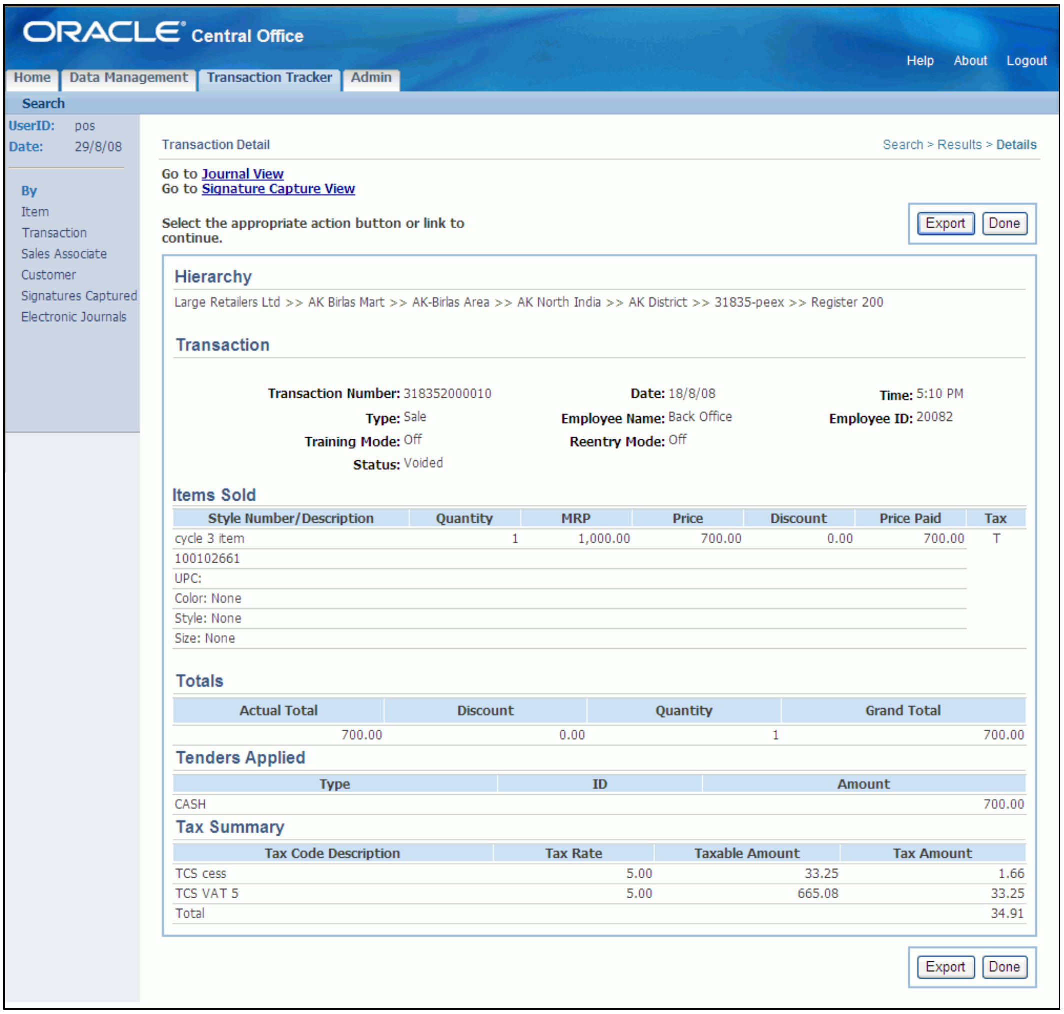
6. You may click **Done** to exit the window or **Export** the data. To know how to export the data, refer the *Central Office User Guide*.

Transaction Tracker Screen

The Transaction Tracker screen has been modified to display the rounding logic in the Transaction details screen.

To view the transaction details:

1. From the **Main Options**, click **Transaction Tracker**.
2. Click the **Search** option. The Search Result displays the existing transaction details.
3. Click on any Transaction Number. The Transaction Detail screen appears.



Transaction Detail Screen

4. On the **Transaction Detail** screen, the following new fields are displayed:

   the primary **MRP** of the item is displayed in the **Transaction** section.

   in the **Total** section, the **Actual Total** field displays the subtotal and the **Grand Total** field displays the rounded total for the transaction.

B

Appendix: Back Office

Oracle Retail Back Office (BO) provides a means of accessing, maintaining, and monitoring store business. The general Oracle Retail Back Office user is a store manager, assistant manager, or system administrator. From a single server in the store, you can access and manage employee status and roles, items, pricing, and store transactions. You can also perform basic store operations such as opening and reconciling tills, adding items, and applying price promotions.

With India Localization patch applied, changes/enhancements have been made to the following in BO:

- Item List Screen
- Item Detail Screen
- Price Promotion Detail Screen
- Price Detail Screen
- Discount Rules Screen

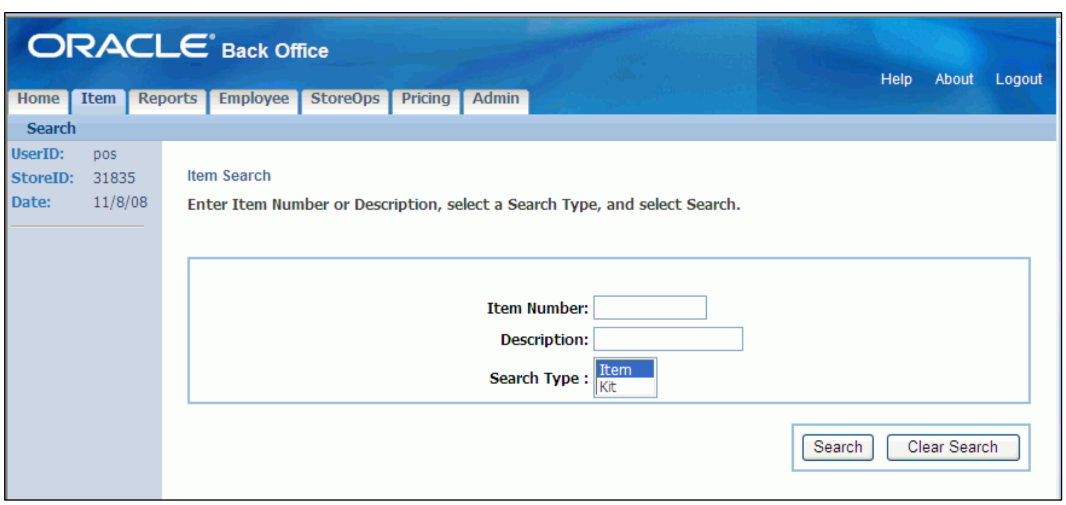
Item Maintenance

Item Maintenance provides the functionality to maintain the store database of items and kits that are available in the store. You can search or modify existing items or kits as well as add items or kits to the database. You can also add or modify the items included in a kit.

Searching for an Item

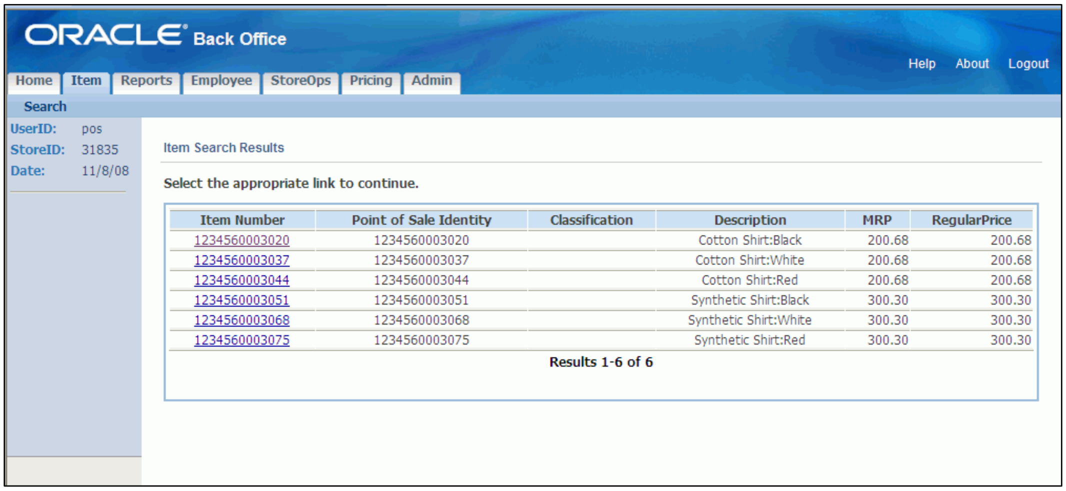
On the Item Search screen, you can search for items by item number or description and optionally select to add a new item to the database if it is not found.
To search for the item:

1. From the **Main Options**, click **Item**. Item Search window appears.



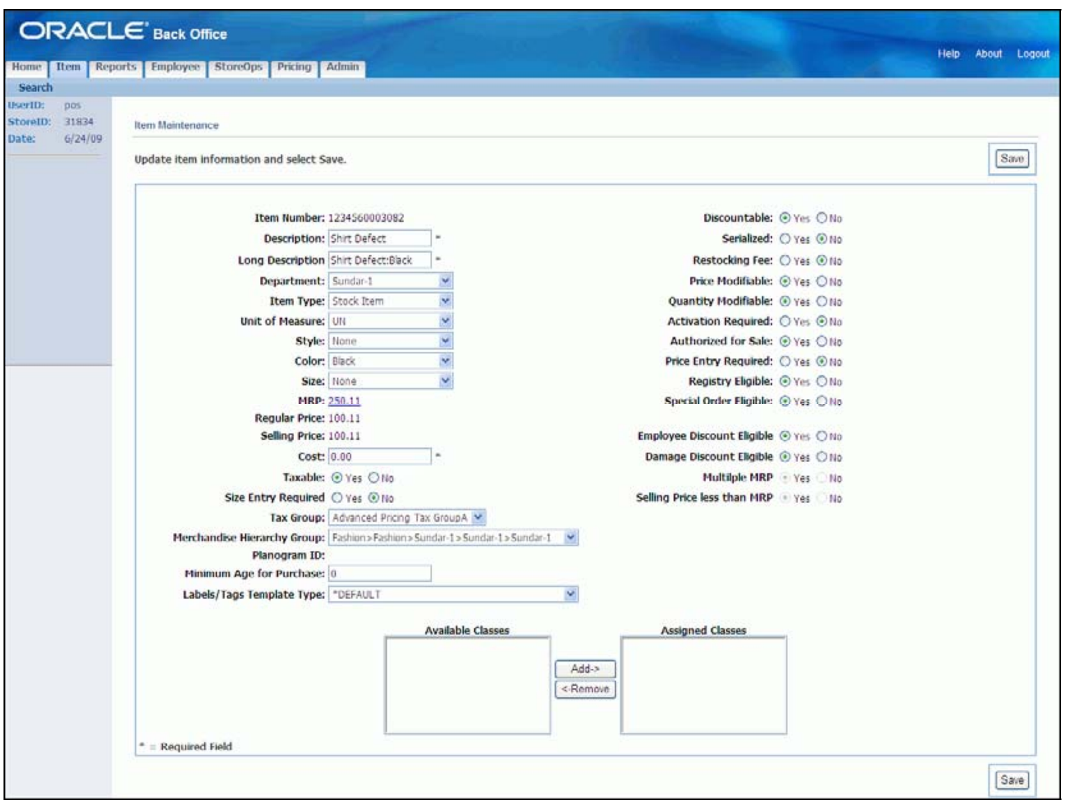
Item Search Screen

2. Select Search Type as **Item** and click **Search**.
   The Item Search Result displays the items details. The primary **MRP** of the item is displayed on this screen as shown in the figure below.



Search Results

3. Click on any of the **Item Number** link. The Item Maintenance screen appears providing complete item detail.

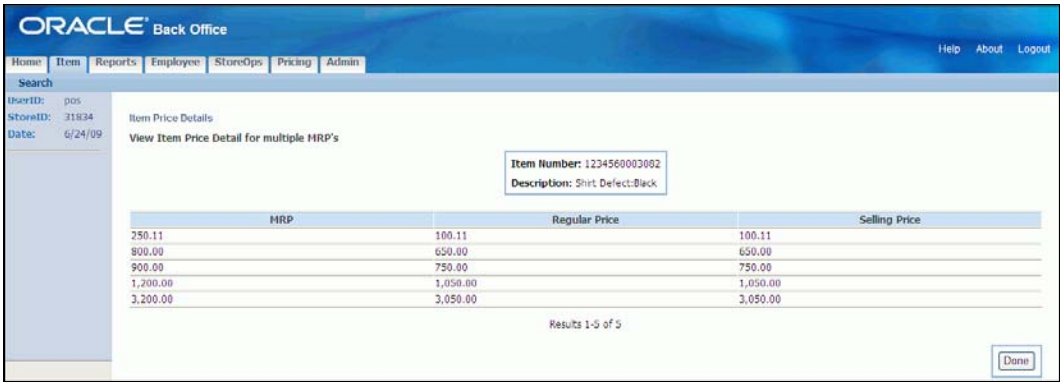


Item Maintenance Screen

On the Item Maintenance screen, MRP indicators and the primary MRP value have been added. The MRP is the primary MRP value of the item.

If the MRP indicators–**Multiple MRP** and **Selling Price less than MRP**–are set to true, then **Yes** check box appears selected; and if set to false then **No** is selected. The indicators are un-editable on this screen.

- Click the hyperlink provided in the MRP field. The regular and the selling price for the different MRPs are displayed as shown below:



Item Price Details Screen

- Click **Done** to return to the Item Maintenance screen.

Pricing

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

The following topics are discussed:

- Price Promotions
- Price Changes
- Discount Rules

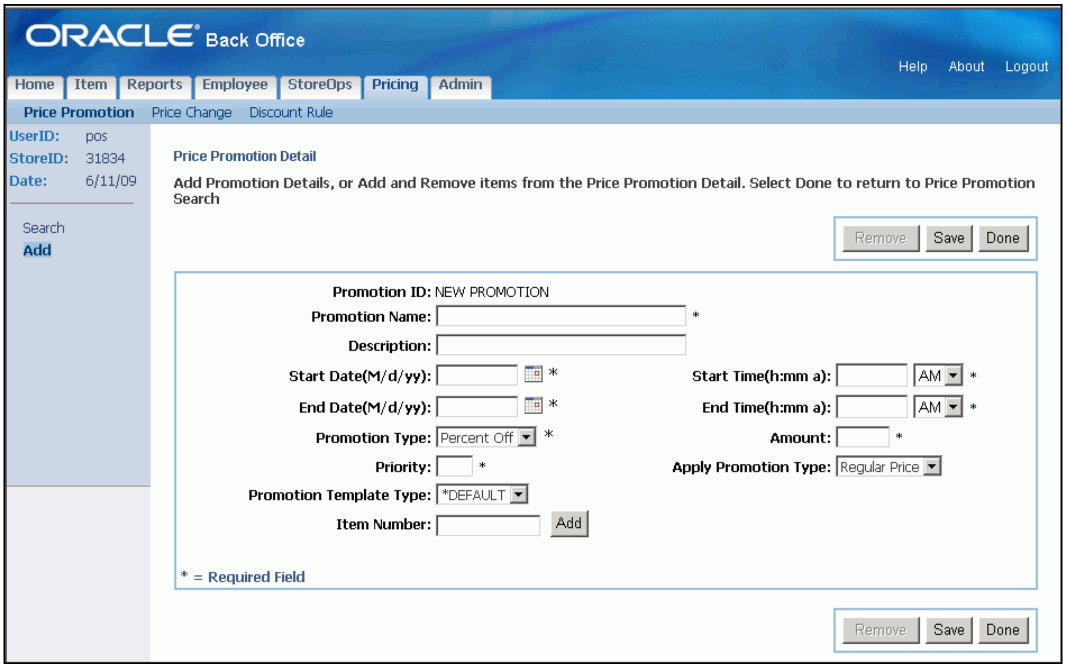
Price Promotions are temporary price reductions for a set period of time. You can search for, create, and edit price promotions. When creating a price promotion, you enter the name and description of the promotion, the starting and ending dates, the type of price reduction, and the amount of the reduction.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

Adding a Price Promotion

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

To add a price promotion:

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



Adding or Editing a Price Promotion

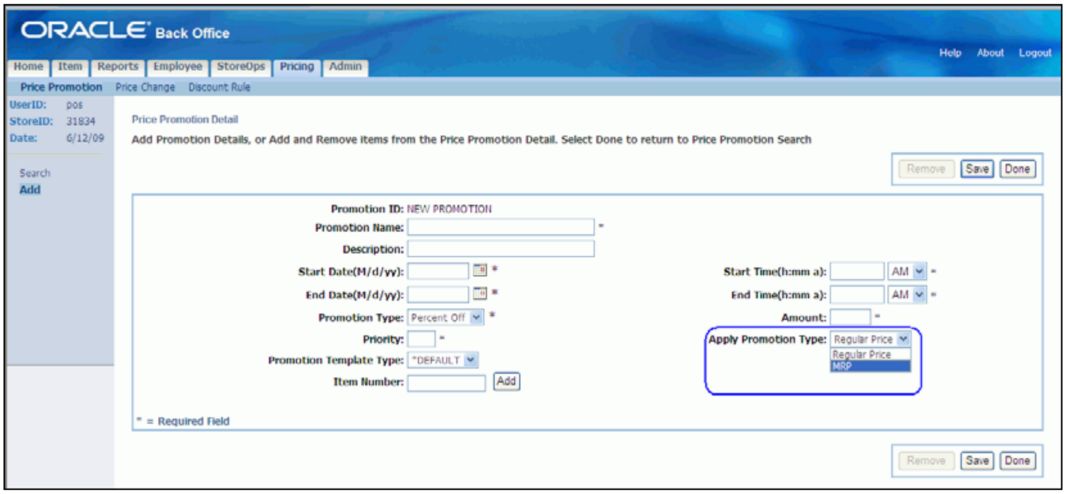
You can edit an existing price promotion or a newly created price promotion on the Price Promotion Detail screen.

To edit or add a price promotion:

1. Enter the promotion name, start date, end date, promotion type, priority, start time, end time, and amount.

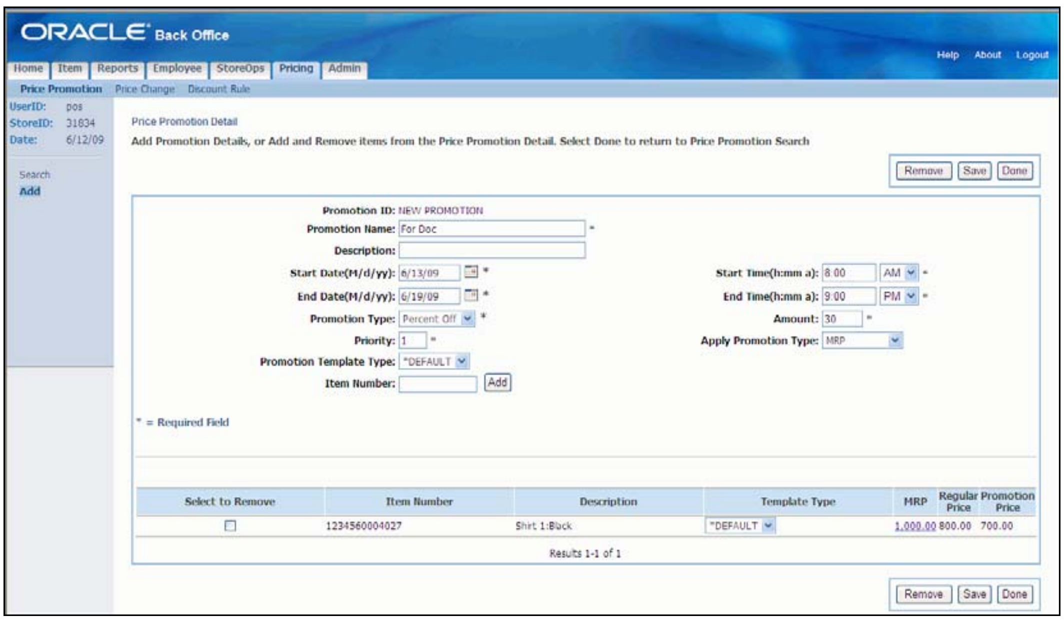
> **Note**: Enter a numerical value for promotion priority, the higher the number, greater the priority. For example, 99 is a higher priority than 1.

2. To add an item to the promotion, enter the item number and click Add. A promotional price for the item is generated. Select a template type for the item.
3. Select whether you want to apply the promotion on the “Regular Price” or on the “MRP” from the Apply Promotion Type list.



Price Promotion Detail Screen

4. The application displays the Regular Price and the Promotion Price for the primary MRP as shown below:



Price Promotion Detail Screen

5. To view the Regular Price and the Promotion Price for multiple MRPs, click the hyperlink in the MRP column. The Regular Price and the Promotion Price for the different MRPs are displayed as shown below:

Price Promotion Item Detail Screen

> **Note**: The Primary MRP is displayed first followed by the non primary MRP's sorted by the activation date in the reverse chronological order.

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

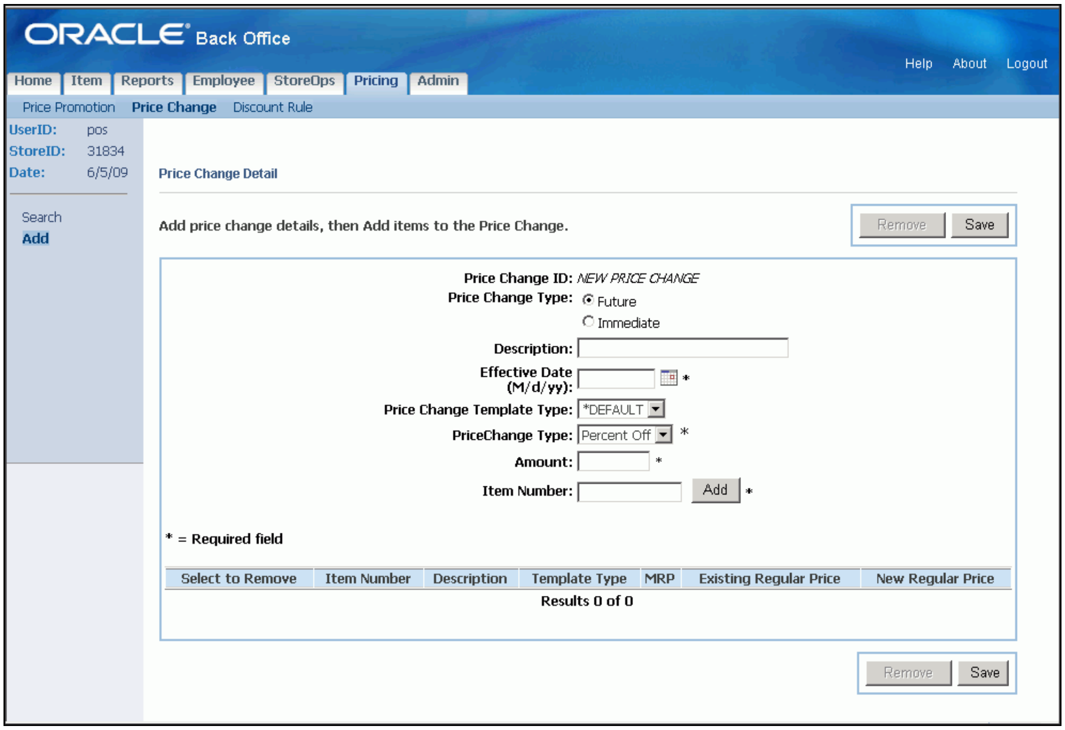
Price Changes

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

> **Note**: The “Editing a Price Change” functionality is not applicable for this release of India Localization.

Adding a Price Change

The Price Change Detail screen enables you to add a new item to a price change.



Price Change Detail Screen

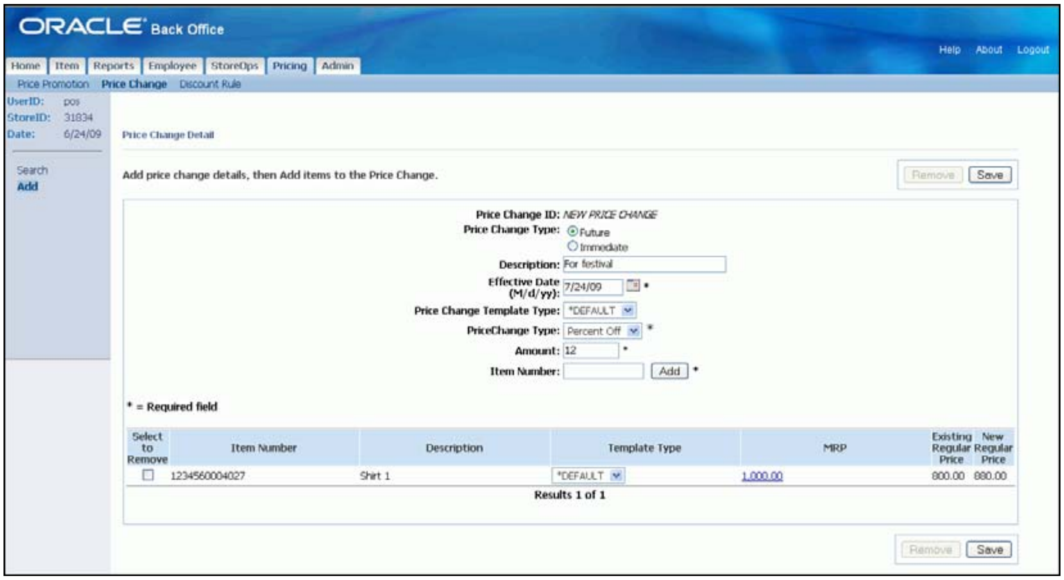
To add a price change:

1. Enter the details for the price change in the Price Change Detail screen:

- Select a price change type. For a price change that takes effect at a later date, click **Future**. For a price change that takes effect immediately, click **Immediate**.
- Type in a new price change description.
- Enter a new effective date.
- Select the PriceChange Type. The three values that are available includes: Percent Off on MRP, Amount off on MRP, and New Price.

> **Note**: Percent off and Amount off can be applied to items that have "Retail less than MRP".

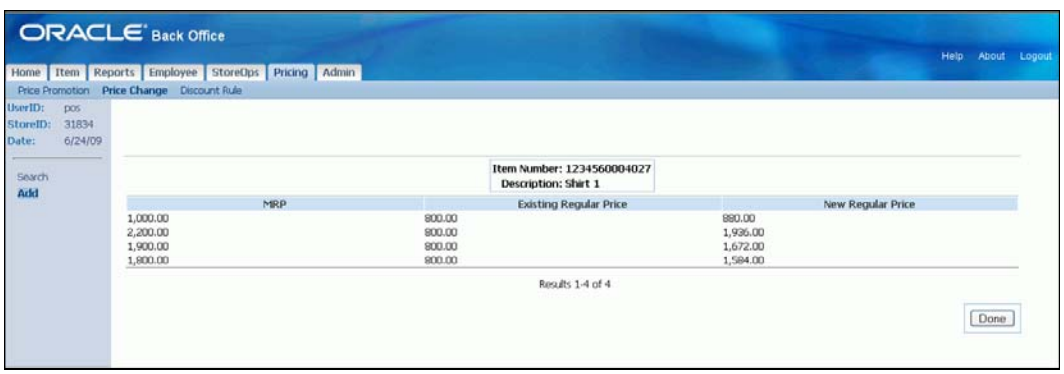
- Enter the amount in the Amount field.
- Click the **Add** left navigation link. Add an item to the price change. The new item appears at the bottom of the screen. If there are multiple MRPs associated with the item, then the value in the MRP column appears as a hyperlink as shown below:



Price Change Detail

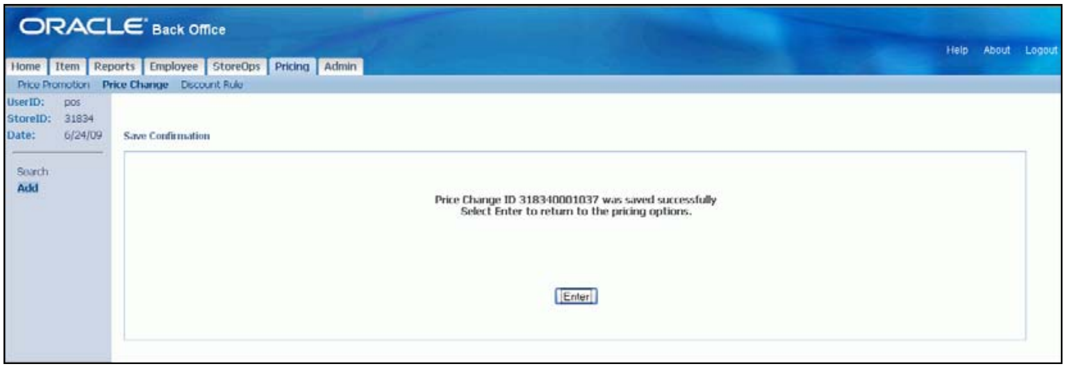
- Click the hyperlink in the MRP column. The primary MRP and the other non primary MRP's are displayed. The Existing Regular Price and the New Regular Price for the different MRPs are also displayed.

> **Note**: The Primary MRP is displayed first followed by the non primary MRP's sorted by the Activation date in the reverse chronological order.



Multiple MRPs

- Click **Done** to return to the Price Change Detail screen. Click **Save** to save the changes. The following confirmation screen is displayed:



Save Confirmation

- Remove an item from the price change. Check the box next to the item and click **Remove**.

2. To save all changes, click **Save**.
3. To return to the Price Change Search screen, click **Done**.

Discount Rules

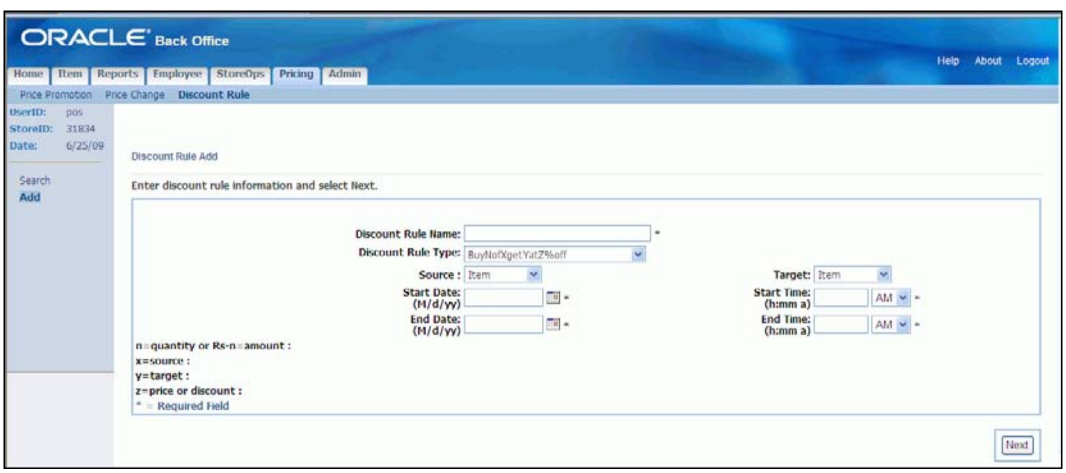
Discount rules are created to temporarily reduce the price of an item or group of items. The discount rules apply to multiples or combinations of items. You can search for, create, edit, or end discount rules.

Adding Discount Rules

On the Discount Rule Add screen, you can add new discount rules to the database.

To add a discount rule:

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



Discount Rule Add Screen

4. Enter the discount rule name. This is a free text field to describe the discount rule.
5. Select the discount rule type from the menu.
6. Select the source and target from the menus. You can select item, class, or department for the source and target.

7. Enter start and end dates or select from the calendar next to the field box.
8. Enter starting and ending times.
9. Click Next.

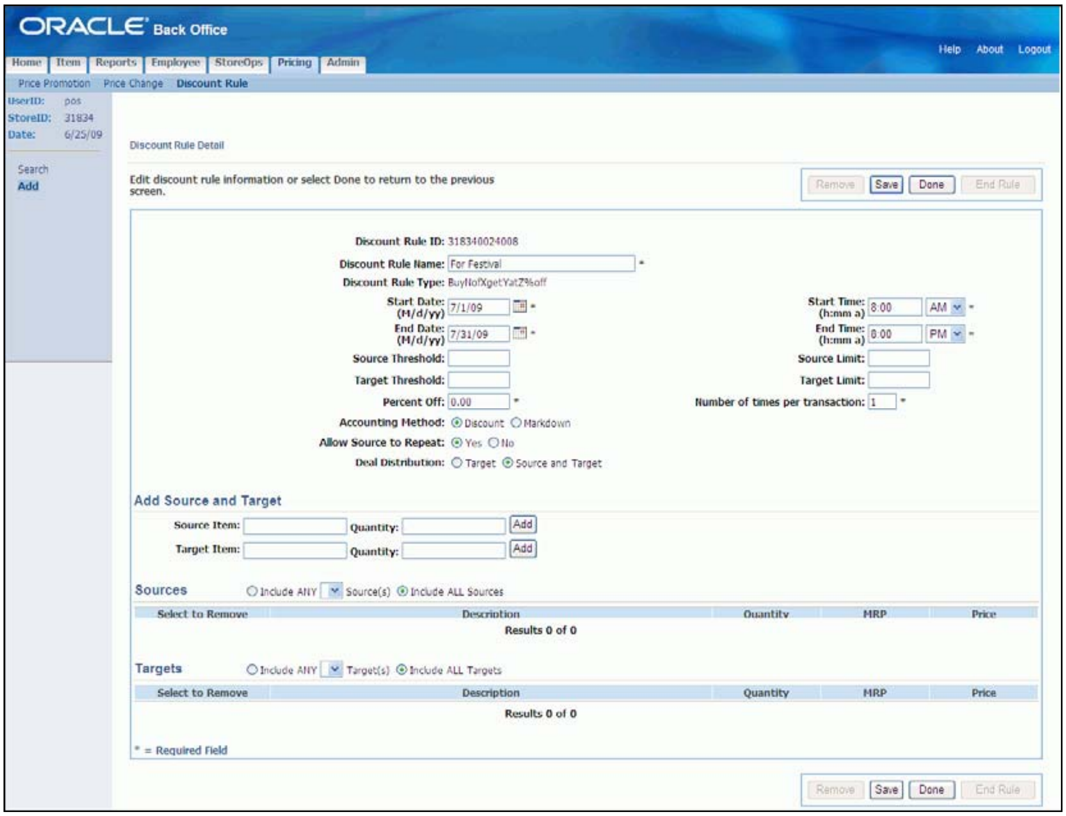
> **Note**: If not all fields are entered, you receive an error message asking you to complete all fields before continuing. If successful, a message is displayed with the assigned rule ID.

Editing a Discount Rule

On the Discount Rule Detail screen, you can view, edit, or end an existing discount rule. If the discount rule is pending or expired, you can edit the name of the rule, the start and end dates, the start and end times, the limit and threshold amounts, quantity, items, classes and departments eligible for specific group discounts. If the rule is active, you can only edit the end date and time.

To edit a discount rule:

1. On the Discount Rule Search screen, click the Discount Rule ID. The Discount Rule Detail screen is displayed.



Discount Rule Detail Screen

Field	Description
Discount Rule ID	Identifier of this discount rule.
Discount Rule Name	Name for this discount rule.
Discount Rule Type	Type of discount for this rule.

Field	Description
Start Date and Start Time	The date and time when this discount rule goes into effect.
End Date and End Time	The date and time when this discount rule expires.
Source Threshold	Minimum price allowed for a source to be part of this rule.
Source Limit	Maximum price allowed for a source to be part of this rule.
Target Threshold	Minimum price allowed for a target to be part of this rule.
Target Limit	Maximum price allowed for a target to be part of this rule.
Percent Off, Dollar Off, Fixed Price	Discount percentage or amount applied to the target.
Number of Times per Transaction	Maximum number of times this rule can be applied in a transaction. Used when Allow Source to Repeat is set to Yes.
Accounting Method	Determines if this rule is described as a discount or markdown for accounting purposes.
Allow Source to Repeat	Determines if this rule can be applied more than once in a transaction. If set to Yes, the Number of Times per Transaction is used to set the maximum number of times this rule can be applied in a transaction.
Deal Distribution	If set to Source, the discount amount is applied only to the target. If set to Source Target, the discount amount is divided between the source and target.
Add Source and Target fields	
Source Item Number	SKU number assigned to the source.
Quantity	Quantity of the source that must be purchased to get the discount on the target.
Target Item Number	SKU number assigned to the target.
Quantity	Quantity of the target that must be purchased to get the discount.
Sources fields	
Select to Remove	A checked box indicates the source has been selected to be removed from the rule.
Item Number	SKU number assigned to the source.
Description	Description of the source item.
Quantity	Quantity of this item that must be purchased to get the discount on the target.
MRP	The Primary MRP of the item.
Price	Price of the item.
Targets fields	
Select to Remove	A checked box indicates the target has been selected to be removed from the rule.
Item Number	SKU number assigned to the target.
Description	Description of the target item.
Quantity	Quantity of this item that must be purchased to get the discount.

Field	Description
MRP	The MRP of the item.
Price	Price of the item without the discount applied.

2. Change the rule information.
3. Change the source and targets for the rule.
   - To add a source, enter the item number and quantity and click **Add**. The item is added to the Sources list.
   - To add a target, enter the item number and quantity and click **Add**. The item is added to the Targets list.
   - To remove a source or target, select the **Select to Remove** check box. Click **Remove**.
4. To end a discount rule, edit the end date and time to the current date and time.
5. To save your changes, click **Save**. The Discount Rule Search screen is displayed.