

Oracle® Retail Mobile Point-of-Service

User Guide

Release 12.0

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Preface

This document describes how to use Oracle Retail Mobile Point-of-Service.

Audience

This document is intended for store employees such as a sales associate or cashier who need to scan merchandise and suspend or tender orders from a remote hand-held device.

Related Documents

For more information, see the following documents in the Oracle Retail Mobile Point-of-Service Release 12.0 documentation set:

- *Oracle Retail Mobile Point-of-Service Release Notes*
- *Oracle Retail Mobile Point-of-Service Installation Guide*
- *Oracle Retail Mobile Point-of-Service Operations Guide*

Customer Support

- <https://metalink.oracle.com>

When contacting Customer Support, please provide:

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

Review Patch Documentation

For a base release (".0" release, such as 12.0), Oracle Retail strongly recommends that you read all patch documentation before you begin installation procedures. Patch documentation can contain critical information related to the base release, based on new information 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

The following text conventions are used in this document:

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

Overview

In an effort to improve customer service and shorten wait time at the register, Oracle Retail Mobile Point-of-Service provides a way for customers to check out from anywhere inside or outside the store.

With a device such as the Symbol Technologies SPT8146, transactions can be tendered by credit card or entered and retrieved at the register for final payment. The flexibility and convenience of this system improves customer checkout time and reduces cost and physical space used by traditional, hard-wired registers.

Oracle Retail Mobile Point-of-Service is a wireless, scaled-down version of the Oracle Retail Point-of-Service application. It is used for line-busting and responds to requests from wireless devices through the use of a web server. Oracle Retail Mobile Point-of-Service and Point-of-Service are installed on the same store server and can be custom fitted to meet a retailer's unique business needs.

Oracle Retail Mobile Point-of-Service offers the following subset of Point-of-Service functions:

- Scanned or manual entry of items
- Price look-up
- Price override
- Adjust quantity
- Cancel transaction
- Accept tax exempt items
- Suspend transaction for retrieval and completion at register
- Delete item from transaction
- Item and transaction discounts
- Complete transaction with credit card
- Item tax override
- Transaction tax override
- Accept electronic signature on screen
- Print receipt or bar-coded suspend ticket

This chapter describes the method by which you start the application, log on and off, and move through the interface. Information regarding security restrictions, errors and terminology are also included in this chapter.

The following topics are discussed in this chapter:

- [Getting Started](#)
- [User Interface](#)
- [Security and Errors](#)
- [Terminology](#)

Getting Started

Oracle Retail Mobile Point-of-Service has the following options:

- Log on and off
- Complete and modify transactions
- Close wireless handheld devices

Starting the Application

After installation of Oracle Retail Mobile Point-of-Service and configuration of all handheld devices, you can run the application and use the handheld devices.

To run the application:

1. Charge the handheld device.
2. If the store's database is not running, start it with the following command:

```
c:\OracleRetailStore\pos\bin\dbstart.bat
```
3. If the store's server is not loaded, start it with the following command:

```
c:\OracleRetailStore\pos\bin\storeserverconduit.bat
```
4. At the register, run Oracle Retail Point-of-Service and open the store. The store must be open before transactions can be completed with Oracle Retail Mobile Point-of-Service.
5. On the store server, start the Oracle Retail Mobile Point-of-Service server with the following command:

```
c:\OracleRetailStore\mpos\bin\ulremote.bat
```
6. Turn on the handheld device and connect it to a printer. You are now ready to log on.

Logging On and Off

After starting the application and opening the store, you can log on to the handheld device. If you have previously logged on, you will be taken to the Sell Item screen. See [Figure 2-1](#).

Note: The term tap is equivalent to click on handheld RF devices.

Figure 1-1 Log On/Off Screen

To log on:

1. Tap **Log On** from the Log On/Off screen. The Sign On screen appears.

Figure 1-2 Sign On Screen

2. Type your user ID and tap **Next**. The Password screen appears.

Figure 1-3 Password Screen

For information on how passwords are handled by this application, see [Passwords](#).

3. Enter your password and tap **Next**.
 - If you entered a valid password, the Sell Item screen appears. See [Figure 2-1](#).
 - If you entered a temporary password or a password that has expired, an error message is displayed. You must go to an Oracle Retail Point-of-Service register or Back Office location and change the password before you can log on to the handheld device.

To log off:

1. Complete the current transaction, then tap **Exit**. The Log On/Off screen appears. See [Figure 1-1](#).
2. Tap **Log Off**. The Sign On screen appears. See [Figure 1-2](#).
 - If you are the only logged on user, a new user can now log on the application.
 - If multiple users are logged on, you must enter your user ID and password to complete logging off.

Note: If you are the last user for the current business day, the device must be closed before you log off.

Closing the Device

At the end of a business day, all registers and handheld devices must be closed to reconcile its transactions. Close the device only at the end of a business day; a closed device is not available for log on until the next business day.

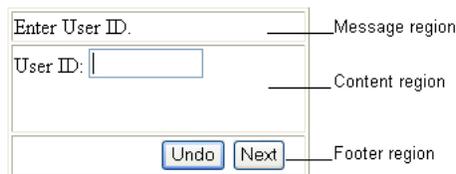
To close the device:

1. From the Log On/Off screen, tap **Close Device**. See [Figure 1-1](#). The Sign On screen appears. See [Figure 1-2](#).
2. To verify closing, enter your logon ID and password. The device is now closed.

User Interface

The following figure shows how Oracle Retail Mobile Point-of-Service screens are organized.

Figure 1-4 Screen Regions



[Table 1-1](#) provides descriptions for each region.

Table 1-1 Screen Region Descriptions

Region	Description
Message Region	This region is used to display instructions or user messages.
Content Region	This region displays operations and application specific data.
Footer Region	This region displays action buttons that are available to the operator based on the screen.

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 Mobile Point-of-Service, limited locale support is provided to enable the date, time, and currency to be displayed in the default locale chosen for the application. For more information, see the Oracle Retail Mobile Point-of-Service Operations Guide. All screens and examples in this guide use 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, transactions cannot be tendered through Oracle Retail Mobile Point-of-Service. A transaction must be suspended and then tendered at a Point-of-Service register. Also, modifications cannot be made to the tax for an item or transaction.

The following buttons are not available when VAT is enabled:

- **Tender** button on the Sell Item screen
- **Ovrd. Tax Amt.** button on the Item Options and Transaction Options screens
- **Ovrd. Tax %** button on the Item Options and Transaction Options screens
- **Tax On/Off** button on the Item Options screen
- **Tax Exempt** button on the Transaction Options screen

Security and Errors

This section provides an overview of how security issues and errors are handled.

Passwords

Passwords are used to restrict access to Oracle Retail Mobile 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 defined to expire within a specific number of days after being set. If you do not change your password before it expires, you are locked out from logging on. If you are locked out, a system administrator must reset your password. You will be assigned a temporary password. You need to go to a Point-of-Service register or Back Office location to change that temporary password before you can log on to the handheld device. You may also be locked out after a specific number of invalid logon attempts.

Multiple Handheld Devices

Each handheld device functions like a register and can be closed independently at any time with the use of your logon ID and password. The last user must close the device before they log off and a closed device is not available for log on until the next business day. A user can be logged on to more than one device and multiple users can be logged into the same device.

Timeout Interval

If there has been no activity on your handheld device for a period of time, you will be automatically logged off and will need to log back on before you can perform any new functions. Any transactions that have not been completed will be lost when the device times out.

Terminology

Some terms are used in special ways with handheld devices:

Stylus: A pointing device used with handheld RF devices to select letters or numbers from the on-screen keyboard or for drawing on the text screen for data-entry where allowed. (For example, signature capture.)

Tap, Select, Click: User's action to execute a command such as a button click or selecting on a HTML link by a stylus or pen-shaped apparatus, typically supplied with the handheld device.

Type or Enter: Enter alphanumeric text into the available data entry field using any means available, such as writing with the stylus or selecting letters or numbers from the on-screen keyboards.

Using Oracle Retail Mobile Point-of-Service

The topics in this chapter describe how to add items to a transaction, perform an item inquiry, and tender transactions. A transaction is a sale of merchandise in exchange for a tender of value.

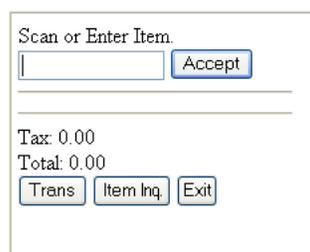
Transactions

Oracle Retail Mobile Point-of-Service is similar to Point-of-Service in that both applications begin transactions from the Sell Item screen. In order to complete a transaction using Oracle Retail Mobile Point-of-Service, two options are available: using a credit card or suspending a transaction for payment at the register. In contrast, Point-of-Service accepts many different types of tender in order to complete a transaction. This chapter will provide detailed information on performing transactions using Oracle Retail Mobile Point-of-Service.

Adding Items

After you log on, the Sell Item screen appears. Most of the activity in this application starts from this screen, where you add items to a transaction. Most actions require that at least one line item exists in the transaction.

Figure 2-1 Sell item Screen



Scan or Enter Item.
 Accept

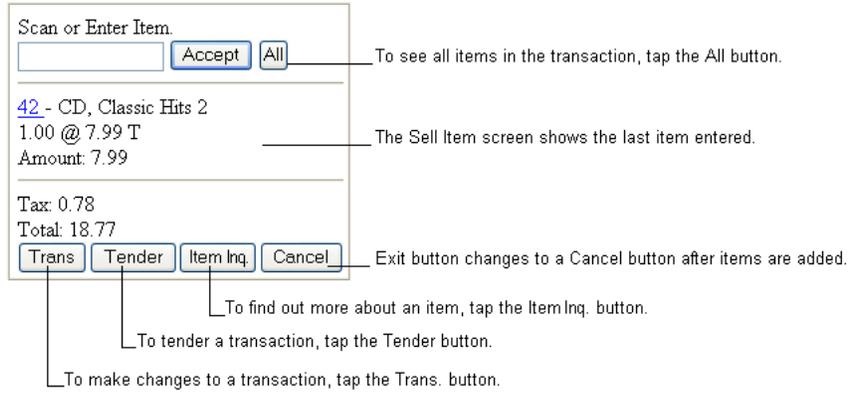
Tax: 0.00
Total: 0.00

Trans Item Inq Exit

To add items to a transaction:

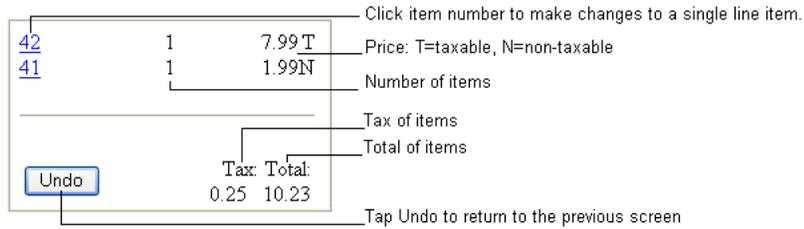
1. Scan the item number or type the item number and tap **Accept**. The item appears on the Sell Item screen.

Figure 2–2 Sell Item Screen with Items Added



The following figure shows the Sell Item screen if you tap the All button.

Figure 2–3 Show All Screen



Item Inquiry

To find out more about an item, perform an item inquiry.

To perform an item inquiry:

1. From the Sell Item screen, tap the **Item Inq.** button. The Enter Item screen appears.
2. Scan the item number or manually enter the item number and tap **Next**. The Item Inquiry screen appears.

Figure 2–4 Item Inquiry Screen

Choose Add to add this item to the transaction or choose Done to exit.
Item Number: 1234
Description: CoolBox
Price: 10.00
Unit of Measure: Units
<input type="button" value="Add"/> <input type="button" value="Undo"/> <input type="button" value="Done"/>

The Item Inquiry screen shows the Item Number, Description, Price, and Unit of Measure.

3. You can perform the following:
 - To add the item to the current transaction and return to the Sell Item screen, tap **Add**.
 - To return to the previous screen, tap **Undo**.
 - To discard the item information and return to the Sell Item screen, tap **Done**.

Tendering a Transaction

After all items for a transaction have been scanned or entered into the application, you can tender the transaction.

Note: When VAT is enabled, transactions cannot be tendered through Oracle Retail Mobile Point-of-Service. The transaction must be suspended and then tendered at a Point-of-Service register. For information on how to suspend the transaction, see [Suspend Transaction](#).

To tender a transaction:

1. Tap the **Tender** button from the Sell Item screen, shown in [Figure 2–1](#), after items have been added. The Credit Card screen appears.

Figure 2–5 Credit Card Screen

Swipe or enter credit card.		
Card #	<input type="text"/>	
Exp (MMYYYY)	<input type="text"/>	
Disc:	Tax:	Total: 21.06
0.00	1.08	
<input type="button" value="Undo"/> <input type="button" value="Next"/>		

2. Swipe the credit card, or manually enter the credit card number and expiration date, and tap **Next**.

Note: The month and year for the expiration date is entered in MMYYYY format. This format is the same for all locales.

If the card expiration date is earlier than the current date, the system displays an error indicating the card has expired. Otherwise, the Signature Capture screen appears.

The credit authorization process begins automatically. The authorization process has several possible return codes:

- Request Declined or Credit Referral
If the request is declined or referred, you can try again with another credit card or suspend the transaction and ask the customer to go to a register to complete the transaction.
- Verify Positive ID
If the Verify Positive ID screen appears, obtain an acceptable form of ID to verify the person's identity and signature, and tap **Yes**.
- Request Approved
If the Credit Card Authorization is accepted, the tender transaction is completed and the Signature Capture screen appears.

Figure 2–6 Signature Capture Screen

Have customer sign. Verify signature and press Next to continue.
Total: 21.06
Signature:
<input type="text"/>
<input type="button" value="Next"/>

3. Ask the customer to sign the signature capture area on the device and tap **Next**.

4. If the signature is not captured properly, the Signature Retry screen appears.
 - To have the customer retry the signature capture, tap **Yes**.
 - To print a receipt and have the customer sign the credit signature slip, tap **No**.
 When the signature is captured or bypassed, the customer receipt prints and the Sell Item screen appears.
5. If the printer is offline or out of paper, the Printer Offline screen appears. Correct the problem and tap **Retry**. If the printer is not working, you can suspend or cancel the transaction.
 - To suspend the transaction, you must return to the Sell Item screen. On the Printer Offline screen, tap **Cancel**. When the Confirm Cancel screen appears, tap **No**. Refer to the [Suspend Transaction](#) section for information on how to suspend the transaction.
 - To cancel the transaction, tap **Cancel** from the Printer Offline screen. The Confirm Cancel screen appears. To confirm the cancellation, tap **Yes**.

Credit Authorization Processor Offline or Timeout

To tender a transaction with a credit card, the credit tender amount must be within certain preset minimum and maximum settings. If the amount is within these limits and is greater than the minimum amount that requires credit authorization, the authorization is attempted.

If the Credit Authorization provider is offline or has timed out, the credit tender amount is checked against the minimum preset allowable limit. If the credit tender is less than the amount required to proceed without a credit authorization, the credit transaction is automatically approved. If the amount is greater than the setting, the transaction must be suspended and completed at the register.

Modifying Transactions

Once items have been added to a transaction, you can modify the transaction in a variety of ways. Most of the changes you can make can apply to either the entire transaction or a specific item. The topics in this section describe the options you can access from these screens. Unless otherwise indicated, the options work the same but are applied to the whole transaction or a single line item based on which option screen they are selected from.

Transaction Options

To make changes to the entire transaction, tap **Trans.** on the Sell Items screen shown in Figure 2-2. The Transaction Options screen appears.

Figure 2–7 Transaction Options Screen

Choose an Option.	
Disc. Amt.	Ovrd. Tax Amt.
Disc. %	Ovrd. Tax %
Suspend	Tax Exempt
<input type="button" value="Undo"/>	

Item Options

To make changes to a specific line item, tap the item number, either on the Sell Items screen shown in Figure 2-2 or the Show All screen in Figure 2-3. The Item Options screen appears.

Figure 2–8 Item Options Screen

Choose an option.	
Disc. Amt.	Ovrd. Tax Amt.
Disc. %	Ovrd. Tax %
Price Override	Tax On/Off
Quantity	Delete Item
<input type="button" value="Undo"/>	

Discount Amount

To discount an item or transaction by an amount:

1. Select the Transaction Options or Item Options screen.
2. Tap **Disc. Amt.** The Discount Amount screen appears.

Figure 2–9 Discount Amount Screen

Enter discount information.	
Amount:	<input type="text"/>
Reason:	Saturday Morning Special ▼
<input type="button" value="Undo"/> <input type="button" value="Next"/>	

3. Type the amount of the discount, select a reason code, and tap **Next**. The system adjusts the prices to reflect the discount and the Sell Item screen appears.

Discount Percent

To discount a transaction or item by a percentage:

1. Select the Transaction Options or Item Options screen.
2. Tap **Disc. %**. The Discount Percent screen appears.

Figure 2–10 Discount Percent Screen

Enter a discount percent.	
Percent:	<input type="text"/>
Reason:	Saturday Morning Special ▼
<input type="button" value="Undo"/> <input type="button" value="Next"/>	

3. On the Discount Percent screen, type the percent amount of the discount, select a reason code from the list, and tap **Next**. The system adjusts the prices to reflect the discount and the Sell Item screen appears.

Suspend Transaction

Suspend a transaction if it is interrupted or cannot be completed, such as when the customer offers any tender other than a credit card. Suspending a transaction causes the system to print a suspend transaction receipt, which the customer takes to a register to complete the transaction.

To suspend a transaction from the Sell Item screen:

1. Tap **Trans**. The Transaction Options screen appears. See [Figure 2-7](#).
2. Tap **Suspend**. The Confirm Suspend screen appears.

Figure 2-11 Confirm Suspend Screen



3. To continue, tap **Yes**. The Transaction Suspended screen appears.

Figure 2-12 Transaction Suspended Screen



4. To continue, tap **OK**. A suspended transaction receipt prints, and the Sell Item screen appears.

Tax Override Amount

Note: When VAT is enabled, the tax override amount function is not available.

To override the tax amount:

1. Select the Transaction Options or Item Options screen.
2. Tap **Ovrd. Tax Amt**. The Tax Amount screen appears.

Figure 2–13 Tax Amount Screen

Enter a tax amount.	
Amount:	<input type="text"/>
Reason:	ExceptionPeriod <input type="button" value="v"/>
<input type="button" value="Undo"/> <input type="button" value="Next"/>	

3. Type the tax amount, select a reason code from the list, and tap **Next**. The system sets the new tax amount and the Sell Item screen appears.

Tax Override Percent

Note: When VAT is enabled, the tax override percent function is not available.

To override the tax percentage for a transaction:

1. Select the Transaction Options or Item Options screen. Tap **Ovrd. Tax %**. The Tax Percent screen appears.

Figure 2–14 Tax Percent Screen

Enter a tax percent.	
Percent:	<input type="text"/>
Reason:	NewRate <input type="button" value="v"/>
<input type="button" value="Undo"/> <input type="button" value="Next"/>	

2. Type the tax percent, select a reason code from the list, and tap **Next**. The system sets the new tax rate and the Sell Item screen appears.

Tax Exempt

Note: When VAT is enabled, the tax exempt function is not available.

To set the tax to exempt for a transaction:

1. Select the Transaction Options screen. See [Figure 2–7](#).
2. Tap **Tax Exempt**. The Tax Exempt screen appears.
3. Type the certificate number, select a reason code from the list, and tap **Next**. The system sets the tax rate to exempt and the tax field displays a letter E in lieu of the tax amount.

Tax On/Off

Note: When VAT is enabled, the tax on/off function is not available.

To turn tax on or off for an item:

1. Select the Item Options screen. See [Figure 2–8](#).
2. Tap **Tax On/Off**. The Tax On/Off screen appears.
3. Tap the **On** or **Off** button to change the setting.
4. Select a reason code from the list and tap **Next**. The system displays a T next to taxable items and an N next to items which are not taxed.

Item Price Override

After an item is added to the transaction, a user with proper security access can change the price using Price Override.

To change the price for an item:

1. From the Item Options screen, tap **Price Override**. The Price Override screen appears.
2. Type the new price, select the reason code from the list, and tap **Next**. The displayed price changes and the Sell Item screen appears.

Item Quantity

When you scan or enter an item, the system creates a new line item with the appropriate item number and a quantity of one.

To change the quantity for an item:

1. From the Item Options screen, tap **Quantity**. The Item Quantity screen appears.

Figure 2–15 Item Quantity Screen

2. On the Item Quantity screen, type the quantity, and tap **Next**. The system adjusts the quantity and the Sell Item screen appears.

Note: You can also scan or enter an item multiple times; this generates multiple line items with the same item number.

Delete Item

To delete an item from a transaction:

1. From the Sell Item screen, tap the item number. If the item is no longer displayed on the Sell Item screen, tap the **All** button to display a list of items, and then tap the item number. The Item Options screen appears. See [Figure 2-8](#).
2. Tap **Delete Item**. The system removes the item from the transaction. The Sell Item screen appears.

Note: If you have entered an item as multiple separate line items in the transaction, you must delete each line item individually.
