

Oracle® Retail Point-of-Service

User Guide

Release 13.1.1

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Preface

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

Audience

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

Related Documents

For more information, see the following documents in the Oracle Retail Point-of-Service Release 13.1.1 documentation set or in the Oracle Retail Strategic Store Solutions Release 13.1.1 documentation set:

- *Oracle Retail Point-of-Service Release Notes*
- *Oracle Retail Point-of-Service Installation Guide*
- *Oracle Retail Point-of-Service Operations Guide*
- *Oracle Retail Strategic Store Solutions Configuration Guide*

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 recreate
- 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, 13.1) or a later patch release (for example, 13.1.1). 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 (with the exception of the Data Model which is only available with the release packaged code):

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

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

- ["Application Overview"](#)
- ["Getting Started"](#)
- ["User Interface"](#)

Note: The Oracle Retail Point-of-Service application may have been customized for your company. If changes were made from the default configuration, the application may look or behave differently than described in this guide.

For example, the steps that describe how to tender a transaction include the franking of certain types of tender such as checks. In your configuration, however, you may not perform franking of checks when tendering a transaction.

Application Overview

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

- Daily Operations
- Point-of-Service
- Administration
- Clock In/Out
- Service Alert
- Browser
- Training On
- Inventory Inquiry

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

Getting Started

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

Starting the Application

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

Logging In and Out

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

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

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

Changing Your Password

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

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

To change your password:

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

Figure 1–1 Change Password Screen

Enter your current password, then enter your new password and select Next.

User ID: *

Current Password: *

Enter New Password: *

Confirm New Password: *

129
2/13/09 1:32 PM Change Password Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next

ORACLE

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

User Interface

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

Screen Regions

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

Figure 1–2 Screen Regions

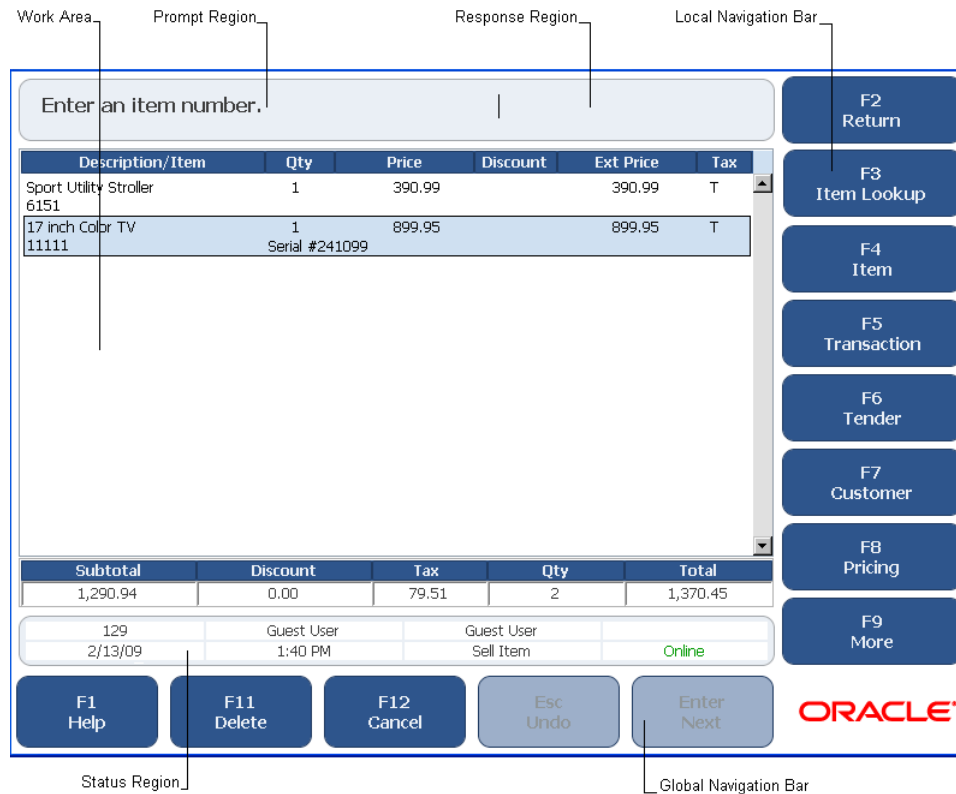


Table 1–1 describes the screen regions.

Table 1–1 Screen Region Descriptions

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

Table 1–1 (Cont.) Screen Region Descriptions

Region	Description
Status	<p>The Status region is comprised of several fields:</p> <ul style="list-style-type: none"> ■ Register ID–Displays the register ID which is a unique identifier for the register. ■ Current Business Date–Displays the current business date that is set during the Start of Day process. ■ Cashier Name–Displays the ID of the cashier working on the register. ■ Current Time–Displays the current time. ■ Sales Associate Name–Displays the name of the sales associate that is linked to the current transaction. ■ Screen Name–Displays the name of the current application screen. ■ Customer–Displays the name of the customer for the current transaction, if applicable. ■ Communications Status–Displays the communications status, which is determined from the last attempt by the application to communicate with the server or device. Possible values for this field are Online, Offline, and Training Mode.
Local Navigation Bar	<p>The local navigation bar contains eight buttons that are used to select application functionality.</p> <p>Each button has a label and an associated function key on the keyboard that can be used to achieve the same result as clicking the button. For example, you can click the F4/Item button or press the F4 function key. Inactive or disabled buttons are grayed-out. Unused buttons are blank.</p>
Global Navigation Bar	<p>The global navigation bar contains five buttons that are used to select application functionality. The behavior of the buttons is repeated on all screens, where possible, to facilitate consistency and ease-of-use.</p> <p>Each button has a label and an associated function key on the keyboard that can be used to achieve the same result as clicking the button. Inactive or disabled buttons are grayed-out.</p>
Work Area	<p>The work area is the region of the screen where data for viewing or selection is presented. In some instances, this area is used to display or collect information from you and other times it is blank.</p>
Dialog Boxes	<p>Dialog boxes are used to present messages or to request verification of a requested action. When these boxes appear, you must provide the requested information and interact with the application by pressing keys or clicking buttons.</p> <p>These boxes have only an “on/off” state such as Enter, Yes, No, Cancel, Retry, Continue, and do not allow for data entry. All local and global navigation is disabled when a dialog is displayed.</p>

The Navigation Bars

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

Global Navigation Bar

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

Figure 1-3 Global Navigation Bar

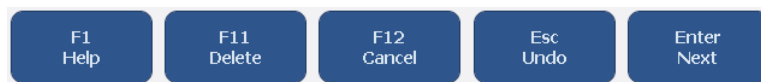


Table 1-2 Global Navigation Key Descriptions

Key	Description
F1/Help	The F1/Help key enables you to access help for the current screen. When you press F1/Help, the help screen is displayed. You may need to choose Page Up or Page Down to find help for the specific topic required. Press F1/Done to close the help screen.
F11/Delete	On most screens, the F11/Delete key is used to clear any information that has been typed or scanned in the current field. When you press F11/Delete, the field is cleared and ready for you to re-enter new information in the same field. For example, on the Sell Item screen, you can delete (or remove) an item from the transaction. To delete an item, select/highlight the item and press F11/Delete. The item is removed from the transaction. Note: If more than one item is to be removed, use the arrow keys to select the first item and press the space bar. Then use the arrow keys to move to the next item and press the space bar again. When all desired items are selected, press F11/Delete.
F12/Cancel	On most screens, the F12/Cancel key is used to cancel the current transaction or specific function. When you press the F12/Cancel key, you are prompted to verify whether you wish to cancel the current operation. If Yes is chosen, the transaction is cancelled or the specified function is cancelled.

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

Key	Description
Enter/Next	<p>The Enter/Next key is used to complete the current operation. For example, if you enter an item number and press Enter/Next, the item number and its defaults (description, price, default quantity of 1, extended price, and tax code) are entered into the transaction and are displayed on the Sell Item screen.</p> <p>When the Enter/Next key is pressed after data has been entered in the work area, the required fields are validated for minimum/maximum characters and acceptable value ranges. If any of the data is invalid, an error message is displayed.</p> <p>Throughout this document, you are directed to “scan the item or enter the item number and press Enter/Next.” You only need to press Enter/Next if you have manually entered the number. If you scan the item, the operation is completed automatically (an implied Enter).</p>
Esc/Undo	<p>The Esc/Undo key is used on most screens to back out of the current operation and return to the previous screen. Unlike the F12/Cancel key, the Esc/Undo key does not cancel the current transaction or specific function. When Esc/Undo is pressed, you lose all of the information that has been entered on that screen.</p>

Local Navigation Bar

The buttons on the local navigation bar change as you navigate through the various components in Oracle Retail Point-of-Service. The functions of the local navigation bars are described under their specific component. For example, the buttons shown in [Figure 1–4](#) are available on the Sell Item screen. Typically, when you select another screen, a different set of options is displayed. Buttons that are grayed-out have been designated disabled and are currently unavailable. The F3/No Sale button is disabled in the following figure.

If there are more options available than buttons that fit on the screen, the last button is the More option. To view the additional options, press More. Press More again to return to the original set of options.

Figure 1–4 Local Navigation Bar

Other Navigation Keys

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

Table 1–3 Other Navigation Key Descriptions

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

Table 1–3 (Cont.) Other Navigation Key Descriptions

Key	Description
Tab/Shift-Tab	The Tab and Shift-Tab keys are enabled on screens with more than one field. The Tab key moves you to the next field on the screen (left to right, top to bottom, bottom to top). The Shift-Tab key moves you to the previous field on the screen (right to left, bottom to top, top to bottom).
Up/Down Arrows	The up and down arrow keys can be used when a screen has more than one entry in a list. The up arrow moves to the entry above the current entry. The down arrow moves to the entry below the current entry.

Language and Locale Support

Oracle Retail Point-of-Service supports multiple languages and a default locale for the application.

Note: All figures and examples in this guide use English language and the English - United States locale.

Language Support

Oracle Retail Point-of-Service has a default language based on the default locale chosen for the application. In addition, each user has a preferred language which can be selected from the languages supported for the application.

Information on each screen is displayed in the default language for the application. If a user has a different preferred language selected, the screen is displayed in that preferred language.

When a customer is linked to a transaction, receipts are printed in the preferred language of the customer. Screens on the signature pad are also displayed in the preferred language of the customer.

Locale Support

Locale support means tailoring the information displayed on a screen and accepting user entered data in a format that meets the conventions of the locale, or geographic region, where the application is being used. In Oracle Retail Point-of-Service, locale support is provided to enable the address and phone number to be displayed in the default locale chosen for the application. The date, time, and currency are displayed in the locale for the preferred language of the user.

Value Added Tax

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

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

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

Item Level Messages

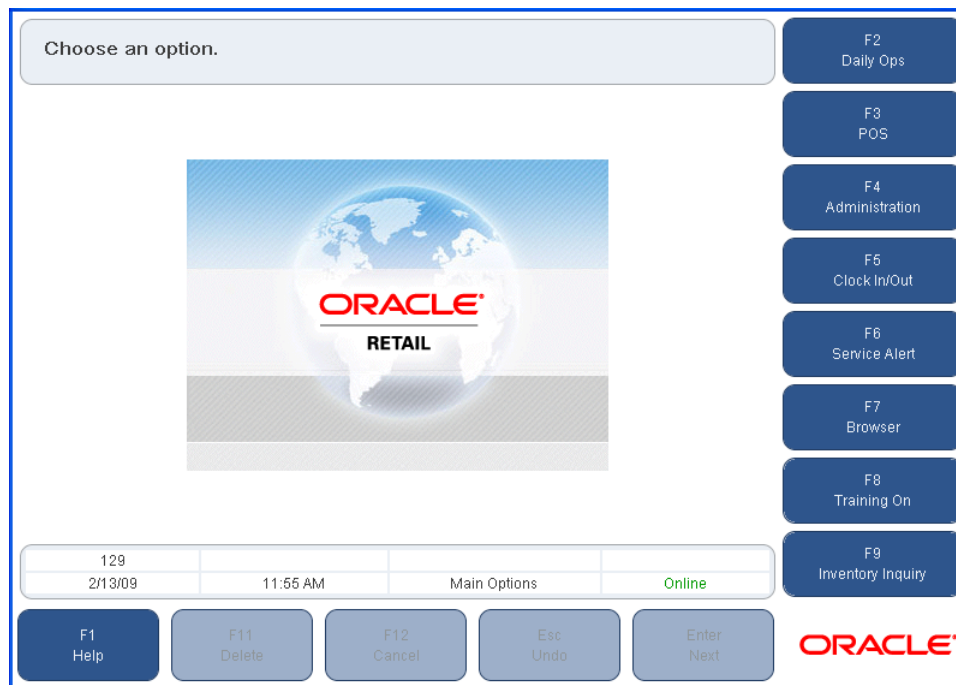
An item level message provides information to the cashier and customer about an item or certain attributes associated with an item. Item level messages can be displayed on the Sell Item and inventory inquiry screens. Item level messages can also be printed on a receipt.

For example, if an item is being sold as a final clearance and cannot be returned, a message could be displayed on the screen and printed on the receipt to inform the cashier and customer that the item cannot be returned. To see an example of an item level message, see [Figure 3–28](#).

The Main Options Screen

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

Figure 1–5 Main Options Screen



You utilize these components to perform various tasks. [Table 1–4](#) describes the components:

Table 1–4 Application Components

Component	Description
Daily Operations	Enables you to access the Start of Day, Register Open, Till Options, Register Close, and End of Day functions.
Point-of-Service	Enables you to conduct the Return, No Sale, Item, Transaction, Tender, Customer, Pricing, Special Order, House Account, Reprint Receipt, Till, Manager, Gift Card/Certificate, and Redeem operations.
Administration	Enables you to access the E-Journal, Reset Totals, Security, Manager, and About functions. See the <i>Oracle Retail Point-of-Service Operations Guide</i> for more information. Also enables you to access the Transaction Re-entry feature. For more information on this feature, see " Using Transaction Re-entry Mode " in Chapter 11 .
Clock In/Out	Enables you to record your time via the Clock In/Out component.
Service Alert	Enables you to view order information with the Refresh and Orders components.
Browser	Enables you to access a web browser if a URL to a website has been configured.
Training On	Enables you to learn the Point-of-Service and Administration components on live registers without affecting real transactions.
Inventory Inquiry	Enables you to request inventory information on an item if Oracle Retail Store Inventory Management was purchased and implemented.

Browser Functionality

You can access a web browser if a URL to a website has been configured for your system.

To access the web browser, press **F7/Browser** from the Main Options screen. You are prompted to log in. See "[Logging In and Out](#)". After logging in, the website is displayed. [Figure 1–6](#) shows an example of the screen.

Note: If your system has not been configured for this feature, an error is displayed after logging in. Press **Enter/Next** to return to the Main Options screen.

Figure 1–6 Web Browser



A navigation bar is displayed at the bottom of the screen. [Table 1–5](#) describes the keys. To return to the Main Options screen, press **Close**.

Table 1–5 Web Browser Navigation Key Descriptions

Key	Description
Close	Return to the Main Options screen.
ALT Left Arrow/Back	Same as the Back button on a browser window.
ALT Right Arrow/Forward	Same as the Forward button on a browser window.
ESC/Stop	Same as the Stop button on a browser window.
F5/Refresh	Same as the Refresh button on a browser window.
ALT Home/Home	Same as the Home button on a browser window.

Data Updates for the Register

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

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

Daily Operations and Time Tracking

The following functions are described in this chapter:

- "Daily Operations"
- "Clocking In and Out"

Daily Operations

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

Figure 2–1 Daily Operations Screen

Choose an option.				F2 Start of Day
				F3 Register Open
				F4 Till Options
				F5 Register Close
				F6 End Of Day
129 2/13/09	Guest User 1:34 PM	Daily Ops	Online	
F1 Help	F11 Delete	F12 Cancel	Esc Undo	Enter Next
ORACLE				

The following topics are described in this section for the Daily Operations component:

- ["Opening the Store"](#)
- ["Suspending and Resuming Tills"](#)
- ["Closing the Store"](#)

Opening the Store

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

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

Start of Day Function

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

To complete Start of Day:

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

The Summary Count screen is displayed.

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

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

Register Open Function

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

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

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

Opening Tills

A till is the cash drawer in the register. Float is the amount of money that is in the till when it is opened. The float travels with the till. A till has to be opened before performing a transaction. A till ID can only be used once during a business day to open a till.

To perform till operations, press **F4/Till Options** from the Daily Ops screen. The Till Options screen is displayed.

Figure 2–2 Till Options Screen



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

To open a till:

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

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

The Daily Operations Wizard

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

Suspending and Resuming Tills

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

Suspending Tills

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

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

Resuming Tills

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

To resume the till:

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

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

Closing the Store

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

[Table 2–1](#) shows the reports that are automatically generated during end of day processing. For information on the report content, see [Appendix A](#).

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

Table 2–1 Automatic Reports

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

Reconciling Tills

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

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

To reconcile a till:

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

For each tender type for which the button is enabled:

- a. Count each tender type in the till.
- b. Press the corresponding button on the navigation bar for the tender type counted.

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

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

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

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

Closing Tills

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

To close a till:

1. From the Till Options screen, press **F3/Close**. The Enter Till ID screen is displayed.
2. Enter the Till ID and press **Enter/Next**.
3. The Remove Till Confirmation screen is displayed, asking if you would like to remove the till at this time.
 - To remove the till, press **Yes**.
 - To leave the till in the drawer, press **No**.
4. The Till Reconcile Location screen is displayed, asking if you want to reconcile the till at the workstation. If the screen is not displayed, follow Step 6.
 - To reconcile the till at the workstation, press **Yes**.
 - To close the till without reconciling, press **No**.
5. If you selected **Yes** in Step 4, then follow Steps 4 through 11 in "[Reconciling Tills](#)".

- If you selected **No** in Step 4, the till is closed and the Till Options screen is displayed.

Closing the Register

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

To close the register:

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

End of Day Function

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

To close the store:

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

Figure 2–3 EOD Summary Screen

Press Next to accept; press Cancel to end without closing the store.

Type	Entered	Expected
Cash (USD)	390.99	(2,460.01)
E-Check (USD)	2,072.92	2,072.92
Store Credit (GBP)	100.00	0.00
Store Credit (USD)	0.00	0.00
Starting Float	890.00	0.00
Ending Float	(3,741.00)	0.00
Loans	0.00	0.00
Pickups (USD)	0.00	0.00

129 Guest User
2/13/09 1:52 PM EOD Summary Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next

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- To accept the balance and close the store, press **Enter/Next**. To end the operation without closing the store, press **F12/Cancel**.
- If you accept the balance, the Summary Count screen is displayed.
- Enter the total amount in the store safe and press **Enter/Next**.

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

Clocking In and Out

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

To clock in or out:

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

Figure 2–4 Clock Entry Screen

Select an entry type and reason code and press Next.

Last Time Entry:
 Current Time Entry: 1/14/09 2:04 PM
 Entry Type: In *
 Reason: Start of Day *

*Required Fields

129	Guest User		
2/13/09	2:05 PM	Clock Entry	Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next ORACLE

3. Verify the time entry, select an entry type and reason from the menus, and press **Enter/Next**. A message indicating the entry was successful is displayed.
4. Press **Enter/Next** to continue. The Main Options screen is displayed.
 For security, when you select another component, you are required to login again.

Completing Transactions

A transaction is an interaction with a customer in which merchandise is exchanged for a tender of value. Performing transactions is part of the POS component selected on the Main Options screen.

All transactions begin from the Sell Item screen. A transaction is started when an item number is entered on the Sell Item screen. The item number can be entered manually or by scanning a bar code. Additional items can be added to the transaction. A transaction can be suspended and resumed.

After all items have been added, the payment process begins. A customer can pay with multiple tenders. The transaction completes when the balance is zero. Return and No Sale are transaction types that begin by selecting a button on the Local Navigation Bar.

For more information on transactions, see the following sections:

- ["The Sell Item Screen"](#)
- ["Handling a Gift Card/Certificate"](#)
- ["Handling Age Restricted Sales"](#)
- ["Handling Related Items"](#)
- ["Tendering a Transaction"](#)
- ["Performing a Return"](#)
- ["Performing an Item Lookup"](#)
- ["Performing Item Options"](#)
- ["Performing Transaction Options"](#)
- ["Reprinting Receipts"](#)
- ["Till Functions"](#)
- ["Redeeming Tender"](#)
- ["No Sale Option"](#)

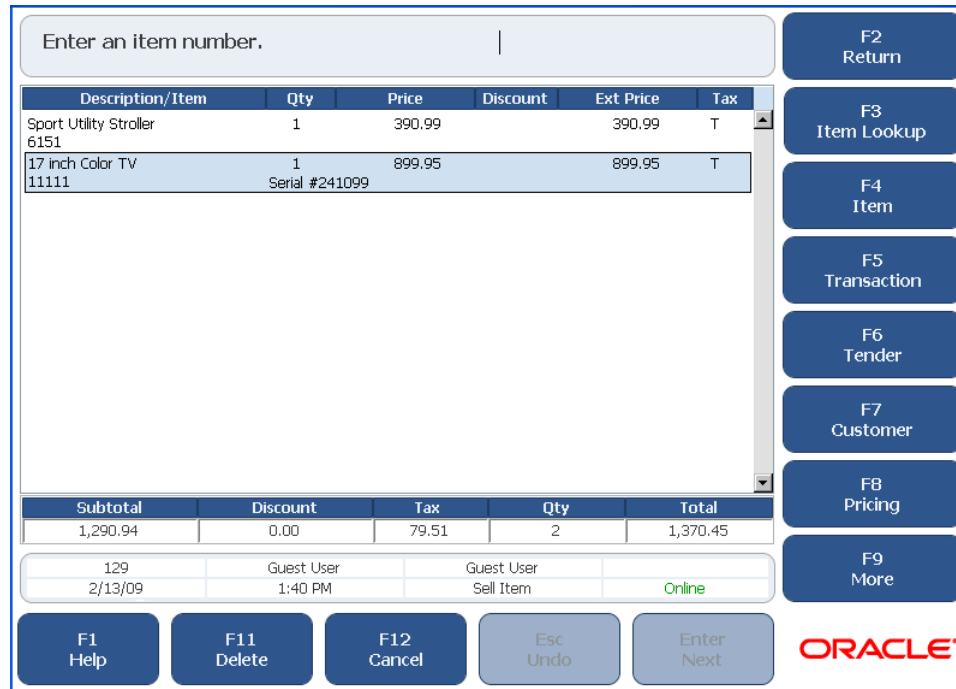
The Sell Item Screen

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

To access the Sell Item screen:

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

Figure 3–1 Sell Item Screen



3. Enter an item number and press **Enter/Next**. If the item requires a serial number, you are prompted to enter the serial number. The item is added to the list and the transaction totals at the bottom of the screen are updated.
4. When all items have been entered, tender the transaction. For information, see ["Tendering a Transaction"](#).

Handling a Gift Card/Certificate

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

Selling a Gift Card

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

To sell a gift card:

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

Figure 3–2 GC Amount Screen

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

Reloading a Gift Card

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

To reload a gift card:

1. Press **F9/More** and then **F7/Gift Card/Cert** from the Main Options screen. The Gift Options screen is displayed.
2. Press **F2/Gift Card**. The GC Options screen is displayed.
3. Press **F3/Reload**. The GC Amount screen is displayed.

4. Follow Steps 4 through 7 in "[Selling a Gift Card](#)".

Selling a Gift Certificate

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

To sell a gift certificate:

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

Figure 3–3 Tender Number Screen

The screenshot shows the Tender Number screen. At the top, a text box says "Enter the gift certificate number, then press Next." followed by a vertical bar. To the right is a numeric keypad with buttons for digits 0-9, a decimal point, and a Next button. Below the keypad is a status bar with four columns: "129", "Guest User", "Guest User", and "Online". The second and third columns also show "2/13/09" and "1:44 PM" respectively. Below the status bar are five function keys: "F1 Help", "F11 Delete", "F12 Cancel", "Esc Undo", and "Enter Next". The Oracle logo is in the bottom right corner.

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

Linking an Item to a Gift Registry

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

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

To link an item to a gift registry:

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

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

Gift Receipt

A customer may request a gift receipt, with no prices shown, to provide with a gift. The person receiving the gift can return the items using the gift receipt. There are several ways to create gift receipts:

- To create a gift receipt that contains all the items in a transaction, you create the gift receipt at the transaction level. See "[Issuing a Gift Receipt for a Transaction](#)".
- To create a separate gift receipt for each selected item in a transaction, you create the gift receipt at the item level. See "[Issuing Gift Receipts for Items](#)".
- To create a gift receipt for a single item or multiple items, you reprint a gift receipt for the transaction. See "[Reprinting Receipts](#)".

Handling Age Restricted Sales

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

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

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

To handle the age restriction:

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

Handling Related Items

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

A primary item can have multiple groups of related items defined for it. [Table 3-1](#) explains the different groups of related items.

Table 3-1 Related Group Items

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

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

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

To handle related items:

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

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

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

Tendering a Transaction

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

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

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

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

Creating an eReceipt for the Transaction

As an alternative to printing a receipt for a customer, a receipt can be sent to the customer by e-mail. An eReceipt can be created for sale and return transactions. When this feature is enabled, you are prompted to ask if the customer wants an eReceipt.

After completing the tender of the transaction, the Receipt Options screen is displayed:

1. Choose the option for the receipt:
 - To print a receipt, press **F2/Print**. The receipt is printed.
 - To create an eReceipt, press **F3/Email**. The eReceipt Email Address screen is displayed. Enter the e-mail address for the customer. Enter the address again to confirm. Press **Enter**.
 - To both print and send a receipt, press **F4/Print & Email**. The eReceipt Email Address screen is displayed. Enter the e-mail address for the customer. Enter the address again to confirm. Press **Enter**. The receipt is also printed.
2. If the receipt could not be sent, it is printed. The Sell Item screen is displayed.

Handling a Cash Drawer Warning

A cash drawer warning indicates that the amount of cash in the cash drawer is less than the required minimum amount or greater than the maximum amount allowed. After the prompt to close the cash drawer, a warning is displayed if either of these conditions occur:

- If the amount is less than the required minimum amount, a warning flashes in the lower left corner of the screen. No action is necessary.
- If the amount is greater than the maximum amount allowed, the Cash Drawer Warning dialog is displayed. You must select **Enter** to continue.

You should notify a store manager if a warning is displayed.

Handling Patriot Act Compliance

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

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

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

Figure 3–4 PAT Customer Information Screen

Based on the payment amount of this transaction, please enter the following information and select enter.

First Name: Michael *
 Middle Initial:
 Last Name: Matthews *
 Date of Birth (M/D/YY): 4/1/60 *
 Taxpayer Identification Number: 55566665555 *
 Occupation, Profession or Business: law *
 Address Line 1: 9999 Anystreet Drive *
 Address Line 2:
 City: Austin *
 State/Region: Texas *
 Postal Code: 77777 *
 Country: USA *

*Required Fields

129	Guest User	Guest User	
2/13/09	1:50 PM	PAT Customer Information	Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next

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To enter customer information:

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

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

Tendering with Cash

To tender a transaction using cash:

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

Figure 3–5 *Tender Options Screen*

Type	Number	Amount
Subtotal	Discount	Tax
1,290.94	0.00	79.51
Total	Tendered	Balance Due
1,370.45	0.00	1,370.45

129	Guest User	Guest User	Online
2/13/09	1:52 PM	Tender Options	

2. Enter the amount of the tender and press **F2/Cash**.
 - If the amount of the tender is more than the balance due, the Issue Change screen is displayed, prompting you to issue the indicated amount of change. If the tender amount meets the requirement for PAT compliance, the PAT Customer Information screen is displayed. After the customer information is entered, you are prompted to close the drawer.
 - If the amount of the cash tender is less than the balance due, the Tender Options screen is displayed to complete the tender.
 - If the cash tender is for the entire amount due, the cash tender is completed. If the tender amount meets the requirement for PAT compliance, the PAT Customer Information screen is displayed. Enter the customer information.

3. After the prompt to close the cash drawer, the system checks the amount of cash in the cash drawer. If the amount of cash is less than the required minimum amount or greater than the maximum amount allowed, a warning is displayed. For more information, see "[Handling a Cash Drawer Warning](#)".
4. If eReceipt is enabled, you are prompted to select a receipt option. Otherwise, the receipt is printed. You are returned to the Sell Item screen.

Tendering with Check

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

To tender a transaction with a check:

1. On the Tender Options screen, the balance due is displayed. Enter the amount of the check and press **F3/Check**. The Enter ID screen is displayed.
2. Select the ID Type from the menu and press **Enter/Next**. The Enter ID Number screen is displayed.
3. Swipe or manually enter the ID number and press **Enter/Next**. If a driver's license number was entered, the ID Origin field is displayed. Select the ID Country and the ID State/Region from the menus. Press **Enter/Next**.
The Enter Phone screen is displayed.
4. Enter the customer's phone number and press **Enter/Next**. The Check Entry Scan screen is displayed.
5. Scan the check through the MICR device or enter the bank information and press **Enter/Next**. The Check Number screen is displayed.
6. Enter the check number and press **Enter/Next**.
 - If referred, the Check Referral screen is displayed. Enter the approval code and press either **F2/Approved** or **F3/Declined**.
 - If **F2/Approved** is pressed, the Close Drawer, Franking Insert, and Franking Remove screens are displayed. If the check is a deposit check, the Place Deposited Check screen is displayed. To place the deposited check in the drop safe, press **Enter**. If the check presented is an e-check, the Return E-check to Customer screen is displayed.
 - If **F3/Declined** is pressed, the Tender Options screen is displayed to select another tender option.
7. If eReceipt is enabled, you are prompted to select a receipt option. Otherwise, the receipt is printed. You are returned to the Sell Item screen.

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

Table 3–2 Check Authorization Results

Result	Process
Request Approved	You are prompted to insert the check for franking and then to remove the check.
Request Declined	An error message is displayed. You are returned to the Tender Options screen to choose another tender type. Press Enter/Next to clear the message.
Request Referred	The authorizer requires additional information. The Check Referral screen is displayed. Respond to the request by typing the required information, or follow the instructions on the screen. <ul style="list-style-type: none"> ▪ If approval is obtained, enter the approval code and press F2/Approved. You are returned to the Tender Options screen and a check tender line is added to the transaction. ▪ If approval is declined, press F3/Declined. You are returned to the Tender Options screen to select another tender type.
Request Soft Declined	A Soft Decline message is displayed indicating that the check may be at risk. You can choose to decline or accept the check. The first <ARG> can be one of the following: <ul style="list-style-type: none"> ▪ The customer has exceeded the maximum check velocity. ▪ Check approval requires confirmation of a positive ID. The second <ARG> is replaced with the authorization code.
Time-out	The Authorization Retry dialog is displayed. You can choose to retry the authorization or to cancel. If cancel is selected, the Check Referral screen is displayed.
Offline	The Check Authorization Offline dialog is displayed. Press Enter . The Check Referral screen is displayed.
Positive ID	The Check Warning dialog is displayed. <ul style="list-style-type: none"> ▪ To accept the check, press Yes. You are returned to the Tender Options screen and a check tender line is added to the transaction. ▪ To decline the check, press No. You are returned to the Tender Options screen to select another tender type.

Tendering with Credit/Debit Card

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

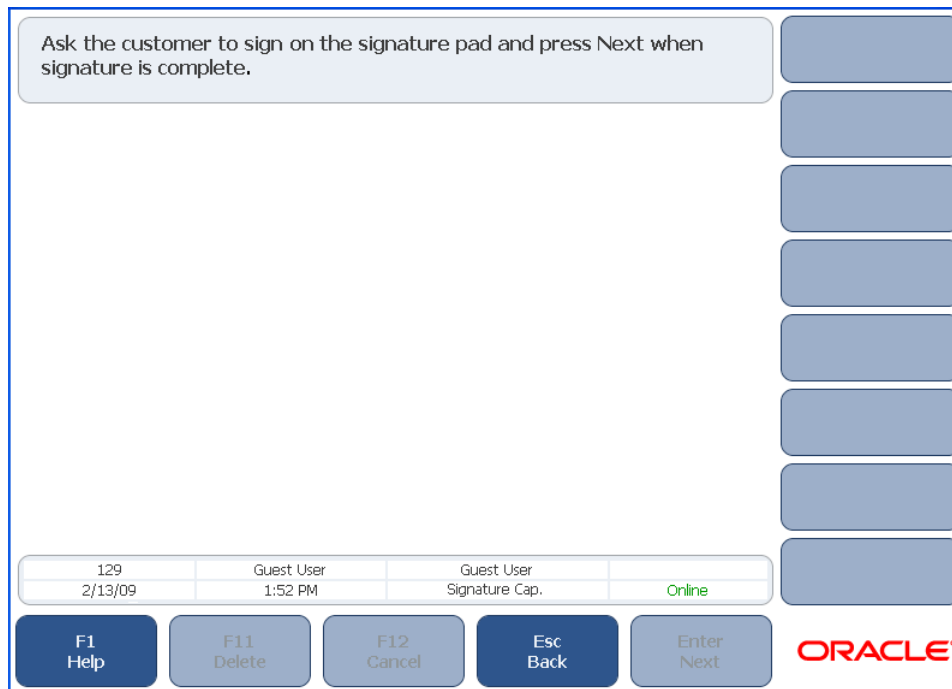
To tender using a credit/debit card:

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

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

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

Figure 3–6 Signature Capture Screen



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

Figure 3–7 Verify Signature Screen

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

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

3. If eReceipt is enabled, you are prompted to select a receipt option. Otherwise, the receipt is printed. You are returned to the Sell Item screen.

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

Table 3–3 Credit Card Authorization Results

Result	Process
Request Approved	<p>If the Credit Card authorization is accepted, the Signature Capture screen is displayed. You are prompted to have the customer sign the signature capture device. Press Enter/Next.</p> <p>If the signature capture was successful, the Verify Credit Card screen is displayed. You are prompted to compare the signature on the credit card with the electronic signature. If the signatures match, press Yes. If the signatures do not match, press No. You are returned to the Tender Options screen to select another tender.</p> <p>The signature is printed on the credit slip and on the customer receipt. You are returned to the Sell Item screen.</p>

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

Result	Process
Request Declined	<p>If the credit card authorization is declined, and the application is configured to allow a manager to override the decline, the Credit Auth. Declined dialog is displayed.</p> <p>If you press No, you are returned to the Tender Options screen to select a different tender type. If Yes is pressed, the Security Access screen is displayed. You (if authorized) or your manager must login to override the declined authorization.</p>
Request Referred	<p>If the Credit Card Authorization is referred, the Credit Referral screen is displayed. The screen displays a referral phone number and prompts you to call the number for authorization.</p> <p>If the authorization is approved, you are prompted to enter the authorization code and press F2/Approved. The approval information is added to the transaction and the Signature Capture screen is displayed.</p> <p>If the authorization is declined, you are prompted to press F3/Declined. The credit card information is discarded.</p> <p>If the application is configured to allow a manager to override the referral, you (if authorized) or your manager must login to override the referral.</p>
Positive ID	<p>If the Credit Card authorization requests a positive ID, the Verify POS ID screen is displayed. This screen notifies you to check another form of identification and prompts for confirmation.</p> <p>If you press Yes, the approval information is added to the transaction and the Signature Capture screen is displayed. If No is pressed, you are returned to the Tender Options screen to select a different tender. The credit card information is discarded.</p>
Time-out	<p>If the Credit Card authorization times out, the wait time has been exceeded. You must try again or select a different tender.</p> <p>If the credit tender amount is equal to or less than the offline credit floor limit, an authorization code is assigned, the approval information is added to the transaction, and the Signature Capture screen is displayed.</p> <p>If the credit tender amount is greater than the limit, a message is displayed regarding the offline status, and the transaction becomes a Request Referred response.</p>
Offline	<p>If the Credit Card Authorization is offline, Oracle Retail Point-of-Service is offline to the authorization service.</p> <p>If the credit amount is equal to or less than the offline credit floor limit, an authorization code is assigned, the approval information is added to the transaction, and the Signature Capture screen is displayed.</p> <p>If the credit tender amount is greater than the limit, a message is displayed regarding the offline status, and the transaction becomes a Request Referred response.</p>

Tendering with a Gift Card

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

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

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

Tendering with a Gift Certificate

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

To tender a transaction using a Gift Certificate:

1. On the Tender Options screen, enter the amount of the gift certificate and press **F6/Gift Cert**. The Store Number screen is displayed.
2. Enter the store number where the gift certificate was issued and then press **Enter/Next** or press **F2/Corporate Issued**. The Tender Number screen is displayed.
3. Scan the barcode or manually enter the gift certificate number and press **Enter/Next**. Oracle Retail Point-of-Service checks the database to approve the validity of the certificate based on amount and certificate number.
 - If the gift certificate tender is greater than the balance due, Oracle Retail Point-of-Service evaluates the difference and the Change Due Options screen is displayed. Select a change option and press **Enter/Next**. The Close Drawer, Franking Insert, and Franking Remove screens are displayed.
 - If the gift certificate tender is less than the balance due, the gift certificate amount is displayed and the Tender Options screen is displayed for you to complete the tender. Once the tender is completed, the Close Drawer, Franking Insert, and Franking Remove screens are displayed.
 - If the amount of the gift certificate is equal to the balance due, the Close Drawer, Franking Insert, and Franking Remove screens are displayed.
4. If eReceipt is enabled, you are prompted to select a receipt option. Otherwise, the receipt is printed. You are returned to the Sell Item screen.

Tendering with a Traveler's Check

To tender a transaction using a traveler's check:

1. On the Tender Options screen, enter the total amount of all traveler's checks presented if the amount is different from the balance due and press **F7/Travel Check**. The Traveler's Check screen is displayed.
2. Enter the number of traveler's checks presented and press **Enter/Next**.
 - If the amount of the traveler's checks is greater than the balance due, the Issue Change screen is displayed, prompting you to issue change. If the tender amount meets the requirement for PAT compliance, the PAT Customer Information screen is displayed. The Franking Insert and Franking Remove screens are displayed.
 - If the traveler's check tender is less than the balance due, you are returned to the Tender Options screen to select another tender type to complete the transaction. Once you have tendered the entire transaction amount, if the tender amount meets the requirement for PAT compliance, the PAT Customer Information screen is displayed. The Franking Insert and Franking Remove screens are displayed.
3. If eReceipt is enabled, you are prompted to select a receipt option. Otherwise, the receipt is printed. You are returned to the Sell Item screen.

Tendering with a Non-Store Coupon

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

To tender a transaction using a non-store coupon:

1. On the Tender Options screen enter the tender amount, if less than the balance due, and press **F8/Coupon**.
2. The Coupon Entry screen is displayed. Scan or manually enter the coupon number (minimum 3 digits) and press **Enter/Next**.
 - If the non-store coupon tender amount is greater than the balance due, the Coup. Overtender screen is displayed. To select a different tender option on the Tender Options screen, press **Enter/Next**.
 - If the non-store coupon tender amount is less than the balance due, the non-store coupon tender item is displayed on the Tender Options screen and the coupon amount is deducted from the tender. You are returned to the Tender Options screen to select an additional tender type to complete the tender.
3. When the tender is complete, if eReceipt is enabled, you are prompted to select a receipt option. Otherwise, the receipt is printed. You are returned to the Sell Item screen.

Tendering with Store Credit

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

To use a store credit as tender:

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

Figure 3–8 Cust. Name Tender Screen

Enter customer name as it appears on the store credit, select ID type, then press Next

First Name: Michael *

Last Name: Matthews *

ID Type: DriversLicense *

129	Guest User	Guest User	
2/13/09	1:58 PM	Cust. Name Tender	Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next ORACLE

2. Enter the customer's first name, last name, and ID type in the required fields. Press **Enter/Next**. The Tender Number screen is displayed.
3. Enter the store credit number and press **Enter/Next**.
4. If validation of store credit is enabled, the system verifies that the store credit was issued and has not been tendered or redeemed:
 - If the store credit is valid, you complete the tender process.
 - If the store credit is not valid, a dialog message is displayed and you are returned to the Sell Item screen.

5. Complete the tender process with the store credit.
 - If the store credit amount is more than the transaction amount, the Change Due Options screen is displayed prompting you to select a change option. The Franking Insert and Franking Remove screens are displayed.
 - If the store credit amount is less than the transaction amount, the Tender Options screen is displayed prompting you to select another tender option to complete the tender. After the tender is complete, the Franking Insert and Franking Remove screens are displayed.
 - If the store credit amount is equal to the transaction amount, the Close Drawer, Franking Insert, and Franking Remove screens are displayed.
6. If eReceipt is enabled, you are prompted to select a receipt option. Otherwise, the receipt is printed. You are returned to the Sell Item screen.

Tendering with a Mall Certificate

To tender a transaction with a mall certificate:

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

Tendering with a Purchase Order

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

To tender a transaction with a purchase order:

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

The P.O. Number screen is displayed.

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

Tendering with Money Orders

Money orders issued by banks or other financial institutions can also be used as tender in Oracle Retail Point-of-Service. To use a money order as a form of tender:

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

Tendering with Foreign Currency

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

To tender using foreign currency:

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

Figure 3–9 Foreign Currency Screen

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

Performing a Return

Return enables the customer to return merchandise for an exchange or refund. Customer information and a personal ID may be required for the return.

If Oracle Retail Returns Management was purchased and implemented, it may be used to authorize the return of the items the customer wants to return. When Oracle Retail Returns Management is used, only the following personal IDs are supported:

- Driver's License
- Passport
- Military ID
- State/Region ID

For more information on Oracle Retail Returns Management, see the *Oracle Retail Returns Management User Guide*.

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

Figure 3–10 Return Options Screen

Choose a return option.

F2
Receipt

F3
No Receipt

F4
Gift Receipt

129 Guest User Guest User
2/13/09 2:08 PM Return Options Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next

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Performing a Return with a Receipt

To perform a return transaction with a receipt available:

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

Figure 3–11 Receipt Info. Screen

Enter receipt information.

Store Number: 04241 *

Register Number: 129 *

Transaction Number: 1160 *

*Required Fields

129	Guest User	Guest User	Online
2/13/09	2:11 PM	Receipt Info	

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next ORACLE

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

Figure 3–12 Return Item Info Screen

Enter item return information and press Next.

Item Number: 6151
 Item Description: Sport Utility Stroller
 Price: 390.99
 Size:
 Unit of Measure: Each
 Quantity: 1 *
 Store Number: 04241
 Sales Associate: pos
 Receipt Number: 042411291160
 Return Reason Code: Wrong Color *
 Serial Number: None
 Restocking Fee: N

*Required Fields

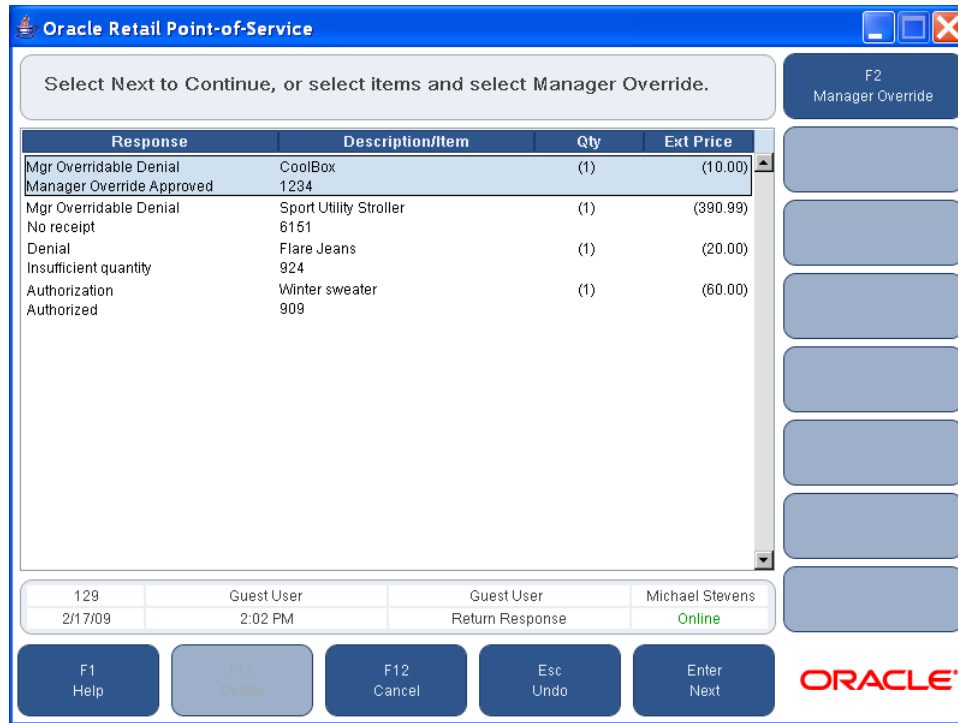
129	Guest User	Guest User	
2/13/09	2:14 PM	Return Item Info	Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next

ORACLE

4. Enter the item return information and select a return reason from the menu. Press **Enter/Next**.
5. If the item is not returnable, a dialog message is displayed and you are returned to the Select Item screen. See Step 3.
6. If the item has a restocking fee, the Restocking Fee dialog box is displayed. To accept the restocking fee, press **Yes**. To decline the restocking fee, press **No**. The entry on the Sell Item screen is updated with the quantity to be returned in parentheses and the Ext. price as a negative number.
7. If a customer ID is required for the return, the Customer Options screen is displayed.
8. Enter a customer ID to link to the transaction or choose a customer option.
9. If a personal ID is required for the return, the Personal ID Entry screen is displayed.
10. Enter the customer name. If a customer is already linked to the transaction, that information is displayed on the screen. Enter the ID number and select the ID type from the menu. Select the ID country and ID state from the menus. Press **Enter/Next**. You are returned to the Sell Item screen.
11. Press **F6/Tender**. If returns are being authorized by Oracle Retail Returns Management and any items are not authorized for return, the Return Response screen is displayed. Otherwise, the Refund Options screen is displayed. See Step 12.

Figure 3–13 Return Response Screen



For each item, the following information is displayed:

Table 3–4 Return Response Columns

Column	Description
Response	The response returned from authorization and the reason for the response. The following responses may be displayed: <ul style="list-style-type: none"> Authorized—The item can be returned. Denial—The item cannot be returned. Contingent Authorization—The item can be returned with manager approval. The return requires approval by a properly authorized user. Manager Overridable Denial—The item can be returned with manager approval. The return has been denied, but the denial can be overridden by a properly authorized user.
Description/Item	Item description and number.
Qty	Quantity
Ext Price	Extended price. This is the price for the total quantity being returned.

Handle any items that were not authorized for return:

- a. To approve the return of any items with a response of Manager Overridable Denial or Contingent Authorization, select the items and press **F2/Manager Override**. The response for the items is changed to Approved.
- b. To accept the authorized and approved items for return, press **Enter/Next**. The Refund Options screen is displayed.

12. Select a refund option and press **Enter/Next**. The Issue Refund screen is displayed.
13. If eReceipt is enabled, you are prompted to select a receipt option. Otherwise, the receipt is printed. You are returned to the Sell Item screen.

Performing a Return Without a Receipt

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

Performing a Return via the Item Number

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

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

Figure 3–14 No Receipt Screen

129	Guest User	Guest User	Online
2/13/09	2:19 PM	No Receipt	Online

2. Enter the item number to be returned and press **Enter/Next**. The No Recpt. Items screen is displayed.
3. When all the items to be returned have been selected, press **Enter/Next**. The Return Item Info screen is displayed. To complete the return, see Steps 4 through 13 in "Performing a Return with a Receipt".

Performing a Return by Searching for the Transaction

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

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

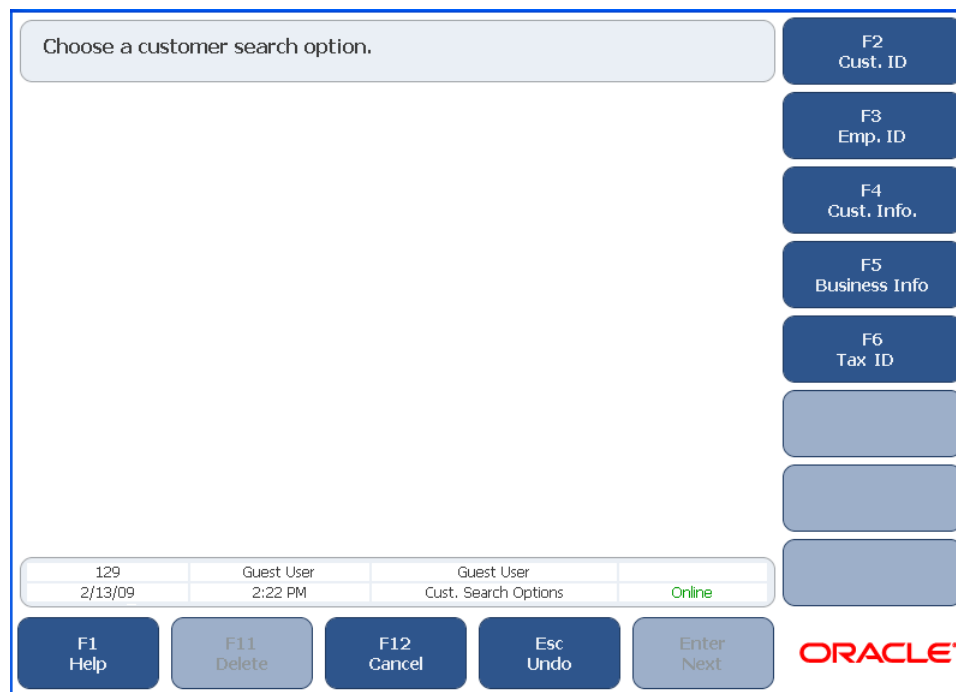
When searching by the customer, the search can be done via the customer ID number or the Cust. Search Options screen.

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

1. Press **F2/Customer** from the No Receipt screen. The Customer Options screen is displayed.
2. Enter the customer ID and press **Enter/Next**. The Display Trans. screen is displayed.
3. Select a transaction and press **Enter/Next**. The Select Item screen is displayed. To complete the return, see Steps 3 through 13 in "[Performing a Return with a Receipt](#)".

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

Figure 3–15 Cust. Search Options Screen



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

- If **F2/Cust. ID** is pressed, the Search by Customer ID screen is displayed. Enter the customer ID and press **Enter/Next**. The Customer Information screen is displayed. Press **F3/Link**. The Display Trans screen is displayed. Select a transaction number and press **Enter/Next**. The Select Item screen is displayed. To complete the return, see Steps 3 through 13 in "[Performing a Return with a Receipt](#)".
- If **F3/Emp ID** is pressed, the Search By Emp. ID screen is displayed. Enter the employee ID and press **Enter/Next**. The Customer Information screen is displayed. To complete the return, see the above section on searching via Customer ID.
- If **F4/Cust. Info** or **F5/Business Info** is pressed, the Search By Customer Info screen is displayed. Enter the required information and press **Enter/Next**. The Customer Information screen is displayed. To complete the return, see the above section on searching a transaction via Customer ID.
- If **F6/Tax ID** is pressed, the Search by Tax ID screen is displayed. Enter the tax ID and press **Enter/Next**. The Customer Information screen is displayed. To complete the return, see the above section on searching a transaction via Customer ID.

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

To search for a transaction via the purchase date:

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

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

To search via the store number:

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

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

To search for a transaction via a check:

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

Figure 3–16 Check Search Screen

Enter bank account information, select a date range, enter an item number and press Next.

MICR Number: 444455999999 *

Date Range: All *

Item Number: 6151 *

*Required Fields

129	Guest User	Guest User	Online
2/13/09	2:26 PM	Check Search	

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next ORACLE

2. Enter the required information and press **Enter/Next**. If transactions are found for the check tender, the Select Item screen is displayed. See Steps 3 through 13 in "Performing a Return with a Receipt".

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

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

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

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

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

Figure 3–17 Credit/Debit Search Screen

Enter credit card or debit card number, select a date range, enter item number and press Next.

Credit/Debit Card Number: 44445555669999 *

Date Range: All *

Item Number: 6151 *

*Required Fields

129	Guest User	Guest User	
2/13/09	2:29 PM	Credit/Debit Search	Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next ORACLE

2. Enter the required information and press **Enter/Next**. If transactions are found for the card, the Select Item screen is displayed. To complete the return, see Steps 3 through 13 in "Performing a Return with a Receipt".

Performing a Return with a Gift Receipt

Returns can also be performed via the gift receipt. To make a return via a gift receipt, press **F4/Gift Receipt** from the Return Options screen. The Receipt Info screen is displayed. To complete the return, see Steps 2 through 13 in "Performing a Return with a Receipt".

Performing an Item Lookup

To look up information on a item:

1. Press **F3/Item Lookup** on the Sell Item screen. The Advanced Inquiry screen is displayed. See [Figure 3–22](#).

The item number and item description fields are always available. The exact item number must be entered. Any other search field is only available when that search criteria has been enabled.

2. Enter the item search information and press **Enter/Next**. The Item Display screen is displayed. See [Figure 3–21](#).
 - To get information on another item, enter a new item number and press **F2/Search**. The Item Display screen is displayed with information for the item.
 - To add the item to the transaction, press **F3/Add**. The Sell Item screen is displayed with the item added to the transaction.
 - To check inventory on an item, press **F4/Inventory Inquiry**. For information on inventory inquiry, see [Chapter 9](#).

- When done displaying the item information, press **Enter/Next**. You are returned to the Sell Item screen.

Performing Item Options

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

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

Figure 3–18 Items Options Screen

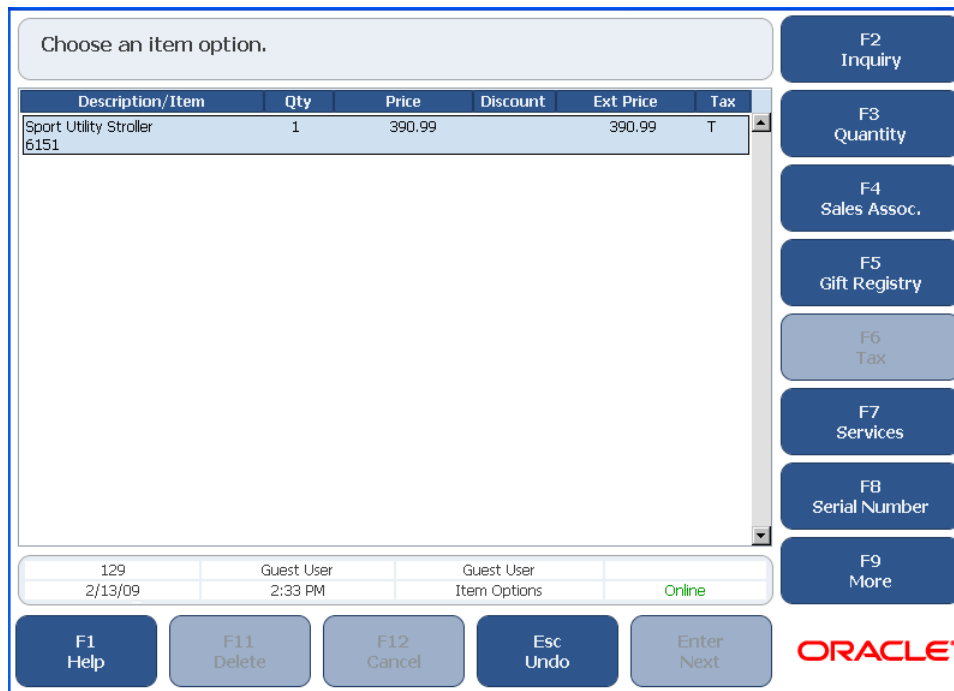


Figure 3–19 Item Options Screen after Selecting F9/More

Description/Item	Qty	Price	Discount	Ext Price	Tax
Sport Utility Stroller 6151	1	390.99		390.99	T

129 2/13/09 Guest User 2:33 PM Guest User Item Options Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next

ORACLE

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

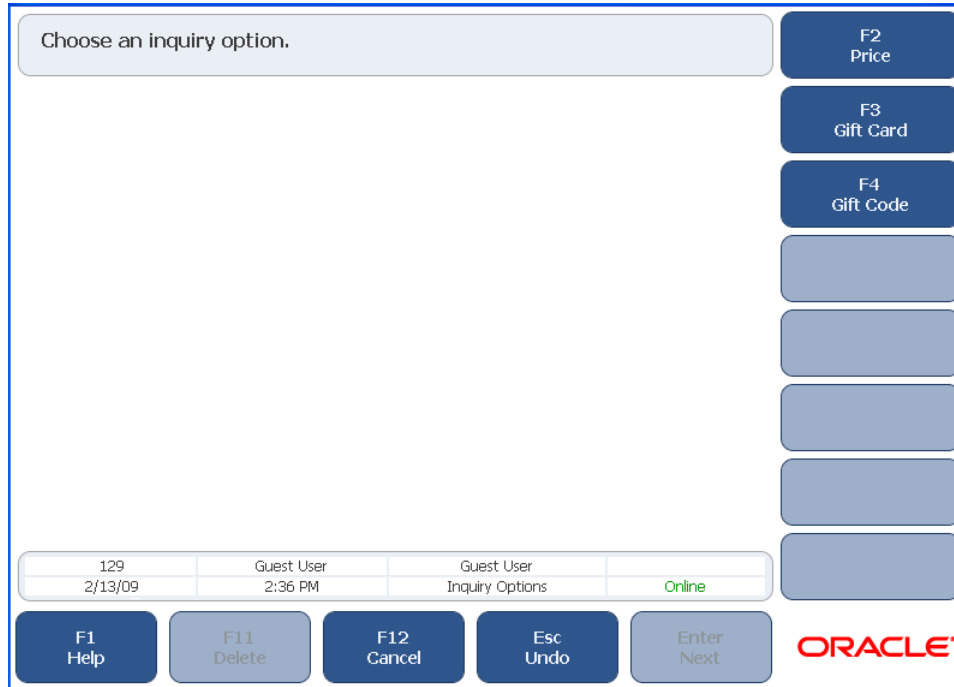
- "Making an Item Inquiry"
- "Changing an Item Quantity"
- "Linking an Item to a Sales Associate"
- "Linking an Item to a Gift Registry"
- "Changing Tax on an Item"
- "Performing Item Services"
- "Adding a Serial Number to an Item"
- "Issuing Gift Receipts for Items"
- "Performing an Item Send"
- "Viewing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

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

Making an Item Inquiry

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

Figure 3–20 Inquiry Options Screen

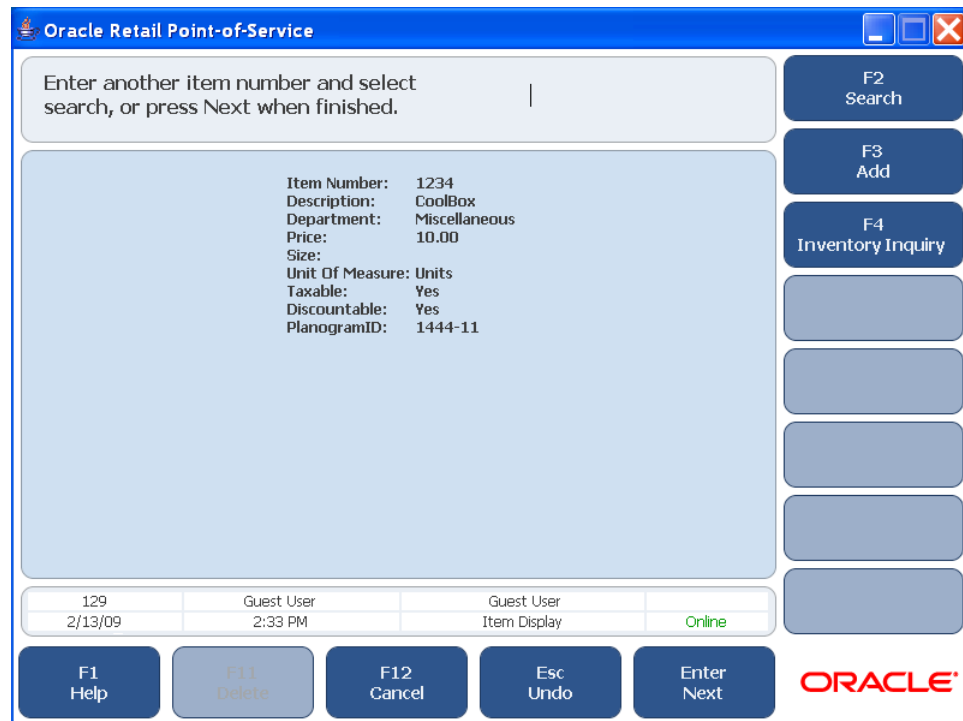


Price Inquiry

To do a price inquiry:

1. Press **F2/Price** from the Inquiry Options screen. The Price Inquiry screen is displayed.
2. Enter an item number and press **Enter/Next** or select an option. The two available options are **F2/Gift Code** and **F3/ADV Search**.
 - If the item number is entered and **Enter/Next** is pressed, the Item Display screen is displayed.

Figure 3–21 Item Display Screen

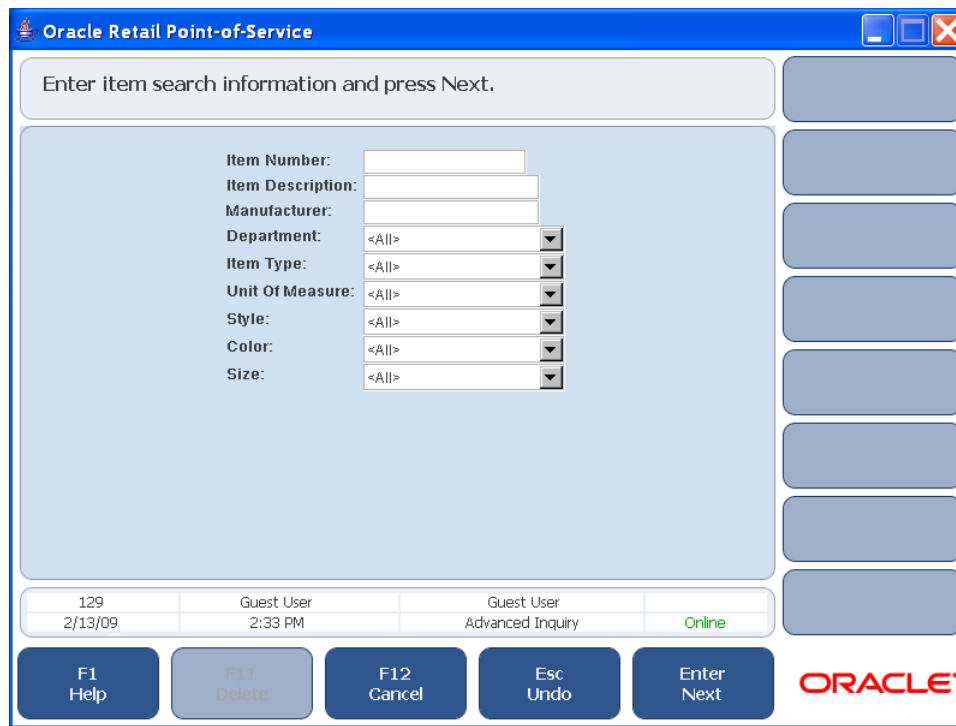


- To get price information on another item, enter a new item number and press **F2/Search**.
- To add the item to the transaction, press **F3/Add**. The Sell Item screen is displayed with the item added to the transaction.
- To check inventory on an item, press **F4/Inventory Inquiry**. For information on inventory inquiry, see [Chapter 9](#).

When finished, press **Enter/Next**. The Sell item screen is displayed.

- If **F2/Gift Code** is pressed on the Price Inquiry screen, the Gift Code Inquiry screen is displayed. Enter the gift code and press **Enter/Next**. The Gift Price screen is displayed. When finished, press **Enter/Next**. The Sell Item screen is displayed.
- If **F3/ADV Search** is pressed on the Price Inquiry screen, the Advanced Inquiry screen is displayed.

Figure 3–22 Advanced Inquiry Screen



The Advanced Inquiry fields are described in [Table 3–5](#). The item number and item description fields are always available. Any other search field is only available when that search criteria has been enabled.

Enter the item search information and press **Enter/Next**.

Table 3–5 Advanced Inquiry Fields

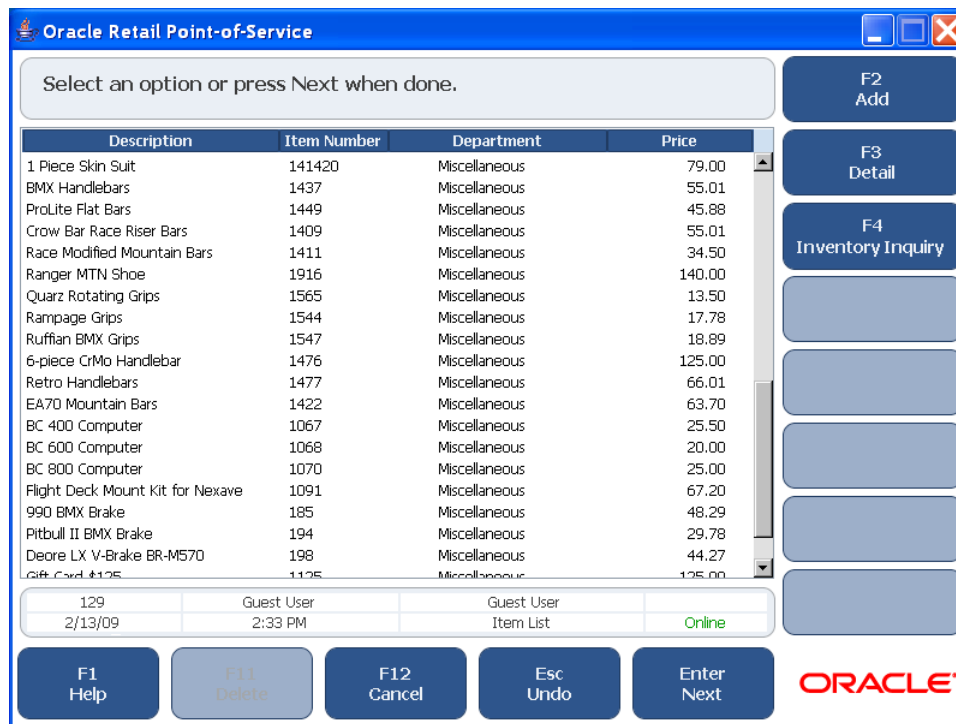
Field	Description
Item Number	Unique identifying number or SKU number used to identify the item.
Item Description	<p>Description of the item.</p> <p>All or part of the item description can be entered or an asterisk can be used as a wildcard, as shown in the following examples:</p> <ul style="list-style-type: none"> ■ If part of the description is entered, such as dishes, Point-of-Service searches for item descriptions that have dishes in any part of the description. For example, <i>dinner dishes</i>, <i>dishes for kids</i>, and <i>seasonal dishes to order</i> would be matches. ■ If an asterisk is used as a suffix, such as dishes*, Point-of-Service searches for item descriptions that start with dishes. For example, <i>dishes for kids</i> would be a match. ■ If an asterisk is used as a prefix, such as *dishes, Point-of-Service searches for item descriptions that end with dishes. For example, <i>dinner dishes</i> would be a match. ■ The asterisk can also be placed anywhere in the description. For example, <i>dinner dishes</i> and <i>dishes for kids</i> would be matches for di*s.

Table 3-5 (Cont.) Advanced Inquiry Fields

Field	Description
Manufacturer	<p>Name of the manufacturer of the item. This field is only displayed if searching for an item by manufacturer is enabled.</p> <p>All or part of the manufacturer name can be entered or an asterisk can be used as a wildcard, as shown in the following examples:</p> <ul style="list-style-type: none"> ▪ If part of the manufacturer name is entered, such as south, Point-of-Service searches for manufacturer names that have south in any part of the description. For example, <i>Southern Suppliers</i>, <i>Kitchens South</i>, and <i>Dinnerware Southwest</i> would be matches. ▪ If an asterisk is used as a suffix, such as south*, Point-of-Service searches for manufacturer names that start with south. For example, <i>Southern Suppliers</i> would be a match. ▪ If an asterisk is used as a prefix, such as *south, Point-of-Service searches for manufacturer names that end with south. For example, <i>Kitchens South</i> would be a match. ▪ The asterisk can also be placed anywhere in the manufacturer. For example, <i>Southern Suppliers</i> would be a match for sou*rs.
Department	Department where the item is defined. If <All> is selected, you must enter an item number, item description, or manufacturer. This field is only displayed if searching for an item by department is enabled.
Item Type	The type of item which may be stock item, service item, store coupon, or unknown. An example of a service item is delivery. This field is only displayed if searching for an item by item type is enabled.
Unit of Measure	How the item is measured, for example, pounds or liters. This field is only displayed if searching for an item by unit of measure is enabled.
Style	Style of the item, generally used for apparel. This field is only displayed if searching for an item by style is enabled.
Color	Color of the item, generally used for apparel. This field is only displayed if searching for an item by color is enabled.
Size	Size of the item, generally used for apparel. This field is only displayed if searching for an item by size is enabled.

- If one match is found, the Item Display screen is displayed. To complete a price inquiry from the Item Display screen, continue at the first bullet in this step.
- If more than one match is found, the Item List screen is displayed.

Figure 3–23 Item List Screen



Select an item in the list and then select an option.

- * To add the item to the transaction, press **F2/Add**.
- * To complete a price inquiry from the Item Display screen, press **F3/Detail**. The Item Display screen is displayed. Continue at the first bullet in this step.
- * To check inventory on an item, press **F4/Inventory Inquiry**. For information on inventory inquiry, see [Chapter 9](#).

Gift Card Inquiry

To perform a gift card inquiry:

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

Gift Code Inquiry

To perform gift code inquiries:

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

Changing an Item Quantity

The quantity of an item can be changed after it is added to the transaction.

To change the quantity of an item:

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

Linking an Item to a Sales Associate

To link an item to a sales associate:

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

Changing Tax on an Item

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

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

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

Overriding Tax for an Item

To override the tax for a particular item:

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

Figure 3–24 Item Tax Options Screen



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

Performing Item Services

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

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

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

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

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

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

Adding a Serial Number to an Item

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

Note: If an item requires a serial number, you are prompted to enter the serial number when the item is added to the transaction.

To add a serial number to an item:

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

Issuing Gift Receipts for Items

A customer may request a gift receipt to provide with a gift. The gift receipt does not show any prices. The person receiving the gift can return the item using the gift receipt.

To request a gift receipt for selected items:

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

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

2. Press **F4/Item**. The Item Options screen is displayed.
3. Press **F9/More** and then **F2/Gift Receipt**. The Sell Item screen is displayed annotated with Gift Receipt.
4. To tender the transaction, press **F6/Tender**. For more information see "[Tendering a Transaction](#)". A separate gift receipt is printed for each selected item. The receipt is annotated *Gift Receipt*.

Performing an Item Send

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

To ship items:

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

Figure 3–25 Capture Customer Information Screen for an Item Send

Enter customer information, then press Next.

First Name: Michael *
 Last Name: Matthews *
 Address Line 1: 9999 Anystreet Drive *
 Address Line 2:
 City: Austin *
 State/Region: Texas *
 Postal Code: 77777 *
 Country: USA *
 Phone Type: Home
 Telephone No.: (512) 555-1024 *
 ID Type: Driver's License

*Required Fields

129	Guest User	Guest User	
2/13/09	2:38 PM	Capture Customer Information	Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next

ORACLE

4. Enter the information in the required fields and press **Enter/Next**. The Same as Customer screen is displayed.
5. You are prompted to select if the ship-to address is the same as the bill-to address.
 - If the ship-to address is the same as the bill-to address, press **Yes**. The Shipping Method screen is displayed.
 - To enter another ship-to address, press **No**. The Ship-To Address screen is displayed. Enter the information in the required area and press **Enter/Next**. The Shipping Method screen is displayed.

Figure 3–26 Shipping Method Screen

Select a shipping method for the address shown. Press Done when finished.

Ship To: Michael Matthews
9999 Anystreet Drive
Austin, TX 77777 - USA

Ship Via: UPS 2nd Day Air
UPS Next Day Air
USPS Parcel Post
USPS Priority Mail

Shipping Charge: 3.50 *

Special Instructions:

*Required Fields

129	Guest User	Guest User	Michael Matthews
2/13/09	2:42 PM	Shipping Method	Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next ORACLE

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

Viewing Item Components

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

To view the components contained in a kit:

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

Performing Alterations

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

To perform an alteration:

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

Figure 3–27 Alteration Type Screen

Choose a type of alteration or repair to be performed.				F2 Pants
				F3 Tops
				F4 Coat
				F5 Skirt
				F6 Dress
				F7 Repairs
129 2/13/09	Guest User 2:45 PM	Guest User Alteration Type	Michael Matthews Online	
F1 Help	F11 Delete	F12 Cancel	Esc Undo	Enter Next
				ORACLE

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

Adding Pickup for an Item

A customer may want to pick up an item in the current transaction. This could be requested, for example, if the customer purchases a large item that needs to be picked up from the loading dock.

To add pickup for an item:

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 **F6/Pickup**. If a customer is not already linked to the transaction, the Customer Options screen is displayed.
3. Link the customer to the transaction.
 - Enter a customer ID and press **Enter/Next**.
 - For information on linking a customer to a transaction, see [Chapter 4](#).
4. The Pickup Date screen is displayed. Enter the date and press **Enter/Next**.
5. The Sell Item screen is displayed. A message is added to the item line to indicate it is a pickup item.

Figure 3–28 Sell Item Screen with Items for Pickup and Delivery



Adding Delivery for an Item

A customer may want to arrange delivery for an item in the current transaction.

Note: A shipping charge is not automatically associated with the item selected for delivery. If a delivery charge is applicable, the charge must be added to the transaction as a non-merchandise item. For information on adding a non-merchandise item, see "[Performing Item Services](#)".

To add delivery for an item:

1. Select an item on the Sell Item screen and press **F4/Item**. The Item Options screen is displayed.
2. Press **F9/More** and then **F7/Deliver**. If a customer is not already linked to the transaction, the Customer Options screen is displayed.
3. Link the customer to the transaction.
 - Enter a customer ID and press **Enter/Next**.
 - For information on linking a customer to a transaction, see [Chapter 4](#).
4. The Delivery Address screen is displayed. Enter the address information and any special directions needed.
5. The Delivery Date screen is displayed. Enter the date and press **Enter/Next**.
6. The Sell Item screen is displayed. A message is added to the item line to indicate it is a delivery item. See [Figure 3-28](#).

Performing Transaction Options

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

The following options on the Trans. Options screen are similar to those in the Item Options screen. The difference is that they only apply to the particular item in the Item Options screen, whereas in the Trans. Option screen they apply to the entire transaction. See "[Performing Item Options](#)" for more information on these options.

- Changing Tax on a Transaction
- Linking a Transaction to a Sales Associate
- Linking a Transaction to a Gift Registry
- Performing a Transaction Send

For information on transaction options, see the following sections:

- "[Issuing a Gift Receipt for a Transaction](#)"
- "[Performing a Transaction Layaway](#)"
- "[Post Voiding a Transaction](#)"
- "[Suspending a Transaction](#)"
- "[Retrieving a Transaction](#)"
- "[Cancelling a Suspended Transaction](#)"
- "[Handling Special Orders](#)"
- "[Adding Items from an Item Basket](#)"

Issuing a Gift Receipt for a Transaction

A customer may request a gift receipt to provide with a gift. The gift receipt does not show any prices. The person receiving the gift can return the items using the gift receipt.

To request a gift receipt for the transaction:

1. Press **F5/Gift Receipt** from the Trans. Options screen. The Sell Item screen is displayed annotated with Gift Receipt.
2. To tender the transaction, Press **F6/Tender**. For more information see "[Tendering a Transaction](#)". One gift receipt is printed which includes all items in the transaction. The receipt is annotated *Gift Receipt*.

Performing a Transaction Layaway

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

Creating a New Layaway

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

To create a new layaway:

1. Press **F6/Layaway** from the Trans. Options screen. The Layaway Options screen is displayed.
2. Press **F2/New**. The Customer Options screen is displayed.
3. Enter a customer's ID or select an option to link a customer to the layaway. See "[Linking Customers to Transactions](#)" for more information. Once a customer is linked to the transaction, the Layaway Customer or Layaway Business screen is displayed.

Figure 3–29 Layaway Customer Screen

Update or confirm the information and press Next.

First Name:	Michael *		
Last Name:	Matthews *		
Address Line 1:	9999 Anystreet Drive *		
Address Line 2:			
City:	Austin *		
State/Region:	Texas		
Postal Code:	77777 *		
Country:	USA		
Phone Type:	Home		
Telephone No.:	(512) 555-1024 *		

*Required Fields

129	Guest User	Guest User	Michael Matthews
2/13/09	2:55 PM	Layaway Customer	Online

F1
Help

F11
Delete

F12
Cancel

Esc
Undo

Enter
Next

ORACLE

4. Enter the information in the required fields and press **Enter/Next**. The Layaway Item screen is displayed. A layaway number is added to the transaction.
5. Enter the Item number and press **F6/Tender**. The Payment Detail screen is displayed.

Figure 3–30 Payment Detail Screen

Verify or edit the fee, payment, and location and press Next.

Layaway Number: 04241129000005
 Customer: Michael Matthews
 Expiration Date: 8/13/10
 Balance Due: 428.25
 Amount Paid: 0.00
 Layaway Fee: 5.00 *
 Deletion Fee: 0.00
 Payment: 134.03 *
 Location: Customer Service Desk *

*Required Fields

129	Guest User	Guest User	Michael Matthews
2/13/09	3:00 PM	Payment Detail	Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next ORACLE

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

Finding an Existing Layaway

To find an existing layaway:

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

Figure 3–31 Layaway List Screen

Layaway No.	First Item	Status	Date Due	Balance
04241129000005	Sport Utility Stroller	Active	8/13/07	294.22

129 Guest User Guest User Michael Matthews
2/13/09 3:06 PM Layaway List Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next

F2 Payment F3 Pickup F4 Delete

ORACLE

4. Select one of the options:

- To make a layaway payment, press **F2/Payment**. The Payment Detail screen is displayed. Enter the payment amount and select Enter/Next. The Tender Options screen is displayed. For more information on tendering a transaction see "[Tendering a Transaction](#)".
- To perform a layaway pickup, press **F3/Pickup**. The Payment Detail screen is displayed. Enter the balance amount due and tender the transaction. When the total balance due is paid, the layaway pickup receipt prints.

Deleting a Layaway

To delete a layaway:

1. Press **F4/Delete**. The Confirm Delete screen is displayed.
2. To delete the layaway, press **Yes**. The Refund Detail screen is displayed.
3. Verify or edit the fees and press **Enter/Next**. The Refund Options screen is displayed.
4. Select a refund option and press **Enter/Next**. You are returned to the Sell Item screen.

Post Voiding a Transaction

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

Note: A completed transaction can be post voided only on the same business day and only from the same till.

Transactions that contain a gift card issue, reload, or redeem cannot be post voided.

To post void a transaction:

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

Figure 3–32 Void Confirm Screen

Choose a void reason code and press Next.

Transaction Number: 042411291165
 Transaction Type: SALE
 Amount: 423.25
 Reason Code: Customer Change Mind *

*Required Fields

129	Guest User	Guest User	
2/13/09	3:11 PM	Void Confirm	Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next ORACLE

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

Suspending a Transaction

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

To suspend a transaction from the Sell Item screen:

1. Press **F5/Transaction**. The Trans. Options screen is displayed.
2. Press **F9/More** and then **F2/Suspend**. The Reason Code screen is displayed.
3. Select a reason code from the list and press **Enter/Next**. The transaction is suspended and the Suspend Saved screen is displayed. Press **Enter**. The suspended transaction receipt is printed and you are returned to the Sell Item screen.

Retrieving a Transaction

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

To retrieve a transaction:

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

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

Cancelling a Suspended Transaction

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

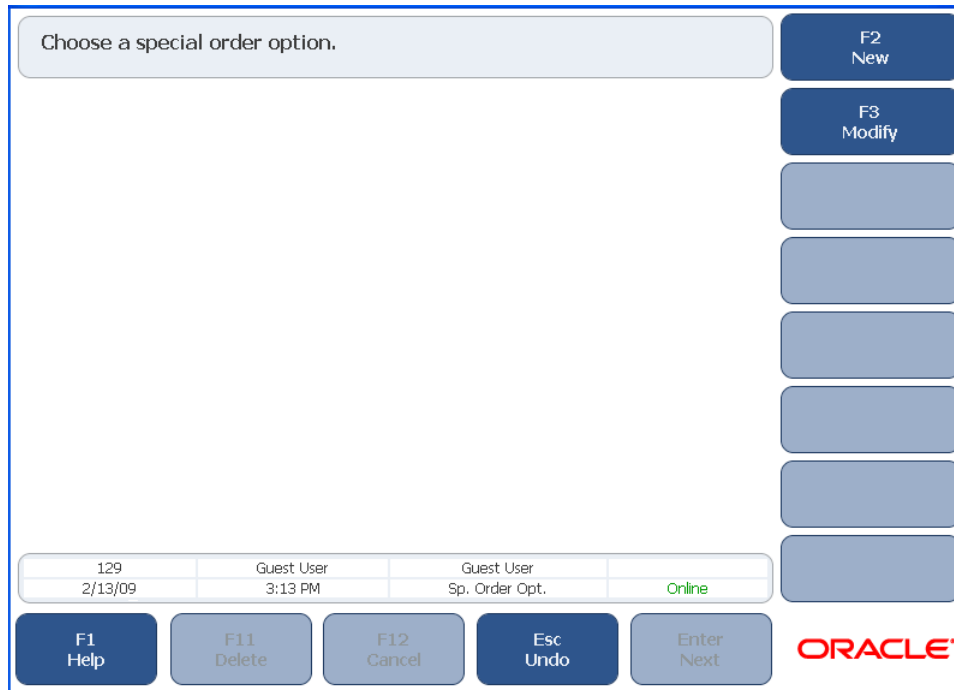
To cancel a suspended transaction during the business day:

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

Handling Special Orders

A special order is a type of transaction used to sell items that are not currently available in the store because either they are out of stock, custom, or back ordered. Retailers may order items that are not available in the store. To create a special order, press **F9/More** and then **F4/Special Order** from the Trans. Options screen. The Sp. Order Opt. screen is displayed. You can create a new special order or modify an existing special order.

Figure 3–33 Sp. Order Opt. Screen



Creating a New Special Order

To create a new special order:

1. Press **F2/New** from the Sp. Order Opt. screen. The Customer Options screen is displayed.
2. Enter the customer ID or use the search options to link the customer to the transaction. For more information on finding a customer, see "[Linking Customers to Transactions](#)". Once a customer is linked to the transaction, the Sp. Ord. Cust. screen is displayed.

Figure 3–34 Sp. Ord. Cust. Screen

Update or confirm the information and press Next.

First Name: David *

Last Name: Stevens *

Address Line 1: 888 Anystreet Drive *

Address Line 2:

City: Austin *

State/Province: Texas

Postal Code: 77777 *

Country: USA

Phone Type: Home

Telephone No.: (512) 555-1225 *

*Required Fields

129	Guest User	Guest User	David Stevens
2/13/09	3:17 PM	Sp. Ord. Cust.	Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next

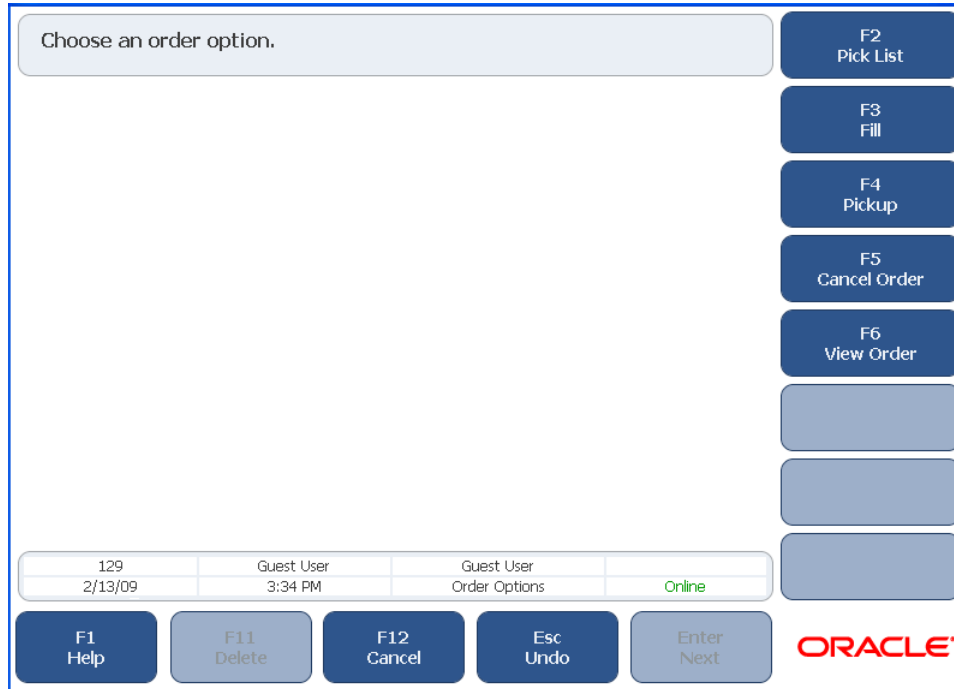
ORACLE

3. Enter the information required and press **Enter/Next**. The Sp. Ord. Item screen is displayed.
4. Scan or manually enter the item numbers. When all items have been entered, press **F6/Tender**. The Sp. Order Deposit screen is displayed.
5. Enter the Deposit Amount if greater than the Minimum Deposit Due, and press **Enter/Next**. The Tender Options screen is displayed. Complete the tender normally. A Special Order receipt prints and you are returned to the Sell Item screen.

Modifying a Special Order

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

Figure 3–35 Order Options Screen



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

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

Printing a Pick List To print a pick list:

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

Filling a Special Order To fill a special order:

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

Figure 3–36 Edit Location Screen

Select a location and press Next.

Order Number: 04241129000007
 Customer Name: David Stevens
 Order Date: 7/14/07
 Location: Customer Service Desk
 Status: Filled

129	Guest User	Guest User	David Stevens
2/13/09	3:38 PM	Edit Location	Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next ORACLE

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

Picking Up a Special Order To pick up a special order:

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

Cancelling a Special Order To cancel a special order:

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

Viewing a Special Order To view a special order:

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

Adding Items from an Item Basket

An item basket is a collection of items that have been scanned using Oracle Retail Store Inventory Management. A customer selects items, the items are scanned, and an item basket ID is assigned to the collection of items. If configured, the customer gets a slip with the item basket ID which can be given to the cashier to get the items in the item basket added to the transaction. Only one basket can be added to a transaction.

To use an item basket:

1. From the Trans. Options screen, press **F9/More** and then **F5/Find Basket**. The Find Basket screen is displayed.
2. Enter the item basket ID or the customer ID and press **Enter/Next**.
3. The items in the basket are added to the transaction. You are returned to the Sell Item screen.

Reprinting Receipts

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

- To reprint the receipt of the previous transaction, press **F2/Last Trans**. The receipt from the last transaction prints.
- To reprint a receipt by transaction number, press **F3/Trans. Number**. The Trans. Search screen is displayed. Enter the transaction number and press **Enter/Next**. The Reprint Select screen is displayed.
 - To print a gift receipt, select the items and press **F2/Gift Receipt**. A gift receipt prints.

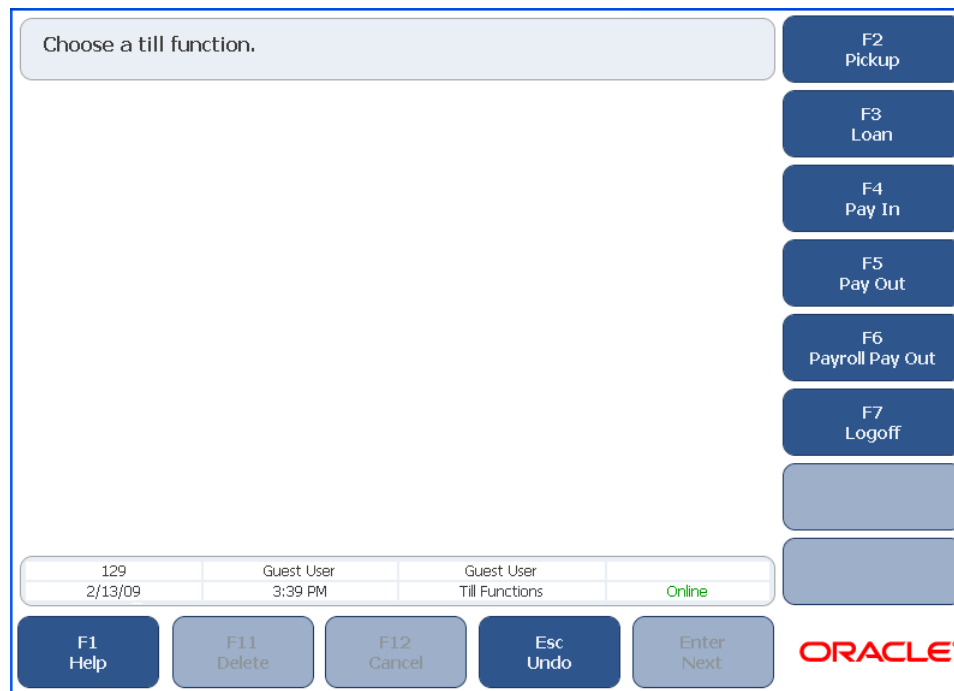
If multiple items are selected, all those items are printed on one gift receipt. You can select single items or groups of items to print the gift receipts requested by the customer.
 - To print a copy of the original receipt, select **F3/Print Orig**. A copy of the original receipt prints with *Duplicate Receipt* on it.
 - To print a copy of the original receipt with a VAT summary, select **F4/Print VAT Receipt**. A copy of the original receipt prints with *Duplicate Receipt* on it and the VAT summary included.

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

Till Functions

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

Figure 3–37 Till Functions Screen



Till Pickup

A till pickup gathers cash from the till when there is too much cash in the till, for example, when a cash drawer warning was displayed.

To complete a till pickup:

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

Till Loan

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

To complete a till loan:

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

Till Pay-in

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

To complete a till pay-in:

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

Till Pay-out

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

To complete a till pay-out:

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

Payroll Pay Out

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

To perform a payroll payment:

1. Press **F6/Payroll Pay Out** from the Till Functions screen. The Payroll Pay Out screen is displayed.
2. Enter the payroll pay out information and select a reason code. Press **Enter/Next**. The Close Drawer screen is displayed and you are returned to the Till Functions screen.

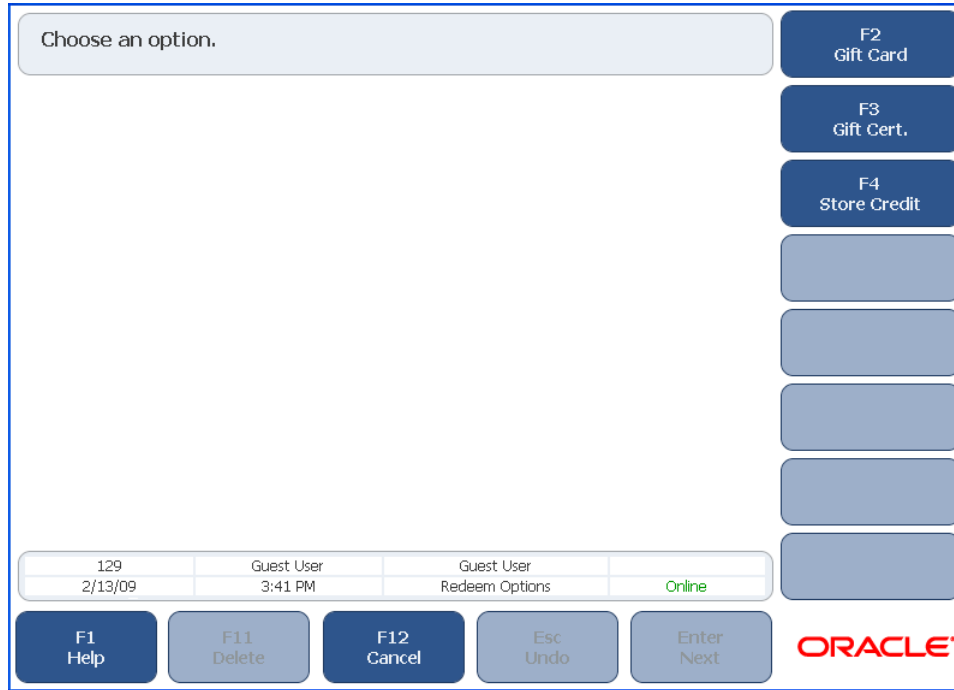
Till Log Off

A till can be logged off through the till close procedure. See "[Closing Tills](#)" in [Chapter 2](#) for more information.

Redeeming Tender

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

Figure 3–38 Redeem Options Screen



Redeeming a Gift Certificate

To redeem a gift certificate:

1. Press **F3/Gift Cert.** from the Redeem Options menu. The Redeem Amount screen is displayed.
2. Enter the amount of the gift certificate and then press **Enter/Next**. The Store Number screen is displayed.
3. Enter the store number where the gift card was issued or press **F2/Corporate Issued**. The Redeem Number screen is displayed.
4. Enter the gift certificate number or press **F2/Foreign**. The Discount Applied dialog box is displayed.
 - If a discount was applied at the time of purchase, press **Yes**. The Discounted Amount screen is displayed. Enter the gift certificate discount amount and press **Enter/Next**. The Capture Customer screen is displayed.
 - To redeem the full value of the gift certificate, press **No**. The Capture Customer screen is displayed.
5. Enter the information and press **Enter/Next**. The Redeem Refund Options screen is displayed. To complete the redeem, see Steps 3 through 5 in "[Redeeming a Gift Card](#)".

Redeeming Store Credit

To redeem store credit:

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

No Sale Option

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

To complete a no sale:

1. On the Sell Item screen, press **F9/More** and then **F2/No Sale**. The No Sale Reason screen is displayed.
2. Select the reason code from the list and press **Enter/Next**. The cash drawer closes. You are returned to the Sell Item screen.

Linking Customers and Sales Associates

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

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

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

The following functions are described in this chapter:

- ["Using Customer Options"](#)
- ["Linking Customers to Transactions"](#)
- ["Linking Sales Associates to Transactions"](#)

Using Customer Options

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

Figure 4–1 Customer Options Screen

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

Searching for a Customer

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

Table 4–1 Customer Search Options

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

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

Figure 4–2 Customer Information Screen

Enter or edit customer information and choose an option.

Customer ID: 04241133000001
 Employee ID:
 First Name: David *
 Last Name: Stevens *
 Address Line 1: 888 Anystreet Drive
 Address Line 2:
 City: Austin
 State/Region: Texas
 Postal Code: 77777 *
 Country: USA
 Phone Type: Home
 Telephone No.: (512) 555-1225
 E-mail:
 Discount: None Pricing Group: None
 Tax ID:

*Required Fields

129	Guest User	Guest User	David Stevens
2/13/09	4:04 PM	Customer Information	Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next

F2 Details
F3 Link
F4 History
F5 Done

ORACLE

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

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

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

- To link a customer to a transaction, press **F3/Link**. The Sell Item screen is displayed with the customer name in the status region.
- To view a customer's history, press **F4/History**. The History List screen is displayed. This screen displays the transaction number, date, location, type and the total amount for each transaction in the customer's history. To view the details of a particular transaction, select the transaction number, and press **Enter/Next**. The History Detail screen is displayed. When finished viewing the transaction details, press **F2/Done** to return to the Customer Information screen.

Editing a Customer

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

Adding an Individual/Business Customer

To add an individual or business customer:

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

The Add Customer screen is displayed.

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

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

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

Deleting a Customer

To delete a customer from the database:

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

To not delete the customer, press **No**. You are returned to the Customer Options screen.

Linking Customers to Transactions

Some transactions must be linked to a customer. Whereas, others can be optionally linked. The must-link transactions are those transactions that have to be linked to a customer. For more information, see "[Must-Link Transactions](#)".

When a customer is linked to a transaction, the following benefits are also available for the customer:

- Receipts are printed in the customer's preferred language if the device supports the user's preferred language.
- Screens on the signature pad are displayed in the customer's preferred language if the device supports the user's preferred language.
- If a customer is entitled to any discounts or price promotions, that special pricing is applied to the transaction.

A discount type and pricing group can be selected when a new customer is added or the details for an existing customer are changed. When a customer is assigned a pricing group, the customer is entitled to receive the price promotions and discounts currently in effect for that pricing group. For more information on discounts and pricing groups, see the *Oracle Retail Back Office User Guide*.

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

Must-Link Transactions

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

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

Linking Sales Associates to Transactions

To link a sales associate to a transaction:

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

Figure 4-3 *Sell Item Screen with the Sales Associates Displayed*

The screenshot shows the Oracle Retail Point-of-Service Sell Item screen. At the top, there is a text input field labeled "Enter an item number." Below it is a table with columns: Description/Item, Qty, Price, Discount, Ext Price, and Tax. The table contains two items:

Description/Item	Qty	Price	Discount	Ext Price	Tax
Sport Utility Stroller 6151	1	390.99		390.99	T
17 inch Color TV 11111	1	899.95		899.95	T

Below the table, there is a summary section with columns: Subtotal, Discount, Qty, and Total. The values are: Subtotal: 1,290.94, Discount: 0.00, Qty: 2, Total: 1,290.94. At the bottom, there is a status region with fields for Item ID (129), Date (2/13/09), User (Guest User), Time (1:32 PM), and Status (Online). The screen also features a vertical column of function buttons on the right: F2 Return, F3 No Sale, F4 Item, F5 Transaction, F6 Tender, F7 Customer, F8 Pricing, and F9 More. At the bottom, there are buttons for F1 Help, F11 Delete, F12 Cancel, Esc Undo, and Enter Next. The Oracle logo is visible in the bottom right corner.

Note: Items can also be linked to sales associates. See "[Linking an Item to a Sales Associate](#)" in [Chapter 3](#) for more information.

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

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

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

Adjusting Price

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

Figure 5–1 Pricing Options Screen

Description/Item	Qty	Price	Discount	Ext Price	Tax
Sport Utility Stroller 6151	1	390.99		390.99	T

Select a pricing option.

F2 Price Override
F3 Markdown
F4 Discount
F5 Employee Discount
F6 Damage Discount
F7 Price Adjustment

129 2/13/09 Guest User 4:11 PM Guest User Pricing Options David Stevens Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next

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The following functions are described in this chapter:

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

Performing a Price Override

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

To change the price for an item:

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

Figure 5–2 Price Override Screen

Enter override amount, choose a reason code and press Next.

Override Price: 390.99 *

Reason Code: 1 - Ad Price *

*Required Fields

129	Guest User	Guest User	David Stevens
2/13/09	4:12 PM	Price Override	Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next ORACLE

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

Performing Markdowns

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

To mark down an item:

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

Figure 5–3 *Markdown Options Screen*

Description/Item	Qty	Price	Discount	Ext Price	Tax
Sport Utility Stroller 6151	1	390.99		390.99	T

129 Guest User Guest User David Stevens
2/13/09 4:14 PM Markdown Options Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next

ORACLE

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

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

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

Applying Manual Discounts

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

Applying a Transaction Discount

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

To apply a transaction discount:

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

Figure 5–4 Discount Options Screen

Select a discount option.

Description/Item	Qty	Price	Discount	Ext Price	Tax
Sport Utility Stroller 6151	1	390.99		390.99	T

129 2/13/09 Guest User 4:16 PM Guest User Discount Options David Stevens Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next

ORACLE

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

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

Applying an Item Discount

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

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

Applying an Employee Discount

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

To apply an employee discount for an item or transaction:

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

Note: The employee number is not validated by Point-of-Service.

Applying a Damage Discount

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

Note: Damaged items cannot be returned.

To apply a damage discount for an item:

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

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

Performing Price Adjustments

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

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

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

To perform a price adjustment:

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

Note: If an item has been price adjusted, it is considered to be an exchange. The item is returned at the higher price and sold at the current price. If the customer returns a price adjusted item, it is considered to be sold during the exchange transaction. Therefore, the price paid is the price adjusted final price.

If a price adjustment is done on a sell item with a discount amount applied and the discount amount is greater than the current price, the customer is charged the current price.

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

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

Handling House Accounts

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

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

Figure 6–1 House Account Options Screen

Choose a House Account option.				F2 Inquiry
				F3 Enrollment
				F4 Temp. Pass
				F5 Ref. Num. Inq.
				F6 Payment
129	Guest User	Guest User		
2/13/09	12:34 PM	House Account Options	Online	
F1 Help	F11 Delete	F12 Cancel	Esc Undo	Enter Next
ORACLE				

The following functions are described in this chapter:

- ["Performing a House Account Inquiry"](#)
- ["Enrolling for a House Account"](#)
- ["Printing a Temporary Pass"](#)
- ["Performing a Reference Number Inquiry"](#)
- ["Accepting a House Account Payment"](#)

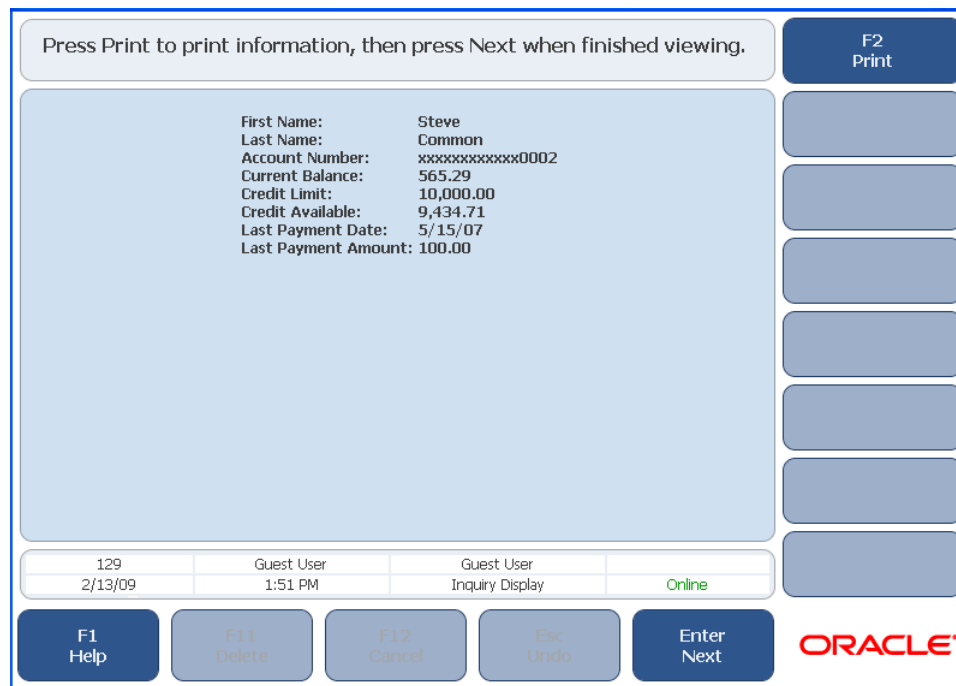
Performing a House Account Inquiry

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

To perform a house account inquiry:

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

Figure 6–2 Inquiry Display Screen



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

Enrolling for a House Account

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

Enrolling through the Tender Function

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

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

Figure 6-3 Credit Cust. Info Screen

Verify customer first and last name, enter customer information and press Next.

First Name:	ROXANN *
Last Name:	BERNDT *
Address Line 1:	600 Anystreet Court *
Address Line 2:	
City:	Austin *
State/Region:	Texas *
Postal Code:	78777 *
Country:	USA *
Date of Birth (M/D/YY):	2/6/66 *
Social Security Number:	444-55-6666 *
Telephone Number:	(512) 555-7741 *

*Required Fields

129	Guest User	Guest User	Online
2/13/09	1:49 PM	Credit Cust. Info	

F1 Help
F11 Delete
F12 Cancel
Esc Undo
Enter Next

ORACLE

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

Enrolling through the House Account Options Screen

To enroll for a house account through the House Account Options screen, press **F3/Enrollment**. The Item Sales Assc. screen is displayed. To complete the enrollment, see Steps 2 to 4 "[Enrolling through the Tender Function](#)".

Printing a Temporary Pass

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

To print a temporary shopping pass:

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

Performing a Reference Number Inquiry

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

To perform a reference number inquiry:

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

Accepting a House Account Payment

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

To accept a house account payment:

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

Figure 6–4 Account Info Screen

Enter the payment amount and press Next.			
First Name: Steve			
Last Name: Common			
Account Number: xxxxxxxxxxxx0002			
Current Balance: 565.29			
Credit Limit: 10,000.00			
Credit Available: 9,434.71			
Last Payment Date: 5/15/07			
Last Payment Amount: 100.00			
129	Guest User	Guest User	Online
2/13/09	1:51 PM	Account Info	
F1 Help	F11 Delete	F12 Cancel	Esc Undo
			Enter Next

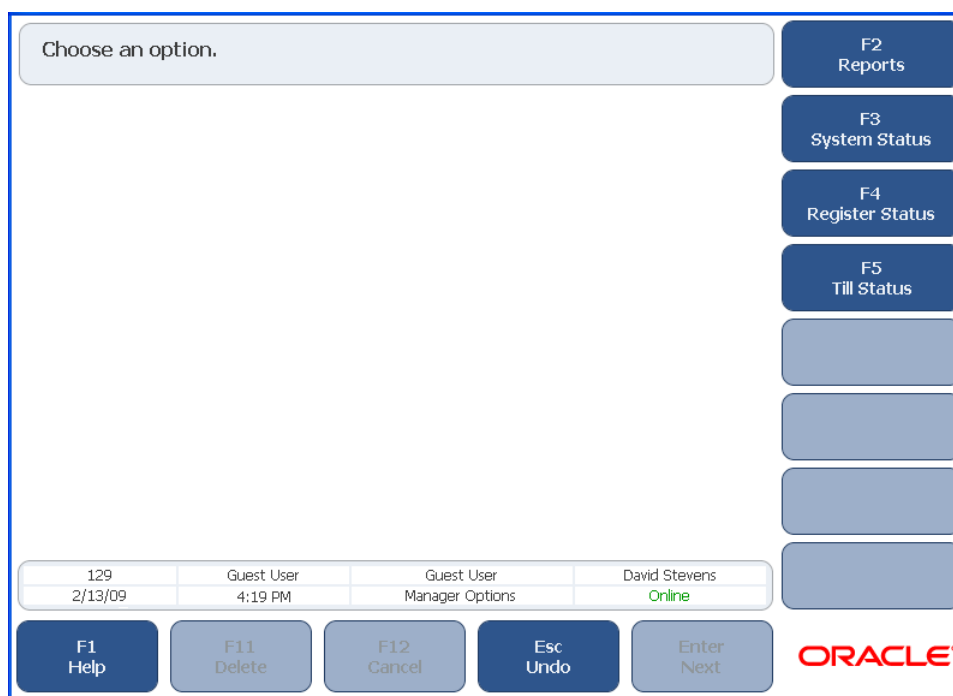
3. Enter the payment amount and press **Enter/Next**. The Tender Options screen is displayed. Tender the transaction. For more information on tendering, see ["Tendering a Transaction"](#) in [Chapter 3](#). Once the tender is complete, a house account payment receipt prints.

Using Manager Options

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

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

Figure 7-1 Manager Options Screen



The following functions are described in this chapter:

- "Reports"
- "System Status"
- "Register Status"
- "Till Status"

Reports

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

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

Table 7-1 Report Options

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

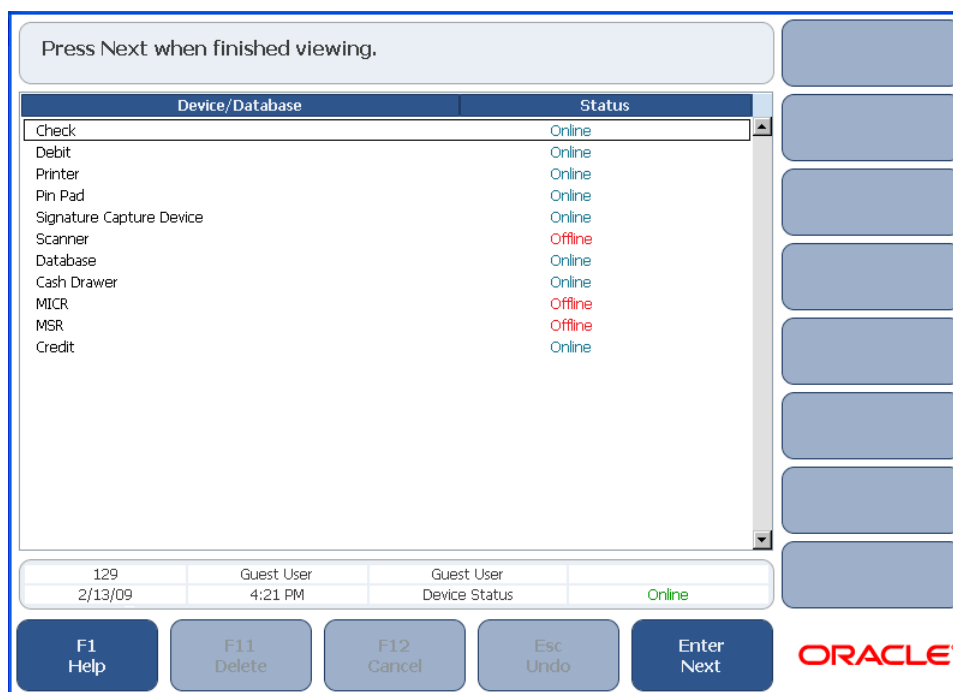
System Status

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

To check device status:

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

Figure 7-2 Device Status Screen



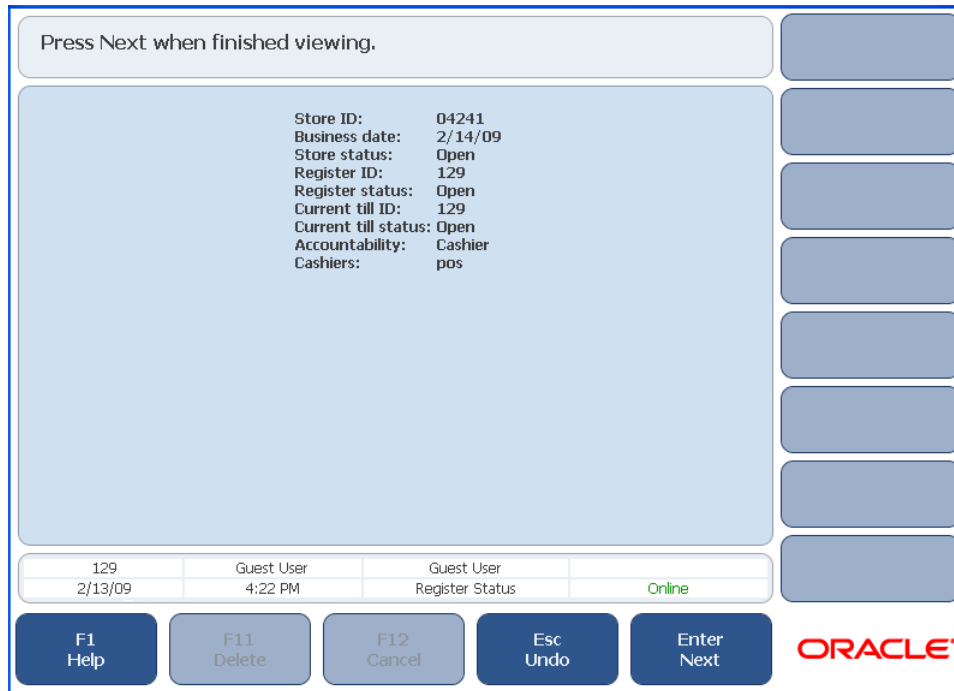
Register Status

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

To check register status:

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

Figure 7-3 Register Status Screen



The register status fields are described in [Table 7-2](#).

Table 7-2 Register Status Fields

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

Till Status

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

To check till status:

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

Figure 7-4 Till Status Screen

Press Next when finished viewing.

Till ID	Status	Cashiers
129	Open	pos

129	Guest User	Guest User	Online
2/13/09	4:23 PM	Till Status	

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next ORACLE

The till status fields are described in [Table 7-3](#).

Table 7-3 Till Status Fields

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

Handling Service Alerts

The Service Alert functionality enables you to pickup, complete, or cancel orders, as well as provide order updates to customers in a timely manner via the use of automated e-mail communication. You can also manage special orders, items marked for pickup, and items marked for delivery.

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

Figure 8–1 Service Alert Screen

Select a new item from the list and press Next or select an option from the service menu.

Type	Date	Time
Pickup	2/17/09	2:27 PM
Description/Summary: #04241129090002: CoolBox		
Pickup	2/17/09	2:40 PM
Description/Summary: #04241129090003: Sport Utility Stroller		

129 Guest User Guest User Online
2/13/09 4:25 PM Service Alert

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next

F2 Refresh F3 Orders

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

Once logged in, the Service Alert screen displays new orders.

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

Processing Orders

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

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

Figure 8–2 Order Options Screen



The following functions are available:

- "Printing a Pick List"
- "Filling an Order"
- "Picking Up an Order"
- "Cancelling an Order"
- "Viewing an Order"

2. If you know the order number, enter it into the prompt region and press **Enter/Next**. To search for an order, press either **F2/Customer** or **F3/Status**.
 - If you press **F2/Customer**, the Customer Options screen is displayed. You can enter the customer ID if you know it. For more search options, press **F2/Find**. The Cust Search Options screen is displayed. See "[Searching for a Customer](#)" in [Chapter 4](#) for more information.
 - If you press **F3/Status**, the Status Search screen is displayed. You can search for any orders by their date range or status.

The Order List screen is displayed.

3. Select the order that needs to be filled and press **Enter/Next**. The Edit Item Status screen is displayed.
4. Select the items you want to fill, and then press **F2/Filled** to change the status to filled.

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

5. Press **Enter/Next** to continue. The Edit Location screen is displayed.
6. From the menu, select the location, and press **Enter/Next**. You are returned to the Service Alert screen.

Picking Up an Order

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

To complete an order:

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

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

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

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

Canceling an Order

To cancel an order:

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

Viewing an Order

To view the details for an order:

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

Automated E-Mail Messages

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

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

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

Note: The created e-mail messages are stored in the database. Point-of-Service does not send the e-mail messages to customers. The retailer is responsible for sending the e-mail messages. For more information, see the *Oracle Retail Point-of-Service Operations Guide*.

Using Inventory Inquiry

Inventory inquiry enables you to request inventory information on an item. Oracle Retail Store Inventory Management must be purchased and implemented in order to use inventory inquiry. Inventory inquiry is disabled in transaction re-entry mode.

Inventory Inquiry can be accessed from the Main Options and Price Inquiry screens. For information on Price Inquiry, see "[Price Inquiry](#)" in [Chapter 3](#).

The following functions are described in this chapter:

- "[Searching for Inventory Information](#)"
- "[Searching for Item Inventory](#)"
- "[Searching for Item Inventory from the List of Items](#)"
- "[Viewing the Inventory Results](#)"

Searching for Inventory Information

To search for inventory information on an item:

1. From the Main Options screen, press **F9/Inventory Inquiry**.
2. Enter your user ID and password. After logging in, the Item Inquiry screen is displayed.

Figure 9–1 Item Inquiry Screen

Enter item search information and press Next.

Item Number:

Item Description:

Manufacturer:

Department:

Item Type:

Unit Of Measure:

Style:

Color:

Size:

129	Guest User	Guest User	
2/13/09	8:28 AM	Item Inquiry	Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next

ORACLE

The Item Inquiry fields are described in [Table 9-1](#). The item number and item description fields are always available. The other search fields are only available when that search criteria has been enabled.

Table 9-1 Item Inquiry Fields

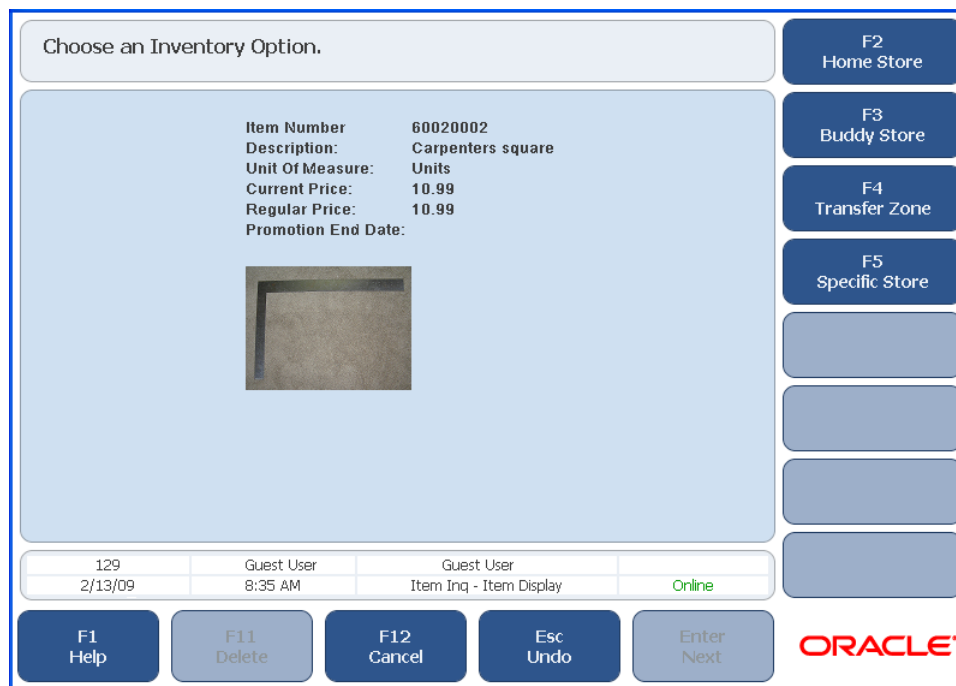
Field	Description
Item Number	Unique identifying number or SKU number used to identify the item. Only the exact item number can be entered.
Item Description	<p>Description of the item.</p> <p>All or part of the item description can be entered or an asterisk can be used as a wildcard, as shown in the following examples:</p> <ul style="list-style-type: none"> ■ If part of the description is entered, such as dishes, Point-of-Service searches for item descriptions that have dishes in any part of the description. For example, <i>dinner dishes</i>, <i>dishes for kids</i>, and <i>seasonal dishes to order</i> would be matches. ■ If an asterisk is used as a suffix, such as dishes*, Point-of-Service searches for item descriptions that start with dishes. For example, <i>dishes for kids</i> would be a match. ■ If an asterisk is used as a prefix, such as *dishes, Point-of-Service searches for item descriptions that end with dishes. For example, <i>dinner dishes</i> would be a match. ■ The asterisk can also be placed anywhere in the description. For example, <i>dinner dishes</i> and <i>dishes for kids</i> would be matches for di*s.
Manufacturer	<p>Name of the manufacturer of the item. This field is only displayed if searching for an item by manufacturer is enabled.</p> <p>All or part of the manufacturer name can be entered or an asterisk can be used as a wildcard, as shown in the following examples:</p> <ul style="list-style-type: none"> ■ If part of the manufacturer name is entered, such as south, Point-of-Service searches for manufacturer names that have south in any part of the description. For example, <i>Southern Suppliers</i>, <i>Kitchens South</i>, and <i>Dinnerware Southwest</i> would be matches. ■ If an asterisk is used as a suffix, such as south*, Point-of-Service searches for manufacturer names that start with south. For example, <i>Southern Suppliers</i> would be a match. ■ If an asterisk is used as a prefix, such as *south, Point-of-Service searches for manufacturer names that end with south. For example, <i>Kitchens South</i> would be a match. ■ The asterisk can also be placed anywhere in the manufacturer. For example, <i>Southern Suppliers</i> would be a match for sou*rs.
Department	Department where the item is defined. If <All> is selected, you must enter an item number, item description, or manufacturer. This field is only displayed if searching for an item by department is enabled.
Item Type	The type of item which may be stock item, service item, store coupon, or unknown. An example of a service item is delivery. This field is only displayed if searching for an item by item type is enabled.
Unit of Measure	How the item is measured, for example, pounds or liters. This field is only displayed if searching for an item by unit of measure is enabled.
Style	Style of the item, generally used for apparel. This field is only displayed if searching for an item by style is enabled.
Color	Color of the item, generally used for apparel. This field is only displayed if searching for an item by color is enabled.
Size	Size of the item, generally used for apparel. This field is only displayed if searching for an item by size is enabled.

3. Enter the search information and press **Enter/Next**.
 - If one item is found that matches the search information, the Item Inq - Item Display screen is displayed. Continue at "[Searching for Item Inventory](#)".
 - If more than one item is found that matches the search information, the Item Inq - Item List screen is displayed. Continue at "[Searching for Item Inventory from the List of Items](#)".
 - If the item is not found in the current store, the Item Not Found Notice dialog is displayed. Press **Enter**. The Item Inq - Item Display screen is displayed. You can search for the item at other stores. Continue at "[Searching for Item Inventory](#)".

Searching for Item Inventory

If one item is found that matches the search information, the Item Inq - Item Display screen is displayed. If a picture of the item is available, it is displayed.

Figure 9–2 Item Inq - Item Display Screen



1. Select the stores to be searched for inventory:
 - To search the current store, press **F2/Home Store**.
 - To search in those stores most often used for transfers to the current store, press **F3/Buddy Store**. The Minimum Qty Available screen is displayed. Enter the minimum quantity of the item required, and press **Enter/Next**.
 - To search in any store which allows transfers to the current store, press **F4/Transfer Zone**. The Minimum Qty Available screen is displayed. Enter the minimum quantity of the item required, and press **Enter/Next**.
 - To search a specific store, press **F5/Specific Store**. The Specific Store screen is displayed. Enter the store number and press **Enter/Next**.

- The Inventory Results screen is displayed. Continue at ["Viewing the Inventory Results"](#).

Searching for Item Inventory from the List of Items

If more than one item is found that matches the search information, the Item Inq - Item List screen is displayed.

Figure 9–3 Item Inq - Item List Screen

Item	Unit Of Measure	Price
Carpenters square 60020002	Units	10.99
Claw hammer 60040004	Units	11.99
Land O Lakes Light Sour Cream 6006	Units	1.09
Carpenters level 60060006	Units	19.99
Tape measure 60080008	Units	7.99
Exodus Pants 6011	Units	74.98

129 Guest User Guest User
2/13/09 8:34 AM Item Inq - Item List Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next

F2 Detail
F3 Home Store
F4 Buddy Store
F5 Transfer Zone
F6 Specific Store

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- Select an item in the list.
- Select to view details on the item or select the stores to be searched for inventory:
 - To see detailed information on the item, press **F2/Detail**. The Item Inq - Item Display screen is displayed. Continue at ["Searching for Item Inventory"](#).
 - To search the current store, press **F3/Home Store**.
 - To search in those stores most often used for transfers to the current store, press **F4/Buddy Store**. The Minimum Qty Available screen is displayed. Enter the minimum quantity of the item required, and press **Enter/Next**.
 - To search in any store which allows transfers to the current store, press **F5/Transfer Zone**. The Minimum Qty Available screen is displayed. Enter the minimum quantity of the item required, and press **Enter/Next**.
 - To search a specific store, press **F6/Specific Store**. The Specific Store Input screen is displayed. Enter the store number and press **Enter/Next**.
- The Inventory Results screen is displayed. Continue at ["Viewing the Inventory Results"](#).

Viewing the Inventory Results

The Inventory Results screen shows the inventory information for the selected item.

Figure 9–4 *Inventory Results Screen*

View the Inventory and choose an option.

Item Number	Description	Unit Of Measure	Price
60020002	Carpenter's square	Units	10.99

Store	Stock On Hand	Available Qty	In Transit Qty	On Order Qty
04241 Lakeline Mall	100.00	100.00	0.00	0.00

129 Guest User Guest User
2/13/09 8:35 AM HomeStore Results Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next

ORACLE

F2 Print
F3 Inventory Details
F4 View Store Info
F5 New Search
F6 Done

Price is only displayed for results from the Home Store. Select a store and choose an option:

- To print the item, store, and inventory information, press, **F2/Print**. A receipt is printed with the information.
- To view details of the inventory in the selected store, press **F3/Inventory Details**. The Inventory Details screen is displayed.

Figure 9-5 Inventory Details Screen

Press Undo to return or Done to exit.				F2 Done
Store Number: 04241 Item Number: 60020002 Description: Carpenter's square Unit Of Measure: Units Price: 10.99 Stock On Hand: 100.00 Available Qty: 100.00 In Transit Qty: 0.00 On Order Qty: 0.00 Transfer Reserved Qty: 100.00 Customer Reserved Qty: 0.00 Vendor Return Qty: 0.00 Unavailable Qty: 0.00				
129	Guest User	Guest User		
2/13/09	8:35 AM	Inventory Details	Online	
F1 Help	F11 Delete	F12 Cancel	Esc Undo	Enter Next
				ORACLE

Price is only displayed for results from the Home Store. When done viewing the information, press **F2/Done**. You are returned to the Inventory Results screen.

- To view information on the selected store, press **F4/View Store Info**. The Store Info screen is displayed.

Figure 9-6 Store Info Screen

Press Undo to return or Done to exit.				F2 Done
Store Number: 04241 Description: Lakeline Mall Store Address: Austin, TX, USA Store Phone: 555-6529				
129	Guest User	Guest User		
2/13/09	8:35 AM	Store Info	Online	
F1 Help	F11 Delete	F12 Cancel	Esc Undo	Enter Next
				ORACLE

When done viewing the information, press **F2/Done**. You are returned to the Inventory Results screen.

- To search for another item, press **F5/New Search**. You are returned to the Item Inquiry or Price Inquiry screen.
- When done viewing the information, press **F6/Done**. You are returned to the Main Options or Price Inquiry screen.

Using Employee Options

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

To access the Employee Options screen:

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

Figure 10–1 Employee Options Screen



The following functions are described in this chapter:

- "Find Employee"
- "Add Employee"

Find Employee

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

To search for an employee:

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

Figure 10–2 Emp. Search Opt. Screen

Choose an employee search option.

F2
Emp. Login ID

F3
Emp. Name

F4
Role

129	Guest User	Guest User	
2/13/09	4:47 PM	Emp. Search Opt.	Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next

ORACLE

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

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

The Employee Master screen is displayed.

Figure 10–3 Employee Master Screen

Enter or modify information, then press Next. To reset the employee's password, press Reset Password.

First Name: *
 Middle Name:
 Last Name: *
 Employee ID: *
 Employee Login ID: *
 Role:
 Status:
 Preferred Language:

*Required Fields

129	Guest User	Guest User	
2/13/09	4:49 PM	Employee Master	Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next **ORACLE**

Changing Employee Information

To change the employee information:

1. Enter any changes to the employee name or login ID. Select a different role, status, or preferred language from the menus.
2. To reset the password, press **F2/Reset Password**. The Reset Password dialog is displayed.
 - To confirm the password reset, click **Yes**. The temporary password is displayed. It should be written down and given to the new employee. This is the only time the password is displayed.
 - To not reset the password, click **No**.
3. To save the changes, press **Enter/Next**.

Add Employee

A new permanent or temporary employee can be added.

To add a new employee:

1. Press **F3/Add**. The Emp. Add Opt. screen is displayed.
2. Select the type of employee to add:
 - To add a permanent employee, press **F2/Standard**. The Employee Master screen is displayed. See [Figure 10-3](#).
 - To add a temporary employee, press **F3/Temp**. The Temp. Employee Master screen is displayed.

Figure 10-4 Temp. Employee Master Screen

Enter or modify information, then press Next. To reset the employee's password, press Reset Password.

F2
Reset Password

First Name: William *

Middle Name: Robert

Last Name: Stevens *

Employee ID: 2 *

Employee Login ID: wrs *

Role: Minimal

Status: Active

Preferred Language: English

Days Valid: 30

*Required Fields

129	Guest User	Guest User	
2/13/09	4:51 PM	Temp. Employee Master	Online

F1 Help F11 Delete F12 Cancel Esc Undo Enter Next

ORACLE

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

Training Mode and Transaction Re-entry Mode

Training mode and transaction re-entry mode are two functions that can be enabled to access Oracle Retail Point-of-Service operations in a different way.

- Training mode provides the ability to train sales associates on certain Oracle Retail Point-of-Service functions without affecting business information.
- If Oracle Retail Point-of-Service is unavailable, sales associates may manually process transactions outside of Point-of-Service. Transaction re-entry mode enables them to enter those transactions into the system when Oracle Retail Point-of-Service is available.

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

The following functions are described in this chapter:

- ["Using Training Mode"](#)
- ["Using Transaction Re-entry Mode"](#)

Using Training Mode

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

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

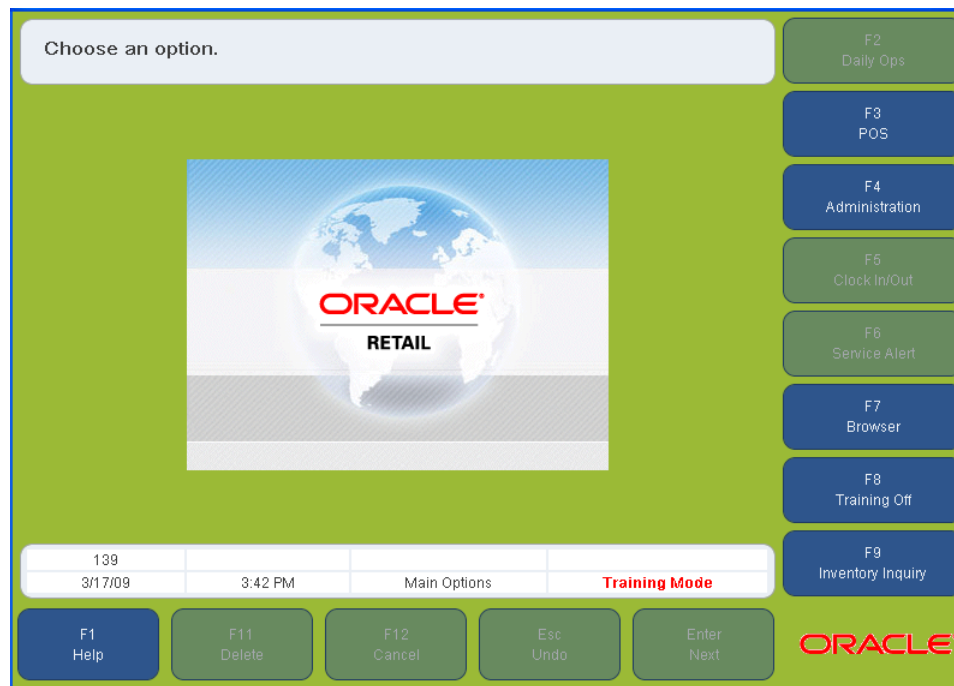
To activate the training mode option:

1. Press **F8/Training** on the Main Options screen. The Identification screen is displayed.
2. Enter your user ID and password. After logging in, the screen changes color and Training Mode is displayed in the communication status region.

Note: When in training mode, only **F3/POS**, **F4/Administration**, **F7/Browser**, **F8/Training Off**, and **F9/Inventory Inquiry** are available.

3. Press **F3/POS**, **F4/Administration**, or **F9/Inventory Inquiry** to train on these components.

Figure 11–1 Main Options Screen in Training Mode



To set training mode to off:

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

Training Mode Functionality

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

[Table 11–1](#) describes the key differences for the POS and Administration functions while operating in Training Mode.

Table 11–1 Key Differences for POS and Administration Functions in Training Mode

Function	Key Differences
F3/POS	<ul style="list-style-type: none"> ■ Gift Certificate/Store Credit Validation are not executed when Oracle Retail Point-of-Service is in training mode. ■ All gift cards sold in training mode are automatically activated, and the simulation value is \$10. ■ All authorization steps are skipped for credit, debit, check, and gift cards when Oracle Retail Point-of-Service is in training mode.
F4/Administration	<ul style="list-style-type: none"> ■ The parameters, reason codes, reset totals, and transaction re-entry functions are not available in training mode.

Security and Parameter Settings

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

Training mode transactions use only existing parameter settings and values. [Table 11–2](#) describes the three key parameter settings that can be set before entering training mode. You do not have access to these parameters while you are in training mode.

Table 11–2 Parameter Settings and Definitions

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

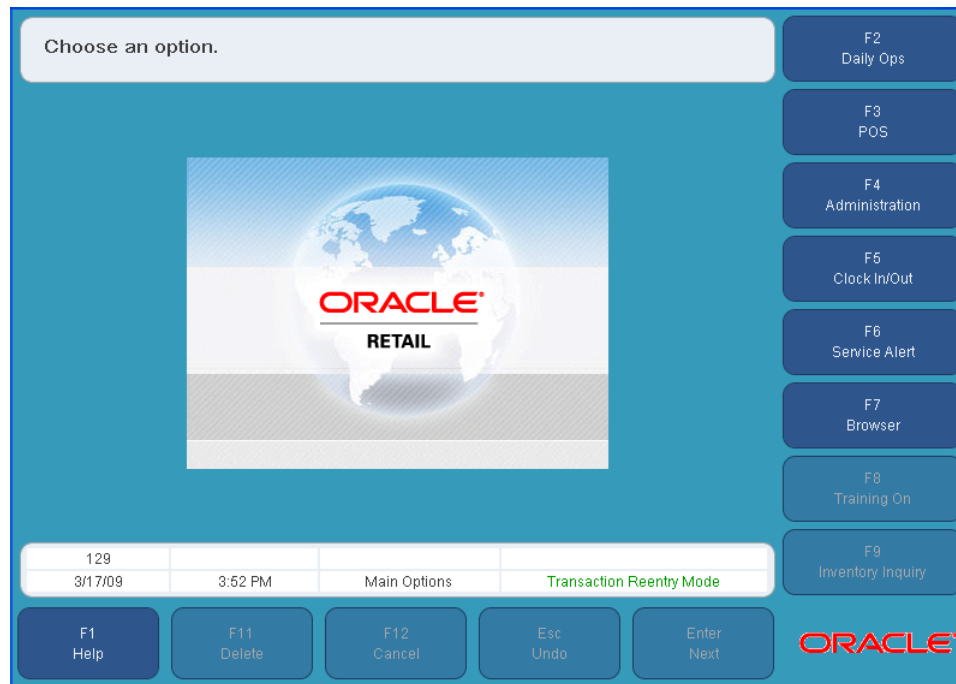
Using Transaction Re-entry Mode

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

To activate transaction re-entry mode:

1. Press **F4/Administration** from the Main Options screen. The Identification screen is displayed.
2. Enter your user ID and password. After logging in, the Admin Options screen is displayed. Press **F8/Re-entry On**.
3. The Transaction Reentry On dialog is displayed. The dialog informs you that re-entry mode is now enabled.
4. To continue, press **Enter**. The Main Options screen in the re-entry mode is displayed. The screen changes color and the annotation *Transaction Reentry Mode* is displayed in the communication status region.

Figure 11–2 Main Options Screen in Re-entry Mode



To set re-entry mode to off:

1. Press **F4/Administration** from the Main Options screen. The Identification screen is displayed.
2. Enter your user ID and password. After logging in, the Admin Options screen is displayed. Press **F6/Re-entry Off**.

3. The Transaction Reentry Off dialog is displayed. The dialog informs you that transaction re-entry mode is now disabled.
4. To continue, press **Enter**. The screen colors change, the application returns to the Main Options screen, and the communication status region is Online.

Re-entry Mode Functionality

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

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

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

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

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

Appendix: Summary Reports

Summary reports are used to determine financial information pertaining to a till, register, or store.

Overview

Oracle Retail Point-of-Service summary reports are generated in two ways:

- When closing a store, register, or till, a summary report is automatically printed:
 - At the completion of reconciling a till, the Till Summary Report is printed.
 - At the completion of closing a register, the Register Summary Report is printed. This report only includes till information for those transactions that were rung up on the register.
 - At the completion of end of day processing, the Store Summary Report is printed. This report shows summary information for the entire store for the business day.
- You select a report through Manager Options, which is described in [Chapter 7](#).
 - A report can be printed for any prior day or the current day.
 - A report can be printed any time during the business day.

Information presented in a summary report is categorized into the following sections. These sections are the same for all summary reports.

- The Store Safe and Float section shows information on the store safe and till floats. The opening amount, closing amount, and over or short amount are shown for each. The store safe is only shown on the Store Summary Report.
- The Tender Summary section shows information on the tenders used during the business day. For each tender, the expected amounts taken in and out, the actual amount counted at reconciliation, and any count that is over or under the expected amount are shown.
- The Transaction Summary section shows the taxable and non-taxable transaction totals. It also displays information on transactions associated with tills, house accounts, layaways, and special orders. The total amount for each type of transaction is shown.
- The House Account Enrollment Summary section shows information on applications for house accounts. The counts of the approved applications and declined applications are shown.

- The Statistical Summary section shows statistics for Gift Cards, Gift Certificates, and Store Credits. It also includes information on discounts and fees applied during the business day. For each entry, the total amount is shown.
- The Count Summary section shows the number of transactions that had price changes or price overrides applied and transactions that were cancelled, post-voided, or no-sale.
- The Tax Summary section shows information on taxable and non-taxable sales. The total amount of sales tax for each tax jurisdiction and the total amount for all jurisdictions are shown.

In a VAT environment, the total VAT for each tax jurisdiction and the total VAT for the business day are shown instead of the sales tax.

Note: Some of the information in the reports depends on the values set for parameters and system settings. For information on the parameters and system settings, see the *Oracle Retail Strategic Store Solutions Configuration Guide*.

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, there is no sales tax. The Sales Tax line in the Transaction Summary section is blank. In the Tax Summary section, a summary of the VAT is shown instead of sales tax.

Report Header

The report header contains the following information:

- Title of the report
- Store number
- Register number for the Register and Till Summary Reports
- Date and time the report was generated
- Identifier of the cashier who closed the store, register, or till
- Business date when the store was opened
- The store, register, or till number covered in the report

Report Example

The following three figures show an example of a summary report. The Store Summary Report is used as the example.

Figure A-1 Summary Report - Part 1

```

Summary Report

2/29/08                               11:27 AM
Store: 04241                           Register: 129
Cashier ID: 24

=====
Starting Date: 1/25/08

Store Summary for #: 04241

=====
Open Safe                               1,000.00
Closing Safe                             1,000.00
Over/Short                               0.00

Open Float                               750.00
Closing Float                             750.00
Over/Short                               0.00

Tender Summary      Count      Amount

Cash
In                  2,035.57
Out                 1,120.23
Net                  915.34
Counted             915.34

Over/Short         0.00

Deposited Checks
In                  2    865.45
Out                 0    0.00
Net                 865.45
Counted            865.45

Over/Short         0.00

Uisa
In                  3  1,698.25
Out                 0    0.00
Net                 1,698.25
Counted            1,698.25

Over/Short         0.00

Travelers Checks
In                  5    500.00
Out                 0    0.00
Net                 500.00
Counted            500.00

Over/Short         0.00

Store Credits
In                  1    947.20
Out                 0    0.00
Net                 947.20
Counted            947.20

Over/Short         0.00

```

Figure A-2 Summary Report - Part 2

Store Credits (MXN)	
In	1 91,063.03
Out	0 0.00
Net	91,063.03
Counted	91,063.03
Over/Short	0.00
Totals	
In	6,046.47
Out	1,120.23
Net	4,926.24
Counted	4,926.24
Over/Short	0.00
Totals (MXN)	
In	91,063.03
Out	0.00
Net	91,063.03
Counted	91,063.03
Over/Short	0.00

=====
=====

Transaction Summary	Amount
Net Trans. Taxable	5,432.75
Net Trans. Non-Taxable	0.00
Sales Tax	391.69
Till Pickup	(10.00)
Till Loan	0.00
Till Pay In	50.00
Till Pay Out	0.00
House Acct. Payment	0.00
Layaway New	0.00
Layaway Pickup	0.00
Layaway Payment	0.00
Layaway Delete	0.00
Special Order New	0.00
Special Order Complete	0.00
Special Order Cancel	0.00
Special Order Partial	0.00

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House Account Enrollment Summary

House Account Applications	Count
Approved	0
Declined	0

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=====

Report Content

Summary reports show information for the base currency plus one alternate currency. In addition to one base currency and one alternate currency, Oracle Retail Point-of-Service can also take in Store Credits and Gift Certificates from additional supported currencies. If any of these Store Credits or Gift Certificates are taken in during a business day, they are shown in the Tender Summary section.

When shown in the report, an alternate currency includes an alternate currency label. For example, if Canadian currency is the alternate currency, a till pickup in Canadian currency would be shown as Till Pickup (CAD).

Table A-1 lists the currencies supported for the base and alternate currencies:

Table A-1 Supported Currencies

Currency	Alternate Currency Label
Canadian Dollars	CAD
European Union Euros	EUR
Japanese Yen	JPY
Mexican Pesos	MXN
United Kingdom Pounds	GBP
United States Dollars	USD

Note the following about summary reports:

- Traveler's checks are counted by the quantity of traveler's checks taken in. The total amount is the total face value of the traveler's checks.
- Queued transaction information is not reported when a till is reconciled or a register or store is closed.
- The totals in the Till Summary Report are reported on the register where the till was closed.
- Kits are counted at the component item level for all reporting.
- Any of the amounts in the reports can be negative numbers. If an amount is negative, it is shown in parentheses.
- The exchange rate used for reports is the rate in place at the time each transaction was performed.
- E-checks are counted separately from deposited checks during till reconciliation.
- If a transaction is deleted from the queue, the transaction and financial information is included in the report automatically generated when a till, register, or store is closed. This information is not included in the report printed through Manager Options.
- If the till is not reconciled and a Till Summary Report is generated through Manager Options, OPEN is shown for the Closing Float and any Counted or Over/Short amounts.
- If the register is not closed and a Register Summary Report is generated through Manager Options, OPEN is shown for the Closing Float and any Counted or Over/Short amounts.

- If the store is not closed and a Store Summary Report is generated through Manager Options, OPEN is shown for the Closing Safe, Closing Float, and any Counted or Over/Short amounts.
- When Register accountability is used, the same information is shown in the Register Summary and Till Summary reports.
- All currency values equal to zero are shown as 0.00.
- All counts equal to zero are shown as 0.

Each section of the summary report is described in a table. For each report line, a description is provided of how each value is calculated.

Store Safe and Float Summary

The first section of the report covers the store safe and till float. Note the following about this section:

- The safe and float amounts are always in base currency.
- The store safe information only appears in the Store Summary Report.
- If the Count Float at Open or Count Float at Close system setting is set to No, the reported amount is determined by the value set for the Float Amount system setting.

Table A-2 describes the information.

Table A-2 Store Safe and Float Summary

Report Line	Description
Open Safe	Store safe amount entered when the store was opened. This line only appears on the Store Summary report.
Closing Safe	Store safe amount entered when the store was closed. This line only appears on the Store Summary report.
Over/Short	Closing Safe minus Open Safe. This line only appears on the Store Summary report.
Open Float	Float amount entered when the till was opened. If the Till Count Float at Open system setting is set to No, the amount in the Float Amount system setting is used. For the Store Summary report, this is the sum of the Open Float counts for all tills opened in the store. For the Register Summary report, this is the sum of the Open Float counts for all tills opened at the register.
Closing Float	Float amount entered when the till was closed. For the Store Summary report, this is the sum of the Close Float counts for all tills closed in the store. For the Register Summary report, this is the sum of all Close Float amounts for all tills closed at the register.
Over/Short	Closing Float minus Open Float.

Tender Summary

Note the following about this section:

- Tenders are shown only if the tender was actually used during the business day.
- The amounts in this section are based on gross tender amounts and include tax.
- The tenders are listed in the following order:
 - Tenders for the base currency
 - Tenders for the alternate currency
 - Any Gift Certificates or Store Credits for currencies other than the base and alternate currencies

If any of these Gift Certificates or Store Credits are taken in during a business day, they are shown in the following order—USD, CAD, MXN, GBP, EUR, and JPY.

- Totals for the base currency and then any alternate currencies
- For tenders other than Cash, a count and amount is shown for the In and Out lines.
- When the Count Till at Reconcile system setting is set to No, the net amount and counted amount will be the same. The Counted amount is shown as N/A and the Over/Short amount is zero.

Table A-3 describes the content of the Tender Summary section.

Table A-3 Tender Summary

Tender	Report Line	Description
Cash	In	Total of the following amounts: <ul style="list-style-type: none"> ■ Gross cash ■ Till loans ■ Till pay-ins
	Out	Total of the following amounts: <ul style="list-style-type: none"> ■ Gross cash out ■ Change ■ Till pickups ■ Till payouts ■ Debit cards post-voided to cash (Void Debit to Cash parameter is set to Yes) ■ e-Checks post-voided ■ Money orders post-voided ■ Cash refunds ■ e-Checks returned
	Net	Cash In minus Cash Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.

Table A-3 (Cont.) Tender Summary

Tender	Report Line	Description
e-Check	In	<ul style="list-style-type: none"> ■ Total number of e-Check tenders. ■ Total amount of e-Check tenders.
	Out	<ul style="list-style-type: none"> ■ Total number of e-Checks post-voided. ■ Total amount of e-Checks post-voided.
	Net	e-Check In minus e-Check Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Deposited Check	In	<p>Total of the following counts:</p> <ul style="list-style-type: none"> ■ Number of deposited checks ■ Number of Mall Gift Certificates, used as checks, collected for payment <p>Total of the following amounts:</p> <ul style="list-style-type: none"> ■ Deposited checks ■ Mall Gift Certificates, used as checks, collected for payment
	Out	<p>Total of the following counts:</p> <ul style="list-style-type: none"> ■ Number of deposited checks post-voided ■ Number of refunds ■ Number of till pickups <p>Total of the following amounts:</p> <ul style="list-style-type: none"> ■ Deposited checks post-voided ■ Refunds ■ Till pickups <p>Mail Bank Checks and Money Orders are not included.</p>
	Net	Deposited Check In minus Deposited Check Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
	Mail Bank Check	Out
	Net	Equal to Mail Bank Check Out.
Visa	In	<ul style="list-style-type: none"> ■ Total number of Visa credit card tenders collected for payment. ■ Total amount of Visa credit card tenders.
	Out	<ul style="list-style-type: none"> ■ Total number of Visa credit card tenders credited on returns and post-voids. ■ Total amount of Visa credit card tenders credited on returns and post-voids.
	Net	Visa In minus Visa Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.

Table A-3 (Cont.) Tender Summary

Tender	Report Line	Description
MasterCard	In	<ul style="list-style-type: none"> ■ Total number of MasterCard credit card tenders collected for payment. ■ Total amount of MasterCard credit card tenders.
	Out	<ul style="list-style-type: none"> ■ Total number of MasterCard credit card tenders credited on returns and post-voids. ■ Total amount of MasterCard credit card tenders credited on returns and post-voids.
	Net	MasterCard In minus MasterCard Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
AMEX	In	<ul style="list-style-type: none"> ■ Total number of AMEX credit card tenders collected for payment. ■ Total amount of AMEX credit card tenders.
	Out	<ul style="list-style-type: none"> ■ Total number of AMEX credit card tenders credited on returns and post-voids. ■ Total amount of AMEX credit card tenders credited on returns and post-voids.
	Net	AMEX In minus AMEX Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Discover	In	<ul style="list-style-type: none"> ■ Total number of Discover credit card tenders collected for payment. ■ Total amount of Discover credit card tenders.
	Out	<ul style="list-style-type: none"> ■ Total number of Discover credit card tenders credited on returns and post-voids. ■ Total amount of Discover credit card tenders credited on returns and post-voids.
	Net	Discover In minus Discover Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Diners	In	<ul style="list-style-type: none"> ■ Total number of Diners credit card tenders collected for payment. ■ Total amount of Diners credit card tenders.
	Out	<ul style="list-style-type: none"> ■ Total number of Diners credit card tenders credited on returns and post-voids. ■ Total amount of Diners credit card tenders credited on returns and post-voids.
	Net	Diners In minus Diners Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.

Table A-3 (Cont.) Tender Summary

Tender	Report Line	Description
JCB	In	<ul style="list-style-type: none"> ■ Total number of JCB credit card tenders collected for payment. ■ Total amount of JCB credit card tenders.
	Out	<ul style="list-style-type: none"> ■ Total number of JCB credit card tenders credited on returns and post-voids. ■ Total amount of JCB credit card tenders credited on returns and post-voids.
	Net	JCB In minus JCB Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
House Card	In	<ul style="list-style-type: none"> ■ Total number of House Card tenders collected for payment. ■ Total amount of House Card tenders.
	Out	<ul style="list-style-type: none"> ■ Total number of House Card tenders credited on returns and post-voids. ■ Total amount of House Card tenders credited on returns and post-voids.
	Net	House Card In minus House Card Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Debit	In	<ul style="list-style-type: none"> ■ Total number of Debit card tenders collected for payment. ■ Total amount of Debit tender.
	Out	<ul style="list-style-type: none"> ■ Total number of Debit card tenders reversed on post-voids. ■ Total amount of Debit reversed on post-voids (Void Debit to Cash parameter is set to No).
	Net	Debit In minus Debit Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.

Table A-3 (Cont.) Tender Summary

Tender	Report Line	Description
Gift Card	In	<ul style="list-style-type: none"> ■ Total number of Gift Cards tendered or redeemed. ■ Total amount of Gift Cards tendered or redeemed.
	Out	Total of the following counts: <ul style="list-style-type: none"> ■ Number of Gift Cards post-voided ■ Number of Gift Cards issued as change ■ Number of Gift Cards issued as refunds ■ Number of post-voided Gift Card redeems Total of the following amounts: <ul style="list-style-type: none"> ■ Gift Cards post-voided ■ Gift Cards issued as change ■ Gift Cards issued as refunds ■ Post-voided Gift Card redeems
	Net	Gift Card In minus Gift Card Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Gift Certificate	In	<ul style="list-style-type: none"> ■ Total number of Gift Certificates tendered or redeemed. ■ Total amount of Gift Certificates tendered or redeemed.
	Out	Total of the following counts: <ul style="list-style-type: none"> ■ Number of Gift Certificates post-voided ■ Number of Gift Certificates issued as change ■ Number of post-voided Gift Certificate redeems Total of the following amounts: <ul style="list-style-type: none"> ■ Gift Certificates post-voided ■ Gift Certificates issued as change ■ Post-voided Gift Certificate redeems
	Net	Gift Certificate In minus Gift Certificate Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Travelers Checks	In	<ul style="list-style-type: none"> ■ Total number of Traveler's Checks tendered. ■ Total amount of Traveler's Checks tendered.
	Out	<ul style="list-style-type: none"> ■ Total number of Traveler's Checks post-voided. ■ Total amount of Traveler's Checks post-voided.
	Net	Travelers Checks In minus Travelers Checks Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.

Table A-3 (Cont.) Tender Summary

Tender	Report Line	Description
Non-Store Coupon	In	<ul style="list-style-type: none"> ■ Total number of Non-Store Coupons tendered. ■ Total face value of Non-Store Coupons tendered.
	Out	<ul style="list-style-type: none"> ■ Total number of Non-Store Coupons post-voided. ■ Total face value of Non-Store Coupons post-voided.
	Net	Non-Store Coupons In minus Non-Store Coupons Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Store Credit	In	<ul style="list-style-type: none"> ■ Total number of Store Credits tendered or redeemed. ■ Total face value of Store Credits tendered or redeemed.
	Out	<p>Total of the following counts:</p> <ul style="list-style-type: none"> ■ Number of Store Credits issued as change ■ Number of Store Credits issued as refunds ■ Number of Store Credits post-voided ■ Number of post-voided Store Credits redeemed <p>Total face value of the following amounts:</p> <ul style="list-style-type: none"> ■ Store Credits issued as change ■ Store Credits issued as refunds ■ Store Credits post-voided ■ Post-voided Store Credits redeemed
	Net	Store Credit In minus Store Credit Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Mall Gift Certificate	In	<ul style="list-style-type: none"> ■ Total number of Mall Gift Certificates tendered or redeemed. ■ Total amount of Mall Gift Certificates tendered or redeemed.
	Out	<p>Total of the following counts:</p> <ul style="list-style-type: none"> ■ Number of Mall Gift Certificates post-voided ■ Number of Mall Gift Certificates redeemed and then post-voided <p>Total of the following amounts:</p> <ul style="list-style-type: none"> ■ Mall Gift Certificates post-voided ■ Mall Gift Certificates redeemed and then post-voided
	Net	Mall Gift Certificate In minus Mall Gift Certificate Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.

Table A-3 (Cont.) Tender Summary

Tender	Report Line	Description
PO Tender	In	Total of the following counts: <ul style="list-style-type: none"> ■ Number of purchase order tenders ■ Number of Mall Gift Certificates, used as purchase orders, collected for payment Total of the following amounts: <ul style="list-style-type: none"> ■ Purchase order tenders ■ Mall Gift Certificates, used as purchase orders, collected for payment
	Out	Total of the following counts: <ul style="list-style-type: none"> ■ Number of purchase order tenders post-voided ■ Number of Mall Gift Certificates, used as purchase orders, post-voided Total of the following amounts: <ul style="list-style-type: none"> ■ Purchase order tenders post-voided ■ Mall Gift Certificates, used as purchase orders, post-voided
	Net	PO Tender In minus PO Tender Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Money Order	In	<ul style="list-style-type: none"> ■ Total number of Money Orders collected for payment. ■ Total amount of Money Orders collected for payment.
	Out	<ul style="list-style-type: none"> ■ Total number of Money Orders post-voided. ■ Total amount of Money Orders post-voided.
	Net	Money Order In minus Money Order Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Cash (alternate currency label)	In	Total amount of the alternate currency cash tendered.
	Out	Total amount of the alternate currency cash picked up and post-voided.
	Net	Cash (alternate currency label) In minus Cash (alternate currency label) Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.

Table A-3 (Cont.) Tender Summary

Tender	Report Line	Description
e-Check (alternate currency label)	In	<ul style="list-style-type: none"> ■ Total number of alternate currency e-Checks. ■ Total amount of alternate currency e-Checks.
	Out	<ul style="list-style-type: none"> ■ Total number of alternate currency e-Checks post-voided and picked up. ■ Total amount of alternate currency e-Checks post-voided and picked up.
	Net	e-Check (alternate currency label) In minus e-Check (alternate currency label) Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Check (alternate currency label)	In	<ul style="list-style-type: none"> ■ Total number of the alternate currency checks. ■ Total amount of the alternate currency checks.
	Out	<ul style="list-style-type: none"> ■ Total number of alternate currency checks post-voided and picked up. ■ Total amount of alternate currency checks post-voided and picked up.
	Net	Check (alternate currency label) In minus Check (alternate currency label) Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Gift Certificate (alternate currency label)	In	<ul style="list-style-type: none"> ■ Total number of alternate currency Gift Certificates tendered or redeemed. ■ Total amount of alternate currency Gift Certificates tendered or redeemed.
	Out	The count and amount are always zero because post-voided alternate currency Gift Certificates cannot be reflected financially.
	Net	Gift Certificate (alternate currency label) In minus Gift Certificate (alternate currency label) Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Store Credit (alternate currency label)	In	<ul style="list-style-type: none"> ■ Total number of alternate currency Store Credits tendered or redeemed. ■ Total face value of alternate currency Store Credits tendered or redeemed.
	Out	The count and amount are always zero because post-voided alternate currency Store Credits cannot be reflected financially.
	Net	Store Credit (alternate currency label) In minus Store Credit (alternate currency label) Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.

Table A-3 (Cont.) Tender Summary

Tender	Report Line	Description
Trav Checks (alternate currency label)	In	<ul style="list-style-type: none"> ■ Total number of alternate currency Traveler's Checks tendered. ■ Total amount of alternate currency Traveler's Checks tendered.
	Out	The count and amount are always zero because post-voided alternate currency Traveler's Checks cannot be reflected financially.
	Net	Trav Checks (alternate currency label) In minus Trav Checks (alternate currency label) Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Gift Certificate (USD)	In	<ul style="list-style-type: none"> ■ Total number of Gift Certificates in United States Dollars tendered or redeemed when United States Dollars is not the base or alternate currency. ■ Total amount of Gift Certificates in United States Dollars tendered or redeemed when United States Dollars is not the base or alternate currency.
	Out	The count and amount are always zero because post-voided Gift Certificates, which are not in the base currency, cannot be reflected financially.
	Net	Gift Certificate (USD) In minus Gift Certificate (USD) Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Store Credit (USD)	In	<ul style="list-style-type: none"> ■ Total number of Store Credits in United States Dollars tendered or redeemed when United States Dollars is not the base or alternate currency. ■ Total face value of Store Credits in United States Dollars tendered or redeemed when United States Dollars is not the base or alternate currency.
	Out	The count and amount are always zero because post-voided Store Credits, which are not in the base currency, cannot be reflected financially.
	Net	Store Credit (USD) In minus Store Credit (USD) Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.

Table A-3 (Cont.) Tender Summary

Tender	Report Line	Description
Gift Certificate (CAD)	In	<ul style="list-style-type: none"> ■ Total number of Gift Certificates in Canadian Dollars tendered or redeemed when Canadian dollars is not the base or alternate currency. ■ Total amount of Gift Certificates in Canadian Dollars tendered or redeemed when Canadian dollars is not the base or alternate currency.
	Out	The count and amount are always zero because post-voided Gift Certificates, which are not in the base currency, cannot be reflected financially.
	Net	Gift Certificate (CAD) In minus Gift Certificate (CAD) Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Store Credit (CAD)	In	<ul style="list-style-type: none"> ■ Total number of Store Credits in Canadian Dollars tendered or redeemed when Canadian Dollars is not the base or alternate currency. ■ Total face value of Store Credits in Canadian Dollars tendered or redeemed when Canadian Dollars is not the base or alternate currency.
	Out	The count and amount are always zero because post-voided Store Credits, which are not in the base currency, cannot be reflected financially.
	Net	Store Credit (CAD) In minus Store Credit (CAD) Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Gift Certificate (MXN)	In	<ul style="list-style-type: none"> ■ Total number of Gift Certificates in Mexican Pesos tendered or redeemed when Mexican Pesos is not the base or alternate currency. ■ Total amount of Gift Certificates in Mexican Pesos tendered or redeemed when Mexican Pesos is not the base or alternate currency.
	Out	The count and amount are always zero because post-voided Gift Certificates, which are not in the base currency, cannot be reflected financially.
	Net	Gift Certificate (MXN) In minus Gift Certificate (MXN) Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.

Table A-3 (Cont.) Tender Summary

Tender	Report Line	Description
Store Credit (MXN)	In	<ul style="list-style-type: none"> ■ Total number of Store Credits in Mexican Pesos tendered or redeemed when Mexican Pesos is not the base or alternate currency. ■ Total face value of Store Credits in Mexican Pesos tendered or redeemed when Mexican Pesos is not the base or alternate currency.
	Out	The count and amount are always zero because post-voided Store Credits, which are not in the base currency, cannot be reflected financially.
	Net	Store Credit (MXN) In minus Store Credit (MXN) Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Gift Certificate (GBP)	In	<ul style="list-style-type: none"> ■ Total number of Gift Certificates in United Kingdom Pounds tendered or redeemed when United Kingdom Pounds is not the base or alternate currency. ■ Total amount of Gift Certificates in United Kingdom Pounds tendered or redeemed when United Kingdom Pounds is not the base or alternate currency.
	Out	The count and amount are always zero because post-voided Gift Certificates, which are not in the base currency, cannot be reflected financially.
	Net	Gift Certificate (GBP) In minus Gift Certificate (GBP) Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Store Credit (GBP)	In	<ul style="list-style-type: none"> ■ Total number of Store Credits in United Kingdom Pounds tendered or redeemed when United Kingdom Pounds is not the base or alternate currency. ■ Total face value of Store Credits in United Kingdom Pounds tendered or redeemed when United Kingdom Pounds is not the base or alternate currency.
	Out	The count and amount are always zero because post-voided Store Credits, which are not in the base currency, cannot be reflected financially.
	Net	Store Credit (GBP) In minus Store Credit (GBP) Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.

Table A-3 (Cont.) Tender Summary

Tender	Report Line	Description
Gift Certificate (EUR)	In	<ul style="list-style-type: none"> ■ Total number of Gift Certificates in Euros tendered or redeemed when Euros is not the base or alternate currency. ■ Total amount of Gift Certificates in Euros tendered or redeemed when Euros is not the base or alternate currency.
	Out	The count and amount are always zero because post-voided Gift Certificates, which are not in the base currency, cannot be reflected financially.
	Net	Gift Certificate (EUR) In minus Gift Certificate (EUR) Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Store Credit (EUR)	In	<ul style="list-style-type: none"> ■ Total number of Store Credits in Euros tendered or redeemed when Euros is not the base or alternate currency. ■ Total face value of Store Credits in Euros tendered or redeemed when Euros is not the base or alternate currency.
	Out	The count and amount are always zero because post-voided Store Credits, which are not in the base currency, cannot be reflected financially.
	Net	Store Credit (EUR) In minus Store Credit (EUR) Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Gift Certificate (JPY)	In	<ul style="list-style-type: none"> ■ Total number of Gift Certificates in Japanese Yen tendered or redeemed when Japanese Yen is not the base or alternate currency. ■ Total amount of Gift Certificates in Japanese Yen tendered or redeemed when Japanese Yen is not the base or alternate currency.
	Out	The count and amount are always zero because post-voided Gift Certificates, which are not in the base currency, cannot be reflected financially.
	Net	Gift Certificate (JPY) In minus Gift Certificate (JPY) Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.

Table A-3 (Cont.) Tender Summary

Tender	Report Line	Description
Store Credit (JPY)	In	<ul style="list-style-type: none"> ■ Total number of Store Credits in Japanese Yen tendered or redeemed when Japanese Yen is not the base or alternate currency. ■ Total face value of Store Credits in Japanese Yen tendered or redeemed when Japanese Yen is not the base or alternate currency.
	Out	The count and amount are always zero because post-voided Store Credits, which are not in the base currency, cannot be reflected financially.
	Net	Store Credit (JPY) In minus Store Credit (JPY) Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
Totals	In	Total amount of all tenders in the base currency for this column.
	Out	Total amount of all tenders in the base currency for this column.
	Net	Totals In minus Totals Out.
	Counted	Total count entered by the cashier of all tenders in the base currency entered by the cashier.
	Over/Short	Counted minus Net.
Totals (alternate currency label) Note: A Totals line is included for each alternate currency collected.	In	Total amount of all tenders in the alternate currency for this column.
	Out	Total amount of all tenders in the alternate currency for this column.
	Net	Totals (alternate currency label) In minus Totals (alternate currency label) Out.
	Counted	Total count entered by the cashier of all tenders in the alternate currency entered by the cashier.
	Over/Short	Counted minus Net.

Transaction Summary

Note the following about this section:

- The amounts in this section are based on transaction information and not item information.
- With the exception of the Sales Tax line, the amounts are based on the net amount and do not include tax.
- Float is not included in any amounts.
- Sales Tax is not included in the Net Transaction Taxable or Net Transaction Non-Taxable lines.
- Taxable transactions with non-taxable items are included in the Net Transaction Taxable line. Items with tax overridden to zero are considered non-taxable items.
- Tax-exempt transactions are considered non-taxable transactions and are included in the Net Transaction Non-Taxable line.
- The till pickup of an alternate currency includes any of the following tenders that are accepted for that alternate currency—cash, check, and Traveler’s Check. For example, for Canadian currency, Canadian cash, Canadian checks, and Canadian Traveler’s Checks are included in a till pickup.
- For any report lines other than Till Pickup, the amount for an alternate currency is converted to local currency and included in the amount shown.

Table A-4 describes the content of the Transaction Summary section.

Table A-4 Transaction Summary

Report Line	Description
Net Trans. Taxable	Amount of sale taxable transactions minus returns and post-voids. Includes taxable layaway completions and order pickups. Note: In a VAT environment, this calculation includes VAT, but does not include shipping charges and shipping charge VAT.
Net Trans. Non-Taxable	Amount of sale non-taxable transactions minus returns and post-voids. Includes non-taxable layaway completions and order pickups. Note: In a VAT environment, this calculation does not include shipping charges and shipping charge VAT.
Sales Tax Note: In a VAT environment, this line is blank.	Total tax collected minus returns and post-voids.
Till Pickup	Total amount of till pickups in the base currency.
Till Pickup (alternate currency label)	Total amount of till pickups for each alternate currency where till pickups occurred.
Till Loan	Total amount of till loans.
Till Pay In	Total amount of till pay ins.
Till Pay Out	Total amount of till pay outs.
House Acct. Payment	Total amount of house account payments.
Layaway New	Total amount of new layaway deposits and new layaway fees minus post-voids.

Table A-4 (Cont.) Transaction Summary

Report Line	Description
Layaway Pickup	Total amount of layaway completions minus post-voids.
Layaway Payment	Total amount of layaway payments minus post-voids.
Layaway Delete	Total amount of layaway deletes minus post-voids. This amount displays as a negative value. Layaway Delete includes layaway payments that are refunded minus the creation and deletion fees.
Special Order New	Total amount of special order deposits minus special order cancels and post-voids.
Special Order Complete	Total amount of special order completions minus special order cancels and post-voids.
Special Order Cancel	Total amount of special order cancels minus post-voids.
Special Order Partial	Total amount of special order partials minus special order cancels and post-voids.

House Account Enrollment Summary

This section contains the count of house account enrollments. [Table A-5](#) describes the content.

Table A-5 House Account Enrollment Summary

Report Line	Description
Approved	Number of house account applications that were approved.
Declined	Number of house account applications that were declined.

Statistical Summary

Note the following about this section:

- With the exception of the post-voids, the amounts are based on item information and not transaction information.
- With the exception of the Post Void Transaction line, the amounts are based on net dollars and do not include tax.
- Returns include Mail Bank Check data.
- Only the Line Item Delete and Item Discount lines include returns.
- On all amounts, post-voids net out but returns might not if the transaction is a partial return or if there is a fee associated with the item being returned.
- Alterations are included in the Non-merchandise amount.

Table A-6 describes the content of the Statistical Summary section.

Table A-6 Statistical Summary

Report Line	Description
Gift Cards Issued	Total amount of Gift Cards issued minus post-voids.
Gift Cards Reloaded	Total amount of Gift Cards reloaded minus post-voids.
Gift Cards Credit	Total amount of Gift Cards credited minus post-voids.
Gift Cards Redeemed	Total amount of Gift Cards redeemed minus post-voids.
Gift Certs. Issued	Total amount of Gift Certificates issued minus post-voids.
Gift Certs. Redeemed	Total amount of Gift Certificates redeemed minus post-voids.
Store Credits Issued	Total amount of Store Credits issued minus post-voids.
Store Credits Redeemed	Total amount of Store Credits redeemed minus post-voids.
Item Empl. Disc.	Total amount of item-level employee discounts applied to sale items minus discounted employee returned items and post-voids.
Trans. Empl. Disc.	Total amount of transaction-level employee discounts.
Trans. Disc.	Total amount of transaction-level discounts applied to sale items minus discounted return items and post-voids. Note: Employee discounts are not included in this amount.
Item Disc.	Total amount of item-level discounts. Note: Employee discounts are not included in this amount.
Item Markdown	Total amount of markdowns minus post-voids.
Post Void Trans.	Total amount of post-voided transactions.
Non-Merchandise	Total amount of non-merchandise items minus post-voids.
Line Item Delete	Total amount of deleted items. The amount does not include items deleted from a cancelled transaction.
Layaway Fee	Total amount of layaway fees minus post-voids.
Layaway Delete Fee	Total amount of layaway delete fees minus post-voids.

Table A-6 (Cont.) Statistical Summary

Report Line	Description
Restocking Fee	Total amount of restocking fees minus post-voids. This amount includes restocking fees for non-taxable items and special order cancels with items that include restocking fees.
Shipping Charges	Total amount of shipping charges minus post-voids. Note: In a VAT environment, this amount includes VAT.

Count Summary

Note the following about this section:

- This section contains only counts. It is based on transaction and item counts.
- The counts are always positive.
- On all counts, post-voids net out but returns might not if a transaction is a partial return or if there is a fee associated with the item being returned.

[Table A-7](#) describes the content of the Count Summary section.

Table A-7 Count Summary

Report Line	Description
Price Overrides	Total number of items with price overrides.
Price Adjustments	Total number of items with price adjustments. This is a return and sale of the same item.
Cancelled Trans.	Total number of cancelled transactions.
No Sales	Total number of no-sale transactions.
Post Voids	Total number of post-void transactions.

Tax Summary

Note the following about this section:

- Several tax jurisdictions and tax rates under those jurisdictions may apply to a store, but only those jurisdictions and rates that have been applied during the dates covered in the report appear in this section.
- The amounts in this section are based on item information and not transaction information.
- For the taxable and nontaxable sales amounts, post-voids net out but returns might not if the transaction is a partial return or if there is a fee associated with the item being returned.
- All tax information is for the current till, register, or store for the current business day.
- The sale of a Gift Card or Gift Certificate is not a sale, but is an exchange of tender. Therefore, these transactions are not included in the non-sales taxable amount.

[Table A-8](#) describes the content of the Tax Summary section. [Table A-9](#) describes the content in a VAT environment. The jurisdictions and tax names shown in these tables within the <> signs are replaced with the actual jurisdiction and tax names when the report is generated.

Table A-8 Tax Summary

Report Line	Description
Sales Taxable	Total amount of taxable items sold minus post-voids, restocking fees, and returns (tax not included). The amount includes the extended prices of items when a layaway or order is picked up.
Sales Nontaxable	Total amount of nontaxable items sold minus returns, restocking fees, and post-voids. The amount includes the extended prices of items when a layaway or order is picked up. Items sold does not include the sale of Gift Cards and Gift Certificates.
Manual Tax	Total amount of tax applied using tax override.
<Jurisdiction 1>	Name of the first local tax jurisdiction.
<Tax 1>	Total amount of locale currency <Tax 1> under locale <Jurisdiction 1>. <Tax 1> is the name of the tax.
<Tax 2>	Total amount of locale currency <Tax 2> under locale <Jurisdiction 1>. <Tax 2> is the name of the tax.
<Jurisdiction 2>	Name of the second local tax jurisdiction.
<Tax 1>	Total amount of locale currency <Tax 1> under locale <Jurisdiction 2>. <Tax 1> is the name of the tax.
<Tax 2>	Total amount of locale currency <Tax 2> under locale <Jurisdiction 2>. <Tax 2> is the name of the tax.
<Tax 3>	Total amount of locale currency <Tax 3> under locale <Jurisdiction 2>. <Tax 3> is the name of the tax.
Total Sales Tax	Total amount of locale tax collected minus returns and post-voids.
Total Shipping Tax	Total amount of locale shipping tax collected minus returns and post-voids. If this value is zero, this line does not appear in the report.

Table A-9 Tax Summary in a VAT Environment

Report Line	Description
Sales Taxable	Total amount of taxable items sold minus post-voids, restocking fees, and returns (tax not included). The amount includes the extended prices of items when a layaway or order is picked up. This calculation includes VAT.
Sales Nontaxable	Total amount of nontaxable items sold minus returns, restocking fees, and post-voids. The amount includes the extended prices of items when a layaway or order is picked up. Items sold does not include the sale of Gift Cards and Gift Certificates.
<Jurisdiction 1>	Name of the first local tax jurisdiction.
<VAT A>	Total amount of locale currency <VAT A> under locale <Jurisdiction 1>. <VAT A> is the name of the VAT. The amount includes Shipping Charge VAT, if applicable.
<VAT B>	Total amount of locale currency <VAT B> under locale <Jurisdiction 1>. <VAT B> is the name of the VAT. The amount includes Shipping Charge VAT, if applicable.
<Jurisdiction 2>	Name of the second local tax jurisdiction.
<VAT A>	Total amount of locale currency <VAT A> under locale <Jurisdiction 2>. <VAT A> is the name of the VAT. The amount includes Shipping Charge VAT, if applicable.
<VAT B>	Total amount of locale currency <VAT B> under locale <Jurisdiction 2>. <VAT B> is the name of the VAT. The amount includes Shipping Charge VAT, if applicable.
<VAT C>	Total amount of locale currency <VAT C> under locale <Jurisdiction 2>. <VAT C> is the name of the VAT. The amount includes Shipping Charge VAT, if applicable.
Total VAT	Total amount of VAT collected minus returns and post-voids. The amount includes Shipping Charge VAT.

Note: The Total Shipping Tax line is not included in a VAT environment. This tax is included in the amount for the Shipping Charges line in the Statistical Summary section.

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