

**Oracle® Retail Point-of-Service**

User Guide

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Oracle Retail Point-of-Service User Guide, Release 14.0

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- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

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# Preface

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

## Audience

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

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

### Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

## Related Documents

For more information, see the following documents in the Oracle Retail Point-of-Service Release 14.0 documentation set:

- *Oracle Retail Point-of-Service Installation Guide*
- *Oracle Retail Point-of-Service Release Notes*
- *Oracle Retail POS Suite Configuration Guide*
- *Oracle Retail POS Suite Data Dictionary*
- *Oracle Retail POS Suite Data Model Differences*
- *Oracle Retail POS Suite Data Model ERWIN File*
- *Oracle Retail POS Suite Data Model Mapping File*
- *Oracle Retail POS Suite Entity Relationship Diagrams, Volume 1 - Subject Areas*
- *Oracle Retail POS Suite Entity Relationship Diagrams, Volume 2 - Overviews*

- *Oracle Retail POS Suite Implementation Guide, Volume 1 - Implementation Solutions*
- *Oracle Retail POS Suite Implementation Guide, Volume 2 - Extension Solutions*
- *Oracle Retail POS Suite Implementation Guide, Volume 4 - Point-of-Service External Order*
- *Oracle Retail POS Suite Implementation Guide, Volume 5 - Mobile Point-of-Service*
- *Oracle Retail POS Suite Operations Guide*
- *Oracle Retail POS Suite Security Guide*
- *Oracle Retail POS Suite 14.0/Merchandising Operations Management 14.0 Implementation Guide*

## Customer Support

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<https://support.oracle.com>

When contacting Customer Support, please provide the following:

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

## Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 14.0) or a later patch release (for example, 14.0.1). If you are installing the base release or additional patches, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

## Improved Process for Oracle Retail Documentation Corrections

To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times **not** be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced on the Oracle Technology Network Web site, or, in the case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

This process will prevent delays in making critical corrections available to customers. For the customer, it means that before you begin installation, you must verify that you have the most recent version of the Oracle Retail documentation set. Oracle Retail documentation is available on the Oracle Technology Network at the following URL:

<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html>

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

If a more recent version of the document is available, that version supersedes all previous versions.

## Oracle Retail Documentation on the Oracle Technology Network

Documentation is packaged with each Oracle Retail product release. Oracle Retail product documentation is also available on the following web site:

<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html>

(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

Documentation should be available on this web site within a month after a product release.

## Conventions

The following text conventions are used in this document:

<b>Convention</b>	<b>Meaning</b>
<b>boldface</b>	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.



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# Overview

Oracle Retail Point-of-Service can be accessed using two types of devices—a register and a mobile device. Not all of the Point-of-Service functionality is available on a mobile device. For information on using a mobile device, see the ["Using Mobile Point-of-Service"](#) chapter.

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

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

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**Note:** The Oracle Retail Point-of-Service application may have been customized for your company. If changes were made on 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.

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## 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. Oracle Retail Point-of-Service is comprised of the following major component areas:

- Daily Operations
- Point-of-Service
- Administration
- Clock In/Out
- Fulfillment
- 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 appears when Oracle Retail Point-of-Service is launched. How you log in to the application is determined by how Point-of-Service is configured. If a component on the Main Options screen requires you to log in, you use one of the following methods:

- The application prompts you for a user ID and password. The login may be completed manually by entering the user ID and password and then pressing **Next/Enter**. 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 appears. See [Figure 1-1](#). You must change your password before you can access the application. For more information, see "[Changing Your Password](#)".

- The application prompts you to enter a user ID and then press a finger against the fingerprint reader. The login may also be completed by swiping a bar code or scanning a magnetic stripe card and then pressing a finger against the fingerprint reader.
- The application prompts you to press a finger against the fingerprint reader.

To log out, press **Undo/Esc** on the global navigation bar until the Main Options screen appears. 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. On the Identification screen, press **F2/Change Password**. The Change Password screen appears.

**Figure 1–1 Change Password Screen**

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

## User Interface

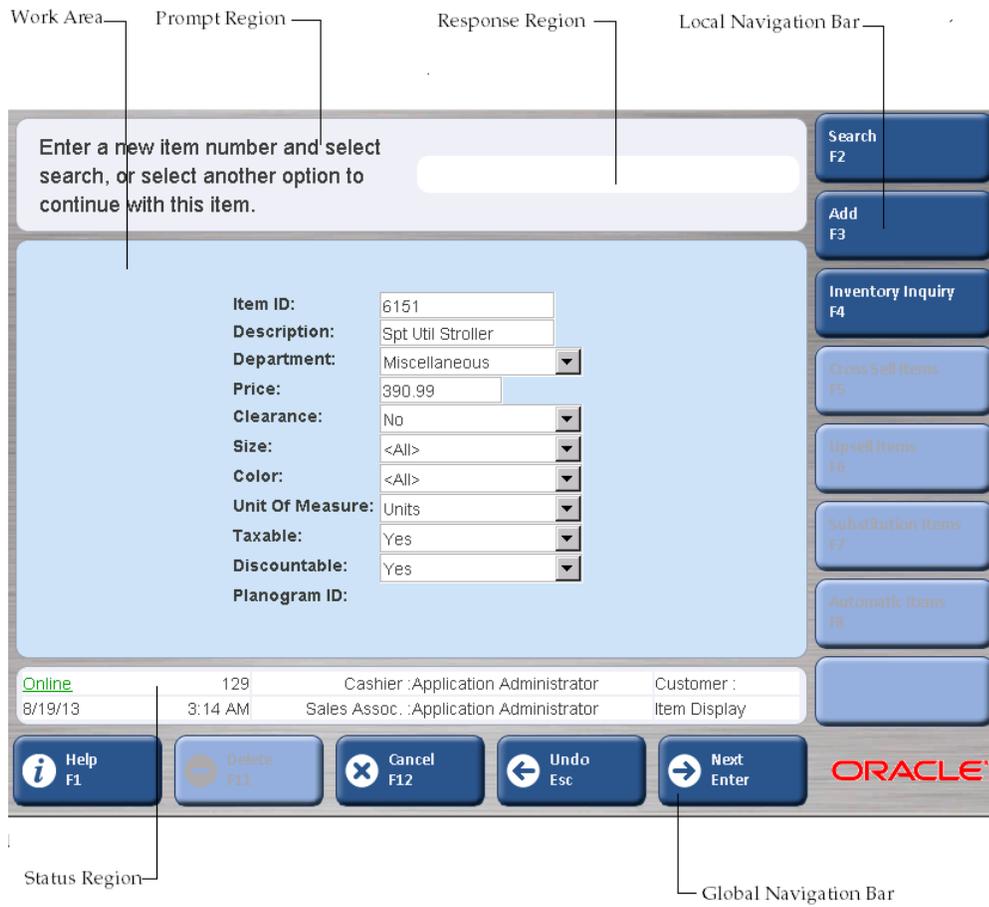
This section provides information regarding the standard screen regions, navigation, and the Main Options screen.

### 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](#) shows the screen regions. During a sale transaction, the status region includes the quantity and total amounts for the transaction. This is shown in [Figure 1–3](#).

**Figure 1-2 Screen Regions**



**Figure 1-3 Status Region For a Sale Transaction**

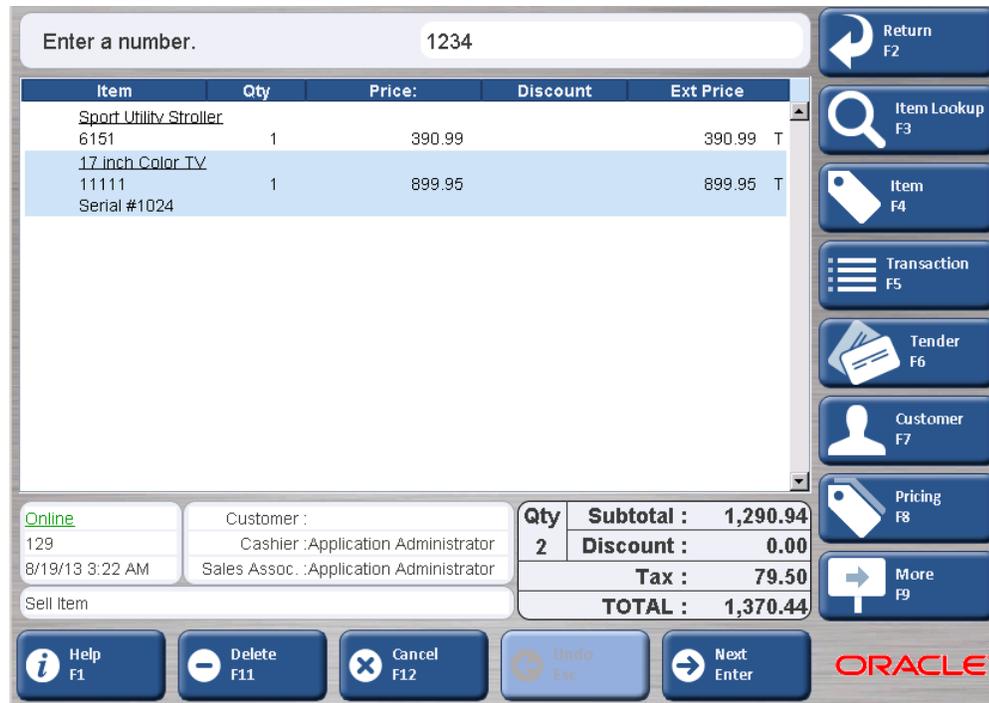


Table 1–1 describes the screen regions.

**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 appears in the response region.
Status	<p>The status region is comprised of several fields:</p> <ul style="list-style-type: none"> <li>■ Communications Status—Displays the communications status, which is determined on the last attempt by the application to communicate with the server or device. Possible values for this field are Online, Offline, Training Mode, and Transaction Reentry Mode.</li> </ul> <p>This field is a link to the register status. To display the status of the database and devices, select this field.</p> <ul style="list-style-type: none"> <li>■ Register ID—Displays the register ID that is a unique identifier for the register.</li> <li>■ Current Business Date—Displays the current business date that is set during the Start of Day process.</li> <li>■ Current Time—Displays the current time.</li> <li>■ Cashier Name—Displays the ID of the cashier working on the register.</li> <li>■ Sales Associate Name—Displays the name of the sales associate that is linked to the current transaction.</li> <li>■ Customer—Displays the name of the customer for the current transaction, if applicable.</li> <li>■ Screen Name—Displays the name of the current application screen.</li> </ul> <p>The status region for the POS component includes additional fields:</p> <ul style="list-style-type: none"> <li>■ Qty—Displays the total number of items in the transaction.</li> <li>■ Subtotal—Displays the total price amount for the transaction.</li> <li>■ Discount—Displays the total discount amount applied to the transaction.</li> <li>■ Tax—Displays the total amount of tax applied to the transaction.</li> <li>■ TOTAL—Displays the total amount due for the transaction.</li> </ul>
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>

**Table 1–1 (Cont.) Screen Region Descriptions**

Region	Description
Global Navigation Bar	The global navigation bar contains five buttons that are used to select application functionality. The behavior of the buttons is repeated on all screens, where possible, to facilitate consistency and ease-of-use.  Each button has a label and an associated function key on the keyboard that can be used to achieve the same result as clicking the button. Inactive or disabled buttons are grayed-out.
Work Area	The work area is the region of the screen where data for viewing or selection is presented. In some instances, this area is used to display or collect information from you and other times it is blank.
Dialog Boxes	Dialog boxes are used to present messages or to request verification of a requested action. When these boxes appear, you must provide the requested information and interact with the application by pressing keys or clicking buttons.  These boxes only have states 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 appears.

## 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. The Undo/Esc button is unavailable in the following figure. [Table 1–2](#) describes the functionality of these keys.

**Figure 1–4 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 appears. 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.

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

Key	Description
F11/Delete	<p>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.</p> <p>For example, on the Sell Item screen, you can delete (or remove) an item on the transaction. To delete an item, select/highlight the item and press F11/Delete. The item is removed on the transaction.</p> <p><b>Note:</b> 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.</p>
F12/Cancel	<p>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.</p>
Undo/Esc	<p>The Undo/Esc 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 Undo/Esc key does not cancel the current transaction or specific function. When Undo/Esc is pressed, you lose all of the information that has been entered on that screen.</p>
Next/Enter	<p>The Next/Enter key is used to complete the current operation. For example, if you enter an item number and press Next/Enter, the item number and its defaults (description, price, default quantity of 1, extended price, and tax code) are entered into the transaction and appear on the Sell Item screen.</p> <p>When the Next/Enter 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 appears.</p> <p>Throughout this guide, you are directed to "scan the item or enter the item number and press Next/Enter." You only need to press Next/Enter if you have manually entered the number. If you scan the item, the operation is completed automatically (an implied Enter).</p>
Keys/Ctrl+K	<p>The Keys/Ctrl+K key is used to display the on-screen keyboard. For more information, see "<a href="#">On-Screen Keyboard</a>".</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 1–5](#) are available on the Sell Item screen. Typically, when you select another screen, a different set of options appears. Buttons that are grayed-out have been designated disabled and are currently unavailable.

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 1–5 Local Navigation Bar**



For some local navigation buttons, selecting the button displays the next set of local buttons just to the left of the original local navigation buttons. Selecting a local navigation button from the new list either displays a third set of buttons to the left or displays the appropriate screen for that button. Navigating off the buttons returns you to the current screen. [Figure 1–6](#) shows an example of an additional set of buttons. In this example, **F5/Transaction** is selected on the Sell Item screen. The navigation buttons for the transaction options are shown.

**Figure 1–6 Local Navigation Bar with Additional Buttons**



## 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.
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.

## Handling IMEI and Serial Numbers

Scanning of the serial number or 15-digit IMEI number for an item is supported for the Point-of-Service and Inventory Inquiry components.

If IMEI scanning is enabled and Oracle Retail Point-of-Service is integrated with Oracle Retail Store Inventory Management, you can scan the IMEI number for the item number. If the IMEI or serial number for an item is scanned, the system connects to Oracle Retail Store Inventory Management to get the item information.

If the IMEI or serial number is scanned in transactions where the serial number is not captured, that is, layaway and order transactions, the system connects to Oracle Retail Store Inventory Management to get the item information but the serial number is not added to the transaction.

## Language and Locale Support

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

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

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### 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 that can be selected on the languages supported for the application.

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

When a customer is linked to a transaction, receipts print 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 date, time, currency, address, and phone number to be displayed in the default locale chosen for the application.

## 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 on the Item Options screen and **F2/Tax** on the Trans. Options screen are not available.
- Some screens have a Tax field in the summary table at the bottom of the screen that 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 3-1](#). The Winter Sweater item has an item level message about the discount.

## The Main Options Screen

When Oracle Retail Point-of-Service is launched, the Main Options screen appears. 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 1–7 Main Options Screen Dashboard View**



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, 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 POS Suite Implementation Guide, Volume 1 - Implementation Solutions</i> for more information.  Also enables you to access the Transaction Re-entry feature. For more information on this feature, see " <a href="#">Using Transaction Re-Entry Mode</a> " in <a href="#">Chapter 11</a> .
Clock In/Out	Enables you to record your time using the Clock In/Out component.
Fulfillment	Enables you to access order information for item pickup.

**Table 1–4 (Cont.) Application Components**

Component	Description
Browser	Enables you to access a web browser if a URL to a web site has been configured. For more information, see " <a href="#">Browser Functionality</a> ".
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.

Figure 1–7 shows the Main Options screen with the Store Dashboard displayed. The dashboard displays graphical reports and messages for the store. The reports that appear depend on how the dashboard is configured. The displayed reports are updated in real time.

If the dashboard is not configured for display, the Main Options screen appears as shown in Figure 1–8. The status region and navigation bars are the same in both views.

**Figure 1–8 Main Options Screen**



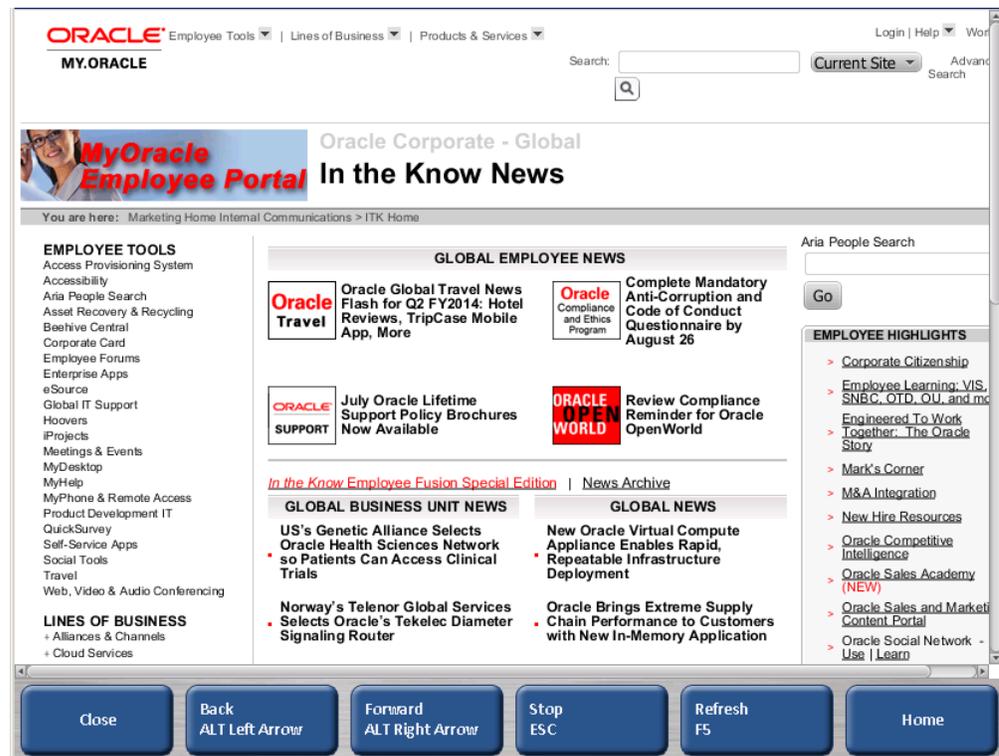
## Browser Functionality

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

To access the web browser, press **F7/Browser** on the Main Options screen. You are prompted to log in. See "[Logging In and Out](#)". After logging in, the web site appears. [Figure 1–9](#) shows an example of the screen.

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

**Figure 1–9 Web Browser**



A navigation bar appears 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.
Back/ALT Left Arrow	Same as the Back button on a browser window.
Forward/ALT Right Arrow	Same as the Forward button on a browser window.
Stop/ESC	Same as the Stop button on a browser window.
Refresh/F5	Same as the Refresh button on a browser window.
Home	Same as the Home button on a browser window.

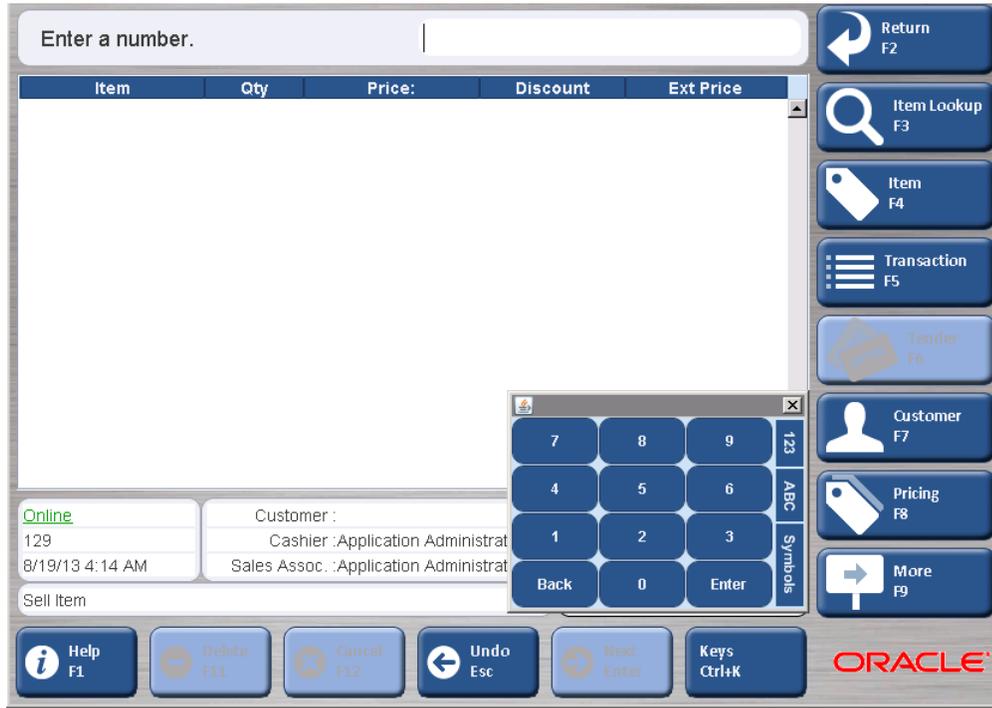
## On-Screen Keyboard

You can enable a keyboard on the Point-of-Service screens. The on-screen keyboard can be used to enter data on the screen rather than using a physical keyboard at the register. The Enter button on the keyboard works the same as the Next/Enter global navigation button.

**Note:** The on-screen keyboard is only supported in the English language.

To display the on-screen keyboard, press **Ctrl+K/Keys**. [Figure 1–10](#) shows an example of the keyboard displayed with numbers.

**Figure 1–10 Sell Item Screen with On-screen Keyboard**



[Table 1–6](#) describes the buttons on the on-screen keyboard.

**Table 1–6 On-screen Keyboard Button Descriptions**

Button	Description
123	Display the keyboard with numbers.
ABC	Display the keyboard with letters.
Symbols	Display the keyboard with symbols.
X	Close the on-screen keyboard.

## 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 appears and all of the buttons on the screen are unavailable. When the update is complete, the Main Options screen appears and the buttons are enabled.

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## Daily Operations and Time Tracking

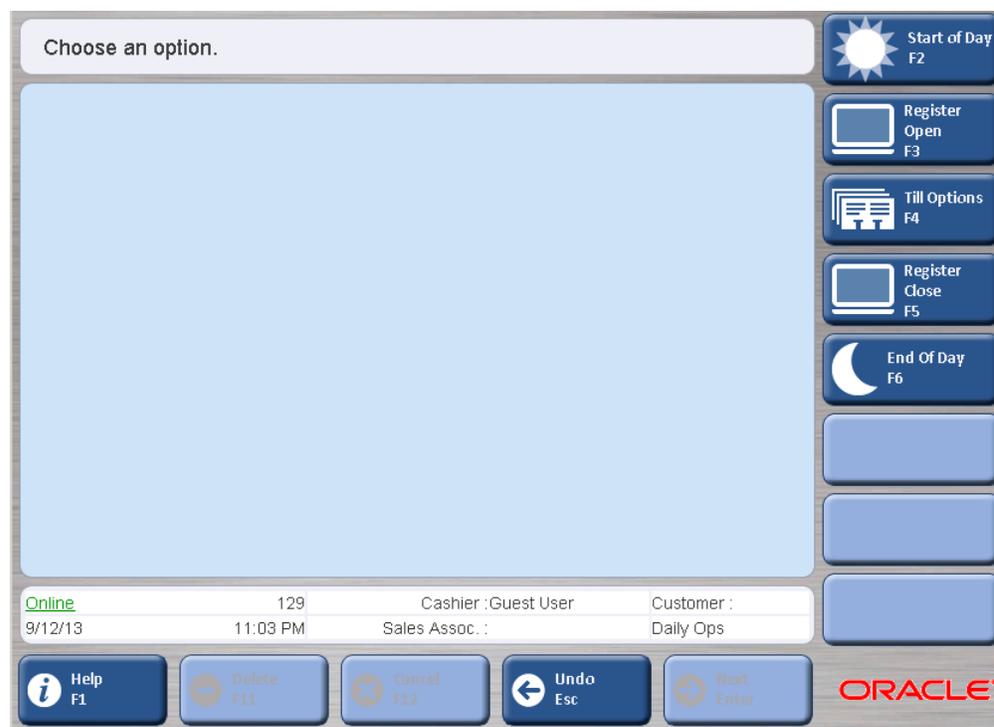
The following functions are described in this chapter:

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

### Daily Operations

The Daily Operations component is accessed on 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** on the Main Options screen. Enter login information and press **Next/Enter**. The Daily Ops screen appears.

**Figure 2–1** Daily Operations Screen



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 in the following sections.

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

The Summary Count screen appears.

3. Enter the total amount in the store safe and press **Next/Enter**. If the amount entered is not what the system expects, the Reconciliation Confirmation Notice appears.
  - If the amount entered is correct, press **Yes**.
  - To re-enter the correct amount, press **No**.

The Store Open screen appears, 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 on the Daily Ops screen, press **F3/Register Open**. The Register Opened screen appears, notifying you that the register has been opened successfully. Press **Next/Enter** to continue. The Daily Ops screen appears.

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

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## Opening Tills

A till is the physical storage box containing the money 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** on the Daily Ops screen. The navigation buttons for the till options appear.

**Figure 2–2 Till Options**




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

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To open a till:

1. On the Till Options screen, press **F2/Open**. The Enter Till ID screen appears.
2. Enter the Till ID and press **Next/Enter**. The Summary Count screen appears.
3. Enter the total amount of the float and press **Next/Enter**. If the entered amount of the till was not what Oracle Retail Point-of-Service expected, the Reconciliation Confirmation Notice screen appears.
  - 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 appears.

## 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 appears 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** on the Till Options screen. The Remove Till Confirmation screen appears.

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

### Resuming Tills

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

To resume the till:

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

The till is resumed and the Till Options screen appears.

## 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](#).

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**Note:** Reports appear in the United States locale, not in the default locale for the application.

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**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.

- To enable reconciling tills in Point-of-Service, the Till Reconcile parameter must be set to Yes. The **F6/Reconcile** button is only available on the Till Options screen when this parameter is set to Yes. For information on this parameter, see the *Oracle Retail POS Suite Configuration Guide*.
- 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.

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To reconcile a till:

1. Press **F6/Reconcile** on the Till Options screen. The Enter Till ID screen appears.
2. Enter the Till ID and press **Next/Enter**.
3. The Close Till Confirm screen appears, 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 appears, 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 appears. Enter the amount of float and press **Next/Enter**. If the entered amount of the float is not what Oracle Retail Point-of-Service expected, the Reconciliation Confirmation Notice screen appears.
  - 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 appears. 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 **Next/Enter**. Some tender types require more detail. For example, Credit requires that the amounts for different credit card types are entered separately.

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

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

The till is reconciled. The Till Options screen appears.

### 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. On the Till Options screen, press **F3/Close**. The Enter Till ID screen appears.
2. Enter the Till ID and press **Next/Enter**.
3. The Remove Till Confirmation screen appears, 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 appears, 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 appears.

### 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:

- On the Daily Ops screen, press **F5/Register Close**.
- The Register Close Successful Notice appears. 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:

- On the Daily Ops screen, press **F6/End of Day**. The EOD Summary screen appears.

**Figure 2–3 EOD Summary Screen**

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

Type	Entered	Expected
Cash	210.53	210.53
Starting Float	400.00	400.00
Ending Float	200.00	200.00
Loans	0.00	0.00
Pickups	0.00	0.00

Online 129 Cashier :Application Administrator Customer :  
8/20/13 3:59 AM Sales Assoc. : EOD Summary

Help F1 Delete F11 Cancel F12 Undo Esc Next Enter

ORACLE

- To accept the balance and close the store, press **Next/Enter**. To end the operation without closing the store, press **F12/Cancel**.
- If you accept the balance, the Summary Count screen appears.
- Enter the total amount in the store safe and press **Next/Enter**.
- If the total amount of the store safe is not what Oracle Retail Point-of-Service expected, the Discrepancy Confirmation screen appears.
  - To verify the amount, press **Yes**.
  - To modify the amount, press **No**.

6. The store is closed. The Daily Ops screen appears.
7. To return to the Main Options screen, press **Undo/Esc**.

## 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** on the Main Options screen.
2. Enter your user ID and password, and press **Next/Enter**. If the login is successful, the Clock Entry screen appears.

**Figure 2–4 Clock Entry Screen**

Select an entry type and reason code and press Next.

Last Time Entry:  
 Current Time Entry: 10/11/13 6:57 AM  
 Entry Type: In \*  
 Reason: Start of Day \*

\*Required Fields

Online	129	Cashier :Application Administrator	Customer :
10/11/13	6:57 AM	Sales Assoc. :	Clock Entry

Help F1 | Delete F11 | Cancel F12 | Undo Esc | Next Enter

ORACLE

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

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## 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 on the Sell Item screen. A transaction is started when an item number is entered on the Sell Item screen. You can enter an item number by any of the following methods:

- Enter the item number manually.
- Scan a bar code.
- Select an item on the scan sheet.

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"](#)
- ["Using a Scan Sheet"](#)
- ["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 appears 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.

If an item is added to a sale transaction by scanning the barcode, a quantity for the item can be entered on the keyboard before scanning the item. To enter the quantity:

1. On the keyboard, press asterisk (\*) and then the quantity number. For example, press \*5.
2. Scan the item. The item is added to the sale transaction in the selected quantity.

To access the Sell Item screen:

1. On the Main Options screen, press **F3/POS**.
2. Enter the login information. The Sell Item screen appears.

**Figure 3–1 Sell Item Screen**

Item	Qty	Price	Discount	Ext Price
Flare Jeans 924	1	20.00		20.00 T
Flare Jeans 924	1	20.00		20.00 T
Winter sweater 909	1	80.00	45.00	15.00 T
Buy 2 \$20 jeans (item 924), get any item from department 9 (item 932) for \$15 (fixed price)				
Compound Bow 702	1	239.99		239.99 T
Bow Case 716	1	0.00		0.00 T
17 inch Color TV 11111 Serial #1024	1	899.95		899.95 T

Qty	Subtotal :	1,239.94
6	Discount :	45.00
	Tax :	71.58
	<b>Total :</b>	<b>1,266.52</b>

The item description is a link to information about the item. To display the information, select the link. [Figure 3–2](#) shows an example of the item information for the Winter Sweater item. After viewing the information, press **Enter** to return to the Sell Item screen.

Figure 3–2 Item Description Dialog

Oracle Retail Point-of-Service

Item ID: 909  
 Description: Winter sweater  
 Department: Women Apparel  
 Price: 60.00  
 Clearance: No  
 Size:  
 Color:  
 Unit Of Measure: Units  
 Taxable: Yes  
 Discountable: Yes  
 Planogram ID: 1222-11  
 1223-11

Enter

3. Enter an item number and press **Next/Enter**.
  - If the item requires a serial number, you are prompted to enter the serial number. Enter the serial number and press **Next/Enter**.
  - If the item does not exist, the Item Not Found screen appears. Enter the item information and press **Next/Enter**.

Figure 3–3 Item Not Found Screen

Item 99999999,  
 This item is not on file. Enter item  
 information and press Next to  
 continue.

Item Number: 99999999  
 Item Description: \*  
 Price: 0.00 \*  
 Department: \*  
 Unit Of Measure: Units \*  
 Quantity: 1 \*  
 Taxable: Yes \*  
 Serial Number:  
 Size:

\*Required Fields

Online 129 Cashier :Application Administrator Customer :  
 8/23/13 1:38 AM Sales Assoc. :Application Administrator Item Not Found

Help F1 Delete F11 Cancel F12 Undo Esc Next Enter

ORACLE

The item is added to the list. The transaction totals on the Sell Item screen are updated.

4. When all items have been entered, tender the transaction. For information, see ["Tendering a Transaction"](#).

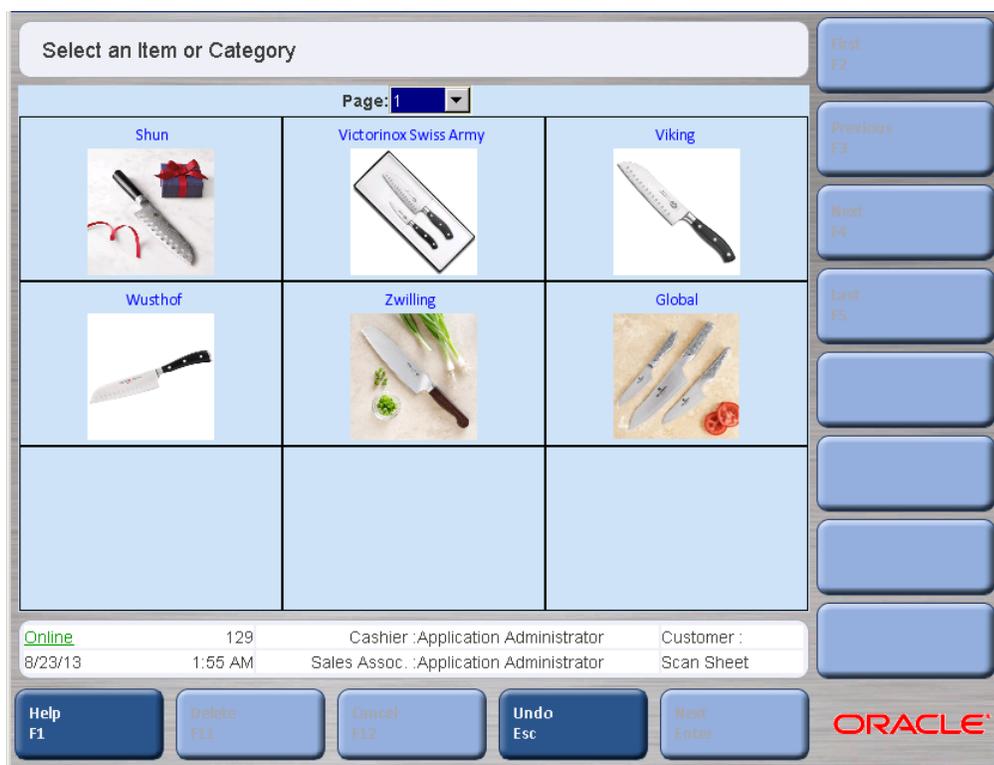
## Using a Scan Sheet

A scan sheet can be used to add items to a sale transaction. Actual items and non-merchandise items, such as alterations, can be included on the scan sheet. Items can also be grouped into categories. You can access the scan sheet on the Sell Item screen.

To add an item on the scan sheet:

1. On the Sell Item screen, press **F9/More**, **F9/More**, and then **F2/Scan Sheet**. The Scan Sheet appears.

**Figure 3–4 Scan Sheet Screen**



2. Make a selection on the scan sheet.
  - Select a category and press **Next/Enter**. The items in the category appear.
  - Select an item and press **Next/Enter**. If the item requires additional input, such as a serial number, you are prompted to enter the information.

The item is added to the transaction. The list of items and transaction totals on the Sell Item screen are updated.

## 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. On the Sell Item screen, press **F9/More** and then **F7/Gift Card/Cert**. The Gift Options screen appears.
2. Press **F2/Gift Card**. The GC Options screen appears.
3. Press **F2/Issue**. The GC Amount screen appears.

**Figure 3–5 GC Amount Screen**

4. Enter the gift card amount or select an amount. Press **Next/Enter**. The Sell Gift Card screen appears.
5. Enter the gift card number. The gift card number can be entered manually or by swiping the card or scanning the bar code. The Sell Item screen appears.
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 appears. 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** on the Main Options screen. The Gift Options screen appears.
2. Press **F2/Gift Card**. The GC Options screen appears.
3. Press **F3/Reload**. The GC Amount screen appears.
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** on the Main Options screen. The Gift Options screen appears.
2. Press **F3/Gift Cert**. The Tender Number screen appears.
3. Enter the gift certificate number and press **Next/Enter**. The Issue Amount Entry screen appears.
4. Enter the gift certificate amount or select a predetermined amount. Press **Next/Enter**. The Sell Item screen appears.
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.

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**Note:** Oracle Retail Point-of-Service only captures the Gift Registry number. The retailer is responsible for setting up the Gift Registry.

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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 appears.
3. Scan the Gift Registry number or manually enter it. Press **Next/Enter**.

The Sell Item screen appears. 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 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 appears.

To handle the age restriction:

- Enter the date of birth and press **Next/Enter**. 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 on 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](#) describes the different groups of related items.

**Table 3-1** *Related Group Items*

Group	Description
Automatic	These related items are automatically added to the transaction, for example, a bow case for a bow.

**Table 3–1 (Cont.) Related Group Items**

Group	Description
Cross Sell	These related items are add-on or accessory items for the primary item, for example, a knife sharpener for a set of knives.
Upsell	These related items are higher-level items, for example, a pair of higher-quality running shoes.
Substitution	These related items are available as replacements or substitutions, for example, a better warranty for a refrigerator.

Figure 3–1 shows an example of an item with a related item in a transaction. The Compound Bow item includes the Bow Case as a related item. On this screen, the tag icon is displayed for items that have related items.

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, all 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 any of the other groups of related items, you can add items from those groups:
  1. To access the related items, press **F4/Item**. The Item Options screen appears.
  2. Press **F9/More** and then **F8/Related Item**. The Related Items screen appears.
  3. Select the related items:
    - For Cross Sell related items, press **F2/Cross Sell Items**. The Cross Sale Items screen appears.
    - For Upsell related items, press **F3/Upsell Items**. The Upsell Items screen appears.
    - For Substitution related items, press **F4/Substitute Items**. The Substitute Items screen appears.
  4. To add related items to the transaction, select the items from the list and press **F2/Add**. The related items are added to the transaction. You are returned to the Sell Item screen.

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**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.

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## 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

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pay for the balance of the transaction. To tender a transaction, you press **F6/Tender** on 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
- House Account

See the following individual sections 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.

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**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](#).

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## 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 appears. Choose the option for the receipt:

- To print a receipt, press **F2/Print**. The receipt prints.
- To create an eReceipt, press **F3/Email**. The eReceipt Email Address screen appears. 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 appears. Enter the e-mail address for the customer. Enter the address again to confirm. Press **Enter**. The receipt is also printed.

If the receipt could not be sent, it prints. The Sell Item screen appears.

## 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 appears 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 appears. You must select **Enter** to continue.

You should notify a store manager if a warning appears.

## 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 order payment transaction meets the requirement for PAT compliance, the PAT Customer Information screen appears. Any customer information that has already been linked to the transaction is defaulted on the screen.

Figure 3–6 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):	9/24/59 *
Taxpayer Identification Number:	5555555555 *
Occupation, Profession or Business:	Furniture Sales *
Address Line 1:	100 Anystreet Drive *
Address Line 2:	
City:	Austin *
State/Region:	Texas
Postal Code:	78777 *
Country:	USA

\*Required Fields

Online 128 Cashier :Application Administrator Customer :  
 10/11/13 6:22 AM Sales Assoc. :Application Administrator Patriot Act Customer Information

Help F1 Delete F11 Cancel F12 Undo Esc Next Enter

ORACLE

To enter customer information:

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

If you do not want to enter the customer information, press **F12/Cancel**. The Sell Item screen appears. 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 appears.

**Figure 3–7 Tender Options Screen**

Enter the tender amount and choose a tender option.

Type	Number	Amount

Online  
 129  
 8/23/13 4:26 AM  
 Tender Options

Customer :  
 Cashier :Application Administrator  
 Sales Assoc. :Application Administrator

<b>Total :</b>	<b>10.53</b>
<b>Tendered :</b>	<b>0.00</b>
<b>Balance Due :</b>	<b>10.53</b>

Help F1    Delete F11    Cancel F12    Undo Esc    Next Enter    ORACLE

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 appears, prompting you to issue the indicated amount of change. If the tender amount meets the requirement for PAT compliance, the PAT Customer Information screen appears. 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 appears 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 appears. 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 appears. 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 prints. You are returned to the Sell Item screen.

## Tendering with a 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 appears. Enter the amount of the check and press **F3/Check**. The Enter ID screen appears.
2. Select the ID Type from the menu and press **Next/Enter**. The Enter ID Number screen appears.
3. Swipe or manually enter the ID number and press **Next/Enter**. If a driver's license number was entered, the ID Origin field appears. Select the ID Country and the ID State/Region from the menus. Press **Next/Enter**.  
The Enter Phone screen appears.
4. Enter the customer's phone number and press **Next/Enter**. The Check Entry Scan screen appears.
5. Scan the check through the MICR device or enter the bank information and press **Next/Enter**. The Check Number screen appears.
6. Enter the check number and press **Next/Enter**.
  - If referred, the Check Referral screen appears. 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 appear. If the check is a deposit check, the Place Deposited Check screen appears. 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 appears.
    - If **F3/Declined** is pressed, the Tender Options screen appears to select another tender option.
7. If eReceipt is enabled, you are prompted to select a receipt option. Otherwise, the receipt prints. 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**

<b>Result</b>	<b>Process</b>
Request Approved	You are prompted to insert the check for franking and then to remove the check.
Request Declined	An error message appears. You are returned to the Tender Options screen to choose another tender type. Press <b>Next/Enter</b> to clear the message.
Request Referred	The authorizer requires additional information. The Check Referral screen appears. Respond to the request by typing the required information, or follow the instructions on the screen. <ul style="list-style-type: none"> <li>■ If approval is obtained, enter the approval code and press <b>F2/Approved</b>. You are returned to the Tender Options screen. A check tender line is added to the transaction.</li> <li>■ If approval is declined, press <b>F3/Declined</b>. You are returned to the Tender Options screen to select another tender type.</li> </ul>
Time-out	The Authorization Retry dialog appears. You can choose to retry the authorization or to cancel. If cancel is selected, the Check Referral screen appears.
Offline	The Check Authorization Offline dialog appears. Press <b>Enter</b> . The Check Referral screen appears.

**Table 3–2 (Cont.) Check Authorization Results**

Result	Process
Positive ID	<p>The Check Warning dialog appears.</p> <ul style="list-style-type: none"> <li>■ To accept the check, press <b>Yes</b>. You are returned to the Tender Options screen. A check tender line is added to the transaction.</li> <li>■ To decline the check, press <b>No</b>. You are returned to the Tender Options screen to select another tender type.</li> </ul>

## Tendering with a Credit/Debit Card

Transactions can be tendered with both credit and debit cards in Oracle Retail Point-of-Service. The authorization of the credit or debit card is handled by an external payment application.

To tender using a credit/debit card:

1. Press **F4/Credit/Debit** on the Tender Options screen. You are prompted to have the customer swipe the card. After the card is successfully swiped, the authorization process begins automatically.

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**Note:** If the credit/debit card is not approved, follow the prompts to handle the reason for the non-approval.

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2. When approval is received, ask the customer to sign on the signature pad. When the signature is complete, press **Next/Enter**. The Verify Signature screen appears.
3. 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 appears. If multiple tenders were used, authorization is done for the next tender.

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

## Tendering with a Gift Card

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

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To tender a transaction using a Gift Card, on the Tender Options screen, press **F5/Gift Card**. Swipe the gift card or enter the gift card number manually. After the card is successfully swiped or the number is entered, 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 prints. 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.

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## Tendering with a Gift Certificate

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

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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 appears.
2. Enter the store number where the gift certificate was issued and then press **Next/Enter** or press **F2/Corporate Issued**. The Tender Number screen appears.
3. Scan the barcode or manually enter the gift certificate number and press **Next/Enter**. 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 appears. Select a change option and press **Next/Enter**. The Close Drawer, Franking Insert, and Franking Remove screens appear.
  - If the gift certificate tender is less than the balance due, the gift certificate amount appears and the Tender Options screen appears for you to complete the tender. Once the tender is completed, the Close Drawer, Franking Insert, and Franking Remove screens appear.
  - If the amount of the gift certificate is equal to the balance due, the Close Drawer, Franking Insert, and Franking Remove screens appear.
4. If eReceipt is enabled, you are prompted to select a receipt option. Otherwise, the receipt prints. 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 on the balance due and press **F7/Travel Check**. The Traveler's Check screen appears.
2. Enter the number of traveler's checks presented and press **Next/Enter**.
  - If the amount of the traveler's checks is greater than the balance due, the Issue Change screen appears, prompting you to issue change. If the tender amount meets the requirement for PAT compliance, the PAT Customer Information screen appears. The Franking Insert and Franking Remove screens appear.
  - 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 appears. The Franking Insert and Franking Remove screens appear.
3. If eReceipt is enabled, you are prompted to select a receipt option. Otherwise, the receipt prints. You are returned to the Sell Item screen.

## Tendering with a Non-Store Coupon

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**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.

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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 appears. Scan or manually enter the coupon number (minimum of 3 digits) and press **Next/Enter**.
  - If the non-store coupon tender amount is greater than the balance due, the Coup. Overtender screen appears. To select a different tender option on the Tender Options screen, press **Next/Enter**.
  - If the non-store coupon tender amount is less than the balance due, the non-store coupon tender item appears on the Tender Options screen and the coupon amount is deducted on 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 prints. 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. On the Tender Options screen, enter the transaction amount and press **F9/More** and then **F2/Store Credit**. The Tender Number screen appears.
2. Enter the store credit number and press **Next/Enter**.
3. 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 appears and you are returned to the Sell Item screen.
4. Complete the tender process with the store credit.
  - If the store credit amount is more than the transaction amount, the Change Due Options screen appears, prompting you to select a change option. The Franking Insert and Franking Remove screens appear.
  - If the store credit amount is less than the transaction amount, the Tender Options screen appears, prompting you to select another tender option to complete the tender. After the tender is complete, the Franking Insert and Franking Remove screens appear.
  - If the store credit amount is equal to the transaction amount, the Close Drawer, Franking Insert, and Franking Remove screens appear.

5. If eReceipt is enabled, you are prompted to select a receipt option. Otherwise, the receipt prints. 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 appears.
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 appears, prompting you to issue change. The Franking Insert and Franking Remove screens appear.
  - If the mall certificate tender amount is less than the transaction amount, the Tender Options screen appears to complete the tender. Once the tender is complete, the Close Drawer, Franking Insert, and Franking Remove screens appear.
  - If the mall certificate tender amount is equal to the transaction amount, the Close Drawer, Franking Insert and Franking Remove screens appear.
3. If eReceipt is enabled, you are prompted to select a receipt option. Otherwise, the receipt prints. 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. On the Tender Options screen, enter the purchase order amount and press **F9/More** and then **F4/Purchase Order.** The Agency Select screen appears.
2. Select the agency.
  - Select the agency name from the menu and press **Next/Enter.**
  - To enter an agency that is not in the list, select **Other** and press **Next/Enter.** The Agcy/Bus Name screen appears. 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 **Next/Enter.**

The P.O. Number screen appears.

3. Enter the last five digits of the purchase order number and press **Next/Enter.** The P.O. Amount screen appears.
  - If the purchase order amount is more than or equal to the transaction amount, the Close Drawer, Franking Insert, and Franking Remove screens appear.
  - 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 appear.
4. If eReceipt is enabled, you are prompted to select a receipt option. Otherwise, the receipt prints. 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. On 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 appears, prompting you to issue change. If the tender amount meets the requirement for PAT compliance, the PAT Customer Information screen appears. The Close Drawer, Franking Insert, and Franking Remove screens appear. You are returned to the Sell Item screen.
  - If the money order amount is less than the transaction amount, the Tender Options screen appears, 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 appears. The Close Drawer, Franking Insert, and Franking Remove screens appear.
  - 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 appears. The Close Drawer, Franking Insert, and Franking Remove screens appear.
2. If eReceipt is enabled, you are prompted to select a receipt option. Otherwise, the receipt prints. 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** on the Tender Options screen. The Foreign Currency screen appears.

**Figure 3–8 Foreign Currency Screen**

2. Select the foreign currency. The tender options available for that currency appear. 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 appears. The Close Drawer screen appears.
  - If the amount of foreign currency is more than the transaction amount, the Issue Change screen appears, 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 appears.
  - 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 appears. The Close Drawer screen appears.
4. If eReceipt is enabled, you are prompted to select a receipt option. Otherwise, the receipt prints. You are returned to the Sell Item screen.

## Tendering with a House Account

To tender a transaction using a house account:

1. On the Tender Options screen, press **F9/More** and then **F8/House Account**. The House Account Card screen appears.
2. Enter the house account number. After the card number is entered, the authorization proceeds.
3. When the tender is complete, if eReceipt is enabled, you are prompted to select a receipt option. Otherwise, the receipt prints. 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.

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

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 on 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 in the following sections.

Figure 3–9 Return Options Screen

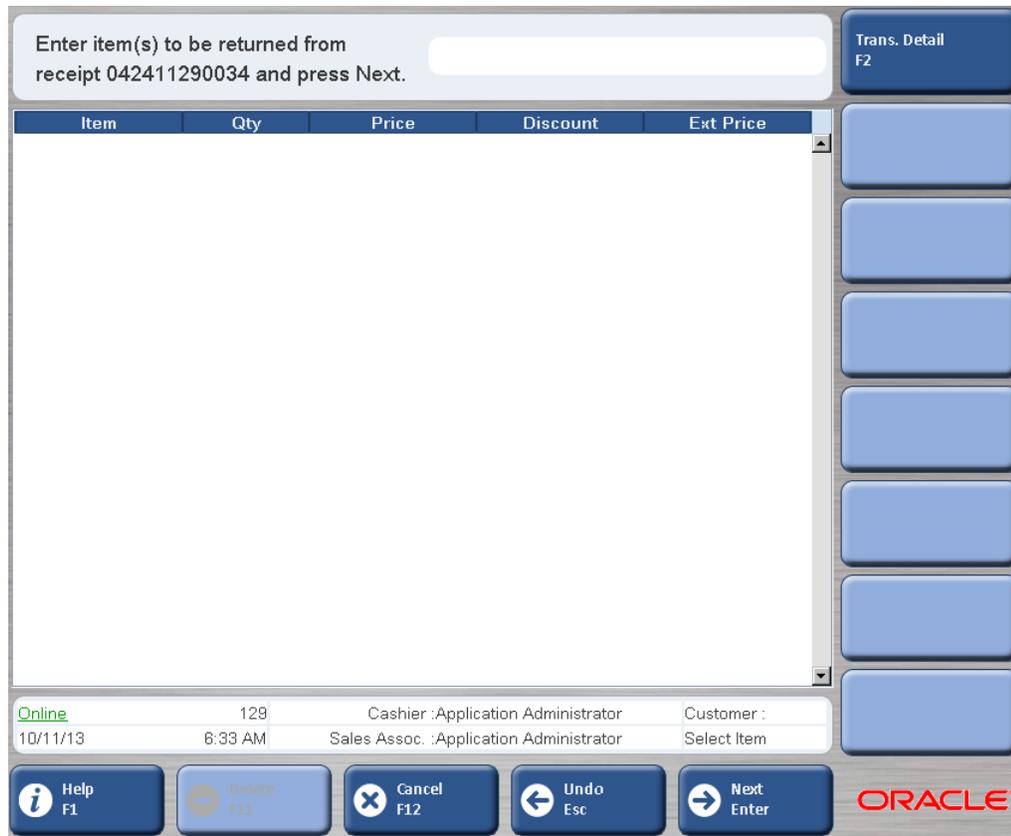
The screenshot shows the 'Return Options' screen. At the top left, there is a text prompt: 'Enter Receipt information or select a return option.' followed by a search input field. To the right of this field is a vertical stack of buttons: 'Search F2' (with a magnifying glass icon), 'No Receipt F3' (with a crossed-out circle icon), and 'Gift Receipt F4' (with a gift box icon). Below these are four more empty blue buttons. At the bottom of the screen, there is a status bar with the following information: 'Online' (green), '129', 'Cashier :Application Administrator', 'Customer :', '8/26/13', '2:00 AM', 'Sales Assoc. :Application Administrator', and 'Return Options'. Below the status bar are five buttons: 'Help F1' (with an 'i' icon), 'Delete F11' (with a trash can icon), 'Cancel F12' (with a circular arrow icon), 'Undo Esc' (with a left arrow icon), and 'Next Enter' (with a right arrow icon). The Oracle logo is in the bottom right corner.

## Performing a Return with a Receipt

To perform a return transaction with a receipt available:

1. Enter the receipt information or scan the receipt barcode to enter the information. Press **Next/Enter**. The Select Item screen appears.

**Figure 3–10 Select item Screen**



2. 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 **Next/Enter**. The Return Item Info screen appears.

**Figure 3–11 Return Item Info Screen**

Enter item return information and press Next.

Item ID: 1234  
 Item Description: CoolBox  
 Price: 10.00  
 Size:  
 Unit of Measure: Units  
 Quantity: 1 \*  
 Store Number: 04241  
 Sales Associate: pos  
 Receipt Number: 042411290034  
 Return Reason Code: Customer Change Mind \*  
 Item Condition: New

\*Required Fields

Online 129 Cashier :Application Administrator Customer :  
 10/11/13 8:34 AM Sales Assoc. :Application Administrator Return Item Info

Help F1 Delete F11 Cancel F12 Undo Esc Next Enter ORACLE

3. Enter the item return information. Select a return reason and item condition from the menus. Press **Next/Enter**.
4. If the item is not returnable, a dialog message appears and you are returned to the Select Item screen. See Step 3.
5. If the item has a restocking fee, the Restocking Fee dialog box appears. 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.
6. If a customer ID is required for the return, the Customer Options screen appears.
7. Enter a customer ID to link to the transaction or choose a customer option.
8. If a personal ID is required for the return, the Personal ID Entry screen appears.
9. Enter the customer name. If a customer is already linked to the transaction, that information appears 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 **Next/Enter**. You are returned to the Sell Item screen.
10. 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 appears. Otherwise, the Refund Options screen appears. See Step 12.

For each item, the following information is shown:

**Table 3–3 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"> <li>■ Authorized—The item can be returned.</li> <li>■ Denial—The item cannot be returned.</li> <li>■ Contingent Authorization—The item can be returned with manager approval. The return requires approval by a properly authorized user.</li> <li>■ 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.</li> </ul>
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 **Next/Enter**. The Refund Options screen appears.
11. Select a refund option and press **Next/Enter**. The Issue Refund screen appears.
  12. If eReceipt is enabled, you are prompted to select a receipt option. Otherwise, the receipt prints. You are returned to the Sell Item screen.

## Performing a Return by Searching for the Transaction

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

- Search for a transaction using the customer number
- Search for a transaction using the purchase date
- Search for a transaction using the store number
- Search for a transaction using the check number
- Search for a transaction using the credit, debit, or gift card number
- Search for a transaction using the item serial number
- Search for a transaction using the order information

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

To return an item by searching for the transaction:

1. Press **F2/Search** on the Return Options screen. The navigation buttons for the search options appear.

**Figure 3–12 Return Transaction Search Screen**

2. Choose the type of search. For more information, see the following sections:

- "Searching for a Transaction Using the Customer ID"
- "Searching for a Transaction Using the Purchase Date"
- "Searching for a Transaction Using the Store Number"
- "Searching for a Transaction Using the Check Number"
- "Searching for a Transaction Using the Credit, Debit, or Gift Card Number"
- "Searching for a Transaction Using the Item Serial Number"
- "Searching for a Transaction Using the Order Information"

### Searching for a Transaction Using the Customer ID

To search for a transaction using the customer IDs:

1. Press **F2/Customer**. The Customer Options screen appears.
2. Enter the customer ID and press **Next/Enter**. The Display Trans. screen appears.
3. Select a transaction and press **Next/Enter**. The Select Item screen appears. To complete the return, see Steps 2 through 12 in "[Performing a Return with a Receipt](#)".

### Searching for a Transaction Using the Customer Search Options Screen

The navigation buttons for the customer search options appear when **F2/Find** is pressed on the Customer Options screen.

**Figure 3–13 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 appears. Enter the customer ID and press **Next/Enter**. The Customer Information screen appears. Press **F3/Link**. The Display Trans screen appears. Select a transaction number and press **Next/Enter**. The Select Item screen appears. To complete the return, see Steps 2 through 13 in "Performing a Return with a Receipt".
- If **F3/Emp ID** is pressed, the Search By Emp. ID screen appears. Enter the employee ID and press **Next/Enter**. The Customer Information screen appears. To complete the return, see the above section on searching using Customer ID.
- If **F4/Cust. Info** or **F5/Business Info** is pressed, the Search By Customer Info screen appears. Enter the required information and press **Next/Enter**. The Customer Information screen appears. To complete the return, see the above section on searching a transaction using Customer ID.
- If **F6/Tax ID** is pressed, the Search by Tax ID screen appears. Enter the tax ID and press **Next/Enter**. The Customer Information screen appears. To complete the return, see the above section on searching a transaction using Customer ID.

### Searching for a Transaction Using the Purchase Date

Transactions can be searched for using 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 using the purchase date:

1. Press **F3/Purchase Date**. The Purchase Date screen appears.
2. Enter the start and end dates and press **Next/Enter**. The Customer Options screen appears.
3. Press **F2/Find**. The Cust. Search Options screen appears. See "[Searching for a Transaction Using the Customer Search Options Screen](#)" to complete the return.

### **Searching for a Transaction Using the Store Number**

Transactions can be searched for using 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 using the store number:

1. Press **F4/Store Number**. The Store Number screen appears.
2. Enter the store number and press **Next/Enter**. The Customer Options screen appears.
3. Press **F2/Find**. The Cust. Search Options screen appears. See "[Searching for a Transaction Using the Customer Search Options Screen](#)" to complete the return.

### **Searching for a Transaction Using the Check Number**

A transaction can be searched for using the check details that were used to tender the transaction.

To search for a transaction using a check:

1. Press **F5/Check**. The Check Search screen appears.

**Figure 3–14 Check Search Screen**

2. Enter the required information and press **Next/Enter**. If transactions are found for the check tender, the Select Item screen appears. See Steps 2 through 12 in "Performing a Return with a Receipt".

### Searching for a Transaction Using the Credit, Debit, or Gift 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 appears instead of the Credit/Debit screen.

---

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

1. Press **F6/Credit/Debit**.
2. You are prompted to ask the customer to swipe their card. If the card is not successfully swiped, you are prompted to search by partial card number. If you select **Yes**, the Credit/Debit Search screen appears.

Figure 3–15 Credit/Debit Search Screen

To complete your search select a date range and enter an item number.

Date Range: All \*

Item Number: 1234 \*

\*Required Fields

Online	129	Cashier : Application Administrator	Customer :
10/14/13	7:28 AM	Sales Assoc. : Application Administrator	Credit/Debit Search

Help F1   Delete F11   Cancel F12   Undo Esc   Next Enter

ORACLE

3. Enter the required information and press **Next/Enter**. If transactions are found for the card, the Select Item screen appears. To complete the return, see Steps 2 through 12 in "[Performing a Return with a Receipt](#)".

### Searching for a Transaction Using the Item Serial Number

A transaction can be searched for using the serial number for an item.

To search for a transaction using the serial number:

1. Press **F8/Serial Number**. The Serial Number Search screen appears.

**Figure 3–16 Serial Number Search Screen**

Enter serial number, select a date range, enter item number and press Next.

Serial Number: 1024 \*

Date Range: All \*

Item Number: 11111

\*Required Fields

Online 129 Cashier :Application Administrator Customer :  
 10/14/13 7:30 AM Sales Assoc. :Application Administrator Serial Number Search

Help F1 Delete F3 Cancel F12 Undo Esc Next Enter

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2. Enter the required information and press **Next/Enter**. If transactions are found for the serial number, the Select Item screen appears. To complete the return, see Steps 2 through 12 in "[Performing a Return with a Receipt](#)".

### Searching for a Transaction Using the Order Information

A transaction can be searched for using the order information for an item.

To search for a transaction using the order information:

1. Press **F9/Order**. The Order Search screen appears.
2. Enter an order number or select the type of order search:
  - To search by customer, press **F2/Customer**. The Order Search by Customer screen appears.
  - To search by credit card, press **F3/Credit Card**. The Credit/Debit Search screen appears.
3. Enter the required information and press **Next/Enter**. If transactions are found for the order, the Select Item screen appears. To complete the return, see Steps 2 through 12 in "[Performing a Return with a Receipt](#)".

### Performing a Return without a Receipt

To return items without a receipt by using the item numbers:

1. Press **F3/No Receipt** on the Return Options screen. The Return Without Receipt screen appears.

**Figure 3–17 Return Without Receipt Screen**

2. Enter the item number to be returned and press **Next/Enter**.
  - a. If an item does not exist, the Item Not Found screen appears. See [Figure 3–3](#). Enter the item information and press **Next/Enter**. The item is added to the list.
  - b. Press **Enter/Next**.
3. The Return Item Info screen appears. To complete the return, see Steps 3 through 12 in "[Performing a Return with a Receipt](#)".

## Performing a Return with a Gift Receipt

Returns can also be performed using the gift receipt. To make a return using a gift receipt, press **F4/Gift Receipt** on the Return Options screen. The Receipt Info screen appears. To complete the return, see Steps 3 through 12 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 appears.

In the Item Search Criteria field, you enter the information you want to search for in the item information. What fields in the item information are compared to the entered criteria is determined by how Point-of-Service is configured, for example, the item number and description may be the fields used for the search. An asterisk can also be entered as a wildcard.

The following examples illustrate different searches:

- If exact information is entered, such as **dishes**, Point-of-Service searches for item information that has **dishes** in any part of it. For example, *dinner dishes*, *dishes for kids*, and *seasonal dishes to order* would be matches.
  - If an asterisk is used as a suffix, such as **dishes\***, Point-of-Service searches for item information that starts with **dishes**. For example, *dishes for kids* would be a match.
  - If an asterisk is used as a prefix, such as **\*dishes**, Point-of-Service searches for item information that ends with **dishes**. For example, *dinner dishes* would be a match.
  - The asterisk can also be placed anywhere in the input. For example, *dinner dishes* and *dishes for kids* would be matches for **di\*s**.
  - To see all items, you enter just an asterisk.
2. Enter the item search criteria and press **Next/Enter**. The Item Display screen appears. See [Figure 3–21](#).
    - To get information on another item, enter a new item number and press **F2/Search**. The Item Display screen appears with information for the item.
    - To add the item to the transaction, press **F3/Add**. The Sell Item screen appears 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](#).
  3. When done displaying the item information, press **Next/Enter**. 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 appears.

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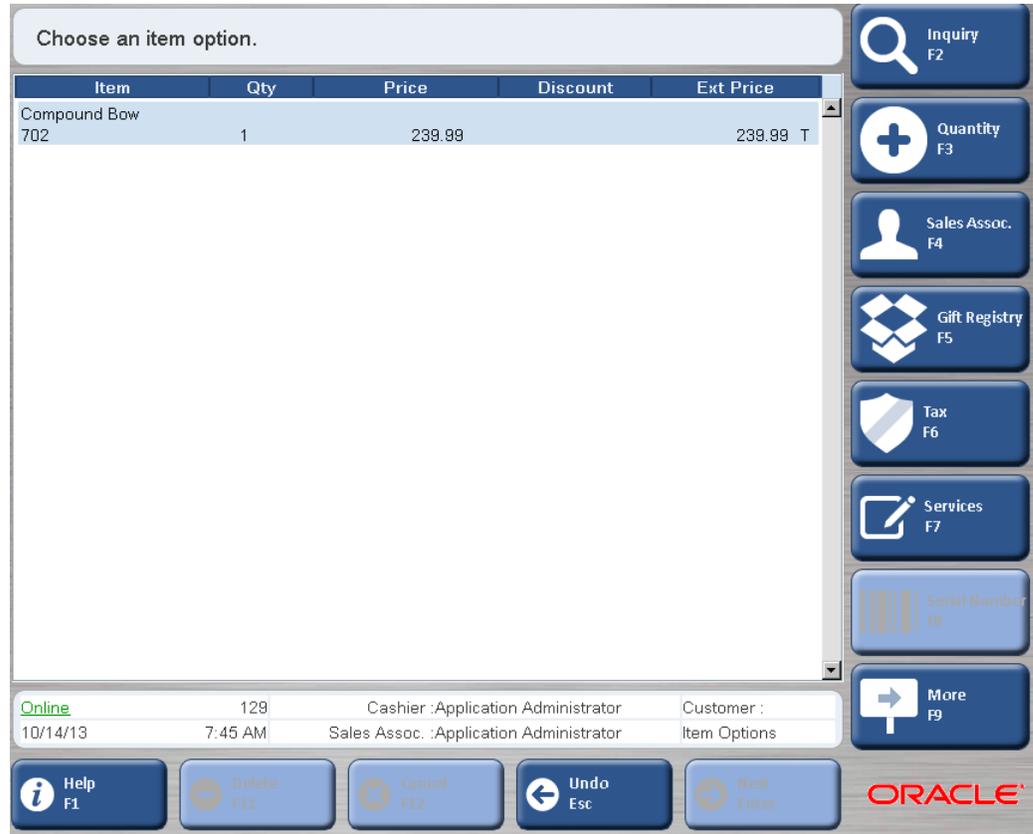
**Note:** If you need to select multiple items, select an item and press the spacebar. Repeat this for each item to be selected. As each item is selected, the line item becomes shaded.

---



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Figure 3-18 Items Options Screen



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



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

- "Making an Item Inquiry"
- "Changing an Item Quantity"
- "Linking an Item to 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"
- "Adding Shipping for an Item"
- "Adding Related Items"

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

## Making an Item Inquiry

To make an item inquiry, press **F2/Inquiry** on the Item Options screen. The navigation buttons for the inquiry options appear.

The following item inquiry options are available:

- "Price Inquiry"
- "Gift Card Inquiry"
- "Gift Code Inquiry"

**Figure 3–20 Inquiry Options**

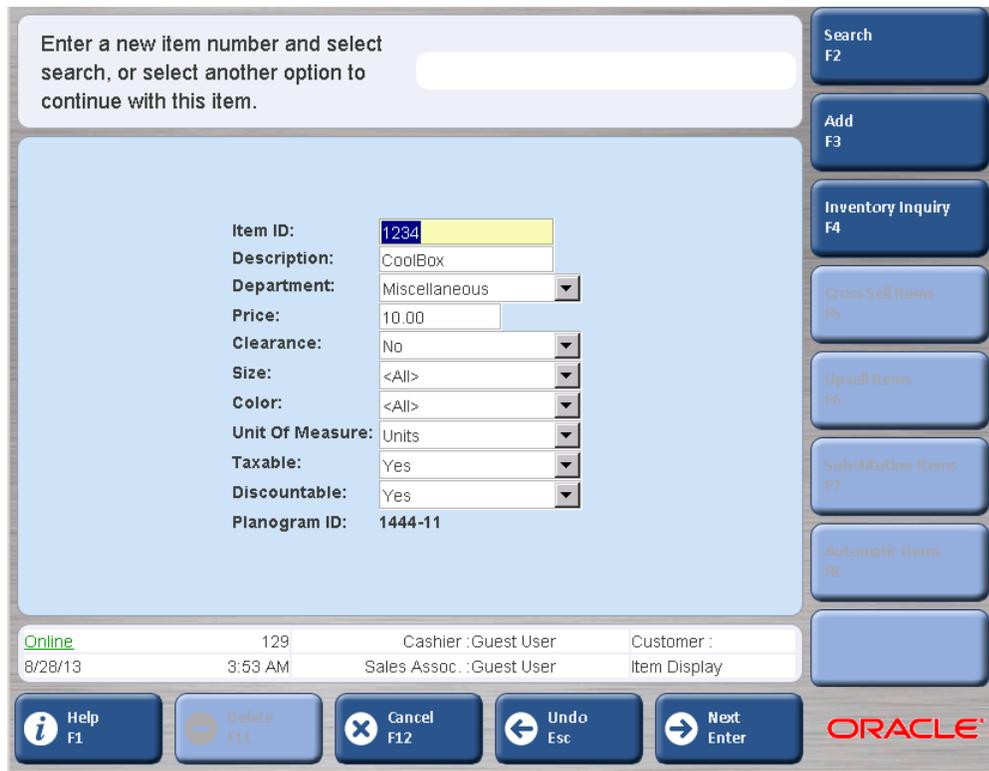


### Price Inquiry

To do a price inquiry:

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

**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 appears 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](#).
- For Cross Sell related items, press **F5/Cross Sell Items**. The Cross Sale Items screen appears.
- For Upsell related items, press **F6/Upsell Items**. The Upsell Items screen appears.
- For Substitution related items, press **F7/Substitute Items**. The Substitute Items screen appears.
- For Automatic related items, press **F8/Automatic Items**. The Auto Related Items screen appears.

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

- If **F2/Gift Code** is pressed on the Price Inquiry screen, the Gift Code Inquiry screen appears. Enter the gift code and press **Next/Enter**. The Gift Price screen appears. When finished, press **Next/Enter**. The Sell Item screen appears.
- If **F3/ADV Search** is pressed on the Price Inquiry screen, the Advanced Inquiry screen appears. For information about this screen, see "[Performing an Item Lookup](#)".

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

- If one match is found, the Item Display screen appears. To complete a price inquiry on the Item Display screen, continue at [Figure 3–21](#).
- If more than one match is found, the Item List screen appears.

**Figure 3–22 Item List Screen**

Item	Department	Price
701	Miscellaneous	4.99
Compound Bow		
702	Sporting Goods	239.99
Razor Arrows		
703	Sporting Goods	3.00
Jagged Arrows		
704	Sporting Goods	4.00
Thorium Arrows		
705	Sporting Goods	5.00
Buckskin Quiver		
706	Sporting Goods	45.00
Buffalo Quiver		
707	Sporting Goods	55.00
Kangaroo Quiver		
708	Sporting Goods	95.00
Bag of Marbles		

Online 129 Cashier :Application Administrator Customer :  
 10/11/13 2:23 PM Sales Assoc. :Application Administrator Item List

Help F1 Delete F11 Cancel F12 Undo Esc Next F10

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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 on the Item Display screen, press **F3/Detail**. The Item Display screen appears. Continue at [Figure 3–21](#).
- \* To check inventory on an item, press **F4/Inventory Inquiry**. For information on inventory inquiry, see [Chapter 9](#).
- \* To add Cross Sell related items, press **F5/Cross Sell Items**. The Cross Sale Items screen appears.
- \* To add Upsell related items, press **F6/Upsell Items**. The Upsell Items screen appears.
- \* To add Substitution related items, press **F7/Substitute Items**. The Substitute Items screen appears.
- \* To add Automatic related items, press **F8/Automatic Items**. The Auto Related Items screen appears.
- \* To add item from the web store to the list, press **F9/Webstore**. The list is updated with items from the search.

### Gift Card Inquiry

To perform a gift card inquiry:

1. Press **F3/Gift Card**. The Gift Card screen appears.
2. Swipe or enter the gift card number. The GC Inquiry screen appears. The gift card number, initial balance, and remaining balance appear.
  - To get gift card inquiry information on another gift card, swipe or enter another gift card number.
  - To exit the gift card inquiry option, press **F2/Done**. The Item Options screen appears.
  - To print the GC Inquiry screen, press **F3/Print**.

### Gift Code Inquiry

To perform gift code inquiries:

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

## 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 appears. Press **F3/Quantity**. The Item Quantity screen appears.
2. Enter the quantity and press **Next/Enter**. The Sell Item screen appears 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 appears. Press **F4/Sales Assoc**. The Item Sales Assoc. screen appears.
2. Enter the sales associate's ID and press **Next/Enter**. The Sell Item screen appears. The sales associate name appears next to the item.

## Changing Tax on an Item

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

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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. Following are the tax status indicators and their corresponding statuses:

- 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** on the Item Options screen. The Item Tax Options screen appears.

**Figure 3–23** Item Tax Options Screen

Item	Qty	Price:	Discount	Ext Price	
Sport Utility Stroller 6151	1	390.99		390.99	T

2. Select an option.
  - To override the tax percentage, press **F2/Override %**. The Item Tax % screen appears. Enter the tax percentage, select the Reason Code on the list, and press **Next/Enter**. The new tax rate is set for the item. You are returned to the Sell Item screen.
  - To override the tax amount, press **F3/Override Amt.** The Item Tax Amount screen appears. Enter the Override Tax amount, select the Reason Code on the list, and press **Next/Enter**. The new tax amount for the item is set. 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 appears. Select On or Off, and a reason code on the list. Press **Next/Enter**. A T (taxable) or O (tax off) appears 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 on the Sell Item screen or by navigating to the Non-Merchandise screen.

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

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

---

---

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

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---

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

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

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## 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.

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

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**Note:** The serial number is not captured by the system during the initiation of orders, layaways, item deliveries, and item pickups. The serial number is only captured by the system at the completion of these processes.

---

---

To add a serial number to an item:

1. Press **F8/Serial Number** on the Item Options screen. The Serialized Item screen appears.
2. You can set up pickup or delivery of the item:
  - To set up pickup of the item, press **F2/Pickup**. See Steps 3 and 4 in ["Adding Pickup for an Item"](#).
  - To set up deliver of the item, press **F3/Delivery**. See Steps 3 through 5 in ["Adding Delivery for an Item"](#).
3. Enter the serial number and press **Next/Enter**. You are returned to the Sell Item screen. 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. On 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 appears.
3. Press **F9/More** and then **F2/Gift Receipt**. The Sell Item screen appears annotated with Gift Receipt.
4. To tender the transaction, press **F6/Tender**. For more information see "[Tendering a Transaction](#)". A separate gift receipt prints 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 appears.
2. Press **F9/More** and then **F3/Send**. The Customer Present screen appears.
3. If the customer is present, press **Yes**. If the customer is not present, press **No**. The Capture Customer Information screen appears.

**Figure 3–24 Capture Customer Information Screen for an Item Send**

Enter customer information, then press Next.

**First Name:** Michael \*  
**Last Name:** Matthews \*  
**Address Line 1:** 9989 Anystreet Drive \*  
**Address Line 2:**   
**City:** Austin \*  
**State/Region:** Texas \*  
**Postal Code:** 78777 \*  
**Country:** USA \*  
**Phone Type:** Home \*  
**Telephone Number:** (512) 555-6130 \*  
**ID Type:** Driver's License

**\*Required Fields**

Online 129 Cashier :Guest User Customer :  
 8/29/13 12:47 AM Sales Assoc. :Guest User Capture Customer Information

Help F1 Delete F11 Cancel F12 Undo Esc Next Enter

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4. Enter the information in the required fields and press **Next/Enter**. The Same as Customer screen appears.
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 appears.
  - To enter another ship-to address, press **No**. The Ship-To Address screen appears. Enter the information in the required area and press **Next/Enter**. The Shipping Method screen appears.

Figure 3–25 Shipping Method Screen

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

Done  
F2

Ship To: Michael Matthews  
124 Windy Ridge Drive  
Austin, TX 78777 USA

Ship Via: Fed Ex Ground 9.00  
Fed Ex Ground VAT blank 9.00  
Fed Ex Ground VAT invalid 9.00 \*

Shipping Charge: 9.00 \*

Reason Code: [Dropdown]

Special Instructions: If no one is home, please leave with neighbor at 128 Windy Ridge.

\*Required Fields

Online 129 Cashier :Application Administrator Customer :Michael Matthews  
10/11/13 2:29 PM Sales Assoc. :Application Administrator Shipping Method

Help F1 Delete F12 Cancel F12 Undo Esc Next Enter ORACLE

6. Select the mode for shipping on the selection list and press **F2/Done**. The shipping charges are added to the transaction. You are returned to the Sell Item screen. 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 appears.
2. Press **F9/More** and then **F4/Components**. The Component Options screen appears.
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 **Next/Enter**. The kit line item appears with the applicable changes shown in the Sell Item screen.

## Performing Alterations

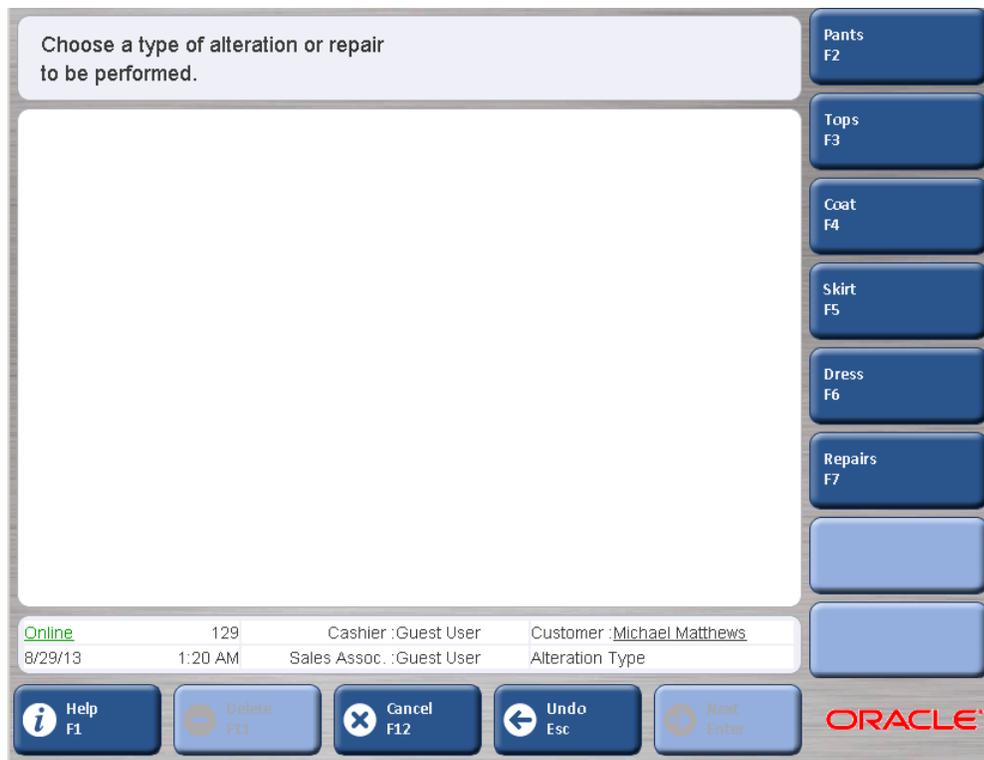
Alterations is a service through which you are able to enter instructions specific to the type of garment to allow the customer, store, and tailor to know how the garment

needs to be altered. Alterations is a service that you can perform on 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 appears.
2. Press **F7/Services**. The Non-Merchandise screen appears.
3. Select Alterations on the Non-Merchandise Item menu and press **Next/Enter**. The Customer Options screen appears.
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 appears.

**Figure 3–26 Alteration Type Screen**



5. Select an alteration type. Depending on the type selected, the particular alteration screen appears. Enter the alteration information and press **Next/Enter**. The Enter Price screen appears.
6. Enter the price of the alteration and press **Next/Enter**. 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 on 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 appears.
2. Press **F9/More** and then **F6/Pickup**.

The screen that appears is dependent on how orders are implemented in Point-of-Service:

- If the Customer Options or Pickup Date screen appears, you can set up the pickup at the store. See "[Setting Up Pickup at the Store](#)".
- If the Pickup Options screen appears, you can select the store for the pickup. See "[Selecting the Store for the Pickup](#)".

### Setting Up Pickup at the Store

To complete setting up the pickup at the store:

1. If a customer is not already linked to the transaction, the Customer Options screen appears. To link the customer to the transaction, enter a customer ID and press **Next/Enter**. For information on linking a customer to a transaction, see [Chapter 4](#).
2. The Pickup Date screen appears. Enter the date and press **Next/Enter**.

The Sell Item screen appears. An icon is added to the item line to indicate it is a pickup item.

**Figure 3–27 Sell Item Screen with Items for Pickup and Delivery**

Item	Qty	Price:	Discount	Ext Price
CoolBox 1234	1	10.00		10.00 T
Pickup 8/31/13 Pickup at Store #04241				
17 inch Color TV 11111	1	899.95		899.95 T
Delivery 8/31/13 Home Address				

Online	Customer : Michael Matthews	Qty	Subtotal :	909.95
129	Cashier : Guest User	2	Discount :	0.00
8/29/13 1:35 AM	Sales Assoc. : Guest User		Tax :	47.77
Order Item			TOTAL :	957.72

### Selecting the Store for the Pickup

To complete setting up the pickup:

1. On the Pickup Options screen, select a store for the pickup:
  - Select a store from the list.

- To search for a store, press **F3/Store Search**. The Store Search for Order screen appears. Enter the search information and press **Next/Enter**. The updated Pickup Options screen appears.
  - To print the order, press **F4/Print**. The order is printed. You are returned to the Order Search screen.
2. Press **F2/Pickup**. The CC Capture Customer for PU screen appears.
  3. Enter the customer information and press **Next/Enter**. The Pickup Date screen appears.
  4. Enter the date and press **Next/Enter**.

The Sell Item screen appears. An icon is added to the item line to indicate it is a pickup item. For an example, see [Figure 3–27](#).

## Adding Delivery for an Item

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

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**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](#)".

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To add delivery for an item:

1. Select an item on the Sell Item screen and press **F4/Item**. The Item Options screen appears.
2. Press **F9/More** and then **F7/Deliver**. If a customer is not already linked to the transaction, the Customer Options screen appears.
3. To link the customer to the transaction, enter a customer ID and press **Next/Enter**. For information on linking a customer to a transaction, see [Chapter 4](#).
4. The Delivery Address screen appears. Enter the address information and any special directions needed.
5. The Delivery Date screen appears. Enter the date and press **Next/Enter**.

The Sell Item screen appears. An icon is added to the item line to indicate it is a delivery item. See [Figure 3–27](#).

## Adding Shipping for an Item

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

To add shipping for an item:

1. Select an item on the Sell Item screen and press **F4/Item**. The Item Options screen appears.
2. Press **F9/More** and then **F7/Shipping**. The Store Order Shipping Information screen appears:
  - Enter the customer's shipping address and press **Next/Enter**.
  - To select a store where to ship the item, press **F2/Ship to Store**. The Store Search Results screen appears:

- Select a store from the list and press **F2/Ship**. The CC Capture Customer for Ship screen appears. Enter the information and press **Next/Enter**.
- To search for a store, press **F3/Store Search**. The Store Search for Order screen appears. Enter the search information and press **Next/Enter**. The updated Store Search Results screen appears.
- To select a customer, press **F3/Customer**. The Customer Options screen appears:
  - Enter the customer ID and press **Next/Enter**.
  - To search for the customer, press **F2/Find**. The navigation buttons for the customer search options appear. Select the search option and enter the search information. Select the customer and press **Next/Enter**. The customer is linked to the transaction.
  - To add a customer, press **F3/Customer** or **F4/Business**. Enter the required information and press **Next/Enter**. The customer is linked to the transaction.
- 3. The Shipping Method screen appears. This screen shows the items and shipping address. Complete the setup:
  - a. Select how the item is shipped. The shipping charge is updated.
  - b. If you manually change the shipping charge, select a reason code.
  - c. Enter any special instructions.
  - d. Press **Next/Enter**.
- 4. If a tax ID needs to be selected, the Multiple Geo Codes screen appears. Select the tax ID and press **Next/Enter**.

The Sell Item screen appears. An icon is added to the item line to indicate shipping is selected for the item. An item is also added for the shipping charge.

## Adding Related Items

You can add available related items to the transaction. On the Sell Item screen, a tag icon appears for primary items which have available related items. For an example, see [Figure 3-1](#).

To add related items:

1. On the Sell Item screen, select a primary item. Press **F9/More** and then **F8/Related Items**. The Related Items screen appears.
2. If only one related item is available, press **F5/Add** to add the item to the transaction.
3. To add related items, select the type of related items:
  - For Cross Sell related items, press **F2/Cross Sell Items**. The Cross Sale Items screen appears.
  - For Upsell related items, press **F3/Upsell Items**. The Upsell Items screen appears.
  - For Substitution related items, press **F4/Substitute Items**. The Substitute Items screen appears.

After adding an item, you are returned to the Sell Item screen.

## Performing Transaction Options

To access the functions that affect an entire transaction, press **F5/Transaction** on the Sell Item screen. The navigation buttons for the transaction options appear.

The following options are similar to item options. The difference is that they only apply to the particular item for item options whereas for transaction options, 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 Orders](#)"
- "[Adding Items from an Item Basket](#)"
- "[Processing a Bill Payment](#)"
- "[Adding an External Order for Payment to the Transaction](#)"

### 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**. The Sell Item screen appears annotated with Gift Receipt.
2. To tender the transaction, Press **F6/Tender**. For more information, see "[Tendering a Transaction](#)". One gift receipt prints that 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 in a following section.

## Creating a New Layaway

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

To create a new layaway:

1. Press **F6/Layaway**. The Layaway Options screen appears.
2. Press **F2/New**. The Customer Options screen appears.
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 appears.

**Figure 3–28 Layaway Customer Screen**

Update or confirm the information and press Next.

First Name: Diane \*  
 Last Name: Jones \*  
 Address Line 1: 124 Windy Drive \*  
 Address Line 2:  
 City: Austin \*  
 State/Region: Texas  
 Postal Code:  
 Country: USA  
 Phone Type: Home  
 Telephone Number: (512) 999-9585 \*  
 Receipt Preference: None

\*Required Fields

Online 129 Cashier :Guest User Customer: Diane Jones  
 8/29/13 4:08 AM Sales Assoc. :Guest User Layaway Customer

Help F1 Delete F11 Cancel F12 Undo Esc Next Enter

ORACLE

4. Enter the information in the required fields and press **Next/Enter**. The Layaway Item screen appears. A layaway number is added to the transaction.
5. Enter the item number to be returned and press **Next/Enter**. If the item does not exist, the Item Not Found screen appears. See [Figure 3–3](#). Enter the item information and press **Next/Enter**.
6. When all the items have been selected, press **F6/Tender**. The Payment Detail screen appears.

**Figure 3–29 Payment Detail Screen**

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

Layaway Number: 04241129130003  
 Customer: Diane Jones  
 Expiration Date: 9/28/13  
 Balance Due: 428.25  
 Amount Paid: 0.00  
 Layaway Fee: 5.00 \*  
 Deletion Fee: 0.00  
 Payment: 134.03 \*  
 Location: Customer Service ... \*

\*Required Fields

Online 129 Cashier :Guest User Customer: Diane Jones  
 8/29/13 4:16 AM Sales Assoc. :Guest User Payment Detail

Help F1 Delete F11 Cancel F12 Undo Esc Next Enter

ORACLE

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

### Finding an Existing Layaway

To find an existing layaway:

1. Press **F6/Layaway**. The navigation buttons for the layaway options appear.
2. Press **F3/Find**. The Find Layaway screen appears.
3. Select a layaway search option.
  - If **F2/Layaway Number** is pressed, the Layaway Number screen appears. Enter the layaway number and press **Next/Enter**. The Layaway List screen appears.
  - If **F3/Customer** is pressed, the Customer Options screen appears. 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 appears.

**Figure 3–30 Layaway List Screen**

Layaway No.	Status:	Date Due	Balance
04241129130003	New First Item: Sport Utility Stroller	9/28/13	294.22

Online 129 Cashier: Guest User Customer: Diane Jones  
8/29/13 4:44 AM Sales Assoc.: Guest User Layaway List

Buttons: Help F1, Delete F11, Cancel F12, Undo Esc, Next/Enter, ORACLE

4. Select one of the options:
  - To make a layaway payment, press **F2/Payment**. The Payment Detail screen appears. Enter the payment amount and select Next/Enter. The Tender Options screen appears. For more information on tendering a transaction see "[Tendering a Transaction](#)".
  - To perform a layaway pickup, press **F3/Pickup**. The Payment Detail screen appears. 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 appears.
2. To delete the layaway, press **Yes**. The Refund Detail screen appears.
3. Verify or edit the fees and press **Next/Enter**. The Refund Options screen appears.
4. Select a refund option and press **Next/Enter**. 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.

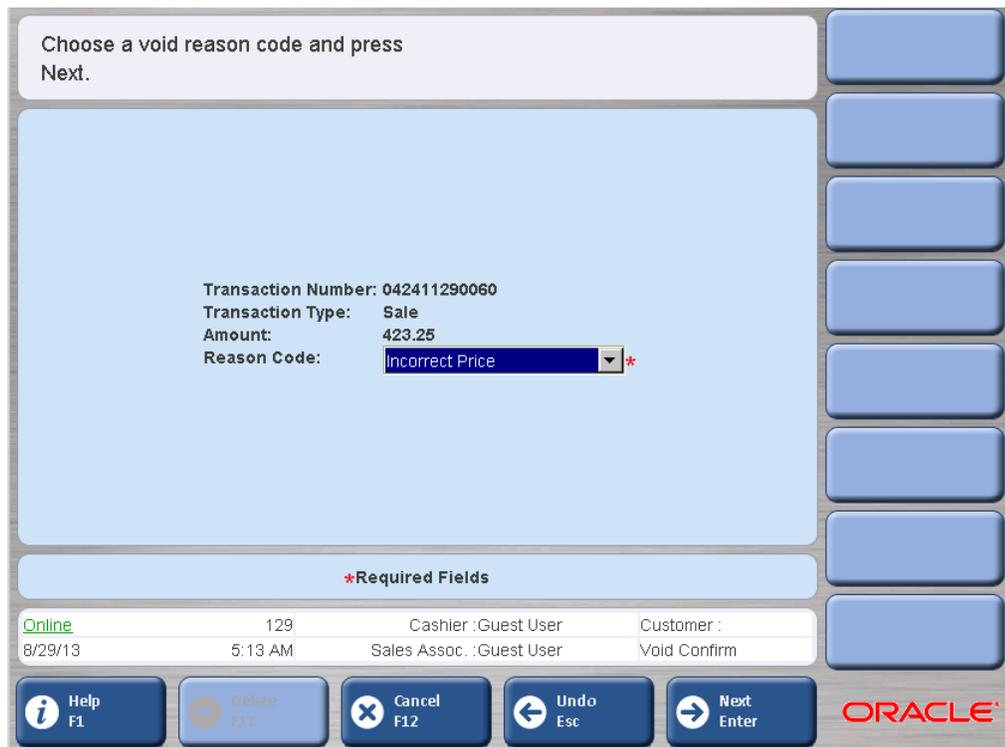
**Note:** A completed transaction can be post voided only on the same business day and only on the same till.

Transactions that contain a web order cannot be post voided.

To post void a transaction:

1. Press **F8/Post Void**. The Receipt Info screen appears.
2. Enter the transaction number and press **Next/Enter**. The Void Confirm screen appears.

**Figure 3–31 Void Confirm Screen**



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

## Suspending a Transaction

If a sale, exchange, return, layaway, or 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 on the Sell Item screen:

1. Press **F5/Transaction**. The navigation buttons for the transaction options appear.
2. Press **F9/More** and then **F2/Suspend**. The Reason Code screen appears.
3. Select a reason code on the list and press **Next/Enter**. The transaction is suspended. The Suspend Saved screen appears. Press **Enter**. The suspended transaction receipt prints. 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**. The Enter Transaction screen appears.
2. Select the transaction.
  - Scan or enter the transaction number and press **Next/Enter**.
  - To see a list of suspended transactions, press **F2/List**. The Suspend List screen appears. If more than one transaction is listed, select the transaction to be retrieved and press **Next/Enter**.

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

## Canceling a Suspended Transaction

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

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To cancel a suspended transaction during the business day:

1. Press **F3/Retrieve**. The Enter Transaction screen appears.
2. Scan or enter the transaction number and press **Next/Enter**. To see a list of suspended transactions, press **F2/List**. The Suspend List screen appears.
3. Select the transaction to be cancelled on the list and press **Next/Enter**. The Sell Item screen appears.
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.

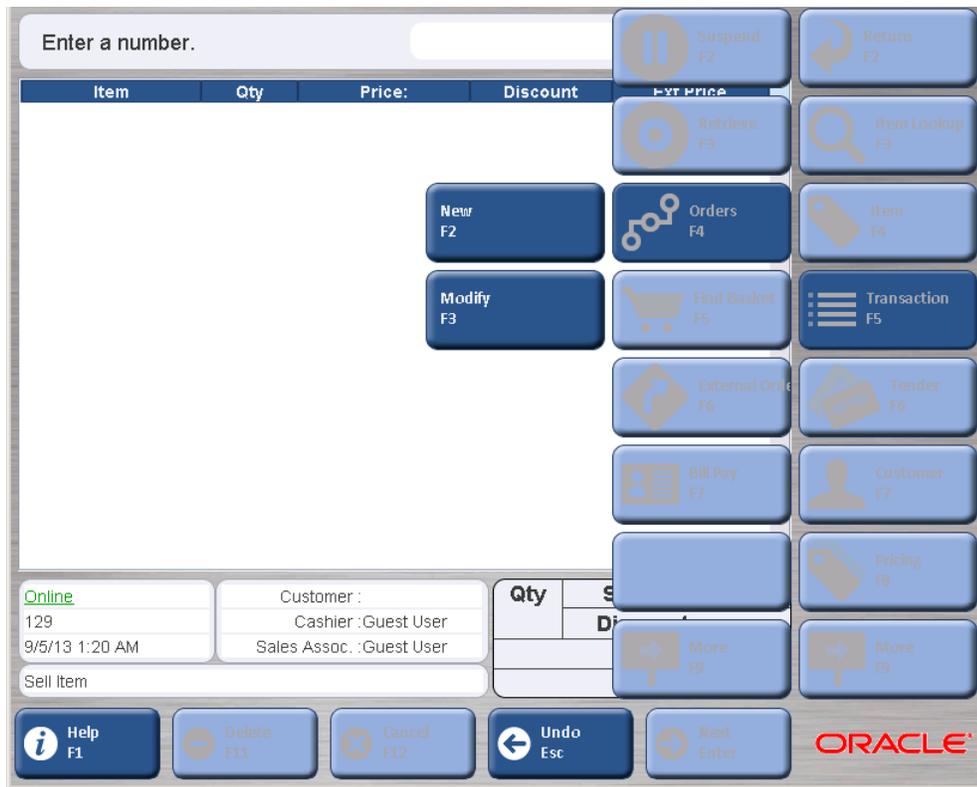
## Handling Orders

To create an order, press **F9/More** and then **F4/Orders**. The navigation buttons for the order options appear. The available order options depend on how ordering has been implemented for Point-of-Service:

- If you can only work with orders created in the store, the navigation buttons enable you to create a new order or modify an existing order. This section describes working with these types of orders.
- If you can work with orders created in other stores, the navigation buttons enable you to modify, cancel, and view the orders. For more information on these options, see [Chapter 8](#).

An order, created in the store, 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.

**Figure 3–32 Order Options**



### Creating a New Order

To create a new order:

1. Press **F2/New**. The Customer Options screen appears.
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 Order Customer screen appears.

**Figure 3–33 Order Customer Screen**

Update or confirm the information and press Next.

First Name:  \*  
 Last Name:  \*  
 Address Line 1:  \*  
 Address Line 2:   
 City:  \*  
 State/Province:  ▾  
 Postal Code:   
 Country:  ▾  
 Phone Type:  ▾  
 Telephone No.:  \*  
 Receipt Preference:  ▾

\*Required Fields

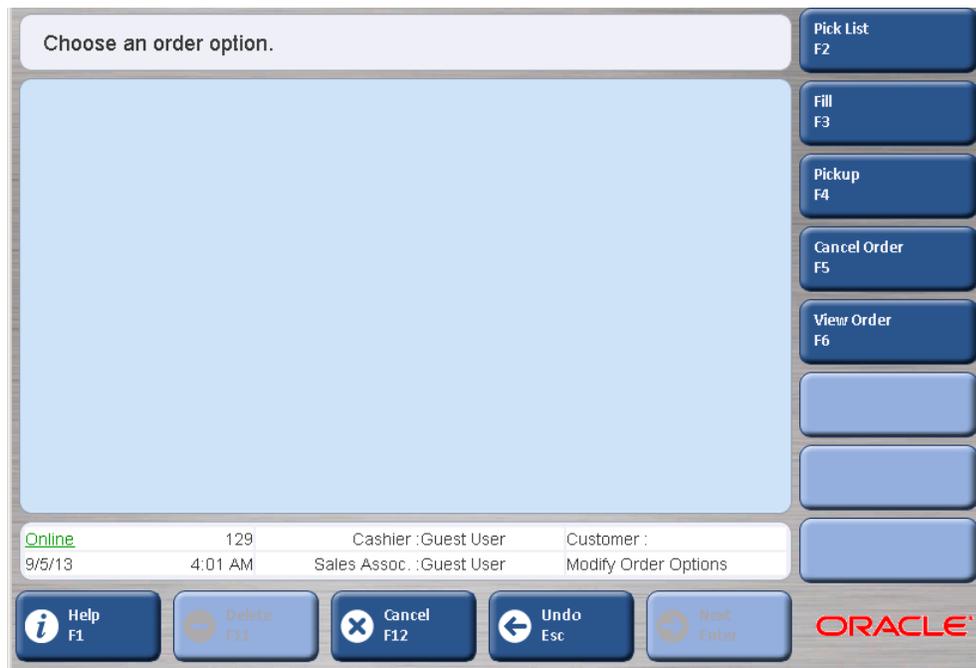
Online	129	Cashier :Guest User	Customer :David Stevens
9/5/13	1:33 AM	Sales Assoc. :Guest User	Order Customer

**ORACLE**

3. Enter the information required and press **Next/Enter**. The Order Item screen appears.
4. Scan or manually enter the item numbers. If an item does not exist, the Item Not Found screen appears. See [Figure 3–3](#). Enter the item information and press **Next/Enter**.
5. When all items have been entered, press **F6/Tender**. The Order Deposit screen appears.
6. Enter the Deposit Amount if greater than the Minimum Deposit Due and press **Next/Enter**. The Tender Options screen appears. Complete the tender normally. An Order receipt prints. You are returned to the Sell Item screen.

### Modifying an Order

To modify an existing order, press **F3/Modify**.

**Figure 3–34 Modify Order Options Screen**

The Order Options screen appears. The following options are available:

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

**Printing a Pick List** To print a pick list:

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

**Filling an Order** To fill an order:

1. Press **F3/Fill** on the Order Options screen. The Order Search screen appears.
2. Enter the order number or search for the order either by Customer or Status.
  - To search using the customer, press **F2/Customer** on the Order Search screen. The Customer Options screen appears. 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.
  - To search using the credit card, press **F3/Credit Card** on the Order Search screen. The Credit/Debit Search screen appears. Enter the date range and item number to search.

- An order status can be new, filled, printed, partial, cancelled, or completed. To search using the status, press **F3/Status** on the Order Search screen. The Status Search screen appears. Enter the information in the required fields and press **F2/Search**.
- 3. If one order is found, the Edit Item Status screen appears. If multiple orders are found, the Order List screen appears. Select the order to be filled with the up and down arrows and press **Next/Enter**. 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 **Next/Enter**. The Edit Location screen appears.
- 5. Select the location on the drop-down selection list and press **Next/Enter**. The Order Printing screen appears, and the order details print. You are returned to the Sell Item screen.

**Picking Up an Order** To pick up an order:

1. Press **F4/Pickup** on the Order Options screen. The Order Search screen appears.
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 an Order](#)".
3. If one order is found, the Edit Item Status screen appears. If more than one order is found, the Order List screen appears. Select the order to be picked up with the up and down arrows and press **Next/Enter**. The Edit Item Status screen is then displayed.
4. Select the items the customer wants to pick up and press **F4/Pick Up**. Press **Next/Enter**. The Order Location screen appears.
5. Verify the order information and press **Next/Enter**. The Confirm Selection screen appears.
6. Press **F2/Tender**. Tender the transaction normally to complete the transaction. You are returned to the Sell Item screen.

**Cancelling an Order** To cancel an order:

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

**Viewing an Order** To view an order:

1. Press **F6/View Order** on the Order Options screen. The Order Search screen appears.

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

## 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 using a wireless device or Oracle Retail Store Inventory Management handheld device, and an item basket ID is assigned to the collection of items. If configured, the customer gets a slip with the item basket ID that 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. Press **F9/More** and then **F5/Find Basket**. The Find Basket screen appears.
2. Enter the item basket ID or the customer ID and press **Next/Enter**. The items in the basket are added to the transaction. You are returned to the Sell Item screen.

## Adding an External Order for Payment to the Transaction

Orders can be created outside of Point-of-Service. These external orders can be added to the transaction so that the customer can pay for the order.

To add an external order to the transaction:

1. Press **F9/More** and then **F6/External Order**. The External Order List screen appears.
2. To search for orders using search criteria:
  - a. Press **F2/Advanced Search**. The Ext Order Adv Search screen appears.
  - b. Enter the search criteria and press **Next/Enter**. The External Order List screen appears with the orders that match the selection criteria.
3. Select an order on the list and press **Next/Enter**. The order is added to the transaction. You are returned to the Sell Item screen.

## Processing a Bill Payment

The bill payment feature can be used by retailers, such as telecom retailers, to capture bill payments made by their subscribers or customers at a Point-of-Service register. Point-of-Service must be integrated with the retailer's billing system to enable bill payments to be made by customers using Point-of-Service.

To process a bill payment:

1. Press **F9/More** and then **F7/BillPay**. The Bill Pay Search screen appears.

Figure 3-35 Bill Pay Search Screen

Enter search information and press Next

Bill Number:

Account Number: 1234

Telephone Number: ( ) -

First Name:

Last Name:

Postal Code:

Email:

Online 129 Cashier :Application Administrator Customer :  
10/14/13 12:28 PM Sales Assoc. :Application Administrator Bill Pay Search

Help F1 Delete F11 Cancel F12 Undo Esc Next Enter

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2. Enter the search criteria and press **Next/Enter**. The Bill Pay List screen appears.

**Figure 3–36 Bill Pay List Screen**



If customer information was entered and more than one customer matches the criteria, the Select Customer screen appears. Select a customer and press **Next/Enter**. The Bill Pay List screen appears for the selected customer.

**Note:** If the billing system is offline, the Bill Payment Offline Details screen appears. Enter the payment details and press **Next/Enter**. The Tender Options screen appears. See "[Tendering a Transaction](#)".

3. Select a bill on the list and press **Next/Enter**. The payment information is captured. The Bill Payment Details screen appears.

Figure 3–37 Bill Pay Details Screen

Enter an amount and press Next to continue.

Name: David Stevens  
Service Type: Land Line  
Account Number: 1234  
Telephone Number: 5550101  
Plan: Talk199  
Bill Number: bill12342  
Bill Date (M/d/yy): 2/27/10  
Billing Period: 1/27/10-2/27/10  
Due Date (M/d/yy): 4/15/10  
Bill Amount: 112.88  
Balance Due: 112.88  
Minimum Payment Due: 70.00  
Status: Active  
Amount: 70.00 \*

\*Required Fields

Online 129 Cashier :Application Administrator Customer :  
10/14/13 12:31 PM Sales Assoc. :Application Administrator Bill Payment Details

Help F1 Delete F11 Cancel F12 Undo Esc Next Enter

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To change the payment amount, enter the new amount and press **Next/Enter**. The new payment amount appears on the Bill Pay List screen.

- To make the payment, press **F2/Tender** on the Bill Pay List screen. See "[Tendering a Transaction](#)".

## Reprinting Receipts

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

- To reprint the receipt of the previous transaction, press **F2/Last Trans**. The receipt on the last transaction prints.
- To reprint a receipt by transaction number, press **F3/Trans. Number**. The Trans. Search screen appears. Enter the transaction number and press **Next/Enter**. The Reprint Select screen appears.
  - 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 print 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.

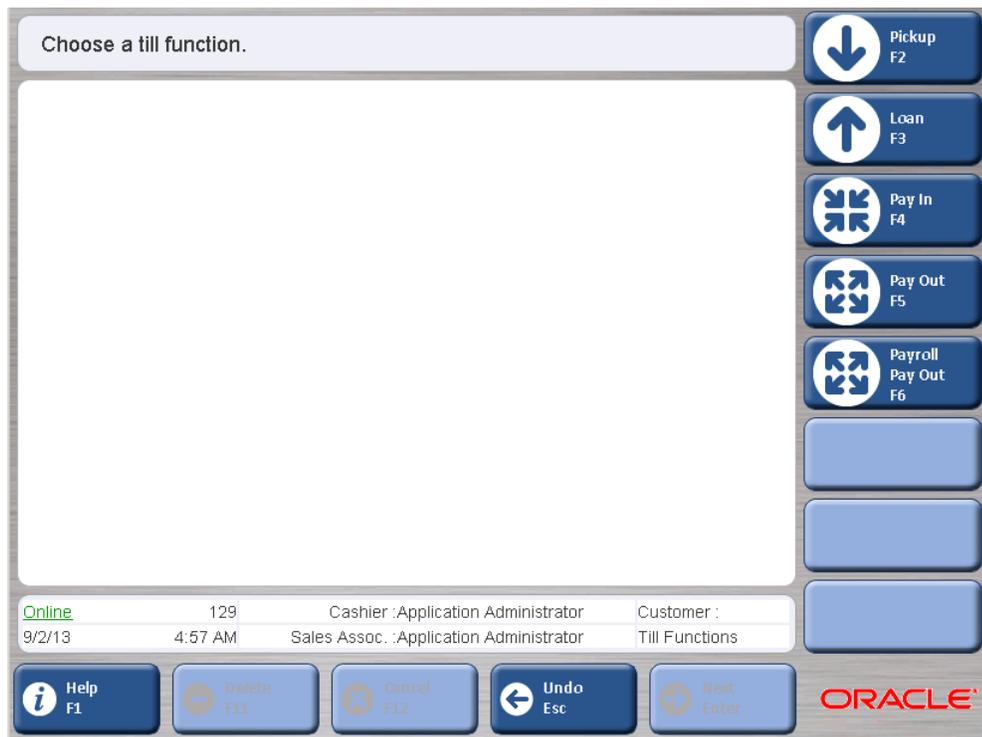
- To print a copy of the original receipt with a VAT summary, select **F4/Print VAT Receipt**. A copy of the original receipt prints with \*Duplicate Receipt\* on it and the VAT summary included.

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

## Till Functions

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

**Figure 3–38 Till Functions Screen**



### Till Pickup

A till pickup gathers cash on 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** on the Till Functions screen. The Tender Type screen appears.
2. Select the type of tender that needs to be picked up. The Summary Count screen appears.
3. Enter the amount of tender pickup and press **Next/Enter**. The Close Drawer screen appears. 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** on the Till Functions screen. The Summary Count screen appears.
2. Enter the amount of cash loan and press **Next/Enter**. The total amount of the loan appears 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 appears. 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** on the Till Functions screen. The Pay In screen appears.
2. Enter the amount of the pay-in, select a reason code on the list, and press **Next/Enter**. The Close Drawer screen appears. 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** on the Till Functions screen. The Pay-out screen appears.
2. Enter the amount of the pay out, and enter valid information in the other required fields, and press **Next/Enter**. The Close Drawer screen appears. 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** on the Till Functions screen. The Payroll Pay Out screen appears.
2. Enter the payroll pay out information and select a reason code. Press **Next/Enter**. The Close Drawer screen appears. You are returned to the Till Functions screen.

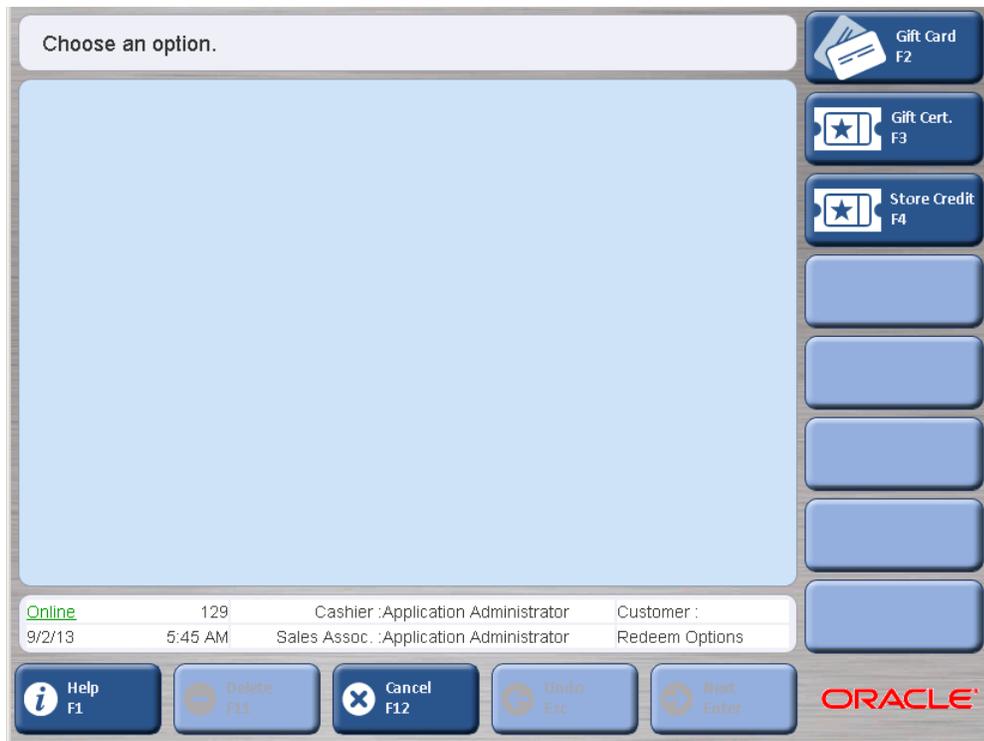
## Till Log Off

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 on the Sell Item screen, press **F9/More** and then **F8/Redeem**. The Redeem Options screen appears. From this screen, you can redeem a gift card, gift certificate, or store credit.

**Figure 3–39 Redeem Options Screen**



## Redeeming a Gift Card

To redeem a gift card:

1. Press **F2/Gift Card** and then **Next/Enter**. The Gift Card screen appears.
2. Swipe or manually enter the gift card number and press **Next/Enter**. The GC Redeem screen appears.
3. Press **Next/Enter**. The Capture Customer screen appears.
4. Enter the required information and press **Next/Enter**. The Redeem Refund Options screen appears.
5. Select a refund option.
  - To obtain a cash refund, press **F2/Cash**. The Issue Refund and Close Drawer screen appears. You are returned to the Sell Item screen.
  - To obtain a check refund, press **F3/Mail Bank Check**. The Capture Customer Information screen appears. Enter the required information and press **Next/Enter**. The Franking Insert and Franking Remove screens appear. You are returned to the Sell Item screen.
  - To obtain a credit refund, press **F4/Credit**. Swipe the card and press **Next/Enter**. You are returned to the Sell Item screen.

## Redeeming a Gift Certificate

To redeem a gift certificate:

1. Press **F3/Gift Cert.** on the Redeem Options menu. The Redeem Amount screen appears.

2. Enter the amount of the gift certificate and then press **Next/Enter**. The Store Number screen appears.
3. Enter the store number where the gift card was issued or press **F2/Corporate Issued**. The Redeem Number screen appears.
4. Enter the gift certificate number or press **F2/Foreign**. The Discount Applied dialog box appears.
  - If a discount was applied at the time of purchase, press **Yes**. The Discounted Amount screen appears. Enter the gift certificate discount amount and press **Next/Enter**. The Capture Customer screen appears.
  - To redeem the full value of the gift certificate, press **No**. The Capture Customer screen appears.
5. Enter the information and press **Next/Enter**. The Redeem Refund Options screen appears. 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** on the Redeem Options screen. The Redeem Amount screen appears.
2. Enter the amount of store credit to be redeemed and press **Next/Enter**. The Redeem Number screen appears.
3. Enter the store credit number or press **F2/Foreign**. The Capture Customer screen appears. 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 appears.
2. Select the reason code on the list and press **Next/Enter**. The cash drawer closes. You are returned to the Sell Item screen.



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## 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** on the Main Options screen and then **F7/Customer**. The navigation buttons for the customer options appear.

**Figure 4–1 Customer Options**

From this screen, you can perform the following actions:

- Enter the customer ID to link the customer to the transaction. You are returned to the Sell Item screen.
- Select **F2/Find** to search for a customer. See "[Searching for a Customer](#)".
- Select **F3/Add Customer** to add an individual customer. Select **F4/Add Business** to add a business customer. See "[Adding an Individual/Business Customer](#)".
- Select **F5/Delete** to delete a customer. See "[Deleting 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** on 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 appears. 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 appears. The correct customer may be selected from this list.
F6/Tax ID	Tax ID	Search by Tax ID	Customers associated with a tax ID can be found by searching by tax ID.

The Customer Information screen appears 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: 04241129000001

First Name: David \*

Last Name: Stevens \*

Address Line 1:

Address Line 2:

City:

State/Region: Texas

Postal Code:

Country: USA

Phone Type: Home

Telephone Number: (512) 555-0200 \*

E-mail:

Receipt Preference: None

Discount: None Pricing Group: None

Tax ID:

\*Required Fields

Online 129 Cashier : Application Administrator Customer :

10/14/13 12:07 PM Sales Assoc. : Application Administrator Customer Information

Help F1 Delete F11 Cancel F12 Undo Esc Next Enter

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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 appears. When you are finished making changes in this screen, press **Next/Enter** 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. 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 appears with the customer name in the status region.
- To view a customer's history, press **F4/History**. The History List screen appears. 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 **Next/Enter**. The History Detail screen appears. 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. 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 appears.

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 on the database:

1. Press **F5/Delete** on the Customer Options screen. The Cust. Search Options screen appears.

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 appears.
3. Enter the information and press **F2/Delete**. The Confirm Delete dialog appears.
4. To delete the customer, press **Yes**. The customer is deleted. 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 print in the customer's preferred language if the device supports the user's preferred language.
- Screens on the signature pad appear 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](#)". On the Customer Information screen, press **F3/Link**. The Sell Item screen appears 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 that is then attached to the transaction. The Sell Item screen appears with the customer's name in the status region, indicating that the customer has been linked to the transaction. Following are examples of transactions that require a customer to be linked:

- Send
- Order
- Return
- Price Adjustment
- Tender Redeem
- Transaction with Mail Back Check as the tender type

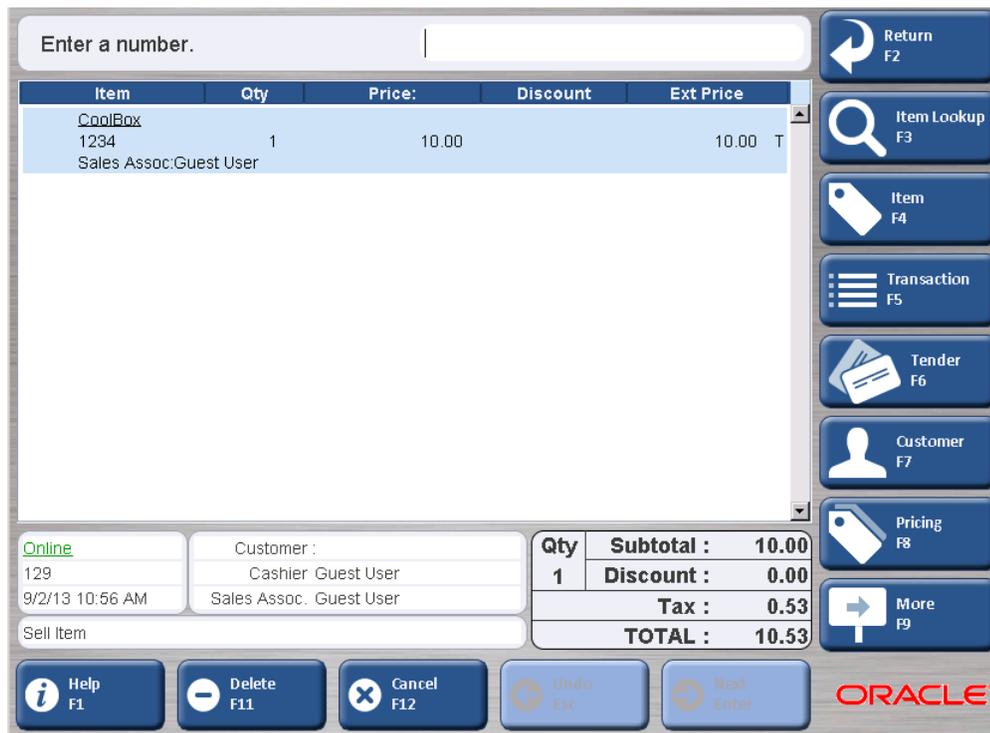
- Layaway
- Tax Exempt
- Alterations

## Linking Sales Associates to Transactions

To link a sales associate to a transaction:

1. Press **F5/Transaction** on the Sell Item screen. The navigation buttons for the transactions options appear.
2. Press **F3/Sales Assoc.** The Trans. Sales Assoc. screen appears.
3. Enter sales associate ID and press **Next/Enter**. 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**




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**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** on the Sell Item screen. The Mult Sales Assoc dialog appears.

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 appears.

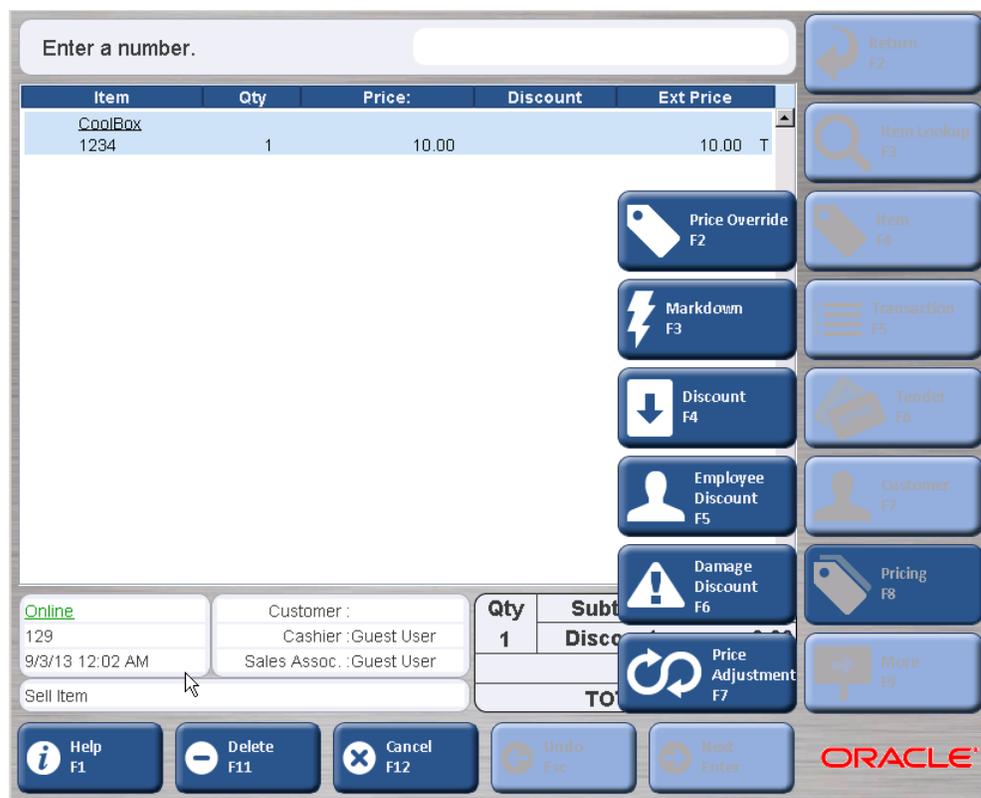


# 5

## Adjusting Price

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

**Figure 5–1 Pricing Options**



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. On the Sell Item screen, select an item within the transaction.
2. Press **F8/Pricing**. The navigation buttons for the pricing options appear.
3. Press **F2/Price Override**. The Price Override screen appears.

**Figure 5–2 Price Override Screen**

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

Override Price: 10.00 \*

Reason Code: 1 - Ad Price \*

\*Required Fields

Online 129 Cashier :Guest User Customer :  
 9/3/13 12:07 AM Sales Assoc. :Guest User Price Override

Help F1 Delete F11 Cancel F12 Undo Esc Next Enter

ORACLE

4. Enter the new price on the Price Override screen and select a reason code from the menu. Press **Next/Enter**. The price is changed. 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** on 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. On the Sell Item screen, select an item within the transaction.

2. Press **F8/Pricing**. The navigation buttons for the pricing options appear.
3. Press **F3/Markdown**. The navigation buttons for the markdown options appear.

**Figure 5–3 Markdown Options**



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

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

The Sell Item screen appears. The markdown appears in the Discount column and reflected in the Extended (Ext) Price column. The discount total appears 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.

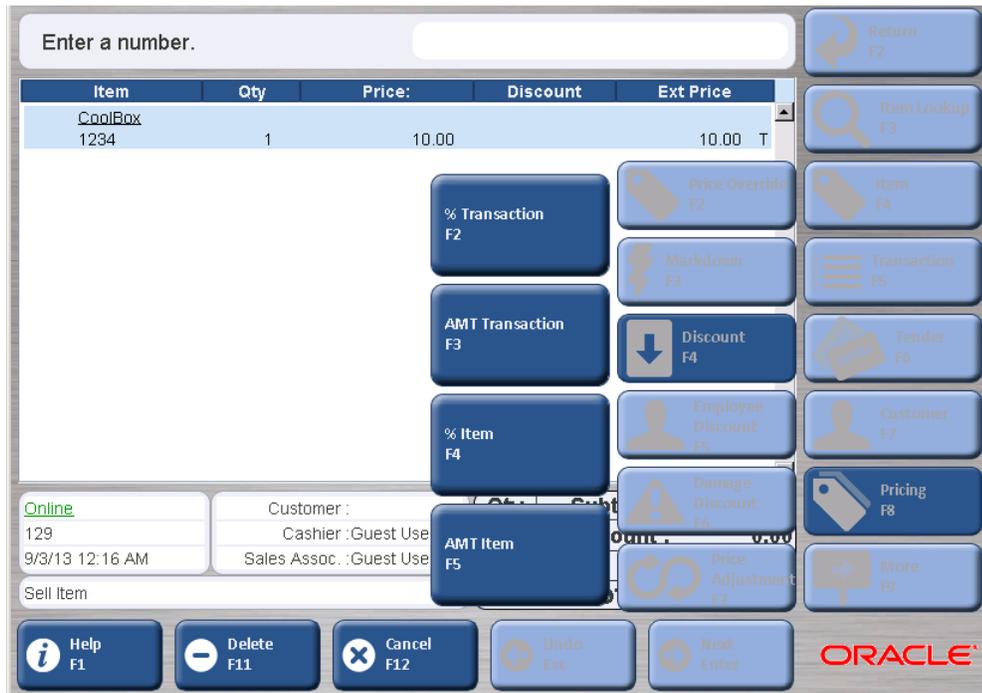
### Applying a Transaction Discount

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

To apply a transaction discount:

1. On the Sell Item screen, select an item within the transaction.
2. Press **F8/Pricing**. The navigation buttons for the pricing options appear.
3. Press **F4/Discount**. The navigation buttons for the discount options appear.

**Figure 5–4 Discount Options**



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

The discount is prorated across all items in the transaction. The discount amount appears 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**. The Employee Number screen appears.
2. Scan or manually enter the employee number and press **Next/Enter**. The Discount Options screen appears. 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**. The Damage Options screen appears.
2. Select an option.
  - To perform a percentage discount, press **F2/% Item**. The Damage Percent screen appears. Enter the discount percent and press **Next/Enter**.
  - To perform an amount discount, press **F3/AMT Item**. The Damage Amount screen appears. Enter the discount amount and press **Next/Enter**.

The discount is applied. You are returned to the Sell Item screen. The discount amount appears 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**. The Receipt Info screen appears.
2. Scan the receipt barcode or enter the required information and press **Next/Enter**. The price is adjusted. The information appears 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 cannot be price adjusted.
- External order items 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. On the Sell Item screen, press **F9/More** and then **F3/House Account**. The navigation buttons for the house account options appear.

**Figure 6–1 House Account Options**



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**. The Card Inquiry screen appears.

**Figure 6–2 Card Inquiry Screen**

Enter search information and press Next.

Country: USA \*

Postal Code: \*

Telephone Number: ( ) - \*

Social Security Number: \*

\*Required Fields

Online	129	Cashier :Guest User	Customer :
9/3/13	1:16 AM	Sales Assoc. :Guest User	Card Inquiry

Help F1 | Delete F11 | Cancel F12 | Undo Esc | Next Enter

ORACLE

2. Enter the search criteria and press **Next/Enter**. The Inquiry Display screen appears.

**Figure 6–3 Inquiry Display Screen**

Press Print to print information, then press Next when finished viewing.

Print  
F2

First Name: Steve  
Last Name: Common  
Account Number: \*\*\*\*\*0002  
Current Balance: 565.29  
Credit Limit: 10,000.00  
Credit Available: 9,434.71

Offline 129 Cashier : Guest User Customer :  
9/3/13 1:47 AM Sales Assoc. : Guest User Inquiry Display

Help F1 Delete F11 Cancel F12 Undo Esc Next Enter

ORACLE

3. To print the information on the Inquiry Display screen, press **F2/Print**. When finished viewing, press **Next/Enter**. 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. On the Sell Item screen, press **F6/Tender**, then **F9/More**, and **F7/Instant Credit**. The Item Sales Assc. screen appears.
2. Enter the sales associate's ID. Press **Next/Enter**. The Credit Cust. Info screen appears.

**Figure 6–4 Credit Cust. Info Screen**

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

First Name: David \*  
 Last Name: Stevens \*  
 Address Line 1: 124 Windy Drive \*  
 Address Line 2: \*  
 City: Austin \*  
 State/Region: Texas \*  
 Postal Code: 78777 \*  
 Country: USA \*  
 Telephone Number: (512) 555-0100 \*  
 Birthday (MM/dd): 02/04 \*  
 Birth Year (yyyy): 1960 \*  
 Social Security Number: 978-65-4320 \*  
 Yearly Income: 65000 \* Application Signed: No  
 Reference Number: 123456 \*

\*Required Fields

Online	129	Cashier : Guest User	Customer :
9/3/13	4:33 AM	Sales Assoc. : Guest User	Credit Cust. Info

Help F1 | Delete F11 | Cancel F12 | Undo Esc | Next Enter

ORACLE

3. Enter the customer information and press **Next/Enter**. The authorization process begins automatically. If the authorization succeeds, you are returned to the Sell Item screen. If the authorization fails, the Instant Credit Card Error dialog appears and you are returned to the Tender Options screen to select another tender option.

## Enrolling through the House Account Options

To enroll for a house account through the house account options, press **F3/Enrollment**. The Item Sales Assc. screen appears. To complete the enrollment, see Steps 2 and 3 "[Enrolling through the Tender Function](#)".

## Printing a Temporary Pass

A temporary shopping pass is a form of tender that prints 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**. The Card Inquiry screen appears. See [Figure 6–2](#).
2. Enter the search information and press **Next/Enter**. The temporary shopping pass prints.

## 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**. The Ref. Number Inquiry screen appears.

2. Enter the search information and press **Next/Enter**. After the authorization process completes, the Enroll Response screen appears. There are four possible responses:
  - Approved
  - Not Approved
  - Reference Number Not Found
  - System Offline so Call Error Number
3. To continue, press **Next/Enter**. The Franking Insert and Franking Remove screens appear. 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**. The Card Inquiry screen appears.
2. Enter the search information and press **Next/Enter**. The Account Info screen appears.

**Figure 6–5 Account Info Screen**

Enter the payment amount and press Next.

First Name: Steve  
 Last Name: Common  
 Account Number: \*\*\*\*\*0002  
 Current Balance: 565.29  
 Credit Limit: 10,000.00  
 Credit Available: 9,434.71

Offline 129 Cashier : Guest User Customer :  
 9/3/13 4:45 AM Sales Assoc. : Guest User Account Info

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3. Enter the payment amount and press **Next/Enter**. The Tender Options screen appears. 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.



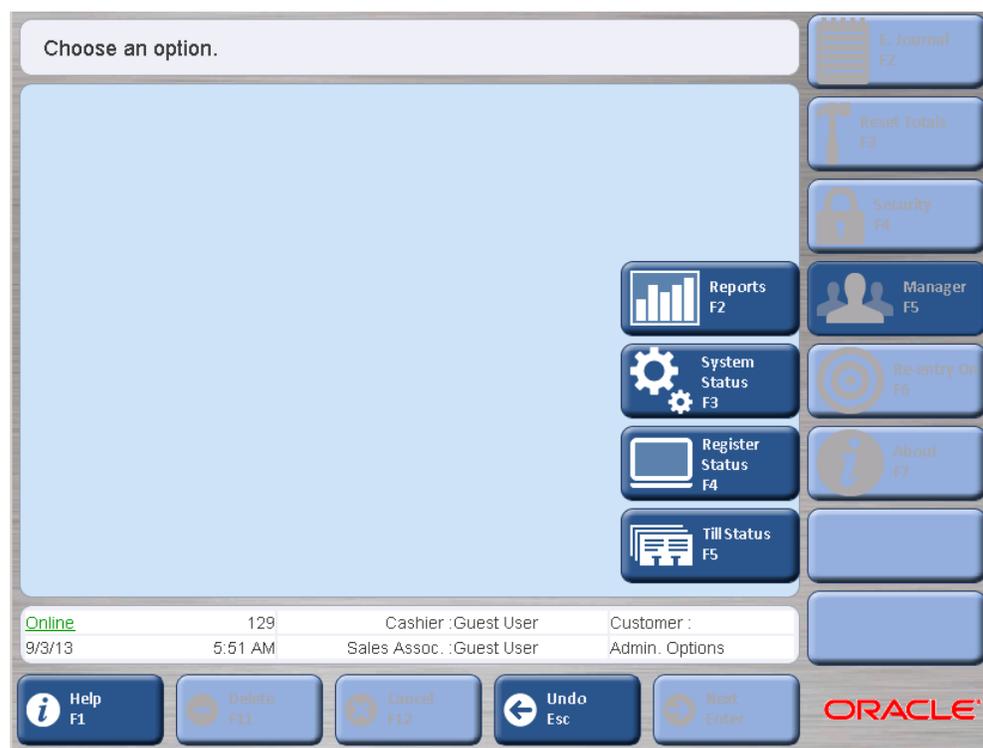
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## Using Manager Options

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:

- On the Sell Item screen, press **F9/More** and then **F6/Manager**.
- On the Main Options screen, press **F4/Administration**. You are prompted to log in. See "[Logging In and Out](#)" in [Chapter 1](#) for more information. After logging in, press **F5/Manager**. The navigation buttons for the manager options appear.

**Figure 7-1** Manager Options



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. A preview of the report can also be displayed before printing the report.

To access a report:

1. Press **F2/Reports**. The Report Options screen appears. [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.
2. Print or view the report:
  - To print the report, press **F2/Print**.
  - To view the report, press **F3/Preview**. The report appears. To then print the report, press **F2/Print**.

**Table 7–1 Report Options**

Function Key	Report Name	Input Data	Description
F2/Summary	Summary	Date Type (store, register, 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.  <b>Note:</b> These reports appear in the United States locale, not in the default locale for the application.  For more information, see <a href="#">Appendix A</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, reason code, and total of suspended transactions for the current business day.

**Table 7-1 (Cont.) Report Options**

<b>Function Key</b>	<b>Report Name</b>	<b>Input Data</b>	<b>Description</b>
F8/Order Status	Order Status	Status (New, Printed, Partial, Filled, Canceled, Completed, Voided) Starting Business Day	An order status report can be printed for new, printed, partial, filled, canceled, 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/More, F2/Orders Sum.	Orders Summary	Starting Business Day Ending 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.
F9/More, F3/Bill Pay Summary	Bill Pay Summary	Starting Business Day Ending Business Day	An bill pay summary report can be printed for a given date range. The report summarizes the bill payment transactions and shows the total amount of bill payments.

## System Status

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

To check device status:

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

**Figure 7-3 Register Status Screen**

Press Next when finished viewing.

Store ID: 04241  
 Business date: 9/2/13  
 Store status: Open  
 Register ID: 129  
 Register status: Open  
 Current till ID: 130  
 Current till status: Open  
 Accountability: Cashier  
 Cashiers: GuestUser

Online 129 Cashier :Guest User Customer :  
 9/3/13 5:55 AM Sales Assoc. :Guest User Register Status

Help F1 Delete F11 Cancel F12 Undo Esc Next Enter ORACLE

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 the till.

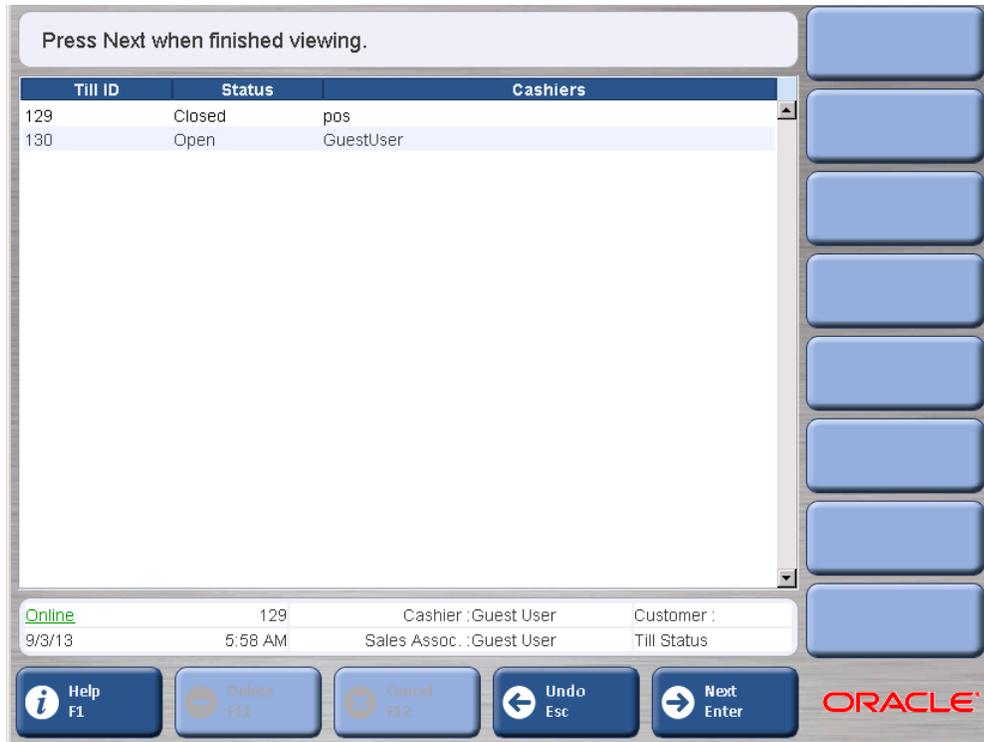
## Till Status

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

To check till status:

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

**Figure 7-4 Till Status Screen**



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

**Table 7-3 Till Status Fields**

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

---

---

## Handling Fulfillment

To access the fulfillment functionality, press **F6/Fulfillment** on 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 initial screen that appears is dependent on how orders are implemented in Point-of-Service:

- If the Fulfillment screen appears, you can work with orders created in the store. See "[Processing Orders in the Store](#)".
- If the Modify Order Options screen appears, you can work with orders across multiple stores. See "[Processing Orders Across Multiple Stores](#)".

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

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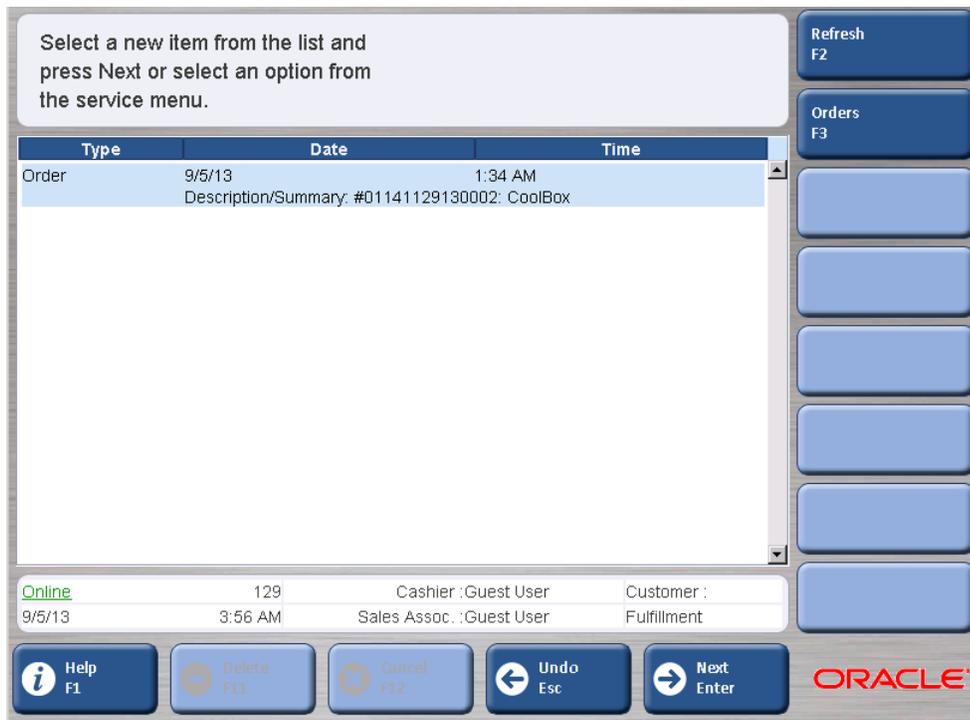
### Processing Orders in the Store

You can pick up, complete, or cancel orders, as well as provide order updates to customers in a timely manner using automated e-mail communication. You can also manage orders, items marked for pickup, and items marked for delivery.

Orders are typically placed over the web by customers requesting items that 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.

Once logged in, the Fulfillment screen displays new orders.

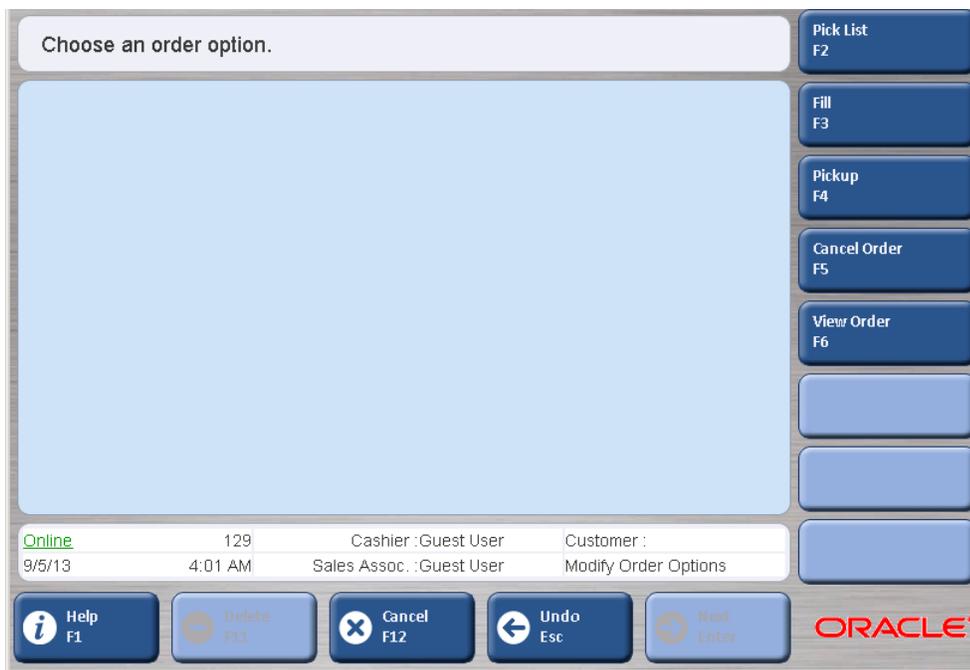
**Figure 8–1 Fulfillment Screen**



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

To manage orders, press **F3/Orders** on the Fulfillment screen. The Order Options screen appears.

**Figure 8–2 Order Options Screen**



The following functions are available:

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

## Printing a Pick List

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

To print a pick list:

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

## Filling an Order

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

To fill an order:

1. On the Order Options screen, press **F3/Fill**. The Order Search screen appears.

**Figure 8–3 Order Search Screen**

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

The Order List screen appears.

3. Select the order that needs to be filled and press **Next/Enter**. The Edit Item Status screen appears.
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 (that is, 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 **Next/Enter** to continue. The Edit Location screen appears.
6. from the menu, select the location and press **Next/Enter**. You are returned to the Fulfillment 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. On the Order Options screen, press **F4/Pickup**. The Order Search screen appears.
2. If you know the order number, enter it and press **Next/Enter**. To search for an order, press either **F2/Customer** or **F3/Credit Card**. For more information, see Step 2 in the section "[Filling an Order](#)". The Order List screen appears.
3. Select the order that contains the items for pickup and press **Next/Enter**. The Edit Item status screen appears.
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 **Next/Enter** to continue. The Edit Location screen appears.
6. Note the location of the item and press **Next/Enter**. The Confirm Selection screen appears.
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 Fulfillment screen.

## Cancelling an Order

To cancel an order:

1. On the Order Options screen, press **F5/Cancel Order**. The Order Search screen appears.
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 appears.
3. Select the order that needs to be cancelled and press **Next/Enter**. The Cancel Order screen appears with all items on the order changed to Cancelled.
4. Press **F2/Cancel Order**. The Cancel confirmation dialog appears.
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 appears.
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 Fulfillment screen.

## Viewing an Order

To view the details for an order:

1. Press **F6/View Order** on the Order Options screen. The Order Search screen appears.
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 appears.
3. Press **Next/Enter**. The Order Details screen appears.
  - To print the order, press **F2/Print**. The order prints. You are returned to the Order Details screen.
  - To view more order information, press **Next/Enter**. The Order Location screen appears. This screen displays the order details such as order number and location. Press **Next/Enter** to return to the Order Options screen.

## Automated E-Mail Messages

Fulfillment 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

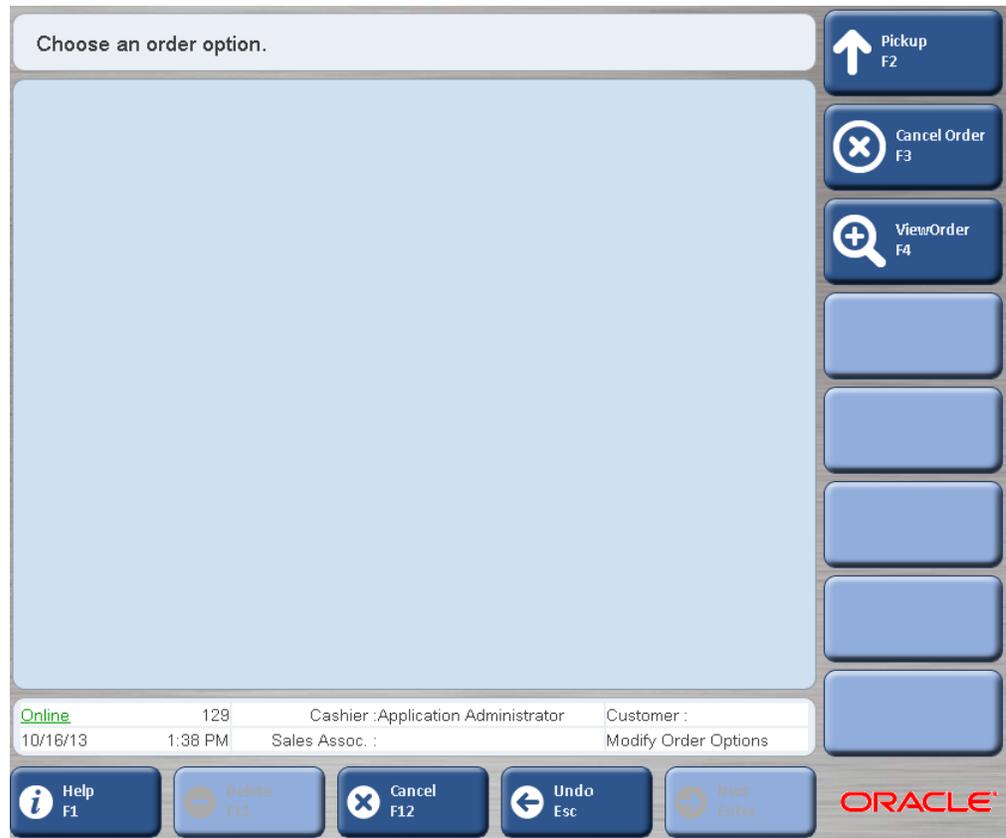
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**Note:** The created e-mail messages are stored in the database. Point-of-Service does not send the e-mail messages to customers. The retailer is responsible for sending the e-mail messages. For more information, see the *Oracle Retail POS Suite Implementation Guide, Volume 1 - Implementation Solutions*.

---

## Processing Orders Across Multiple Stores

Once logged in, the Modify Order Options screen appears. You can search for orders to be picked up, cancel an order, and view an order.

**Figure 8-4 Modify Order Options Screen**

## Searching for an Order

To search for an order:

1. Select an option. The Order Search screen appears.

Figure 8–5 Order Search Screen

2. If you know the order number, enter the number and press **Next/Enter**.
3. To search for an order:
  - To search
  -

After the order is found, the screen for the option that was selected on the Modify Order Options screen appears:

- To modify an order, see "[Modifying an Order](#)".
- To cancel an order, see "[Cancelling an Order](#)".
- To see details of an order, see "[Viewing an Order](#)".

## Modifying an Order

To modify an order:

1. Press **F2/Pickup**. The Order Search screen appears.
2. Enter the order number or press **F2/Customer** to search for the order.
3. Press **Next/Enter**. The Edit Item Status screen appears. This screen shows the item, quantity, status, and store for the pickup.
4. Select an item:

- To change the status for the item, press **F2/Pickup**. The status changes to Pickup.
- To cancel pickup of the item, press **F3/Cancel**. Continue at Step 5 in "[Cancelling an Order](#)".

## Cancelling an Order

To cancel an order:

1. Press **F3/Cancel Order**. The Order Search screen appears.
2. Enter the order number or press **F2/Customer** to search for the order.
3. Press **Next/Enter**. The Cancel Order screen appears. This screen shows details of the order.
4. To cancel the order, press **F2/Cancel**.
5. You are prompted to confirm the cancellation. To confirm the cancellation, press **Yes**.
6. To complete the cancellation, press **F6/Tender**. The Refund Options screen appears.
7. Select a refund option and press **Next/Enter**. The Issue Refund screen appears.
8. If eReceipt is enabled, you are prompted to select a receipt option. Otherwise, the receipt prints.

## Viewing an Order

To view an order:

1. Press **F4/View Order**. The Order Search screen appears.
2. Enter the order number or press **F2/Customer** to search for the order.
3. Press **Next/Enter**. The Order Details screen appears. This screen shows the item, quantity, order status, and store for the pickup:
  - To print the order information, press **F2/Print**.
  - To see details on the order, press **Next/Enter**. The Order Location screen appears. This screen shows the order number, customer name, order date and location for the pickup in the store, and status.



---

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## 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 on 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 on the List of Items"](#)
- ["Viewing the Inventory Results"](#)

### Searching for Inventory Information

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.

All or part of the item number, item description, or manufacturer can be entered. An asterisk can be used as a wildcard. The following formats are accepted. Item description is used for the examples:

- 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, *dinner dishes*, *dishes for kids*, and *seasonal dishes to order* 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, *dishes for kids* 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, *dinner dishes* would be a match.
- The asterisk can also be placed anywhere in the description. For example, *dinner dishes* and *dishes for kids* would be matches for **di\*s**.
- To see all items, you enter just an asterisk.

To search for inventory information on an item:

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

**Figure 9–1 Item Inquiry Screen**

**Table 9–1 Item Inquiry Fields**

Field	Description
Item Number	Unique identifying number or SKU number used to identify the item. All or part of the item number can be entered or an asterisk can be used as a wildcard, as described above.
Item Description	Description of the item. All or part of the item description can be entered or an asterisk can be used as a wildcard, as described above.
Manufacturer	Name of the manufacturer of the item. This field is only displayed if searching for an item by manufacturer is enabled. All or part of the manufacturer name can be entered or an asterisk can be used as a wildcard, as described above.
Department	Department where the item is defined. If <All> is selected, you must enter an item number, item description, or manufacturer in any of those fields. A wildcard can be used. 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 **Next/Enter**.
  - If one item is found that matches the search information, the Item Inq - Item Display screen appears. Continue at "[Searching for Item Inventory](#)".
  - If more than one item is found that matches the search information, the Item Inq - Item List screen appears. Continue at "[Searching for Item Inventory on the List of Items](#)".
  - If the item is not found in the current store, the Item Not Found Notice dialog appears. Press **Enter**. The Item Inq - Item Display screen appears. 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 appears. If a picture of the item is available, it appears.

**Figure 9–2 Item Inq - Item Display Screen**

Choose an Inventory Option.

Home Store F2

Buddy Store F3

Transfer Zone F4

Specific Store F5

Item Number: 60020002  
 Description: Carpenters square  
 Unit Of Measure:  
 Current Price: 10.99  
 Regular Price: 10.99  
 Promotion End Date:

Online 129 Cashier : Customer :  
 9/12/13 4:27 AM Sales Assoc. : Item Inq - Item Display

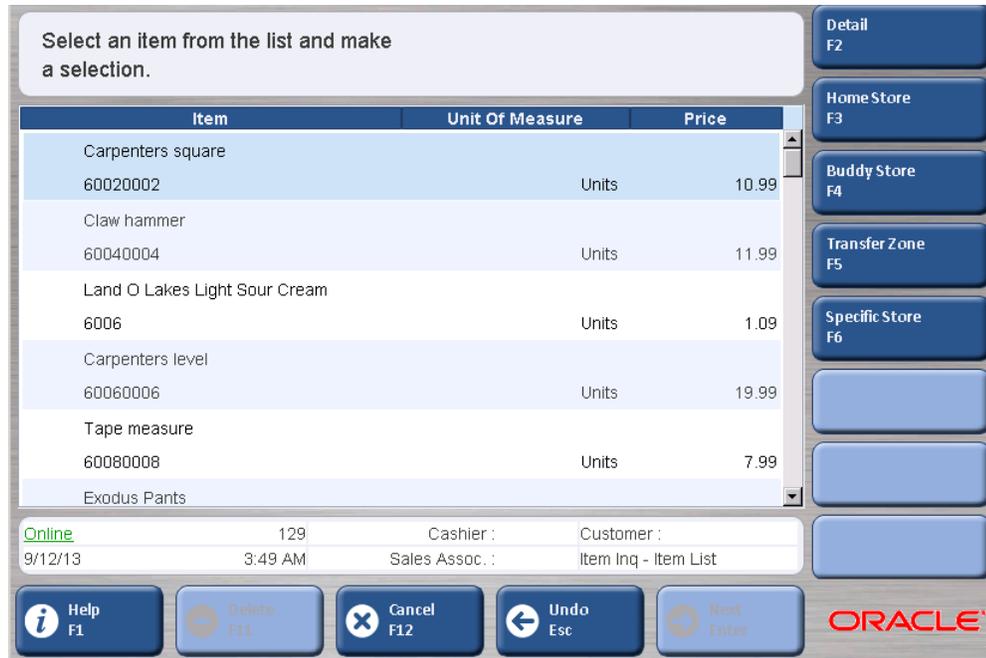
Help F1 Delete F11 Cancel F12 Undo Esc Next Enter ORACLE

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 appears. Enter the minimum quantity of the item required, and press **Next/Enter**.
  - To search in any store that allows transfers to the current store, press **F4/Transfer Zone**. The Minimum Qty Available screen appears. Enter the minimum quantity of the item required and press **Next/Enter**.
  - To search a specific store, press **F5/Specific Store**. The Specific Store screen appears. Enter the store number and press **Next/Enter**.
2. The Inventory Results screen appears. Continue at "[Viewing the Inventory Results](#)".

## Searching for Item Inventory on the List of Items

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

**Figure 9–3 Item Inq - Item List Screen**



1. Select an item in the list.
2. 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 appears. 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 appears. Enter the minimum quantity of the item required and press **Next/Enter**.
  - To search in any store that allows transfers to the current store, press **F5/Transfer Zone**. The Minimum Qty Available screen appears. Enter the minimum quantity of the item required and press **Next/Enter**.
  - To search a specific store, press **F6/Specific Store**. The Specific Store Input screen appears. Enter the store number and press **Next/Enter**.
3. The Inventory Results screen appears. 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
100270319	Carpenters Square	Units	85.00

Store	Stock On Hand	Available Qty	In Transit Qty	On Order Qty
04241 Lakeline Mall	50.00	49.00	0.00	0.00

Online 129 Cashier : Customer :  
9/10/13 9:13 AM Sales Assoc. : Home Store Results

Help F1   Delete F11   Cancel F12   Undo Esc   Next Enter   ORACLE

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

---

**Note:** Price is only displayed for results on the Home Store.

---

Select a store and choose an option:

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

**Figure 9–5 Inventory Details Screen**

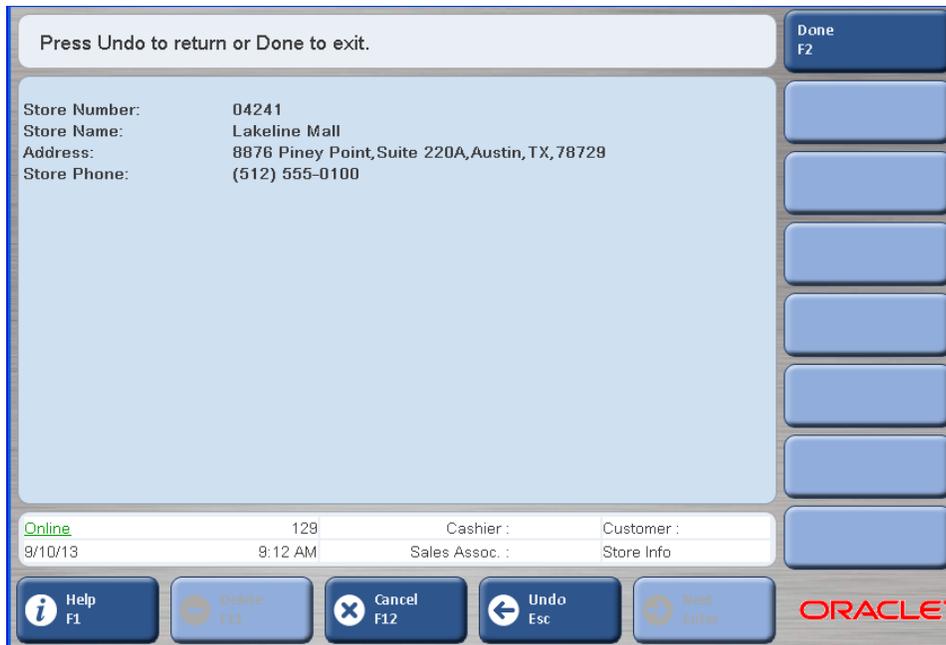


**Note:** Price is only displayed for results on the Home Store.

When done viewing the information, press **F2/Done**. You are returned to Main Options or Price Inquiry screen.

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

**Figure 9–6 Store Info Screen**



When done viewing the information, press **F2/Done**. You are returned to the Main Options or Price Inquiry 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.



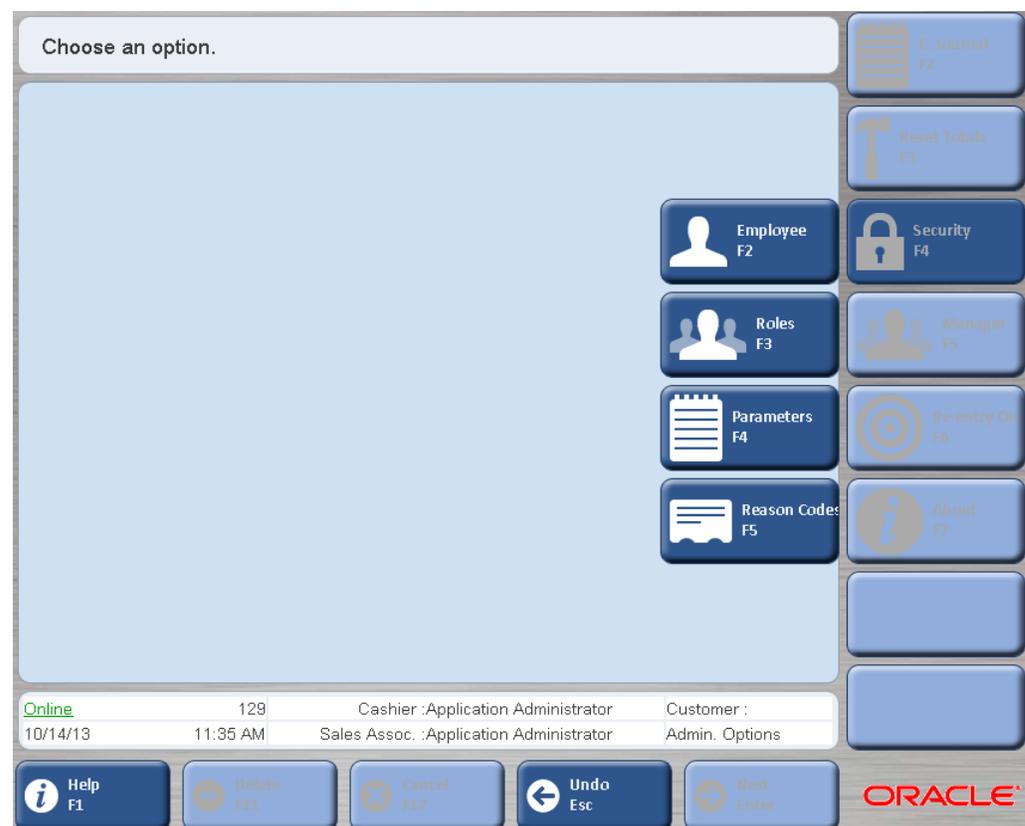
# 10

## Using Security Options

Security Options enable you to work with employee information, roles, parameters, and reason codes.

On the Main Options screen, press **F4/Admin**. You are prompted to log in. See "Logging In and Out" in [Chapter 1](#) for more information. After logging in, press **F5/Security**. The navigation buttons for the security options appear.

**Figure 10–1 Security Options**



The following options are described in this chapter:

- "Employee"
- "Roles"
- "Parameters"

- "Reason Codes"

## Employee

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

To access the employee options, press **F2/Employee**. The navigation buttons for the employee options appear.

**Figure 10–2 Employee Options**



The following functions are described:

- "Find Employee"
- "Add Employee"

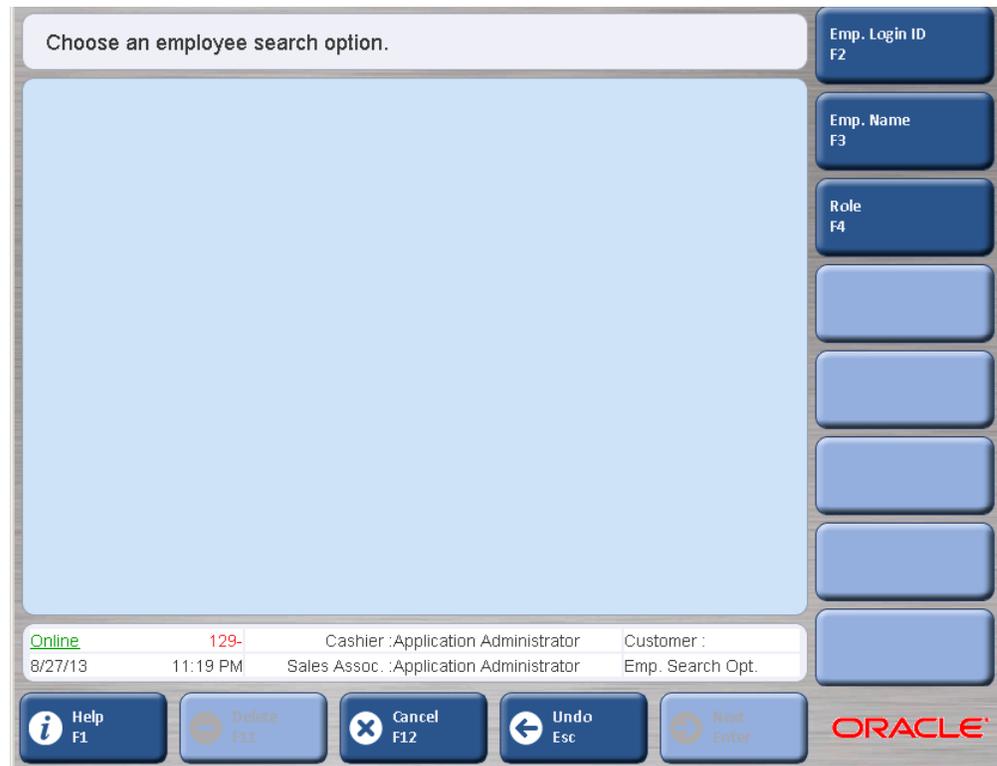
### Find Employee

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 appears.

Figure 10–3 Emp. Search Opt. Screen



2. Select the criteria for the search:

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

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

The Employee Master screen appears.

Figure 10–4 Employee Master Screen

Enter information, then press Next to save.

Reset Password F2

Set Fingerprint F3

First Name: Guest \*

Middle Name:

Last Name: User \*

Employee ID: 10002 \*

Employee Login ID: guestuser \*

Role: Administrator

Status: Active

Preferred Language: English

\*Required Fields

Online 129- Cashier :Application Administrator Customer :  
8/28/13 12:20 AM Sales Assoc. :Application Administrator Employee Master

Help F1 Delete F11 Cancel F12 Undo Esc Next Enter

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. To save the changes, press **Next/Enter**.
2. To reset the password, press **F2/Reset Password**. The Reset Password dialog appears.
  - To confirm the password reset, click **Yes**. The temporary password appears. It should be written down and given to the new employee. This is the only time the password appears.
  - To not reset the password, click **No**. The Employee Master screen is redisplayed.
3. A fingerprint can be used to identify the employee at login if the application is configured to use a fingerprint reader. To capture the employee's fingerprint:
  - a. Press **F3/Set Fingerprint**. The Employee Fingerprint Enroll screen appears.
  - b. Direct the employee to press a finger against the fingerprint reader at least four times. Press **Esc**. The Employee Verify Fingerprint screen appears.
  - c. Direct the employee to press the same finger that was used for enrollment in the previous step against the fingerprint reader one time. Press **Esc**. The fingerprint is saved.

## 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 appears.
2. Select the type of employee to add:
  - To add a permanent employee, press **F2/Standard**. The Employee Master screen appears. See [Figure 10-4](#).
  - To add a temporary employee, press **F3/Temp**. The Temp. Employee Master screen appears.

**Figure 10-5 Temp. Employee Master Screen**

Enter information, then press Next to save.

Reset Password F2

Set Fingerprint F3

First Name: Temporary \*

Middle Name:

Last Name: User \*

Employee ID: 10003 \*

Employee Login ID: \*

Role: Administrator

Status: Active

Preferred Language: English

Days Valid: 1 \*

\*Required Fields

Online	129-	Cashier :Application Administrator	Customer :
8/28/13	12:23 AM	Sales Assoc. :Application Administrator	Temp. Employee Master

Help F1 Delete F11 Cancel F12 Undo Esc Next Enter

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. A fingerprint can be used to identify the employee at login if the application is configured to use a fingerprint reader. To capture the employee's fingerprint:
  - a. Press **F3/Set Fingerprint**. The Employee Fingerprint Enroll screen appears.
  - b. Direct the employee to press a finger against the fingerprint reader at least four times. Press **Esc**. The Employee Verify Fingerprint screen appears.
  - c. Direct the employee to press the same finger that was used for enrollment in the previous step against the fingerprint reader one time. Press **Esc**. The fingerprint is saved.

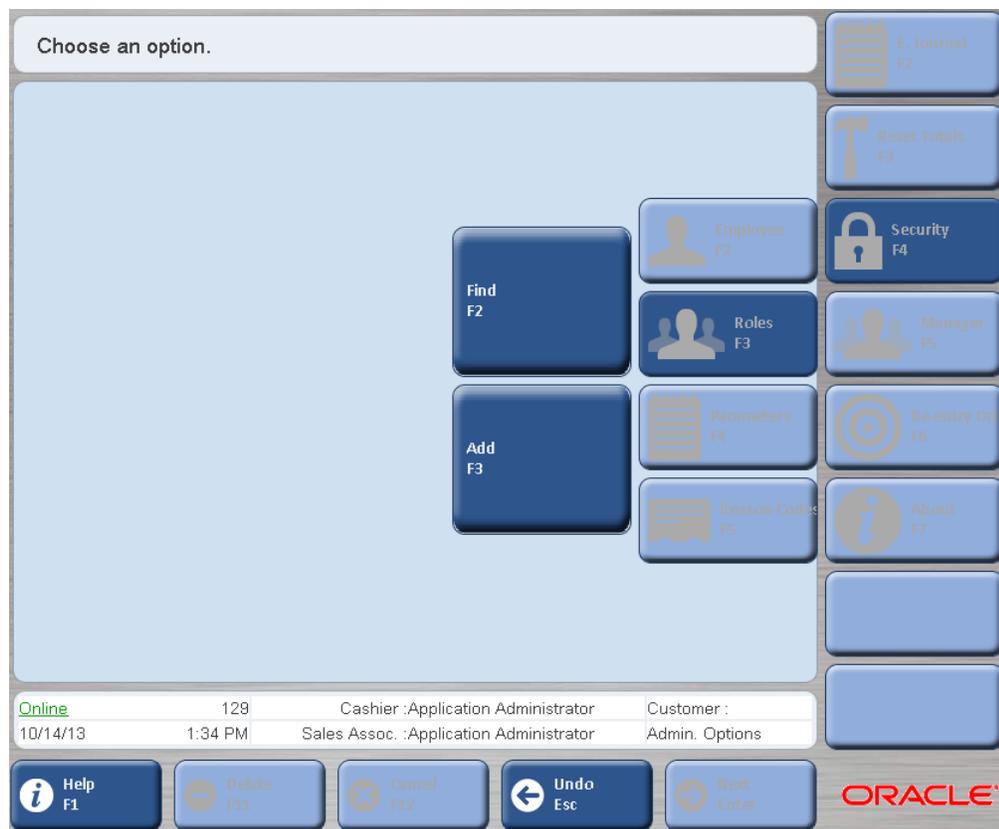
5. Press **Next/Enter**.

- If the information matches an existing employee, the Emp. Select Add screen appears. 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 appears. It should be written down and given to the new employee. This is the only time the password appears.

## Roles

Role options enable you to view roles, edit roles, and add roles. Press **F3/Roles**. The navigation buttons for the role options appear.

**Figure 10–6 Role Options**



The following functions are described:

- "Finding and Editing a Role"
- "Adding a Role"

### Finding and Editing a Role

To find and edit a role:

1. Press **F2/Find**. The Find Role screen appears.

**Figure 10-7 Find Role Screen**

Select a role, then press Next.

Role Name: Administrator  
Cashier  
Manager

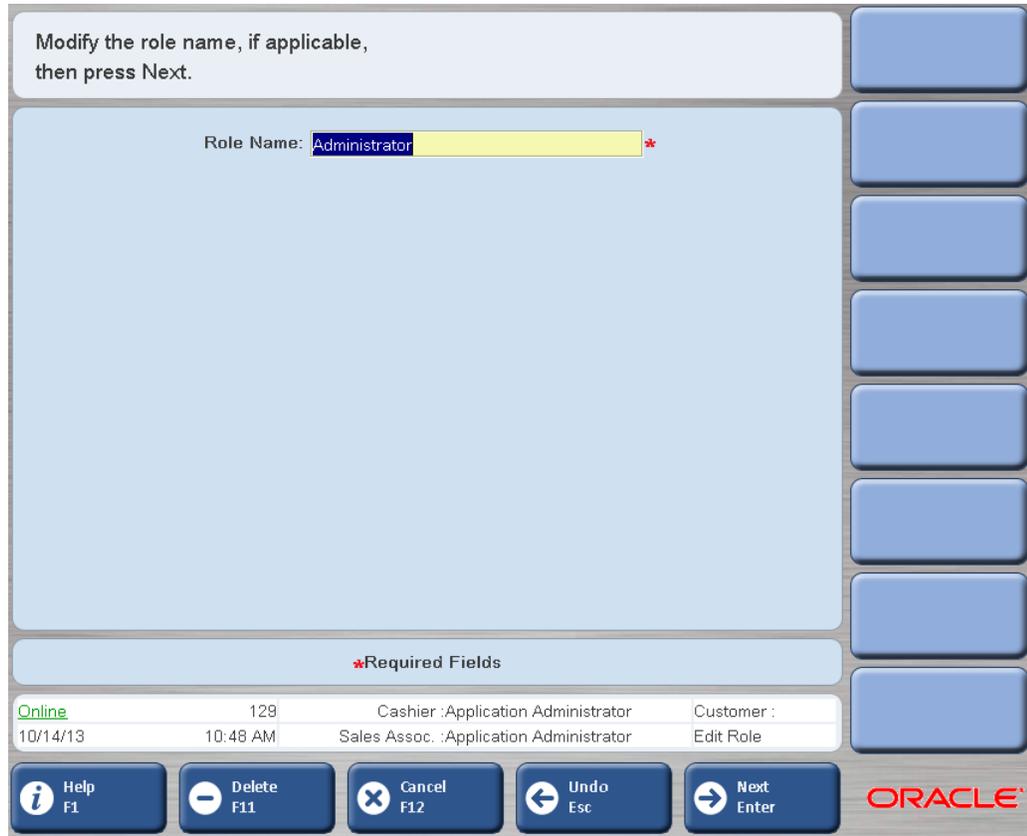
Online	129	Cashier :Application Administrator	Customer :
10/14/13	10:47 AM	Sales Assoc. :Application Administrator	Find Role

Help F1   Delete F11   Cancel F12   Undo Esc   Next Enter

ORACLE

2. Select a role name and press **Next/Enter**. The Edit Role screen appears.

**Figure 10–8 Edit Role Screen**



3. Change the role name, if needed, and press **Next/Enter**. The Set Access screen appears. The screen shows the access settings for the role.

Figure 10–9 Set Access Screen

Select a function to toggle access, then press Yes/No. Press Done when complete.

Function	Access
Accept Invalid Drivers License Format	Yes
Administration	Yes
Back Office	Yes
Bank Deposit	Yes
Bill Pay	Yes
Cancel Order	Yes
Cancel Transaction	Yes
Clock In/Clock Out	Yes
Customer - Add/Find	Yes
Customer - Delete	Yes
Customer Discount	Yes
Daily Operations	Yes
Discount Rule - Add/Modify	Yes
Discount Rule - End	Yes
E-Mail	Yes
Electronic Journal	Yes
Employee - Add/Find	Yes
Employee - Reset Password	Yes
Employee - Set Fingerprint	Yes
Employee Time Maintenance	Yes
End of Day	Yes
Fulfillment	Yes
House Account	Yes
Inventory Inquiry	Yes
Item Maintenance	Yes
Item/Transaction Discounts	Yes
Item/Transaction Gift Registry	Yes

Online 129 Cashier :Application Administrator Customer :  
 10/14/13 10:50 AM Sales Assoc. :Application Administrator Set Access

Help F1 Delete F11 Cancel F12 Undo Esc Next Enter

ORACLE

4. To change the access for a function, select the function and press **F2/Yes/No** to toggle the access for that function.
5. When you completed your changes, press **F3/Done**. You are returned to the Admin Options screen.

## Adding a Role

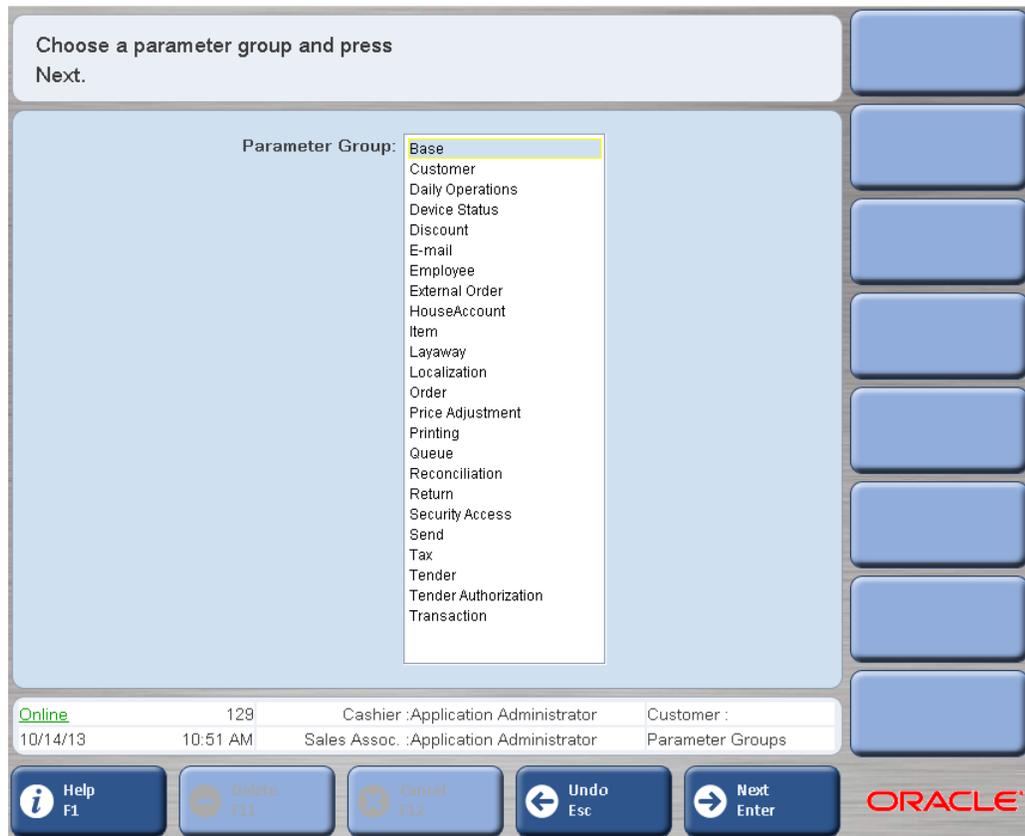
To add a role:

1. Press **F3/Add**. The Add Role screen appears.
2. Enter the new role name and press **Next/Enter**. The Set Access screen appears. For a new role, access for all the functions is initially set to No.
3. To change the access for a function, select the function and press **F2/Yes/No** to toggle the access for that function.
4. When you completed your settings, press **F3/Done**. You are returned to the Admin Options screen.

## Parameters

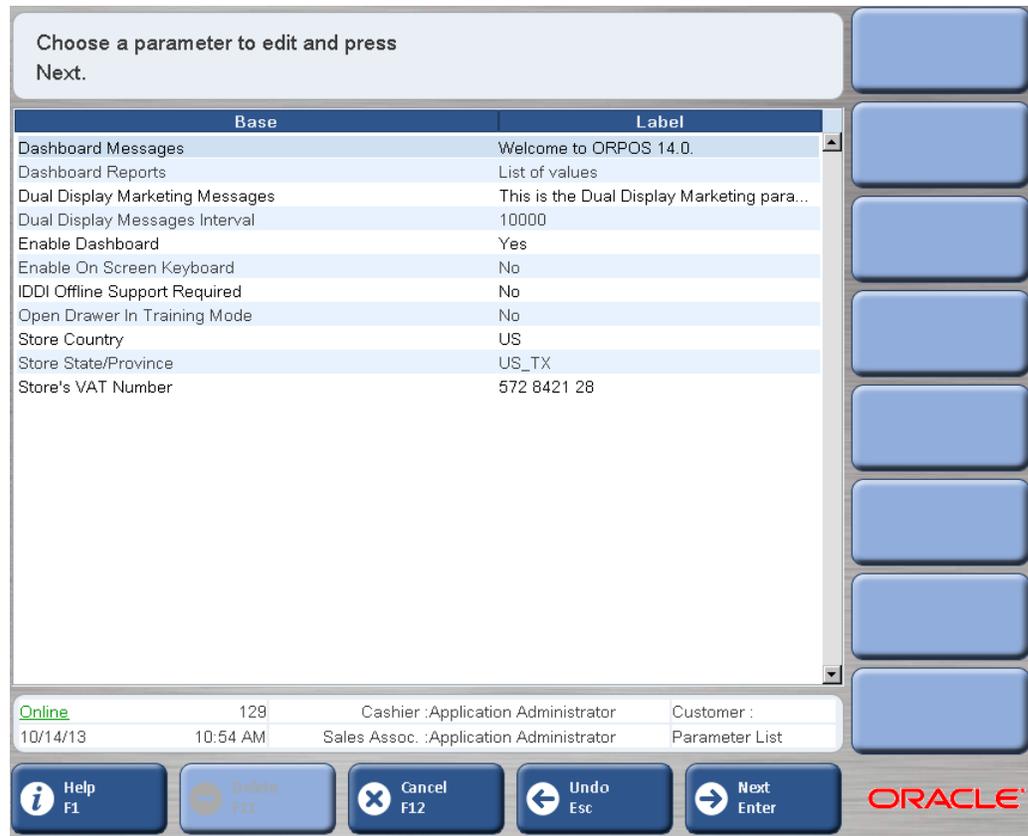
The parameter option enables you to edit parameter values. To edit parameters:

1. Press **F4/Parameters**. The Parameter Groups screen appears.

**Figure 10–10 Parameter Groups Screen**

2. Select a parameter group and press **Next/Enter**. The Parameter List screen appears. This screen shows all the parameters in the parameter group that can be edited.

Figure 10–11 Parameter List Screen



3. Select a parameter list and press **Next/Enter**. The Edit Parameter screen appears.

**Figure 10–12 Edit Parameter Screen**

The screenshot shows the 'Edit Parameter Screen' for the parameter group 'Base' and parameter name 'Dashboard Reports'. The screen is divided into two main sections: 'Select From List' and 'New Value List'. The 'Select From List' section contains a single entry: 'AssociateProductivityReport'. The 'New Value List' section contains two entries: 'HourlyProductivityReport' and 'DepartmentSalesReport'. On the right side of the screen, there are several blue buttons: 'Add F2', 'Delete F3', and five unlabeled buttons. At the bottom of the screen, there is a status bar with the following information: 'Online', '129', 'Cashier :Application Administrator', 'Customer :', '10/14/13', '10:58 AM', 'Sales Assoc. :Application Administrator', and 'Edit Parameter'. Below the status bar are five buttons: 'Help F1', 'Delete F11', 'Cancel F12', 'Undo Esc', and 'Next Enter'. The Oracle logo is visible in the bottom right corner.

The Edit Parameter screen is used to change the value of a parameter. [Figure 10–12](#) shows an example of a parameter with a list of values.

The type of edit screen displayed depends on the parameter:

- If the parameter uses a text field, enter the new value for the text and press **F2/Done**.

**Figure 10–13 Example of a Parameter with a Text Value**

The screenshot shows the 'Edit Parameter Screen' for the parameter group 'Base' and parameter name 'Dashboard Messages'. The 'Parameter Value' field is a text area containing the text 'Welcome to ORPOS 14.0' and 'This is the Dashboard.' The text area has a yellow background and a scroll bar on the right. The Oracle logo is visible in the bottom right corner.

- If the parameter uses a value field, enter the new value and press **Next/Enter**. The minimum and maximum allowed values are displayed on the screen.

**Figure 10–14 Example of a Parameter with a Range of Allowed Values**

Parameter Group:	Base
Parameter Name:	Dual Display Messages Interval
Parameter Value:	10000 *
Minimum Allowed Value:	500
Maximum Allowed Value:	1000000

- If the parameter uses one value chosen from a list of possible values, select the new value from the list and press **Next/Enter**.

**Figure 10–15 Example of a Parameter One Value Chosen from a List**

Parameter Group:	Base
Parameter Name:	Store State/Province
Parameter Value:	US_TX

- US\_OR
- US\_PA
- US\_RI
- US\_SC
- US\_SD
- US\_TN
- US\_TX
- US\_UT

- If the parameter allows more than one value from a list, you can add and remove values from the list. For an example, see [Figure 10–16](#):
  - To add a value to the parameter, select the value in the Select From List field and press **F2/Add**. The value moves to the New Value List field.
  - To remove a value from the parameter, select the value in the New Value List and press **F3/Delete**. The value moves to the Select From List field.
  - When you have made all your changes, press **Next/Enter**.

After making the changes, you are returned to the Parameter List screen.

4. If you have made all your changes to a parameter list, press **Undo/Esc**. You are returned to the Parameter Groups screen.
5. When you have made all your changes, press **Undo/Esc** to return to the Admin Options screen.

## Reason Codes

Reason codes options enable you to edit and add reason codes.

To edit or add reason codes:

1. Press **F5/Reason Codes**. The Reason Code Group screen appears.

**Figure 10–16 Reason Code Group Screen**



2. Select a group and press **Next/Enter**. The Reason Code List screen appears.

---

**Note:** If the Edit Reason Codes parameter is set to No, the reason codes are for viewing only.

---

Figure 10-17 Reason Code List Screen

Select a reason code and choose an option or choose Add or Delete to add or delete a reason code in the group.

Reason Code Group: Layaway Location Reason Codes  
 Default:  
 Reason Code:

- Customer Service Desk
- Hold Shelf
- Front Register
- Return Register

Make Default  
F2

Edit  
F3

Add  
F4

Delete  
F5

Move Up  
F6

Move Down  
F7

No Default  
F8

Done  
F9

Online 129 Cashier :Application Administrator Customer :  
 10/14/13 1:11 PM Sales Assoc. :Application Administrator Reason Code List

Help  
F1

Delete  
F11

Cancel  
F12

Undo  
Esc

Next  
Enter

ORACLE

3. To change a reason code, select it and select an option:
  - To make the code the default for the reason code group, press **F2/Default**.
  - To change the name or database ID of a code, select the code in the list and press **F3/Edit**. The Edit Reason Code screen appears.

Figure 10–18 Edit Reason Code Screen

Modify the reason code value and press Next.

Reason Code Group: Layaway Location Reason Codes  
Reason Code Name: Return Register \*  
Database ID: 3 \*

\*Required Fields

Online	129	Cashier :Application Administrator	Customer :
10/14/13	1:13 PM	Sales Assoc. :Application Administrator	Edit Reason Code

Help F1 | Delete F11 | Cancel F12 | Undo Esc | Next Enter

ORACLE

Make the changes and press **Next/Enter**. The Reason Code List screen appears.

- To add a code, press **F4/Add**. The Add Reason Code screen appears. Enter a reason code name and database ID and press **Next/Enter**. The Reason Code List screen appears.
- To delete a code, press **F5/Delete**.
- To change the position of a code in the list, press **F6/Move Up** or **F7/Move Down**.
- To clear the default, press **F8/No Default**.
- When you have completed your changes, press **F9/Done**. You are returned to the Reason Code Group screen.

---

---

## 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.

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---

**Note:** While in training mode, transaction data is stored in the database, but the transactions are not included in any financial reporting.

---

---

- 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.

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\* appears 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 appears.
2. Enter your user ID and password. After logging in, the screen changes color and Training Mode appears 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.

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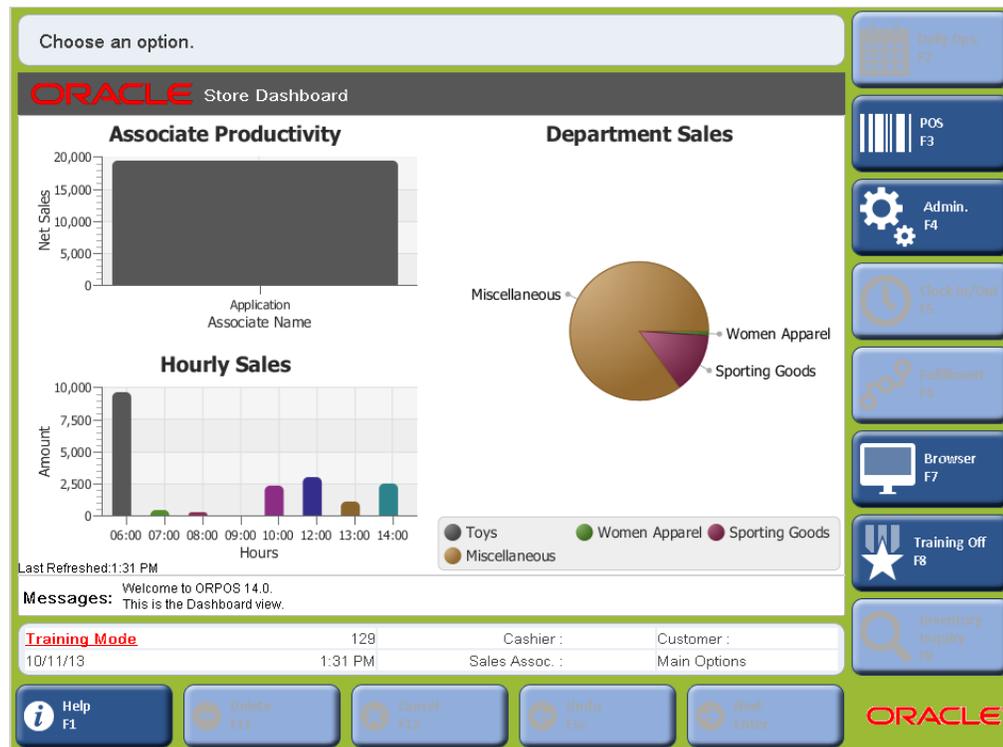
3. Press **F3/POS**, **F4/Administration**, or **F9/Inventory Inquiry** to train on these components.

---

**Note:** The store dashboard appears in training mode when the dashboard parameter is enabled.

---

**Figure 11–1 Main Options Screen in Training Mode**



To set training mode to off:

1. Press **F8/Training Off** on 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 and altered data is deleted from Oracle Retail Point-of-Service. You can still print receipts and slips while in training mode. However, receipts have *\*Not a Receipt, Training Mode\** annotated at the bottom. Similarly, slip prints have *\*Training Mode\** annotated at the bottom when printed.

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

## 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.

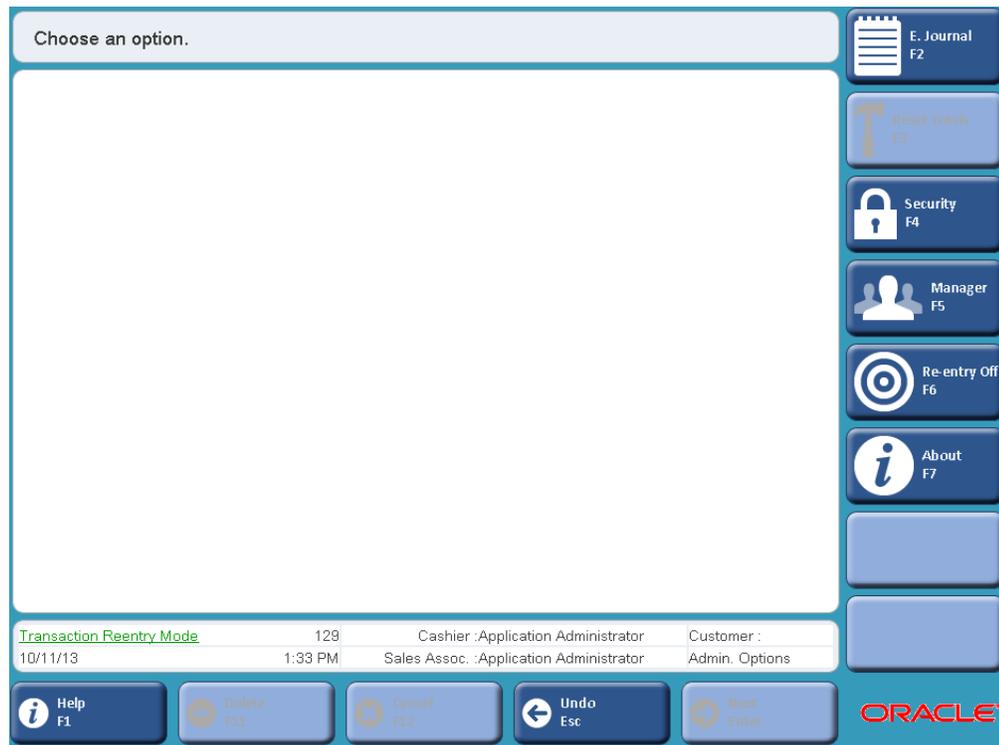
## Using Transaction Re-Entry Mode

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\* appears 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** on the Main Options screen. The Identification screen appears.
2. Enter your user ID and password. After logging in, the Admin Options screen appears. Press **F6/Re-entry On**.
3. The Transaction Reentry On Notice dialog appears. The dialog informs you that re-entry mode is now enabled.
4. To continue, press **Enter**. The Admin Options screen in the re-entry mode appears. The screen changes color. The annotation \*Transaction Reentry Mode\* appears in the communication status region.

**Figure 11–2 Admin Options Screen in Re-entry Mode**



To set re-entry mode to off:

1. Press **F4/Administration** on the Main Options screen. The Identification screen appears.
2. Enter your user ID and password. After logging in, the Admin Options screen appears. Press **F6/Re-entry Off**.
3. The Transaction Reentry Off Notice dialog appears. 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 Admin 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 prints 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, print 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.



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## Using Mobile Point-of-Service

This chapter contains introductory information for users of Mobile Point-of-Service. Not all of the functionality available at a register is supported on a mobile device. This chapter describes only the functionality that is available on a mobile device. To perform any other functionality, you need to use a register.

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

For example, in this chapter, the steps to perform a price override include selecting a reason code. In your configuration, however, you may not select a reason code when overriding a price.

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### Mobile Point-of-Service Overview

Mobile Point-of-Service enables you to perform the following functionality on a mobile device:

- Scan items or enter the item numbers manually. Scan or enter a serial number if required for an item.
- Sell and activate gift cards. Look up a gift card balance.
- Look up item availability.
- Apply discounts and price overrides to items. Apply discounts to transactions.
- Fill an order pickup.
- Add and link a customer to a transaction.
- Tender transactions using a credit card, debit card, or gift card.
- Print receipts and send receipts in email. Reprint receipts.
- Suspend and resume transactions.

If Mobile Point-of-Service is implemented with Oracle Retail Store Inventory Management, the following Oracle Retail Store Inventory Management functionality is supported:

- Inventory lookup at the current store
- Inventory lookup at buddy stores
- Validation of serial numbers

Mobile Point-of-Service supports the same locales and languages as Point-of-Service. For more information, see ["Language and Locale Support"](#) in [Chapter 1](#).

Mobile Point-of-Service supports both handheld and tablet mobile devices. The same functionality is supported on both type of devices. For information on using each type of device, see the following sections:

- ["Handheld Mobile Device"](#)
- ["Tablet Mobile Device"](#)

## Handheld Mobile Device

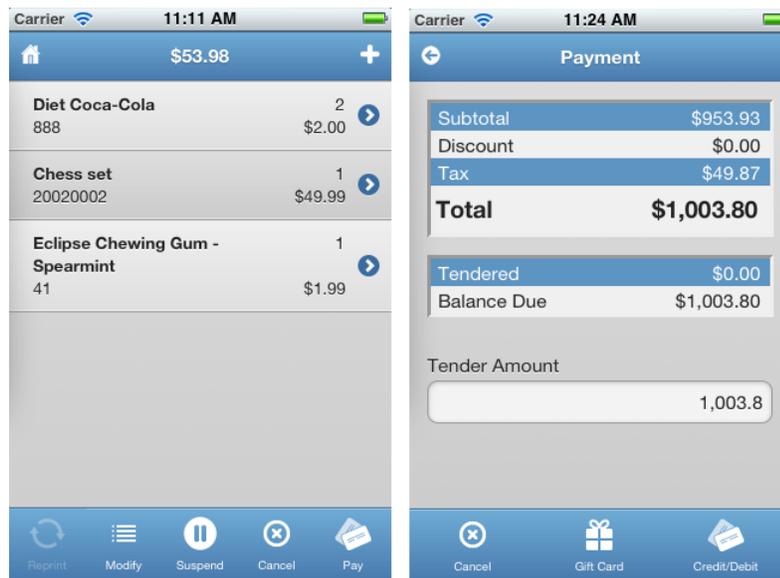
This section describes using Mobile Point-of-Service on a handheld. For more information, see the following sections:

- ["User Interface on the Handheld"](#)
- ["Getting Started on the Handheld"](#)
- ["Performing Transactions on the Handheld"](#)
- ["Performing Item Lookup on the Handheld"](#)
- ["Handling an Order Pickup on the Handheld"](#)
- ["Resuming a Suspended Transaction on the Handheld"](#)

## User Interface on the Handheld

[Figure 12–1](#) shows examples of pages on the handheld.

**Figure 12–1 Examples of Handheld Pages**



The content of the page is dependent on the available functionality. Pages have the following structure:

- The top of the page shows page-specific information and icons.  
The first example is the Scan Items page:

- On the left is the Home icon. Tap it to go to the Home page. See [Figure 12-4](#).
- The subtotal of the items in the transaction is shown.
- On the right is the icon to add items to the list. Tap it to add items.

The second example is the Payment page:

- The arrow on the left is used to return to the previous page.
- The title of the page is shown.

The Home icon and arrow are common to many of the pages.

- The middle of the page is the work area of the page. It may contain information, input fields, and drop-down lists. In the second example, Tender Amount is an input field. For an example of a drop-down list, see [Figure 12-20](#).
- At the bottom of the page are the set of icons available for that page. If an icon is grayed out, it is not available. In the first example, **Reprint** is not available. If additional icons are available, icons are available to move up and down through the list. For an example, see [Figure 12-11](#).

To use drop-down lists, tap the Choose one field. See [Figure 12-27](#). The list of choices appears. See [Figure 12-28](#).

If you need to enter information, tap the input field. A keyboard opens for you to enter the information. [Figure 12-2](#) illustrates the available keyboards.

**Figure 12-2 Examples of Alphabetic and Numeric Keyboards on the Handheld**



After entering the information, close the keyboard to return to the page where the information was needed. The information you entered appears in the input field.

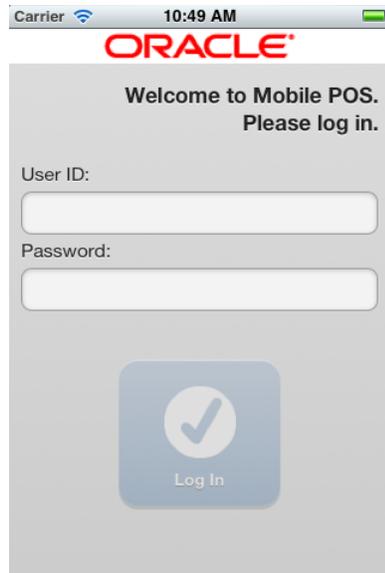
## Getting Started on the Handheld

This section provides instructions on starting the Mobile Point-of-Service application and logging in and out.

## Starting the Application on the Handheld

To start Mobile Point-of-Service, tap the **Mobile POS** icon. The Login page appears.

**Figure 12–3** Handheld Login Page



## Logging In on the Handheld

Enter a user ID and password. Tap **Log In**. After successfully logging in, the Home page appears. See [Figure 12–4](#).

If you enter a temporary password or a password that has expired, you must change your password at a register. For more information, see "[Changing Your Password](#)" in [Chapter 1](#).

## Logging Out on the Handheld

On the Home page, tap **Log Out**. You are logged out of the application. The Login page appears. See [Figure 12–3](#).

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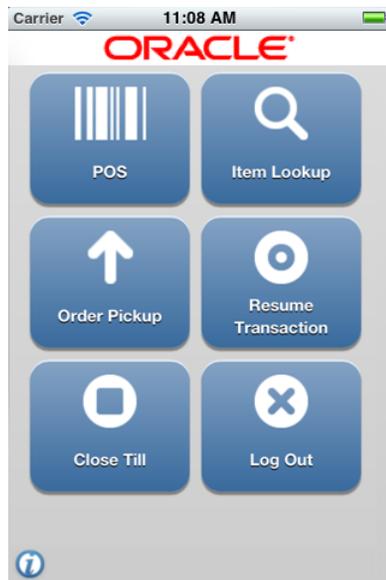
**Note:** If you leave Mobile Point-of-Service while a transaction is in progress, the transaction is cancelled and you are logged out.

---

---

## Using the Handheld Home Page

After logging in, the Home page appears.

**Figure 12–4 Handheld Home Page**

On this page, you access the functionality of Mobile Point-of-Service:

- The **POS** icon enables you to scan items and tender the transaction. For more information, see ["Performing Transactions on the Handheld"](#).
- The **Item Lookup** icon enables you to search for items based on item number. For more information, see ["Performing Item Lookup on the Handheld"](#).
- The **Order Pickup** icon enables you to fill an order for a pickup. For more information, see ["Handling an Order Pickup on the Handheld"](#).
- The **Resume Transaction** icon enables you to resume a suspended transaction. For more information, see ["Resuming a Suspended Transaction on the Handheld"](#).
- The **Close Till** icon enables you to close the till currently assigned to the handheld. For more information, see ["Closing the Till on the Handheld"](#).
- The **Log Out** icon enables you to log out of the application. For more information, see ["Logging Out on the Handheld"](#).
- The **Info** icon, at the lower-left corner, enables you to view information about the Mobile Point-of-Service application and handheld. For more information, see ["Viewing Application and Handheld Device Information"](#).

### Viewing Application and Handheld Device Information

Information about the Mobile Point-of-Service application and the handheld appear on the About Mobile POS page. To access the page, tap the **Info** icon on the Home page.

**Figure 12–5 Handheld About Mobile POS Page**

Table 12–1 describes the information shown on this page.

**Table 12–1 Fields on Mobile Point-of-Service About Page**

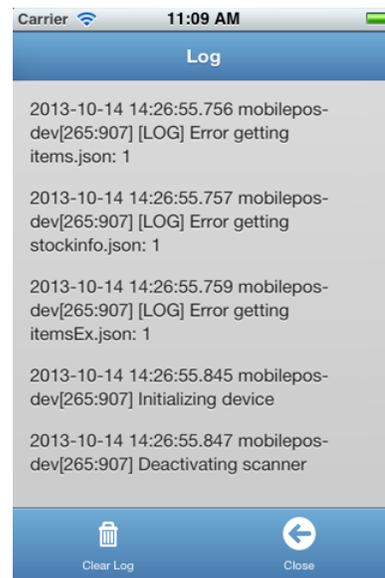
Field	Description
Store	ID of the store.
Register	ID of the register assigned to the handheld.
Till	ID of the till that is open on the handheld.
Mobile POS version	Version of Mobile Point-of-Service being used.
POS version	Version of Point-of-Service being used.
Device	Device type and software version.
Model	Model of the sled.
Manufacturer	Manufacturer of the sled.

On this page, you can do the following:

- To view the contents of the log, tap **View Log**. For information on the log, see "[Viewing Handheld Log Information](#)".
- When done viewing this page, tap **Close**. You are returned to the Home page.

### Viewing Handheld Log Information

When errors occur on the handheld, information is saved in the log. The saved information can be used to help identify and correct the errors. To view the log, tap **View log** on the About page.

**Figure 12–6 Mobile Point-of-Service Log Page**

On this page, you can do the following:

- To clear the contents of the log, tap **Clear Log**.
- When done viewing the log, tap **Close**. You are returned to the About Mobile POS page.

### Closing the Till on the Handheld

To close the till currently open on the handheld, tap **Close Till** on the Home page. The till is closed. It must be reconciled at a register or Back Office. When you return to the Scan Items page, another till is opened.

## Performing Transactions on the Handheld

All transactions begin on the Scan Items page. A transaction is started when an item number is entered on the Scan Items page. You can enter an item number by scanning the bar code or entering the item number manually.

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. To tender a transaction on the handheld, two options are available:

- Tender on the handheld using a credit card, debit card, or gift card.
- If the customer wants to use any other tenders, suspend the transaction and complete the payment process at a register.

For more information on transactions, see the following sections:

- ["Tendering a Transaction on the Handheld"](#)
- ["Modifying an Item on the Handheld"](#)
- ["Modifying the Transaction on the Handheld"](#)
- ["Suspending a Transaction on the Handheld"](#)
- ["Handling Items that Cannot be Processed on the Handheld"](#)

- "Cancelling a Transaction on the Handheld"

### Starting a Transaction on the Handheld

To begin a transaction, tap **POS** on the Home page. The Scan Items page appears.

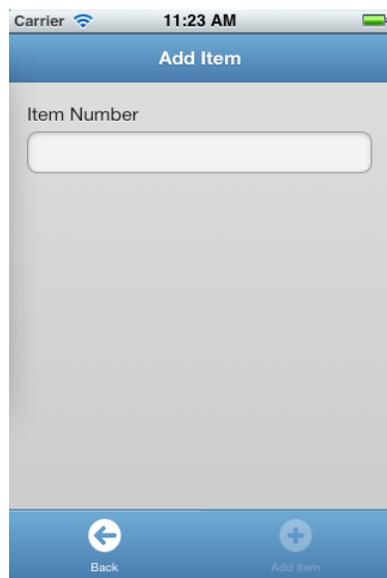
**Figure 12–7 Handheld Scan Items Page**



To add an item to a transaction:

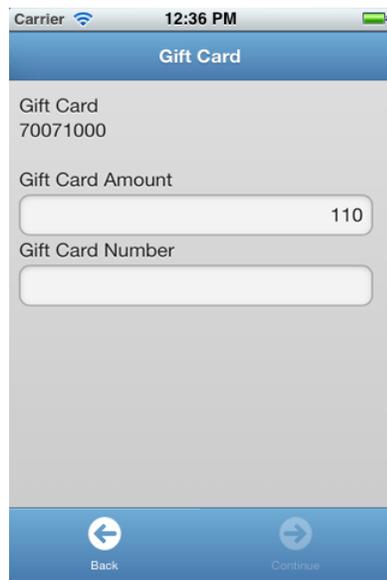
1. Scan the item number or enter the item number manually. To enter the item number manually:
  - a. Tap the plus sign (+) at the upper-right corner. The Add Item page appears.

**Figure 12–8 Handheld Add Item Page**





**Figure 12–10 Handheld Gift Card Page**



Enter the gift card amount and number and tap **Continue**. The gift card item is added to the transaction. When the transaction is completed, the gift card is activated.

**Using the Scan Items Page on the Handheld** Figure 12–11 shows the Scan Item page with multiple items added.

**Figure 12–11 Handheld Scan Items Page with Added Items**

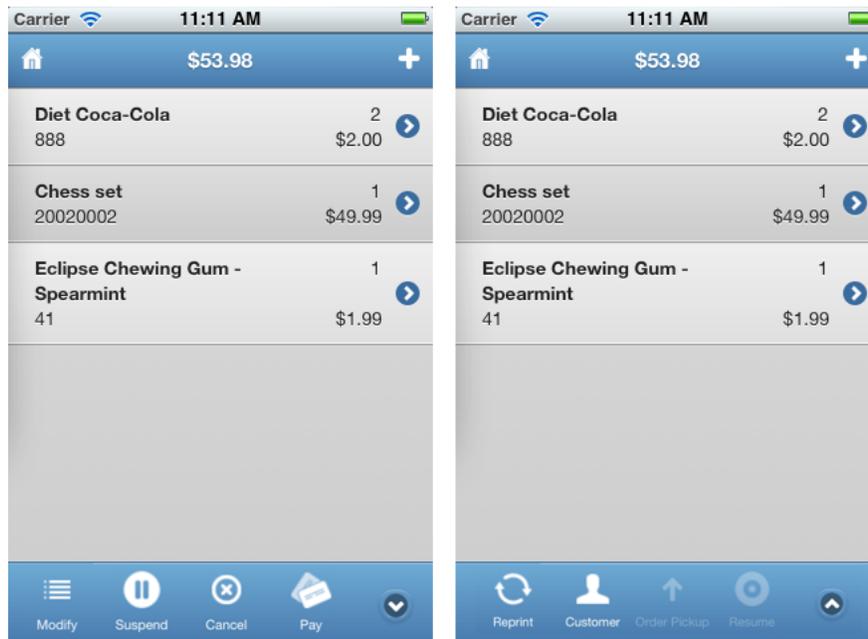


Figure 12–11 shows both sets of icons at the bottom of the page. On this page, you can do the following:

- To view detailed information for an item, tap the icon on the right side of the item entry. See "[Viewing Detailed Item Information on the Handheld](#)".
- To modify an item, see "[Modifying an Item on the Handheld](#)".
- To modify the transaction, tap **Modify**. See "[Modifying the Transaction on the Handheld](#)".
- To suspend the transaction, tap **Suspend**. See "[Suspending a Transaction on the Handheld](#)".
- To cancel the transaction, tap **Cancel**. See "[Cancelling a Transaction on the Handheld](#)".
- To tender the transaction, tap **Pay**. See "[Tendering a Transaction on the Handheld](#)".
- To reprint the receipt for a transaction, tap **Reprint**. See "[Reprinting a Receipt on the Handheld](#)".
- To link a customer to the transaction, tap **Customer**. See "[Linking a Customer to the Transaction on the Handheld](#)".
- To fill an order pickup, tap **Order Pickup**. See "[Handling an Order Pickup on the Handheld](#)".
- To resume a suspended transaction, tap **Resume**. See "[Resuming a Suspended Transaction on the Handheld](#)".

### Linking a Customer to the Transaction on the Handheld

Some aspects of a transaction, for example, special pricing, require a customer to be linked to the transaction. For information on the benefits and requirements for linking a customer, see [Chapter 4](#).

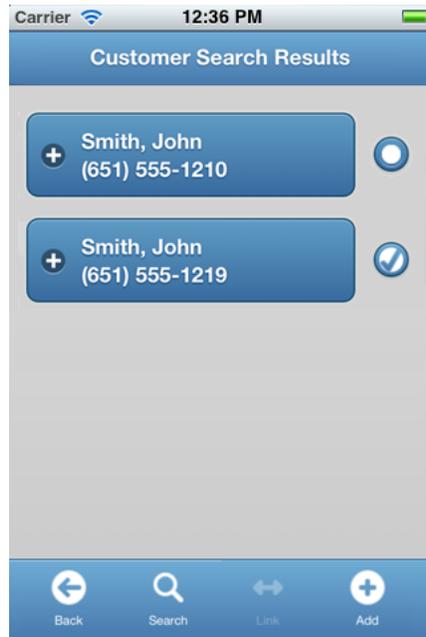
To link a customer to the transaction:

1. Tap **Customer**. The Customer Search page appears.

**Figure 12–12** *Handheld Customer Search Page*

2. To search for a customer:
  - a. Enter the customer ID or customer information and tap **Search**. If one match is found, that customer is linked to the transaction. If more than one match is found, the Customer Search Results page appears.

**Figure 12–13 Handheld Customer Search Results Page**



- b. Tap the customer you want to link to the transaction and tap **Link**.
3. To add a customer:
  - a. Enter the customer information and tap **Add**. If no customer matching the search information is found, the customer is added and linked to the transaction.
  - b. If matches are found for the customer information, the Customer Search Results page appears. Select a customer from the list. Tap the customer you want to link to the transaction and tap **Link**.

### Viewing Detailed Item Information on the Handheld

To view detailed information on the item, tap the icon on right side of the item line. The Item Detail page appears.

**Figure 12-14 Handheld Item Detail Page**

If an item image is available, the image appears. The name of the item, price, quantity, applied discounts, linked sales associate, and any item-level messages appear.

When you are done viewing the information, tap **Close**.

### **Tendering a Transaction on the Handheld**

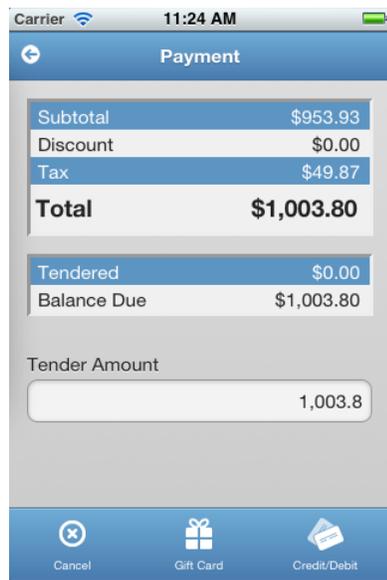
After all items for a transaction have been added, you can tender the transaction. To tender a transaction on the handheld, two options are available:

- Tender on the handheld using a credit card, debit card, or gift card.
- Suspend the transaction and tender at a register. To suspend the transaction, see ["Suspending a Transaction on the Handheld"](#).

To tender a transaction:

1. Tap **Pay** on the Scan Items page. The Payment page appears.

**Figure 12–15 Handheld Payment Page**



2. Enter the tender amount.
3. To tender with a credit card or debit card, tap **Credit/Debit**. To tender with a gift card, tap **Gift Card**.

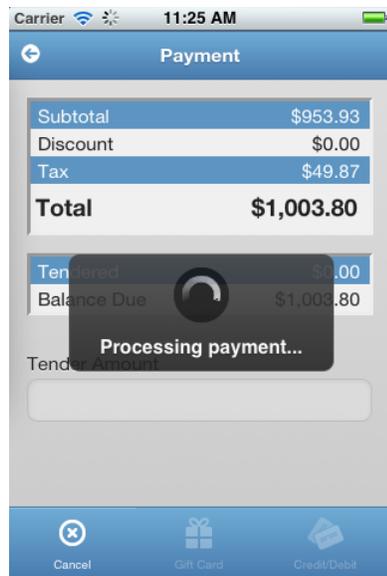
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**Note:** A gift card has to be activated before it can be used as a tender.

---

4. Swipe the card on the pin pad. The authorization process begins automatically.

**Figure 12–16 Handheld Processing Payment Page**



5. Handle the result of the authorization:

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**Note:** If the card is not approved, follow the prompts to handle the reason for the non-approval.

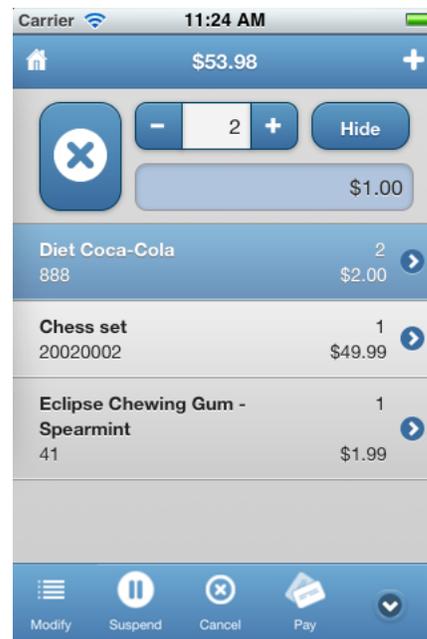
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- If the authorization is approved for a credit card or debit card:
  - If the balance is zero for the transaction, the customer is prompted to provide a signature on the pin pad. When the customer completes providing the signature, the Receipt page appears. See "[Printing a Receipt on the Handheld](#)".
  - If there is a balance remaining for the transaction, the customer is prompted to provide a signature on the pin pad. When the customer completes providing the signature, the Payment page appears so you can process the next tender. See Step 2.
- If the authorization is approved for a gift card:
  - If the balance is zero for the transaction, the Receipt page appears. See "[Printing a Receipt on the Handheld](#)".
  - If there is a balance remaining for the transaction, the Payment page appears so you can process the next tender. See Step 2.

### Modifying an Item on the Handheld

To modify an item, tap **Modify** on the Scan Items page. Options open at the top of the page to modify the item.

**Figure 12–17 Handheld Scan Items Page with Item Selected**



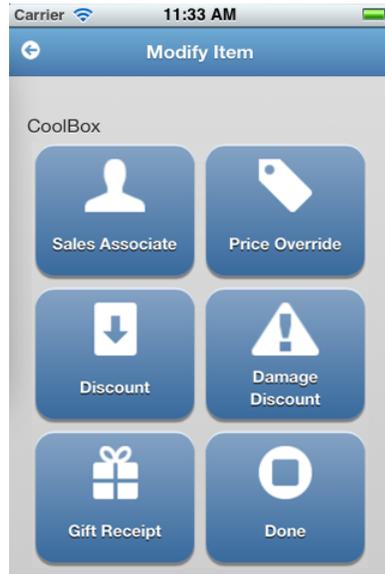
To modify the item, you can do the following:

- To increase the quantity, tap the plus sign (+). To decrement the quantity, tap the minus sign (-).
- To remove the item on the transaction, tap the Delete icon on the left.

- To change the price or other item options, tap the Price field. The Modify Item page appears. See [Figure 12–18](#).
- To close the options, tap **Hide**.

The Modify Item page enables you to change item options.

**Figure 12–18 Handheld Modify Item Page**

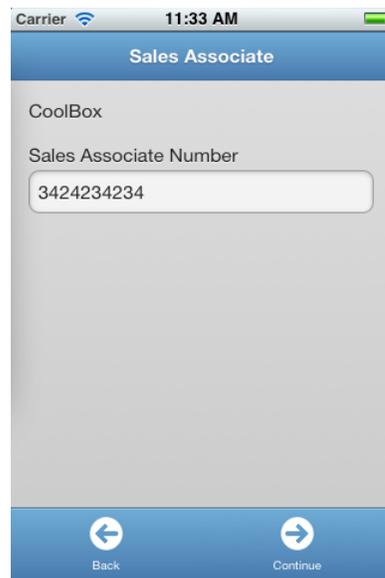


Tap the item option to be changed:

- To change the sales associate linked to the item, see "[Modifying the Sales Associate on the Handheld](#)".
- To override the current price of the item, see "[Overriding the Price on the Handheld](#)".
- To apply a discount to the item, see "[Applying a Discount to an Item on the Handheld](#)".
- To apply a damage discount to the item, see "[Applying a Damage Discount to an Item on the Handheld](#)".
- To add a gift receipt for the item, tap **Gift Receipt**. An icon is added to the Scan Items screen to indicate a gift receipt for the item is printed when the transaction is completed.
- When you are done modifying the item, tap **Done**.

**Modifying the Sales Associate on the Handheld** To change the sales associate linked to an item:

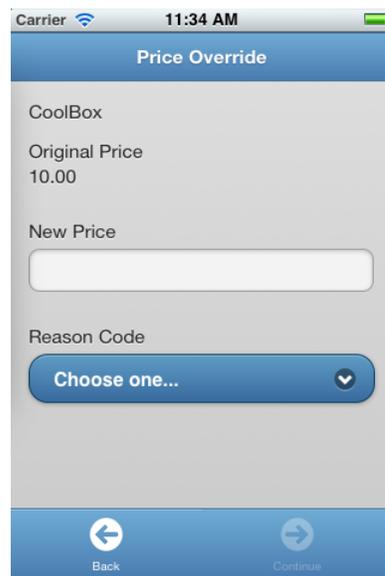
1. On the Modify Item page, tap **Sales Associate**. The Sales Associate page appears.

**Figure 12–19 Handheld Sales Associate Page for an Item**

2. Enter the sales associate number and tap **Continue**. The linked sales associate is changed. You are returned to the Modify Item page.

**Overriding the Price on the Handheld** To override the current price of the item:

1. On the Modify Item page, tap **Price Override**. The Price Override page appears.

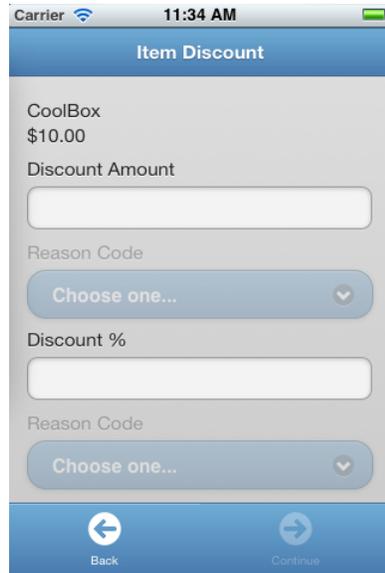
**Figure 12–20 Handheld Price Override Page**

2. Enter the new price.
3. Tap the Reason Code field and select a reason code on the drop-down list.
4. Tap **Continue**. The price of the item is changed. You are returned to the Modify Item page.

**Applying a Discount to an Item on the Handheld** You can apply both a discount amount and percent. To apply a discount to an item:

1. On the Modify Item page, tap **Discount**. The Item Discount page appears.

**Figure 12–21 Handheld Item Discount Page**

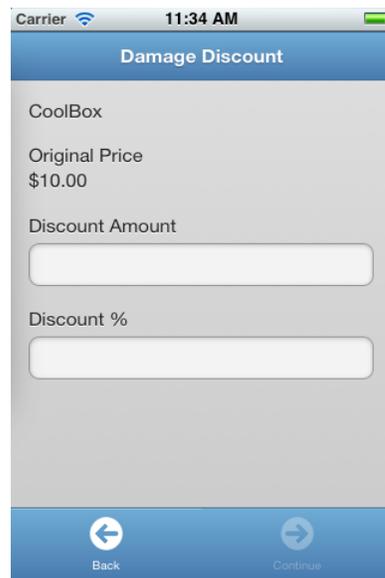


The screenshot shows a mobile application interface titled "Item Discount". At the top, the status bar displays "Carrier", signal strength, "11:34 AM", and battery level. Below the title bar, the item name "CoolBox" and price "\$10.00" are shown. The form contains two identical sections for entering discount information. Each section includes a text input field for the discount value and a dropdown menu for the "Reason Code" with the text "Choose one...". At the bottom of the screen, there are two navigation buttons: "Back" (with a left arrow) and "Continue" (with a right arrow).

2. To apply a discount amount, enter a discount amount. Tap the Reason Code field and select a reason code for the discount amount.
3. To apply a discount percent, enter a discount percent. Tap the Reason Code field and select a reason code for the percent.
4. Tap **Continue**. The price of the item is changed. You are returned to the Modify Item page.

**Applying a Damage Discount to an Item on the Handheld** You can apply both a damage discount amount and percent. To apply a damage discount to an item:

1. On the Modify Item page, tap **Damage Discount**. The Damage Discount page appears.

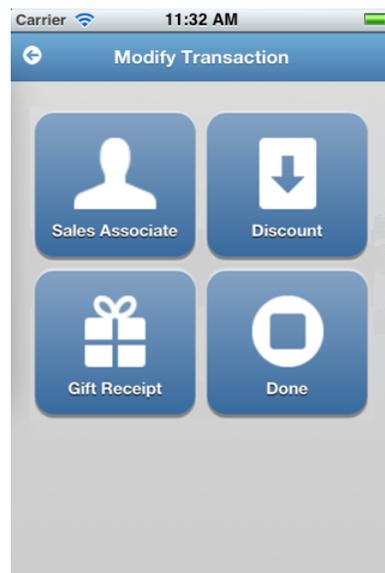
**Figure 12–22 Handheld Damage Discount Page**

2. To apply a discount amount, enter a discount amount.
3. To apply a discount percent, enter a discount percent.
4. Tap **Continue**. The price of the item is changed. You are returned to the Modify Item page.

### Modifying the Transaction on the Handheld

Once items have been added to a transaction, you can modify the transaction.

To make changes to the entire transaction, tap **Modify** on the Scan Items page. The Modify Transaction page appears.

**Figure 12–23 Handheld Modify Transaction Page**

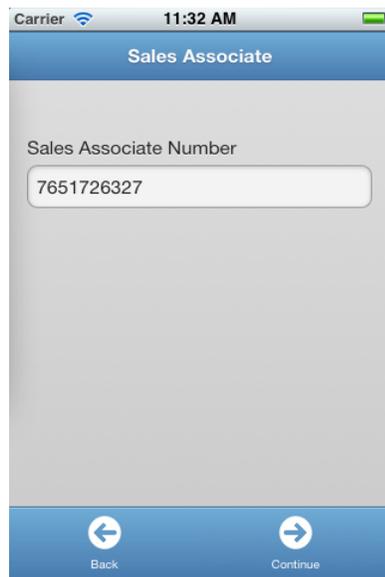
Tap the transaction option to be changed:

- To change the sales associate linked to the transaction, see "[Modifying the Sales Associate on the Handheld](#)".
- To apply a discount to the transaction, see "[Applying a Discount to the Transaction on the Handheld](#)".
- To add a gift receipt for the transaction, tap **Gift Receipt**. One gift receipt is printed for all the items in the transaction when the transaction is completed.
- When you are done modifying the transaction, tap **Done**.

**Modifying the Sales Associate on the Handheld** To change the sales associate linked to the transaction:

1. On the Modify Transaction page, tap **Sales Associate**. The Sales Associate page appears.

**Figure 12–24 Handheld Sales Associate Page for the Transaction**



2. Enter the sales associate number and tap **Continue**. The sales associate linked to the transaction is changed. You are returned to the Modify Transaction page.

**Applying a Discount to the Transaction on the Handheld** You can apply both a discount amount and percent. To apply a discount to the transaction:

1. On the Modify Transaction page, tap **Discount**. The Transaction Discount page appears.

**Figure 12–25 Handheld Transaction Discount Page**

2. To apply a discount amount, enter a discount amount. Tap the Reason Code field and select a reason code for the discount amount.

**Figure 12–26 Handheld Transaction Discount Page with Reason Codes Displayed**

3. To apply a discount percent, enter a discount percent. Tap the Reason Code field and select a reason code for the percent.
4. Tap **Continue**. The discount is applied to the transaction. You are returned to the Modify Transaction page.

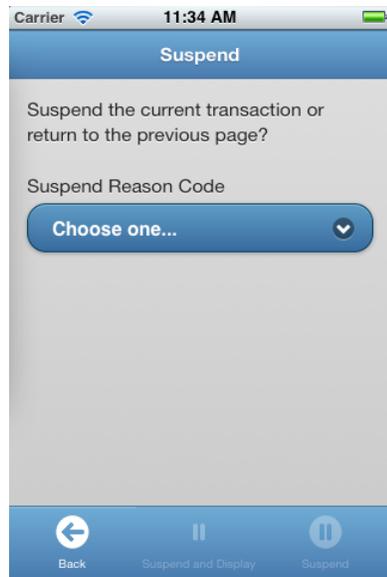
### Suspending a Transaction on the Handheld

Suspend a transaction if it is interrupted or cannot be completed, such as when the customer offers a tender not supported on the handheld. A suspend transaction receipt prints, which the customer takes to a register to complete the transaction.

To suspend a transaction:

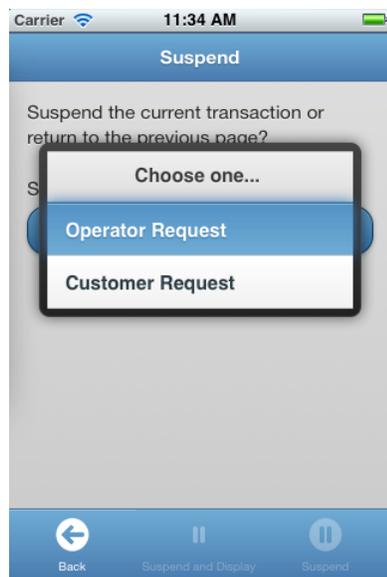
1. On the Scan Items page, tap **Suspend**. The Suspend page appears.

**Figure 12–27 Handheld Suspend Page**



2. Tap the Suspend Reason Code field. The available reason codes appear.

**Figure 12–28 Handheld Suspend Page with Reason Code Selections**



3. Tap the reason code you want to choose.

4. Complete suspending the transaction:
  - To suspend the transaction and display the transaction ID, tap **Suspend and Display**. The Suspended page appears. When done viewing the page, tap **Close**.

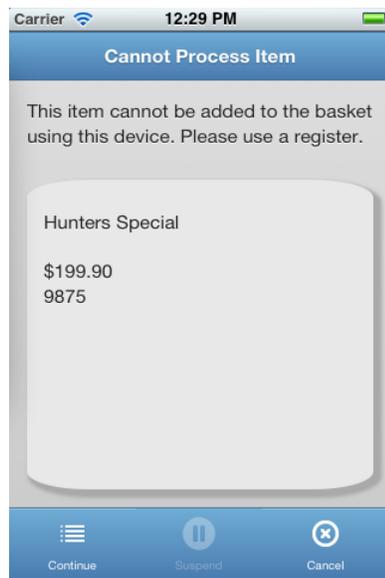
**Figure 12–29 Handheld Suspended Page**



- To suspend the transaction and print a receipt with the transaction ID, tap **Suspend**. A suspended transaction receipt prints. The Receipt page appears with the location where the receipt is printing. See [Figure 12–33](#).
- To return to the previous page without suspending the transaction, tap **Back**.

### Handling Items that Cannot be Processed on the Handheld

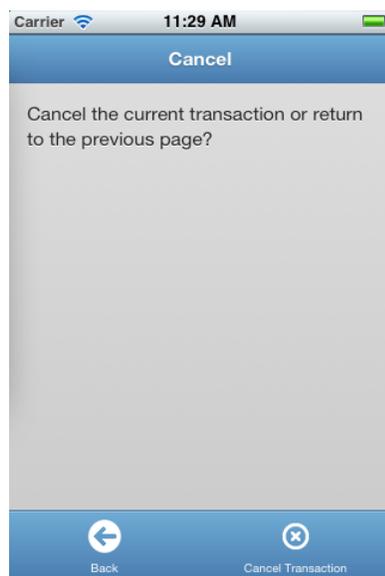
Some items cannot be handled on the handheld. For example, if an item has an age restriction, the age information must be entered at a register. If an item is scanned that requires processing at a register, the Cannot Process Item page appears.

**Figure 12–30 Handheld Cannot Process item Page**

- To delete the item and continue with the transaction, tap **Continue**. The Scan Items page appears.
- To suspend the transaction so the item can be processed at a register, tap **Suspend**. See "[Suspending a Transaction on the Handheld](#)".
- To cancel the transaction, tap **Cancel**. See "[Cancelling a Transaction on the Handheld](#)".

### Cancelling a Transaction on the Handheld

You can cancel the transaction in-progress from any page where the Cancel icon appears. To cancel a transaction, tap **Cancel**. The Cancel page appears.

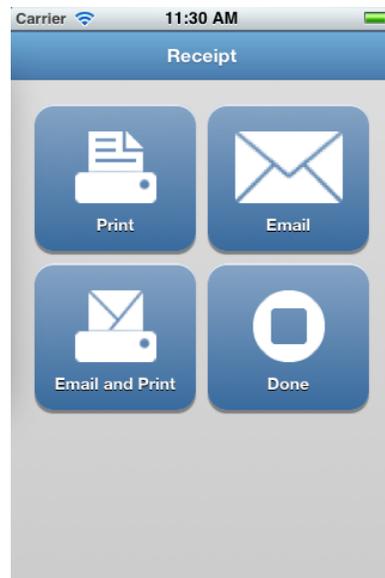
**Figure 12–31 Handheld Cancel Page**

- To cancel the transaction, tap **Cancel Transaction**. The transaction is ended and the Home page appears.
- To return to the previous page, tap **Back**. You can continue with the transaction.

### Printing a Receipt on the Handheld

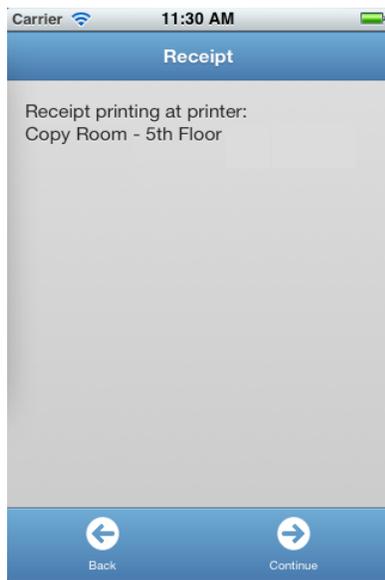
When payment for a transaction is completed, the Receipt page appears.

**Figure 12–32** *Handheld Receipt Page*

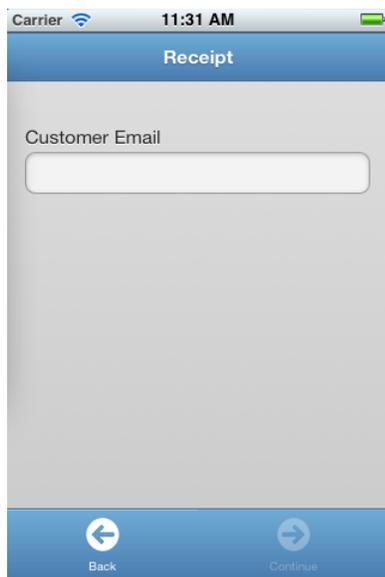


Select how you want to handle the receipt:

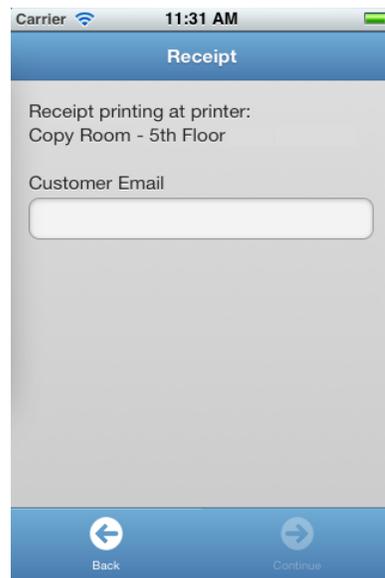
- To print the receipt at a network printer, tap **Print**. The location where the receipt is printing is shown on the Receipt page. See [Figure 12–33](#). To return to the Scan Items page, tap **Continue**. To return to the Receipt page to select another option, tap **Back**.

**Figure 12–33 Handheld Printing Receipt Page**

- To send the receipt in an email to the customer, tap **Email**. The input field for the email address appears on the Receipt page. Enter the email address for the customer and tap **Continue**. If an invalid address is entered, an error message appears. You can enter another email address. To return to the Receipt page to choose another option, tap **Back**.

**Figure 12–34 Handheld Receipt Email Page**

- To both print the receipt and send it in an email, tap **Email and Print**. The location where the receipt is printing appears. Enter the email address for the customer and tap **Continue**. If an invalid address is entered, an error message appears. You can enter another email address. To return to the Receipt page to choose another option, tap **Back**.

**Figure 12–35 Handheld Receipt Printing and Email Page**

- When you are done handling the receipt, tap **Done**.

### Reprinting a Receipt on the Handheld

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**Note:** You can only reprint the receipt for the last transaction.

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To reprint a receipt for the last transaction, tap **Reprint** on the Scan Items page. The Receipt page appears to enable you to reprint the receipt. See "[Printing a Receipt on the Handheld](#)".

### Performing Item Lookup on the Handheld

To perform an item lookup:

1. On the Home page, tap **Item Lookup**. The Item Lookup page appears.

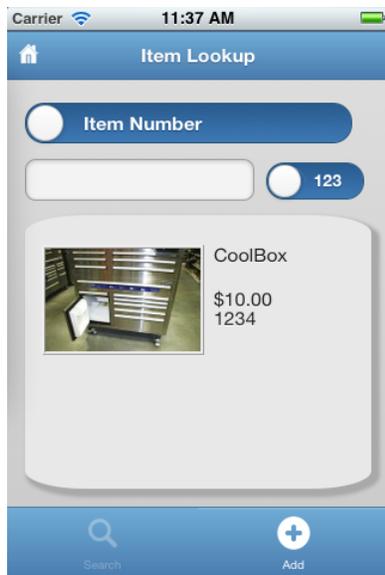
**Figure 12–36 Handheld Item Lookup Page**

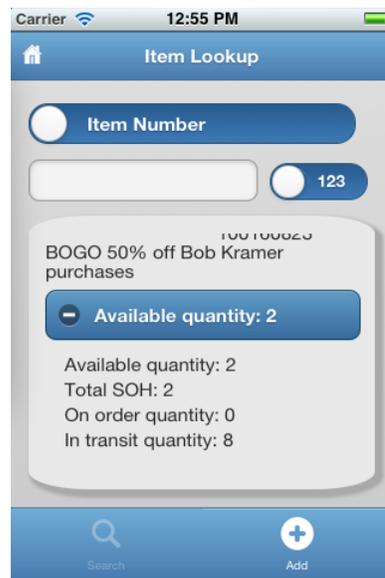
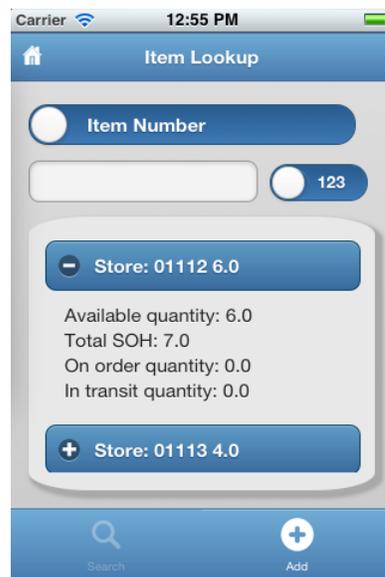


2. Scan the item number or manually enter the item number and tap **Search**.

The page is updated with the available item information, such as, item number, description, price, available quantity at the current store, and buddy stores with available quantity. If you do multiple searches, drag your finger across the page to view previous results. [Figure 12–37](#), [Figure 12–38](#), and [Figure 12–39](#) show examples of the information that may be returned.

**Figure 12–37 Handheld Item Lookup Detail Page**



**Figure 12–38 Handheld Item Lookup Page with Available Quantity Expanded****Figure 12–39 Handheld Item Lookup Page with Store Information Expanded**

3. You can perform the following functions:
  - To add the item to the current transaction, tap **Add**. The Scan Items page appears with the item added to the transaction.
  - To return to the Home page, tap the Home icon.

### Performing Gift Card Lookup on the Handheld

You can look up the balance remaining on a gift card.

To look up the balance on a gift card:

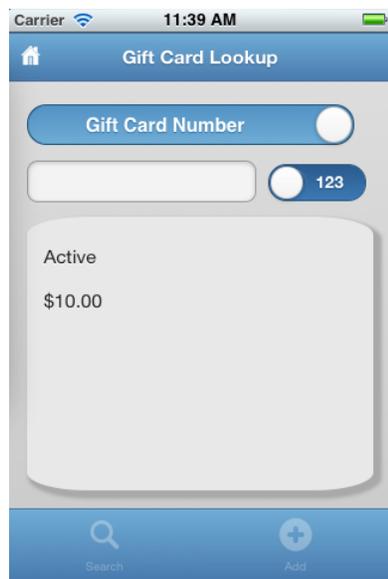
1. On the Item Lookup page, move **Item Number** to **Gift Card Number**. The Gift Card Lookup page appears.

**Figure 12–40 Handheld Gift Card Lookup Page**



2. Enter the gift card number and tap **Search**. The gift card balance appears.

**Figure 12–41 Handheld Gift Card Lookup Page with Results**



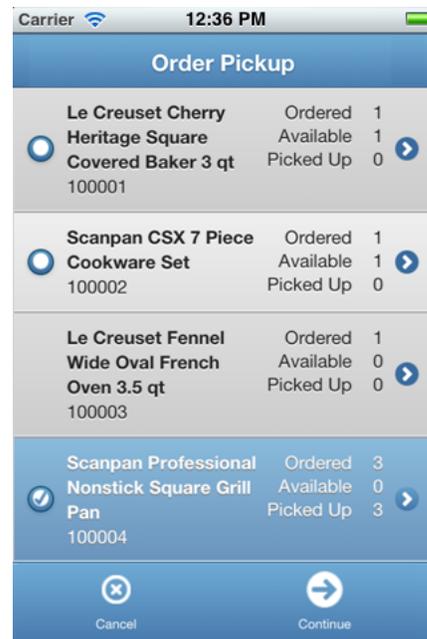
3. When you are done viewing the results, tap the **Home** icon to return to the Home page.

## Handling an Order Pickup on the Handheld

Orders for pickup of items, that have been placed at a register or created at a web site, can be filled on a mobile device. To fill an order to be picked up:

1. On the Home page, tap **Order Pickup**. The Order Search page appears.
2. Scan the order receipt, enter the order ID, or enter the customer information to search for the order. The Order Pickup page appears with the list of available orders matching the search information.

**Figure 12–42 Handheld Order Pickup Page**

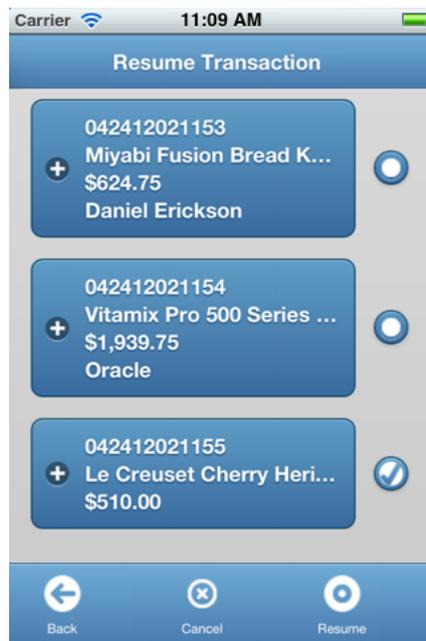


3. To select an order for pick up, tap the order. To change the picked up quantity, tap the right arrow icon. The Pickup Quantity dialog appears.
4. Enter the quantity for pickup and tap **OK**. Then entry for the order is updated on the Order Pickup page.
5. When you have completed filling orders, tap **Continue**. You are returned to the Home page.

## Resuming a Suspended Transaction on the Handheld

You can resume sale transactions that have been suspended on a mobile device or at a register. To resume a suspended sale transaction:

1. On the Home page, tap **Resume Transactions**. The Resume Transaction page appears.

**Figure 12–43 Handheld Resume Transaction Page**

2. Select the transaction:
  - Scan or enter the transaction number.
  - To select the transaction to be resumed, tap the entry. A check appears to indicate the transaction is selected.
3. To resume the selected transaction, tap **Resume**. The suspended transaction is resumed. The transaction details appear on the Scan Items page. You can complete, change, or cancel the transaction.

## Tablet Mobile Device

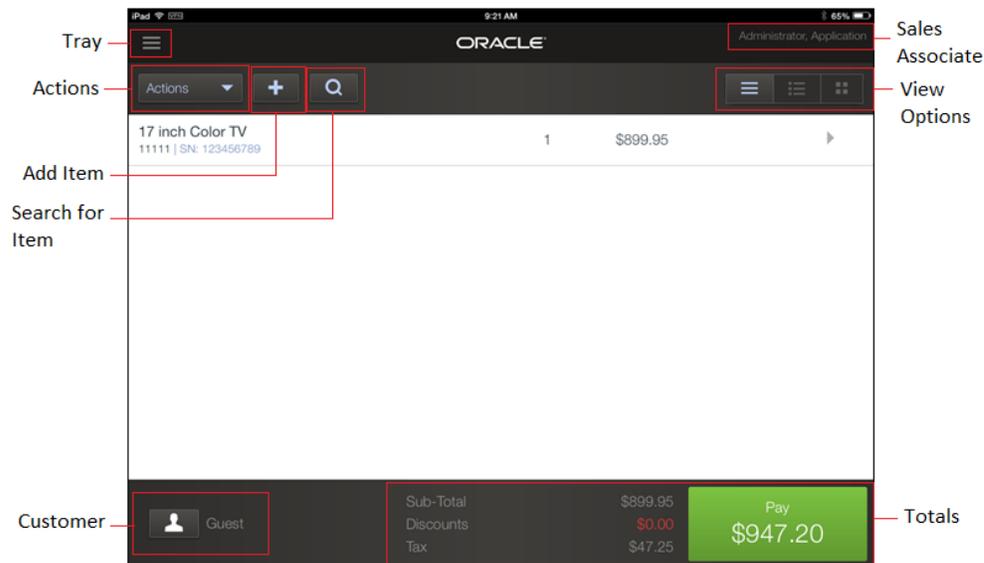
This section describes using Mobile Point-of-Service on a tablet. For more information, see the following sections:

- ["User Interface on the Tablet"](#)
- ["Getting Started on the Tablet"](#)
- ["Performing Transactions on the Tablet"](#)
- ["Performing Item Lookup on the Tablet"](#)
- ["Handling an Order Pickup on the Tablet"](#)
- ["Resuming a Suspended Transaction on the Tablet"](#)

### User Interface on the Tablet

[Figure 12–44](#) shows an example of a page on the tablet. This is an example of the Basket page.

Figure 12-44 Example of a Tablet Page



Pages have the following structure:

- The content of the top of the page is dependent on the page:
  - The tray shows the activities available on the page. For an example, see [Figure 12-47](#).
  - The sales associate is shown at the top right.
  - Icons are shown for different available functionality. In this example, the following are shown:
    - \* Actions shows the list of activities for the current transaction.
    - \* The plus icon enables you to add items to the transaction.
    - \* The magnifying glass icon enables you to search for items.
    - \* There are three options at the right to select the view for the page. In this example, you can select to show the list, details, or tiles. For more information, see ["Using the Tablet Dashboard Page"](#).
- The middle of the page is the work area of the page. It may contain information, input fields, and drop-down lists.
- If a customer is linked to the transaction, the customer name is shown in the bottom left of the page. Current totals for the transaction are also shown at the bottom of the page. Depending on the page, there may not be any information shown in this part of the page.

To use drop-down lists, tap the field. The list of choices appears. For an example, see [Figure 12-61](#). To select your choice, tap that entry.

If you need to enter information, tap the input field. A keyboard opens for you to enter the information. To see an example of a keyboard, see [Figure 12-45](#). After entering the information, close the keyboard to return to the page where the information was needed. The information you entered appears in the input field.

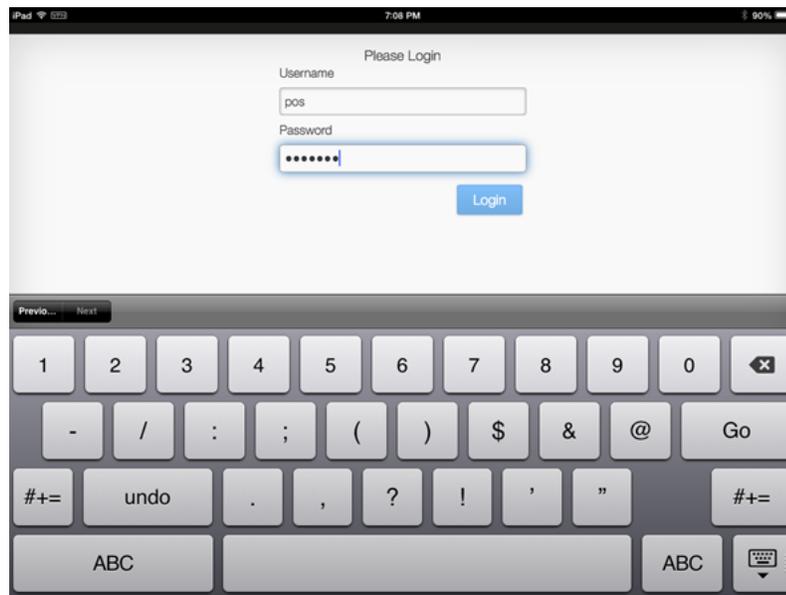
## Getting Started on the Tablet

This section provides instructions on starting the Mobile Point-of-Service application and logging in and out.

### Starting the Application on the Tablet

To start Mobile Point-of-Service, tap the **Mobile POS** icon. The Login page appears.

**Figure 12–45** Tablet Login Page



### Logging In on the Tablet

Enter a user name and password. Tap **Login**. After successfully logging in, the Dashboard page appears. See [Figure 12–46](#).

If you enter a temporary password or a password that has expired, you must change your password at a register. For more information, see "[Changing Your Password](#)" in [Chapter 1](#).

### Logging Out on the Tablet

On the Home page, tap the user name link at the top right of the screen and select to logout. You are logged out of the application. The Login page appears. See [Figure 12–45](#).

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**Note:** If you leave Mobile Point-of-Service while a transaction is in progress, the transaction is cancelled and you are logged out.

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### Using the Tablet Dashboard Page

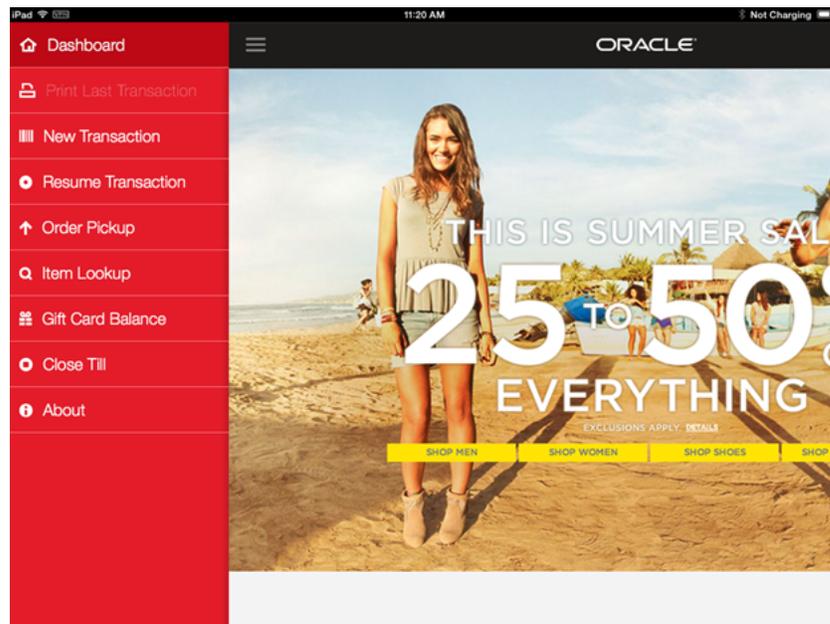
After logging in, the Dashboard page appears.

**Figure 12–46 Tablet Dashboard Page**



To access the functionality of Mobile Point-of-Service, tap the tray. The menu of available activities appears.

**Figure 12–47 Menu on Tablet Dashboard Page**



On this page, you access the functionality of Mobile Point-of-Service:

- **Dashboard** displays the dashboard.
- **Print Last Transaction** reprints the receipt from the last transaction. For more information, see ["Reprinting a Receipt on the Tablet"](#).
- **New Transaction** starts a new transaction on the tablet. For more information, see ["Starting a Transaction on the Tablet"](#).

- **Resume Transaction** enables you to resume a suspended transaction. For more information, see ["Resuming a Suspended Transaction on the Tablet"](#).
- **Order Pickup** enables you to set up customer pickup for an item. For more information, see ["Handling an Order Pickup on the Tablet"](#).
- **Item Lookup** enables you to search for items. For more information, see ["Performing Item Lookup on the Tablet"](#).
- **Gift Card Balance** enables you to check the available balance on a gift card. For more information, ["Performing Gift Card Balance Lookup on the Tablet"](#).
- **Close Till** closes the till currently assigned to the tablet. For more information, see ["Closing the Till on the Tablet"](#).
- **About** displays information about the application and table. For more information, see ["Viewing Application and Tablet Device Information"](#).

### Viewing Application and Tablet Device Information

Information about the Mobile Point-of-Service application and the tablet appear on the About Mobile POS page. To access the page, tap **About**.

**Figure 12–48** About Mobile POS for Tablet Page

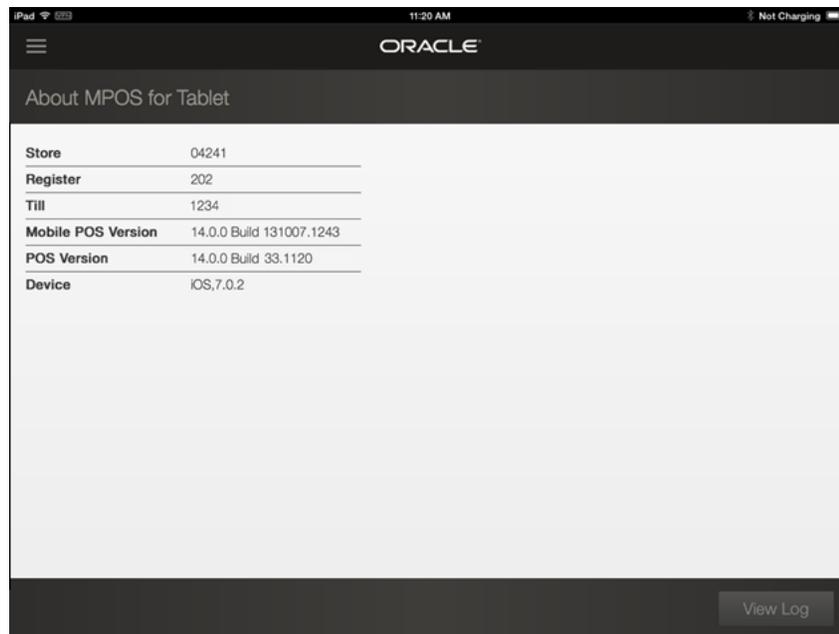


Table 12–2 describes the information shown on this page.

**Table 12–2** Fields on About MPOS for Tablet Page

Field	Description
Store	ID of the store.
Register	ID of the register assigned to the tablet.
Till	ID of the till that is open on the tablet.
Mobile POS version	Version of Mobile Point-of-Service being used.
POS version	Version of Point-of-Service being used.

**Table 12–2 (Cont.) Fields on About MPOS for Tablet Page**

Field	Description
Device	Device type and software version.
Model	Model of the sled.
Manufacturer	Manufacturer of the sled.

When errors occur on the tablet, information is saved in the log. The saved information can be used to help identify and correct the errors.

To view the contents of the log, tap **View Log**. The Log page appears. For an example of log information, see [Figure 12–6](#).

On the Log page, you can do the following:

- To clear the contents of the log, tap **Clear Log**.
- To send email with the contents of the log attached, tap **Email Log**.
- When done viewing the log, tap **Back**. You are returned to the About MPOS for Tablet page.

### Closing the Till on the Tablet

To close the till currently open on the tablet, tap **Close Till**. The till is closed. It must be reconciled at a register or Back Office. When you return to the Basket page, another till is opened on the tablet.

## Performing Transactions on the Tablet

All transactions begin on the Basket page. A transaction is started when an item number is entered on the Basket page. You can enter an item number by scanning the bar code or entering the item number manually.

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. To tender a transaction on the tablet, two options are available:

- Tender on the tablet using a credit card, debit card, or gift card.
- If the customer wants to use any other tenders, suspend the transaction and complete the payment process at a register.

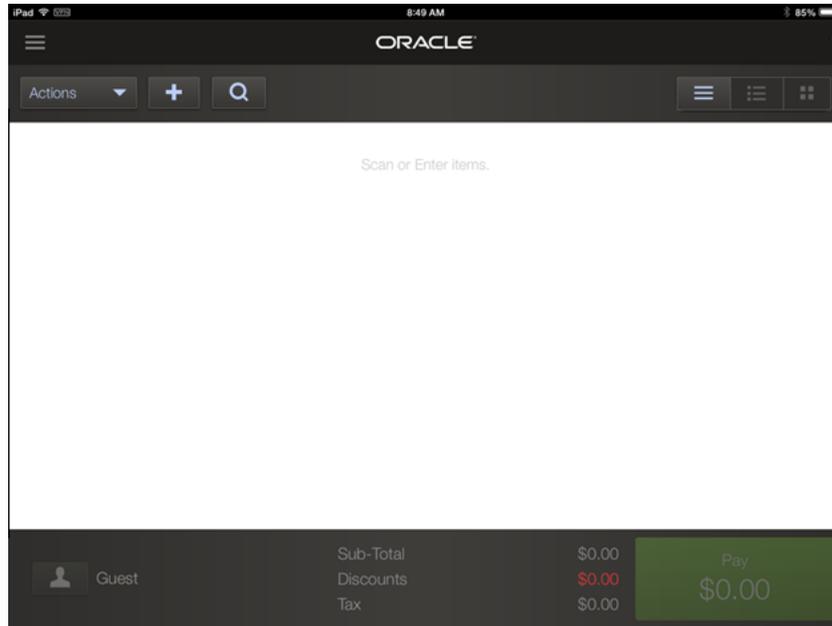
For more information on transactions, see the following sections:

- ["Tendering a Transaction on the Tablet"](#)
- ["Modifying an Item on the Tablet"](#)
- ["Modifying the Transaction on the Tablet"](#)
- ["Suspending a Transaction on the Tablet"](#)
- ["Handling Items that Cannot be Processed on the Tablet"](#)
- ["Cancelling a Transaction on the Tablet"](#)

### Starting a Transaction on the Tablet

To begin a transaction, tap **New Transaction**. The Basket page appears.

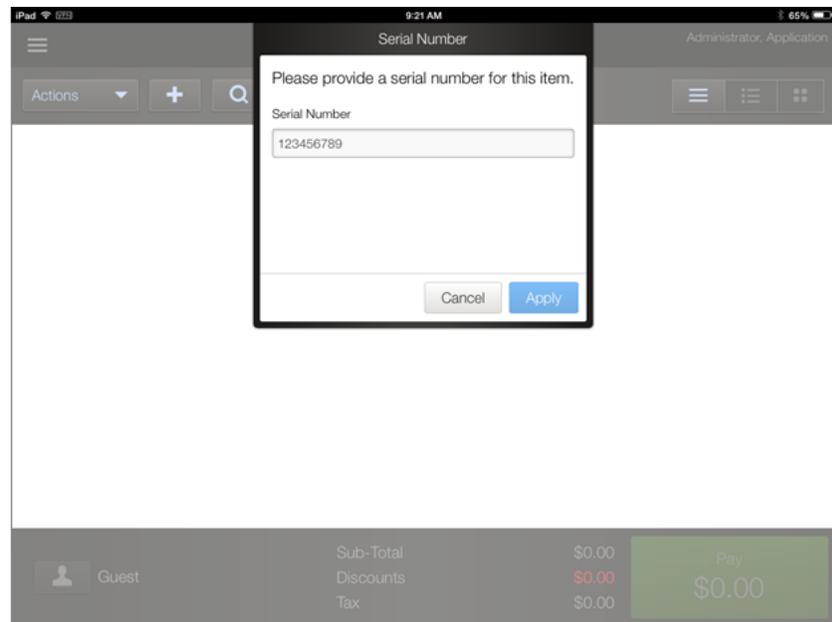
**Figure 12–49 Tablet Basket Page**



To add an item to a transaction:

1. Scan the item number or enter the item number manually. To enter the item number manually:
  - a. Tap the plus sign (+) at the upper-right corner. The Add Item dialog appears.
  - b. Enter the item number and tap **Add Item**.
2. If the item being added to the transaction requires a serial number, the Serial Number dialog appears.

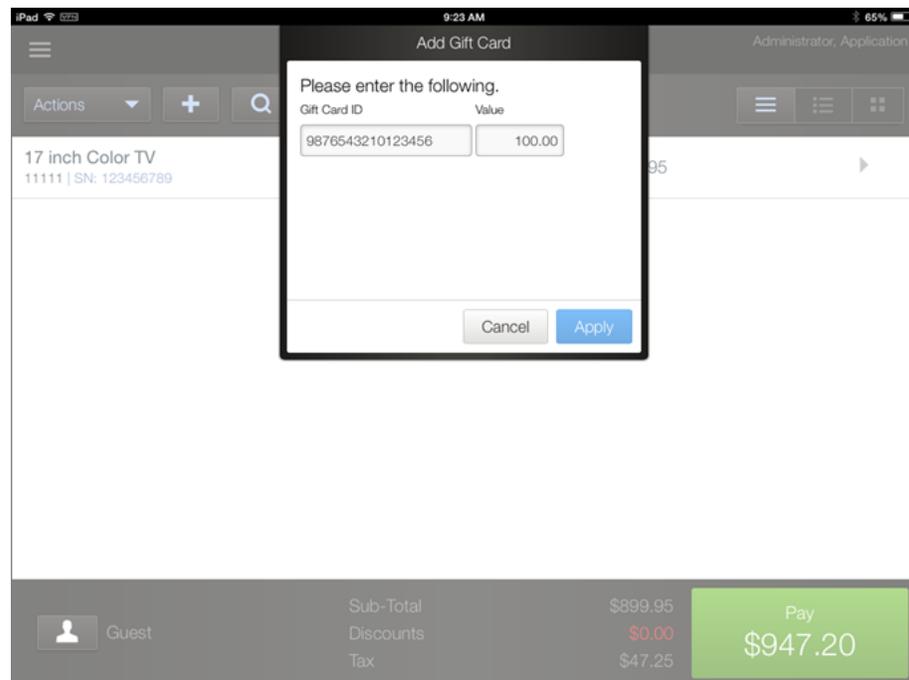
**Figure 12–50 Tablet Serial Number Dialog**



Scan or enter the serial number and tap **Apply**.

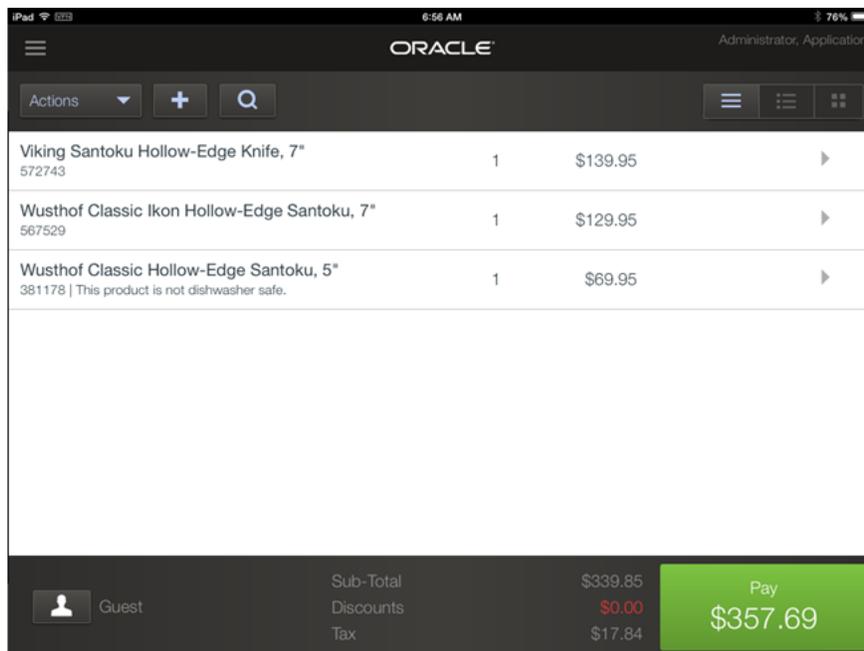
- If the serial number is valid, the item is added to the transaction.
  - If the serial number is not valid, the Add Serial Number page appears:
    - To add the serial number to the system, tap **Add Serial Number**. The item is added to the transaction.
    - To not add the serial number and not add the item to the transaction, tap **Back**.
3. If the item is a gift card and a gift card number is needed, the Add Gift Card dialog appears.

**Figure 12–51** Tablet Add Gift Card Dialog



Enter the gift card number and value. Tap **Apply**. The gift card item is added to the transaction. When the transaction is completed, the gift card is activated.

**Working with Items on the Basket Page on the Tablet** Figure 12–52 shows the Basket page with multiple items added.

**Figure 12–52 Tablet Basket Page with Added Items**

For information on the functionality available on this page, see the following sections:

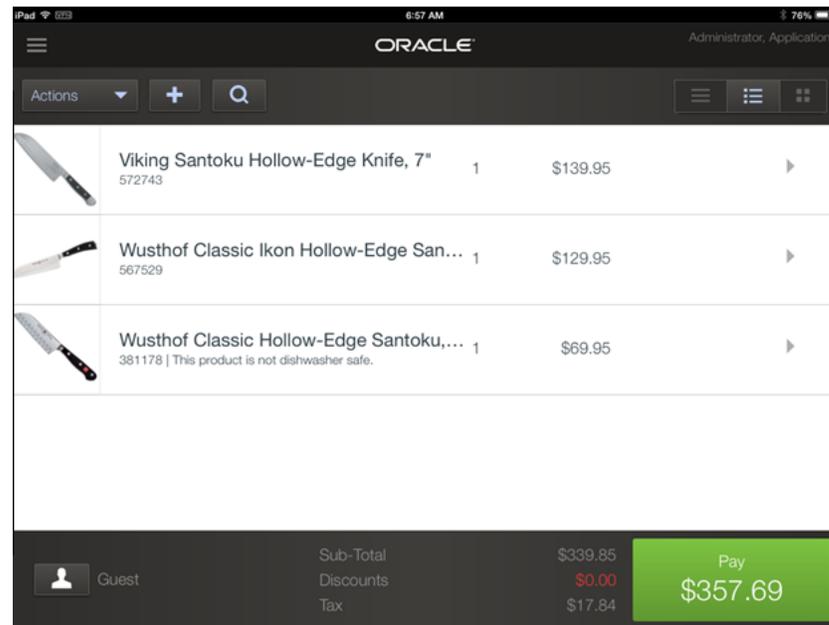
- To view detailed information for an item, see ["Viewing Detailed Item Information on the Tablet"](#).
- To modify an item, see ["Modifying an Item on the Tablet"](#).
- To modify the transaction, see ["Modifying the Transaction on the Tablet"](#).
- To tender the transaction, see ["Tendering a Transaction on the Tablet"](#).

### Viewing Detailed Item Information on the Tablet

Three views are available for the items on the Basket page. To change the view, you tap the appropriate icon on the upper right side of the page:

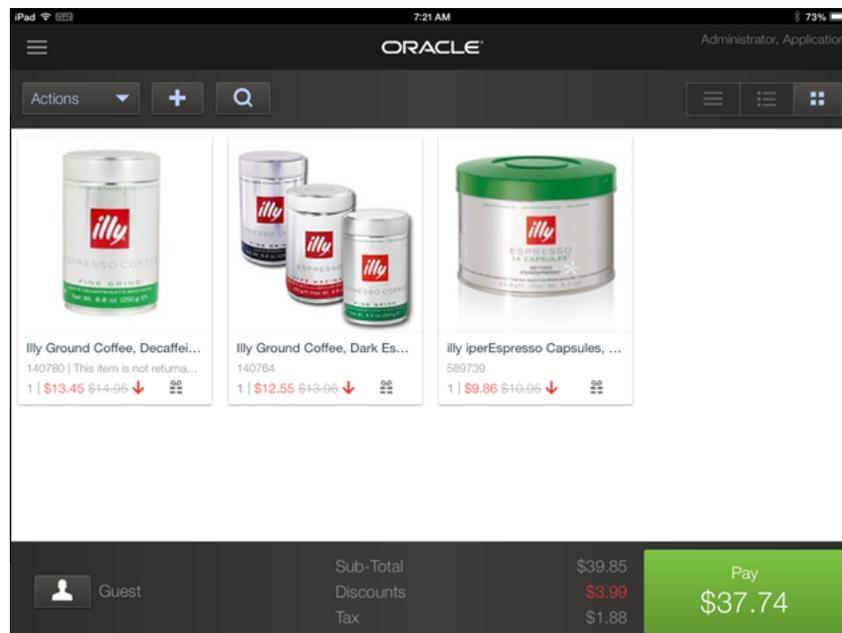
- The first icon shows the list of items as shown in [Figure 12–52](#).
- The second icon show the list of items that includes a tile with a picture of the item if a picture is available.

**Figure 12–53 Tablet Basket Page with Tiles Displayed**



- The third icon shows a detailed view of the items.

**Figure 12–54 Tablet Basket Page with Details Displayed**



If an item image is available, the image appears. The name of the item, price, quantity, applied discounts, linked sales associate, and any item-level messages appear.

## Linking a Customer to the Transaction on the Tablet

Some aspects of a transaction, for example, special pricing, require a customer to be linked to the transaction. For information on the benefits and requirements for linking a customer, see [Chapter 4](#).

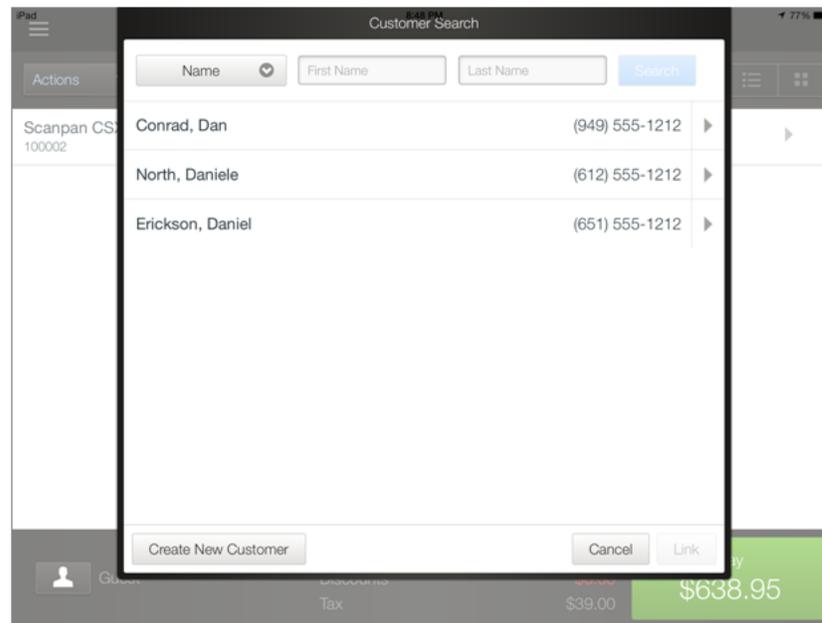
To link a customer to the transaction:

1. Tap the customer icon on the Basket page. The Customer Search dialog appears.

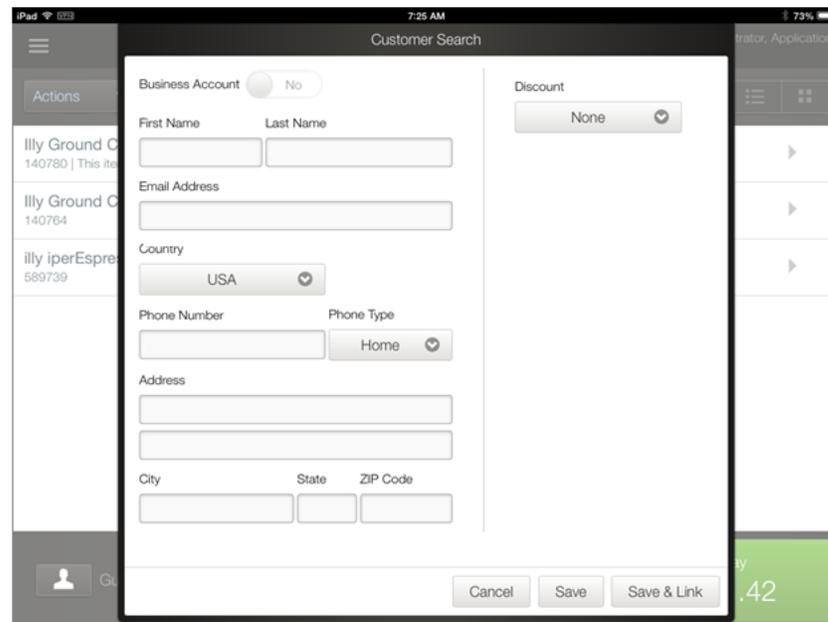
**Figure 12–55** Tablet Customer Search Dialog



2. To search for a customer:
  - a. Enter the customer ID or customer information and tap **Search**. If one match is found, that customer is linked to the transaction. If more than one match is found, the Customer Search dialog is updated with the list of customers who match the search criteria.

**Figure 12–56 Tablet Customer Search Dialog with Results**

- b. Tap the customer you want to link to the transaction and tap **Link**.
3. To add a customer:
  - a. Tap **Create New Customer**. The Customer Search dialog is updated with the input fields. Select whether this is a business account. Enter the customer information.

**Figure 12–57 Tablet Customer Search Dialog with Input Fields**

- b. To save the customer, tap **Save**. To save and link the customer to the transaction, tap **Save & Link**.

- c. If matches are found for the customer information, the Customer Search page appears with the list of customers that matched the customer information. Select a customer from the list. Tap the customer you want to link to the transaction and tap **Link**.

### Tendering a Transaction on the Tablet

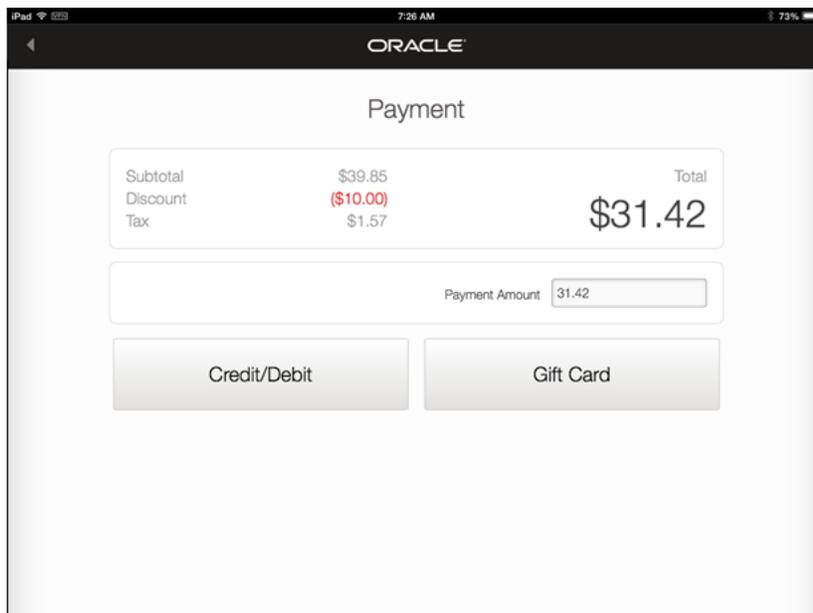
After all items for a transaction have been added, you can tender the transaction. To tender a transaction on the tablet, two options are available:

- Tender on the tablet using a credit card, debit card, or gift card.
- Suspend the transaction and tender at a register. To suspend the transaction, see ["Suspending a Transaction on the Tablet"](#).

To tender a transaction:

1. Tap **Pay** on the Basket page. The Payment page appears.

**Figure 12–58 Tablet Payment Page**



2. Enter the payment amount.
3. To tender with a credit card or debit card, tap **Credit/Debit**. To tender with a gift card, tap **Gift Card**.

---

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

---

4. Swipe the card on the pin pad. The authorization process begins automatically.
5. Handle the result of the authorization:

---

**Note:** If the card is not approved, follow the prompts to handle the reason for the non-approval.

---

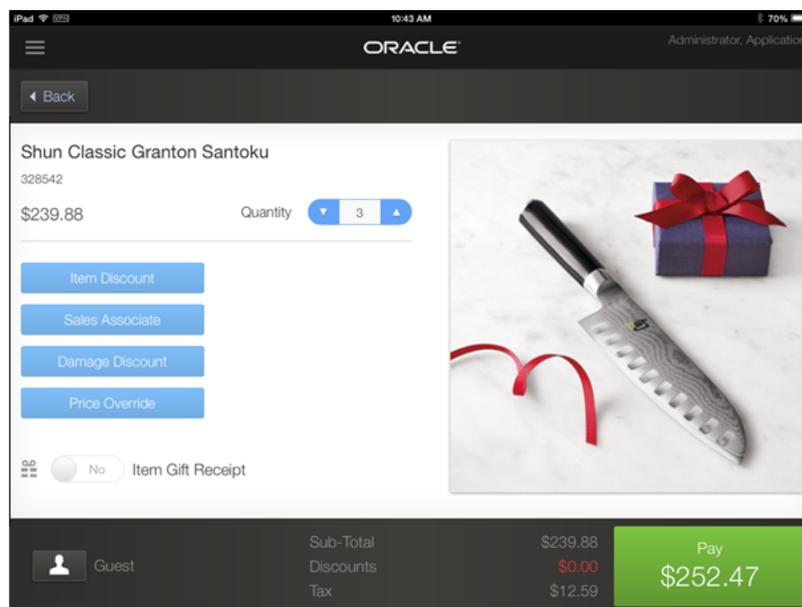
- If the authorization is approved for a credit card or debit card:

- If the balance is zero for the transaction, the customer is prompted to provide a signature on the pin pad. When the customer completes providing the signature, the Receipt page appears. See ["Printing a Receipt on the Tablet"](#).
- If there is a balance remaining for the transaction, the customer is prompted to provide a signature on the pin pad. When the customer completes providing the signature, the Payment page appears so you can process the next tender. See Step 2.
- If the authorization is approved for a gift card:
  - If the balance is zero for the transaction, the Receipt page appears. See ["Printing a Receipt on the Tablet"](#).
  - If there is a balance remaining for the transaction, the Payment page appears so you can process the next tender. See Step 2.

### Modifying an Item on the Tablet

To modify an item, tap the item on the Basket page. The Modify Item Page appears.

**Figure 12–59** Tablet Modify Item Page



To modify the item, you can do the following:

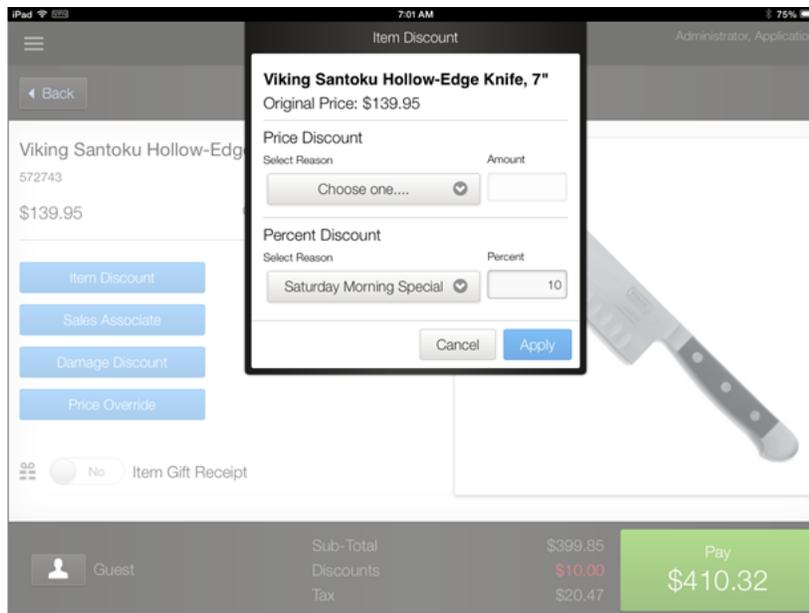
- To increase the quantity, tap the up arrow for the Quantity. To decrement the quantity, tap the down arrow.
- To apply a discount to the item, see ["Applying a Discount to an Item on the Tablet"](#).
- To link the sales associate to the item, see ["Modifying the Sales Associate on the Tablet"](#).
- To apply a damage discount to the item, see ["Applying a Damage Discount to an Item on the Tablet"](#).
- To override the current price of the item, see ["Overriding the Price on the Tablet"](#).

- To include a gift receipt for the item, set the field to Yes. Otherwise, set the field to No.
- To close the options, tap **Back**.

**Applying a Discount to an Item on the Tablet** You can apply both a discount amount and percent. To apply a discount to an item:

1. On the Modify Item page, tap **Item Discount**. The Item Discount dialog appears.

**Figure 12–60 Tablet Item Discount Dialog**



2. To apply a price discount, enter a discount amount. Tap the Select Reason field and select a reason code for the discount amount.
3. To apply a percent discount, enter a discount percent. Tap the Select Reason field and select a reason code for the percent.
4. Tap **Apply**. The price of the item is changed. You are returned to the Modify Item page.

**Modifying the Sales Associate on the Tablet** To change the sales associate linked to an item:

1. On the Modify Item page, tap **Sales Associate**. The Sales Associate ID dialog appears.
2. Enter the sales associate user name and tap **Apply**. The linked sales associate is changed. You are returned to the Modify Item page.

**Applying a Damage Discount to an Item on the Tablet** You can apply both a damage discount amount and percent. To apply a damage discount to an item:

1. On the Modify Item page, tap **Damage Discount**. The Damage Discount dialog appears.
2. To apply a discount amount, enter a discount amount.
3. To apply a discount percent, enter a discount percent.

4. Tap **Apply**. The price of the item is changed. You are returned to the Modify Item page.

**Overriding the Price on the Tablet** To override the current price of the item:

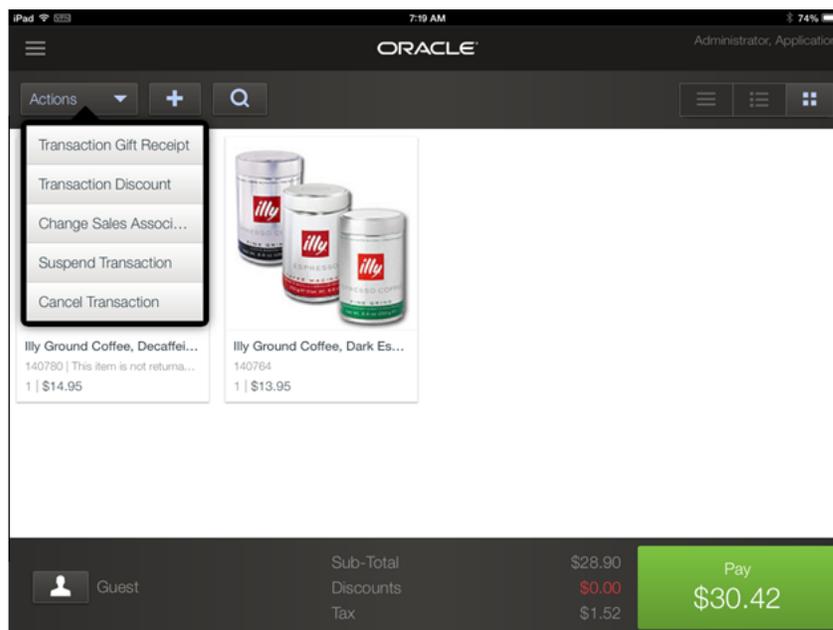
1. On the Modify Item page, tap **Price Override**. The Price Override dialog appears.
2. Enter the new price.
3. Tap the Select Reason field and select a reason code for the override.
4. Tap **Apply**. The price of the item is changed. You are returned to the Modify Item page.

### Modifying the Transaction on the Tablet

Once items have been added to a transaction, you can modify the transaction.

To make changes to the entire transaction, tap Actions on the Basket page. The modify transaction options appear.

**Figure 12–61** Tablet Modify Transaction Page



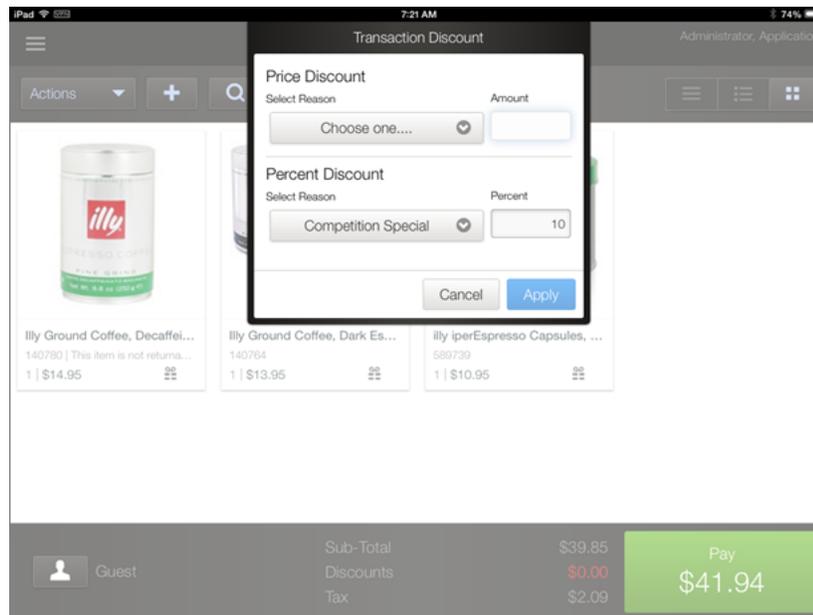
Tap the transaction option to be changed:

- To add a gift receipt for the transaction, tap **Transaction Gift Receipt**. One gift receipt is printed for all the items in the transaction when the transaction is completed.
- To apply a discount to the transaction, see ["Applying a Discount to the Transaction on the Tablet"](#).
- To change the sales associate linked to the transaction, see ["Modifying the Sales Associate on the Tablet"](#).
- To suspend the transaction, see ["Suspending a Transaction on the Tablet"](#).
- To cancel the transaction, see ["Cancelling a Transaction on the Tablet"](#).

**Applying a Discount to the Transaction on the Tablet** You can apply both a discount amount and percent. To apply a discount to the transaction:

1. On the Modify Transaction page, tap **Transaction Discount**. The Transaction Discount dialog appears.

**Figure 12–62 Tablet Transaction Discount Dialog**



2. To apply a price discount, enter a discount amount. Tap the Select Reason field and select a reason code for the discount amount.
3. To apply a percent discount, enter a discount percent. Tap the Select Reason field and select a reason code for the percent.
4. Tap **Apply**. The discount is applied to the transaction. You are returned to the Modify Transaction page.

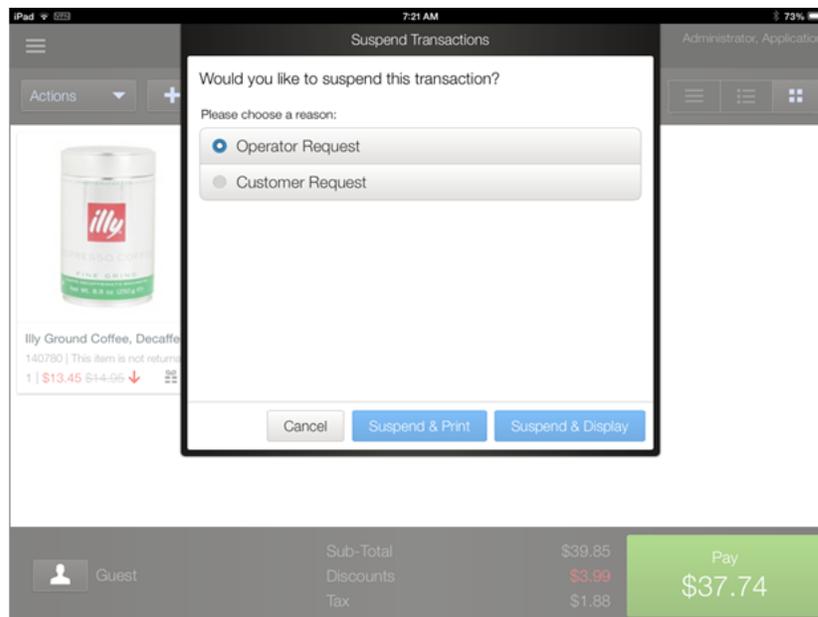
**Modifying the Sales Associate on the Tablet** To change the sales associate linked to the transaction:

1. On the Modify Transaction page, tap **Change Sales Associate**. The Sales Associate dialog appears.
2. Enter the sales associate number and tap **Apply**. The sales associate linked to the transaction is changed. You are returned to the Modify Transaction page.

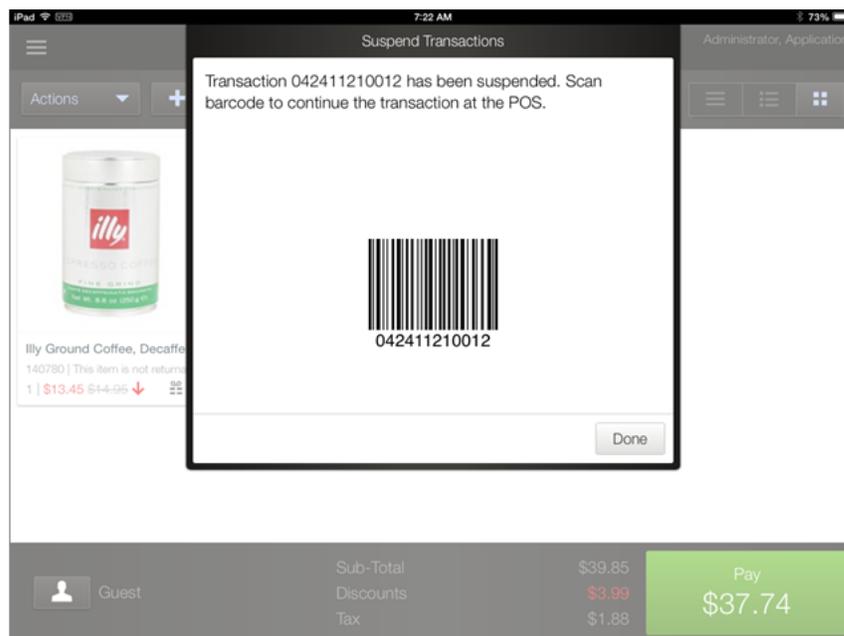
**Suspending a Transaction on the Tablet** Suspend a transaction if it is interrupted or cannot be completed, such as when the customer offers a tender not supported on the tablet. A suspend transaction receipt prints, which the customer takes to a register to complete the transaction.

To suspend a transaction:

1. On the Modify Transaction page, tap **Suspend Transaction**. The Suspend Transaction dialog appears.

**Figure 12–63 Tablet Suspend Transaction Dialog**

2. Tap the reason code you want to choose.
3. Complete suspending the transaction:
  - To suspend the transaction and display the transaction ID, tap **Suspend & Display**. The Suspended Transaction dialog appears. When done viewing the page, tap **Done**.

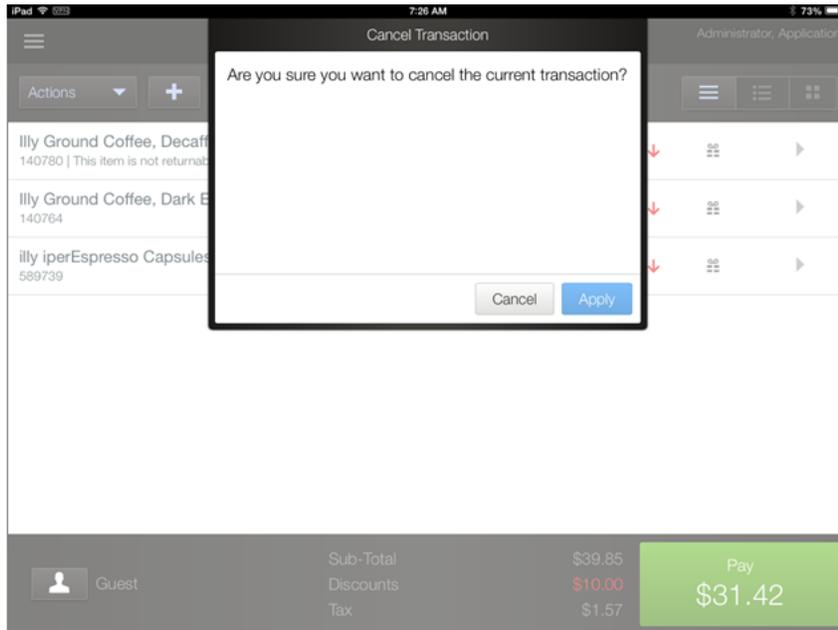
**Figure 12–64 Tablet Suspended Transaction Dialog**

- To suspend the transaction and print a receipt with the transaction ID, tap **Suspend & Print**. A suspended transaction receipt prints. The Receipt page appears with the location where the receipt is printing. See [Figure 12–68](#).

- To return to the previous page without suspending the transaction, tap **Cancel**.

**Canceling a Transaction on the Tablet** You can cancel the transaction in-progress from any page where the Cancel icon appears. To cancel a transaction, tap **Cancel Transaction**. The Cancel Transaction dialog appears.

**Figure 12–65 Tablet Cancel Page**



- To cancel the transaction, tap **Apply**. The transaction is ended and the Basket page appears.
- To return to the previous page, tap **Cancel**. You can continue with the transaction.

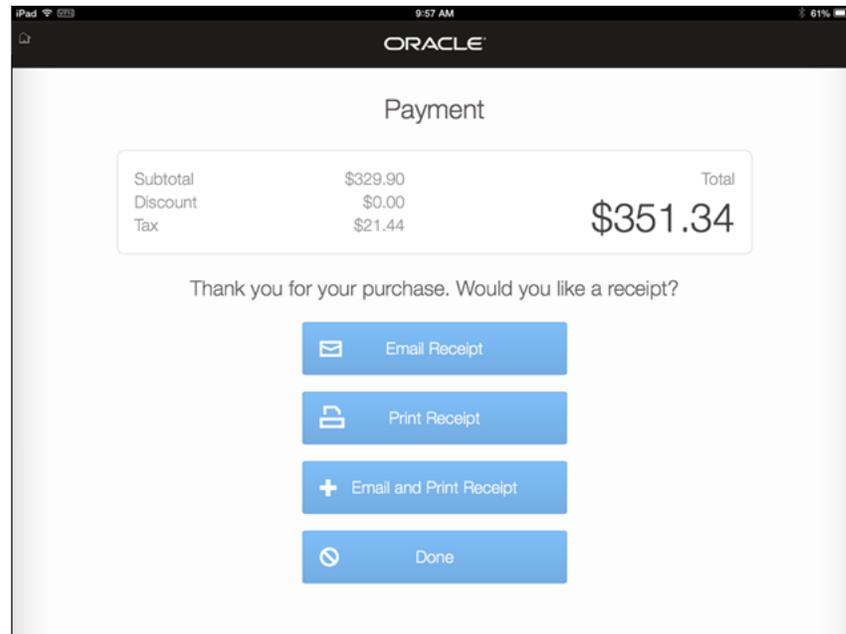
### Handling Items that Cannot be Processed on the Tablet

Some items cannot be handled on the tablet. For example, if an item has an age restriction, the age information must be entered at a register. If an item is scanned that requires processing at a register, the Cannot Process Item page appears:

- To delete the item and continue with the transaction, tap **Continue**. The Basket page appears.
- To suspend the transaction so the item can be processed at a register, tap **Suspend**. See "[Suspending a Transaction on the Tablet](#)".
- To cancel the transaction, tap **Cancel**. See "[Canceling a Transaction on the Tablet](#)".

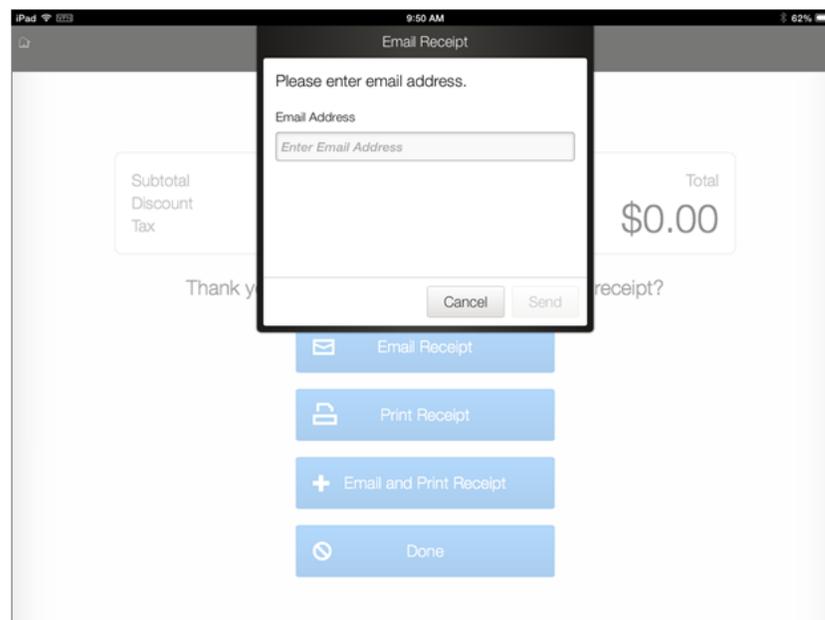
### Printing a Receipt on the Tablet

When payment for a transaction is completed, the Receipt page appears.

**Figure 12–66 Tablet Receipt Page**

Select how you want to handle the receipt:

- To print the receipt at a network printer, tap **Print Receipt**. The receipt is printed.
- To send the receipt in an email to the customer, tap **Email Receipt**. The Email Receipt dialog appears. Enter the email address for the customer and tap **Send**. If an invalid address is entered, an error message appears. You can enter another email address. To return to the Receipt page to choose another option, tap **Cancel**.

**Figure 12–67 Tablet Email Receipt Dialog**

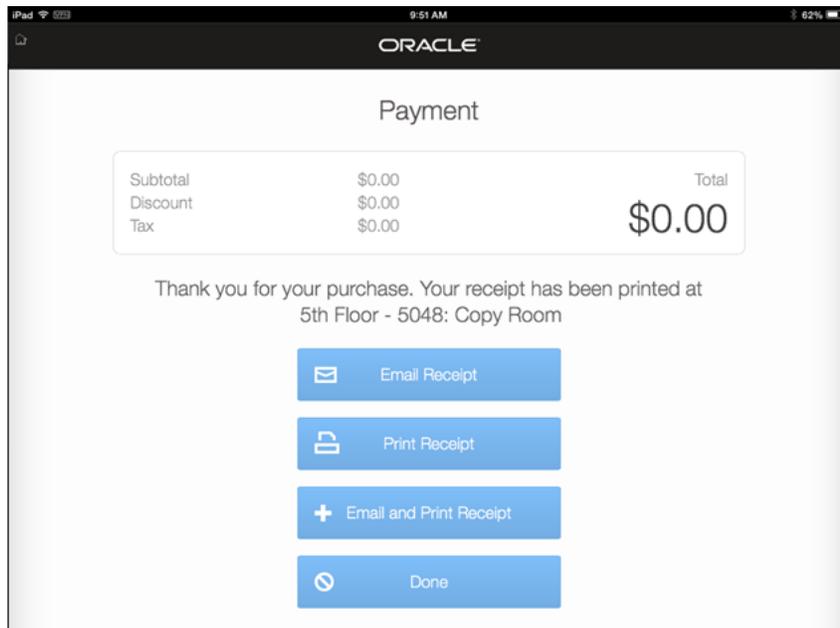
- To both print the receipt and send it in an email, tap **Email and Print Receipt**. The location where the receipt is printing appears. The Email Receipt page appears.

Enter the email address for the customer and tap **Send**. If an invalid address is entered, an error message appears. You can enter another email address. To return to the Receipt page to choose another option, tap **Cancel**.

When you have completed processing the receipt, the page is updated:

- If the receipt is printed, the location where the receipt was printed is shown.
- If the receipt is sent in an email to the customer, the email address is shown.

**Figure 12–68** Tablet Receipt Printed Page



- If the customer does not want a receipt or you are done processing the receipt, tap **Done**.

### Reprinting a Receipt on the Tablet

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**Note:** You can only reprint the receipt for the last transaction.

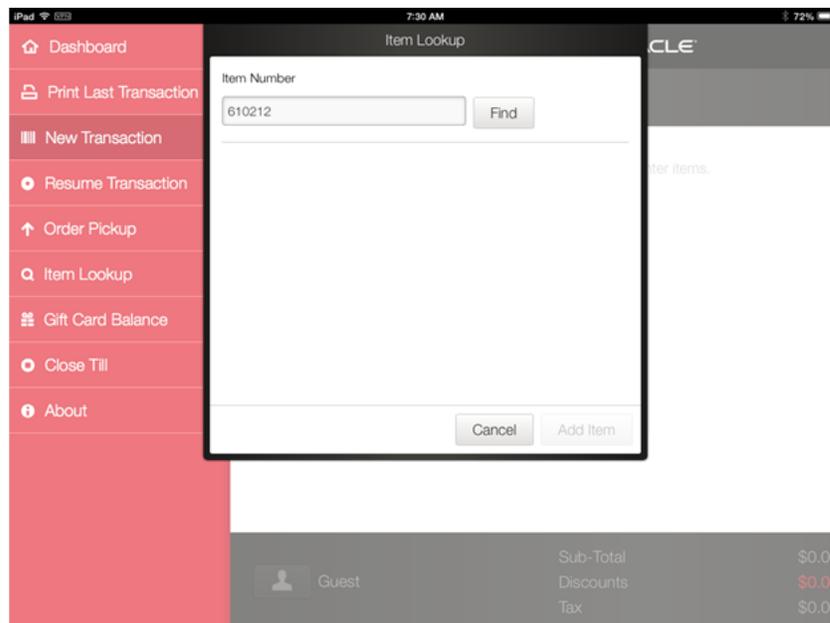
---

To reprint a receipt for the last transaction, tap **Print Last Transaction** on the Basket page. The Print Last Transaction dialog appears. To reprint the receipt, tap **Print Last Transaction**. The location where the receipt printed is shown.

### Performing Item Lookup on the Tablet

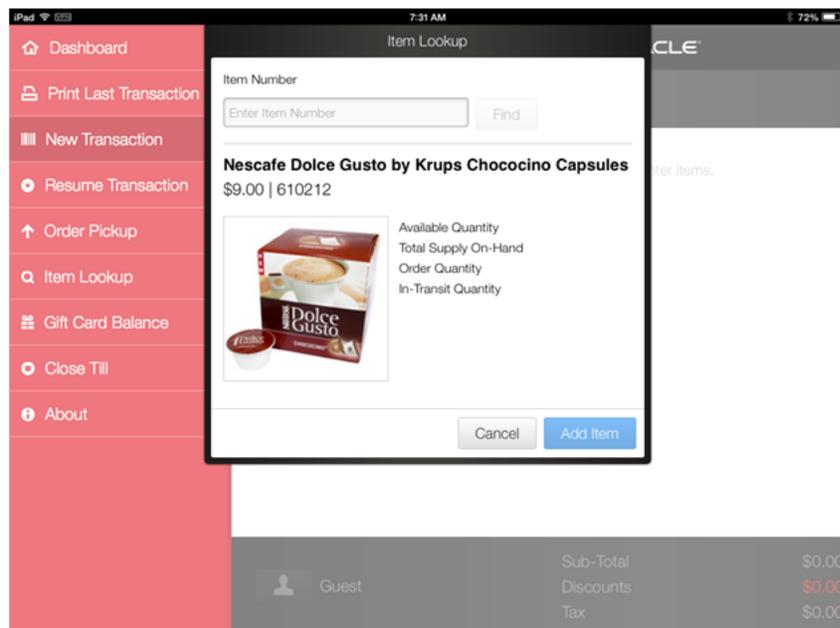
To perform an item lookup:

1. On the Basket page, tap **Item Lookup**. The Item Lookup dialog appears.

**Figure 12–69 Tablet Item Lookup Dialog**

2. Scan the item number or manually enter the item number and tap **Find**.

The dialog is updated with the available item information, such as, item number, description, price, available quantity at the current store, and buddy stores with available quantity. If you do multiple searches, drag your finger across the page to view previous results.

**Figure 12–70 Tablet Item Lookup Dialog with Details**

3. You can perform the following functions:
  - To add the item to the current transaction, tap **Add Item**. The Basket page appears with the item added to the transaction.

- To return to the Basket page without adding the item, tap **Cancel**.

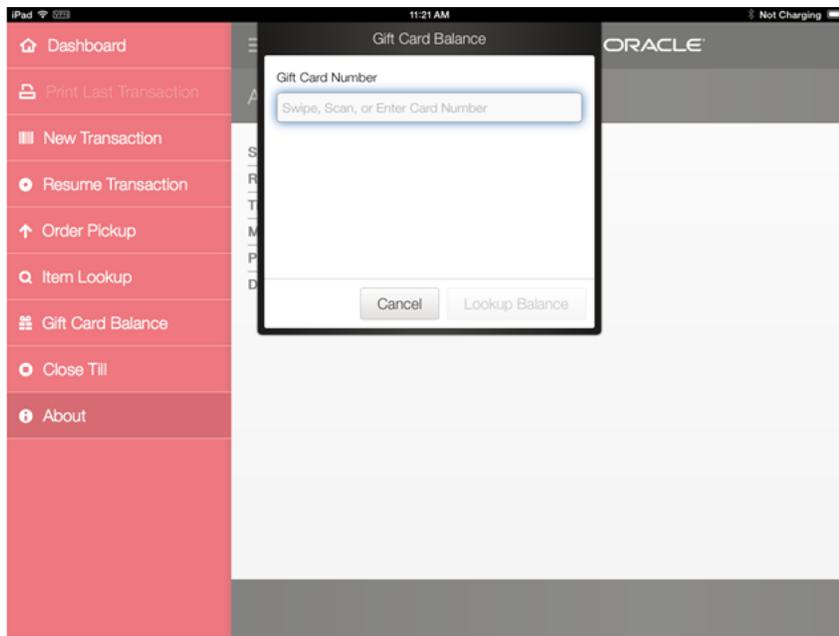
### Performing Gift Card Balance Lookup on the Tablet

You can look up the balance remaining on a gift card.

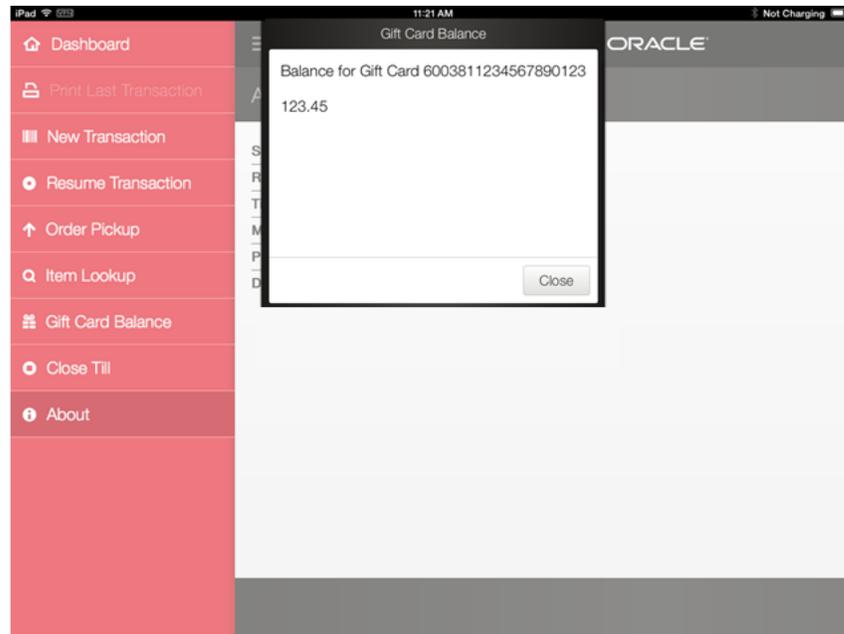
To look up the balance on a gift card:

1. On the Basket page, tap **Gift Card Balance**. The Gift Card Balance dialog appears.

**Figure 12–71** Tablet Gift Card Balance Dialog



2. Scan, swipe, or enter the gift card number and tap **Lookup Balance**. The gift card balance appears.

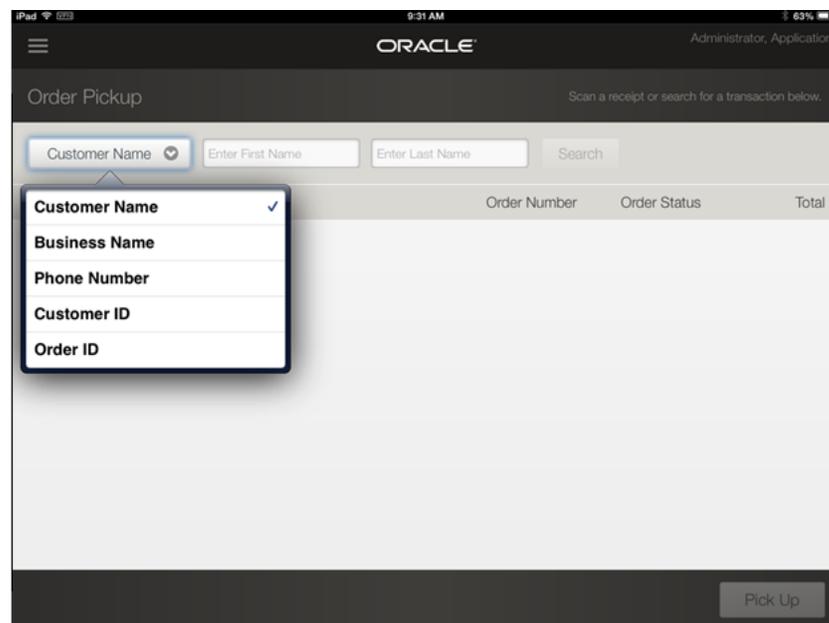
**Figure 12–72 Tablet Gift Card Balance Dialog with Results**

3. When you are done viewing the results, tap **Close** to return to the Basket page.

## Handling an Order Pickup on the Tablet

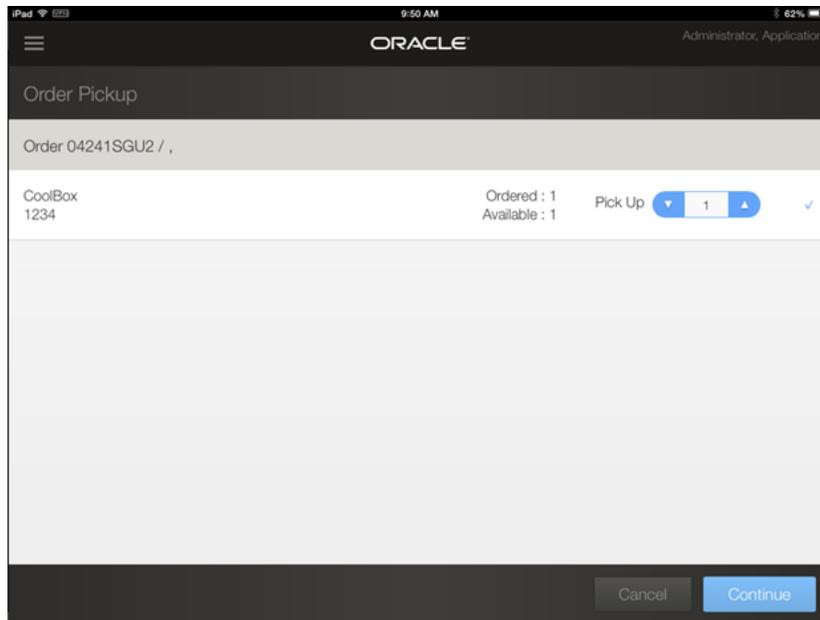
Orders that have been placed at a register or created at a web site, can be filled on a mobile device. To fill an order to be picked up:

1. On the Basket page, tap **Order Pickup**. The Order Pickup page appears.

**Figure 12–73 Tablet Order Pickup Page**

2. Scan the order receipt, enter the order ID, or enter the customer information to search for the order. The Order Pickup page appears with the list of available orders matching the search information.

**Figure 12–74 Handheld Order Pickup Page**

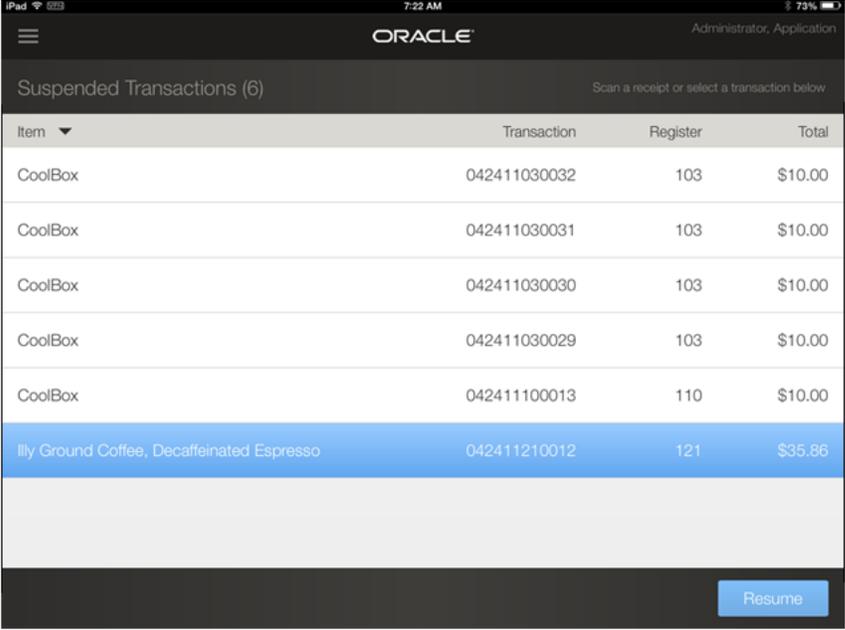


3. To select an order for pick up, tap the order.
4. Select the quantity in the Pick Up field. To increase the quantity, tap the up arrow. To decrease the quantity, tap the down arrow.
5. When you have completed filling orders, tap **Continue**. You are returned to the Basket page.

## Resuming a Suspended Transaction on the Tablet

You can resume sale transactions that have been suspended on a mobile device or at a register. To resume a suspended sale transaction:

1. On the Basket page, tap **Resume Transaction**. The Suspended Transaction page appears.
2. Select the transaction:
  - Scan or enter the transaction number and tap **Resume**.
  - If more than one transaction is listed, tap the transaction to be retrieved and tap **Resume**.

**Figure 12-75 Tablet Suspended Transaction Page**

The screenshot shows the Oracle Tablet interface for suspended transactions. The header includes the Oracle logo and the user role 'Administrator, Application'. The page title is 'Suspended Transactions (6)' with a sub-header 'Scan a receipt or select a transaction below'. The table lists the following transactions:

Item	Transaction	Register	Total
CoolBox	042411030032	103	\$10.00
CoolBox	042411030031	103	\$10.00
CoolBox	042411030030	103	\$10.00
CoolBox	042411030029	103	\$10.00
CoolBox	042411100013	110	\$10.00
Ily Ground Coffee, Decaffeinated Espresso	042411210012	121	\$35.86

A 'Resume' button is located at the bottom right of the screen.

The suspended transaction is resumed. The transaction details appear on the Basket page. You can complete, change, or cancel the transaction.



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## 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 automatically prints:
  - At the completion of reconciling a till, the Till Summary Report prints.
  - At the completion of closing a register, the Register Summary Report prints. 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 prints. 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, orders, and bill payments. 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.

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**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 POS Suite Configuration Guide*.

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## 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                   2    865.45
Counted               2    865.45

Over/Short          0.00

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

Over/Short          0.00

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

Over/Short          0.00

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

=====  
=====

House Account Enrollment Summary

House Account Applications	Count
Approved	0
Declined	0

=====  
=====



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"> <li>■ Gross cash</li> <li>■ Till loans</li> <li>■ Till pay-ins</li> </ul>
	Out	Total of the following amounts: <ul style="list-style-type: none"> <li>■ Gross cash out</li> <li>■ Change</li> <li>■ Till pickups</li> <li>■ Till payouts</li> <li>■ Debit cards post-voided to cash (Void Debit to Cash parameter is set to Yes)</li> <li>■ e-Checks post-voided</li> <li>■ Money orders post-voided</li> <li>■ Cash refunds</li> <li>■ e-Checks returned</li> </ul>
	Net	Cash In minus Cash Out.
	Counted	Count entered by the cashier.
	Over/Short	Counted minus Net.
e-Check	In	<ul style="list-style-type: none"> <li>■ Total number of e-Check tenders.</li> <li>■ Total amount of e-Check tenders.</li> </ul>
	Out	<ul style="list-style-type: none"> <li>■ Total number of e-Checks post-voided.</li> <li>■ Total amount of e-Checks post-voided.</li> </ul>
	Net	e-Check In minus e-Check Out.
	Counted	N/A
	Over/Short	Always 0.00

**Table A-3 (Cont.) Tender Summary**

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

**Table A-3 (Cont.) Tender Summary**

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

**Table A-3 (Cont.) Tender Summary**

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

**Table A-3 (Cont.) Tender Summary**

<b>Tender</b>	<b>Report Line</b>	<b>Description</b>
Gift Card	In	<ul style="list-style-type: none"> <li>■ Total number of Gift Cards tendered or redeemed.</li> <li>■ Total amount of Gift Cards tendered or redeemed.</li> </ul>
	Out	Total of the following counts: <ul style="list-style-type: none"> <li>■ Number of Gift Cards post-voided</li> <li>■ Number of Gift Cards issued as change</li> <li>■ Number of Gift Cards issued as refunds</li> <li>■ Number of post-voided Gift Card redeems</li> </ul> Total of the following amounts: <ul style="list-style-type: none"> <li>■ Gift Cards post-voided</li> <li>■ Gift Cards issued as change</li> <li>■ Gift Cards issued as refunds</li> <li>■ Post-voided Gift Card redeems</li> </ul>
	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"> <li>■ Total number of Gift Certificates tendered or redeemed.</li> <li>■ Total amount of Gift Certificates tendered or redeemed.</li> </ul>
	Out	Total of the following counts: <ul style="list-style-type: none"> <li>■ Number of Gift Certificates post-voided</li> <li>■ Number of Gift Certificates issued as change</li> <li>■ Number of post-voided Gift Certificate redeems</li> </ul> Total of the following amounts: <ul style="list-style-type: none"> <li>■ Gift Certificates post-voided</li> <li>■ Gift Certificates issued as change</li> <li>■ Post-voided Gift Certificate redeems</li> </ul>
	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"> <li>■ Total number of Traveler's Checks tendered.</li> <li>■ Total amount of Traveler's Checks tendered.</li> </ul>
	Out	<ul style="list-style-type: none"> <li>■ Total number of Traveler's Checks post-voided.</li> <li>■ Total amount of Traveler's Checks post-voided.</li> </ul>
	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**

<b>Tender</b>	<b>Report Line</b>	<b>Description</b>
Non-Store Coupon	In	<ul style="list-style-type: none"> <li>■ Total number of Non-Store Coupons tendered.</li> <li>■ Total face value of Non-Store Coupons tendered.</li> </ul>
	Out	<ul style="list-style-type: none"> <li>■ Total number of Non-Store Coupons post-voided.</li> <li>■ Total face value of Non-Store Coupons post-voided.</li> </ul>
	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"> <li>■ Total number of Store Credits tendered or redeemed.</li> <li>■ Total face value of Store Credits tendered or redeemed.</li> </ul>
	Out	<p>Total of the following counts:</p> <ul style="list-style-type: none"> <li>■ Number of Store Credits issued as change</li> <li>■ Number of Store Credits issued as refunds</li> <li>■ Number of Store Credits post-voided</li> <li>■ Number of post-voided Store Credits redeemed</li> </ul> <p>Total face value of the following amounts:</p> <ul style="list-style-type: none"> <li>■ Store Credits issued as change</li> <li>■ Store Credits issued as refunds</li> <li>■ Store Credits post-voided</li> <li>■ Post-voided Store Credits redeemed</li> </ul>
	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"> <li>■ Total number of Mall Gift Certificates tendered or redeemed.</li> <li>■ Total amount of Mall Gift Certificates tendered or redeemed.</li> </ul>
	Out	<p>Total of the following counts:</p> <ul style="list-style-type: none"> <li>■ Number of Mall Gift Certificates post-voided</li> <li>■ Number of Mall Gift Certificates redeemed and then post-voided</li> </ul> <p>Total of the following amounts:</p> <ul style="list-style-type: none"> <li>■ Mall Gift Certificates post-voided</li> <li>■ Mall Gift Certificates redeemed and then post-voided</li> </ul>
	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**

<b>Tender</b>	<b>Report Line</b>	<b>Description</b>
PO Tender	In	Total of the following counts: <ul style="list-style-type: none"> <li>■ Number of purchase order tenders</li> <li>■ Number of Mall Gift Certificates, used as purchase orders, collected for payment</li> </ul> Total of the following amounts: <ul style="list-style-type: none"> <li>■ Purchase order tenders</li> <li>■ Mall Gift Certificates, used as purchase orders, collected for payment</li> </ul>
	Out	Total of the following counts: <ul style="list-style-type: none"> <li>■ Number of purchase order tenders post-voided</li> <li>■ Number of Mall Gift Certificates, used as purchase orders, post-voided</li> </ul> Total of the following amounts: <ul style="list-style-type: none"> <li>■ Purchase order tenders post-voided</li> <li>■ Mall Gift Certificates, used as purchase orders, post-voided</li> </ul>
	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"> <li>■ Total number of Money Orders collected for payment.</li> <li>■ Total amount of Money Orders collected for payment.</li> </ul>
	Out	<ul style="list-style-type: none"> <li>■ Total number of Money Orders post-voided.</li> <li>■ Total amount of Money Orders post-voided.</li> </ul>
	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**

<b>Tender</b>	<b>Report Line</b>	<b>Description</b>
e-Check (alternate currency label)	In	<ul style="list-style-type: none"> <li>■ Total number of alternate currency e-Checks.</li> <li>■ Total amount of alternate currency e-Checks.</li> </ul>
	Out	<ul style="list-style-type: none"> <li>■ Total number of alternate currency e-Checks post-voided and picked up.</li> <li>■ Total amount of alternate currency e-Checks post-voided and picked up.</li> </ul>
	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"> <li>■ Total number of the alternate currency checks.</li> <li>■ Total amount of the alternate currency checks.</li> </ul>
	Out	<ul style="list-style-type: none"> <li>■ Total number of alternate currency checks post-voided and picked up.</li> <li>■ Total amount of alternate currency checks post-voided and picked up.</li> </ul>
	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"> <li>■ Total number of alternate currency Gift Certificates tendered or redeemed.</li> <li>■ Total amount of alternate currency Gift Certificates tendered or redeemed.</li> </ul>
	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"> <li>■ Total number of alternate currency Store Credits tendered or redeemed.</li> <li>■ Total face value of alternate currency Store Credits tendered or redeemed.</li> </ul>
	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**

<b>Tender</b>	<b>Report Line</b>	<b>Description</b>
Trav Checks (alternate currency label)	In	<ul style="list-style-type: none"> <li>■ Total number of alternate currency Traveler's Checks tendered.</li> <li>■ Total amount of alternate currency Traveler's Checks tendered.</li> </ul>
	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"> <li>■ Total number of Gift Certificates in United States Dollars tendered or redeemed when United States Dollars is not the base or alternate currency.</li> <li>■ Total amount of Gift Certificates in United States Dollars tendered or redeemed when United States Dollars is not the base or alternate currency.</li> </ul>
	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"> <li>■ Total number of Store Credits in United States Dollars tendered or redeemed when United States Dollars is not the base or alternate currency.</li> <li>■ Total face value of Store Credits in United States Dollars tendered or redeemed when United States Dollars is not the base or alternate currency.</li> </ul>
	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**

<b>Tender</b>	<b>Report Line</b>	<b>Description</b>
Gift Certificate (CAD)	In	<ul style="list-style-type: none"> <li>■ Total number of Gift Certificates in Canadian Dollars tendered or redeemed when Canadian dollars is not the base or alternate currency.</li> <li>■ Total amount of Gift Certificates in Canadian Dollars tendered or redeemed when Canadian dollars is not the base or alternate currency.</li> </ul>
	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"> <li>■ Total number of Store Credits in Canadian Dollars tendered or redeemed when Canadian Dollars is not the base or alternate currency.</li> <li>■ Total face value of Store Credits in Canadian Dollars tendered or redeemed when Canadian Dollars is not the base or alternate currency.</li> </ul>
	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"> <li>■ Total number of Gift Certificates in Mexican Pesos tendered or redeemed when Mexican Pesos is not the base or alternate currency.</li> <li>■ Total amount of Gift Certificates in Mexican Pesos tendered or redeemed when Mexican Pesos is not the base or alternate currency.</li> </ul>
	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**

<b>Tender</b>	<b>Report Line</b>	<b>Description</b>
Store Credit (MXN)	In	<ul style="list-style-type: none"> <li>■ Total number of Store Credits in Mexican Pesos tendered or redeemed when Mexican Pesos is not the base or alternate currency.</li> <li>■ Total face value of Store Credits in Mexican Pesos tendered or redeemed when Mexican Pesos is not the base or alternate currency.</li> </ul>
	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"> <li>■ Total number of Gift Certificates in United Kingdom Pounds tendered or redeemed when United Kingdom Pounds is not the base or alternate currency.</li> <li>■ Total amount of Gift Certificates in United Kingdom Pounds tendered or redeemed when United Kingdom Pounds is not the base or alternate currency.</li> </ul>
	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"> <li>■ Total number of Store Credits in United Kingdom Pounds tendered or redeemed when United Kingdom Pounds is not the base or alternate currency.</li> <li>■ Total face value of Store Credits in United Kingdom Pounds tendered or redeemed when United Kingdom Pounds is not the base or alternate currency.</li> </ul>
	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**

<b>Tender</b>	<b>Report Line</b>	<b>Description</b>
Gift Certificate (EUR)	In	<ul style="list-style-type: none"> <li>■ Total number of Gift Certificates in Euros tendered or redeemed when Euros is not the base or alternate currency.</li> <li>■ Total amount of Gift Certificates in Euros tendered or redeemed when Euros is not the base or alternate currency.</li> </ul>
	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"> <li>■ Total number of Store Credits in Euros tendered or redeemed when Euros is not the base or alternate currency.</li> <li>■ Total face value of Store Credits in Euros tendered or redeemed when Euros is not the base or alternate currency.</li> </ul>
	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"> <li>■ Total number of Gift Certificates in Japanese Yen tendered or redeemed when Japanese Yen is not the base or alternate currency.</li> <li>■ Total amount of Gift Certificates in Japanese Yen tendered or redeemed when Japanese Yen is not the base or alternate currency.</li> </ul>
	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**

<b>Tender</b>	<b>Report Line</b>	<b>Description</b>
Store Credit (JPY)	In	<ul style="list-style-type: none"> <li>■ Total number of Store Credits in Japanese Yen tendered or redeemed when Japanese Yen is not the base or alternate currency.</li> <li>■ Total face value of Store Credits in Japanese Yen tendered or redeemed when Japanese Yen is not the base or alternate currency.</li> </ul>
	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.
<b>Totals</b>	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.
<b>Totals (alternate currency label)</b>  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. <b>Note:</b> 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. <b>Note:</b> In a VAT environment, this calculation does not include shipping charges and shipping charge VAT.
Sales Tax <b>Note:</b> 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.
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 order deposits minus order cancels and post-voids.
Special Order Complete	Total amount of order completions minus order cancels and post-voids.
Special Order Cancel	Total amount of order cancels minus post-voids.
Special Order Partial	Total amount of order partials minus order cancels and post-voids.
Bill Payment	Total amount of bill payments collected minus 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. <b>Note:</b> Employee discounts are not included in this amount.
Item Disc.	Total amount of item-level discounts. <b>Note:</b> Employee discounts are not included in this amount.
Item Markdown	Total amount of markdowns minus post-voids.

**Table A-6 (Cont.) Statistical Summary**

Report Line	Description
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.
Restocking Fee	Total amount of restocking fees minus post-voids. This amount includes restocking fees for non-taxable items and order cancels with items that include restocking fees.
Shipping Charges	Total amount of shipping charges minus post-voids. <b>Note:</b> In a VAT environment, this amount includes VAT.
Cash Rounding Adjustment	Total amount of rounding adjustments made for transactions involving cash given for change and refunds.

## 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.
<b>Total Sales Tax</b>	Total amount of locale tax collected minus returns and post-voids.
<b>Total Shipping Tax</b>	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.

**Table A-9 (Cont.) Tax Summary in a VAT Environment**

<b>Report Line</b>	<b>Description</b>
<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.
<b>Total VAT</b>	Total amount of VAT collected minus returns and post-voids. The amount includes Shipping Charge VAT.

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**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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# Glossary

**balance due**

Amount of money the customer owes the retailer.

**basket**

Collection of items with an identifiable number scanned in Oracle Retail Store Inventory Management that can be retrieved at the Point-of-Service register.

**buddy store**

Store within a transfer zone in Oracle Retail Store Inventory Management to which the retailer often transfers items.

**business date**

Duration between the opening of a store and the subsequent closing of the store.

**cancelled transaction**

Transaction that is cancelled by a cashier while the transaction is still in progress.

**deletion fee**

Fee applied if a customer selects to delete a layaway before completion.

**down payment**

Percentage amount that is required to hold merchandise for a customer. This payment is applied to the cost of the items on the layaway and is partially refundable if the items are returned, less any applied fees.

**EJournal**

Journal used to record the steps that created a transaction or an entry at the time it occurred.

**electronic journal (EJournal)**

See [EJournal](#).

**employee ID**

ID an employee enters when logging in.

**external order**

Order created using a third-party order management system external to Oracle Retail Point-of-Service.

**gift card**

Process of issuing a gift card to a customer as a sale or as a refund tender in a return or exchange transaction.

**gift card credit**

Value has been added to any card (whether it is a brand new one or one that is reloaded with value) as a result of a return where a balance is due to the customer.

**grace period**

Number of days after a password expires before the user is locked out from logging in.

**hard totals**

Device containing summary financial information, store status, and transaction information that is locally available to the register. A set of hard totals is kept for each till, each register, and the store.

**home store**

Store where a user is currently logged in.

**issue**

Process of issuing a gift card to a customer as a sale or as a refund tender in a return or exchange transaction.

**layaway**

Holding of merchandise while the customer pays for it in installments.

**layaway fee**

Amount that the customer is charged for the holding of the merchandise for layaway.

**negative balance due**

Amount of money the retailer owes the customer.

**no sale transaction**

Situation where the cash drawer is opened for a non-financial transaction.

**operating fund**

Amount of money kept on hand in the store during a business day. The operating fund includes till float amounts.

**parameter**

Name value pairs used to control flow in an application and set allowed values for data.

**parameter group**

Set of parameters grouped together by category.

**password policy**

Set of criteria used to prevent unauthorized user access to the application.

**PAT cash**

Combination of and use of specific tender types, considered to be cash according to IRS Form 8300 (form used to report cash payments over 10,000 received in a trade or

business after December 31, 2001), which are then used to tender in a single transaction.

**Patriot Act (PAT) cash**

See [PAT cash](#).

**post-void**

Cancellation of a transaction after it has been completed.

**preferred language**

Language that is associated with a user or customer and used when the user logs in or the customer is linked to a transaction.

**pricing group**

Group associated to specific price promotions and discount rules.

**primary item**

An item that has a set of related items or fees associated with it.

**reason code**

Specifies the possible conditions why a process was executed.

**regular employee**

Permanent employee.

**related item**

Item or fee associated with a primary item.

**redeem**

Process of redeeming a gift card for the full value of the gift card.

**reentry mode**

Mode of register operation that provides the ability to enter information for transactions that were completed manually while the register was offline.

**reload**

Process of adding monetary value to an existing gift card. Reloading a gift card can be done as its own transaction or as a refund in a return or exchange transaction.

**role**

A named collection of functions. When an employee is assigned a role, that employee has access to the functions associated with the role.

**service alert**

Pickup orders and email communications that need an action initiated.

**suspended transaction**

Transaction that is saved for later completion before being tendered.

**temporary employee**

Employee whose status is determined by the number of days valid.

**tax certificate number**

Number provided for sales tax exemption issued separately by the state where doing business.

**tax ID**

Federal identifier assigned by a national government. For example, in the United States, the TIN is assigned by the IRS for reporting purposes (even if it is a tax exempt organization).

**temporary password**

Password randomly generated by the system for new employees, new temporary employees, or when an operator selects to reset a password.

**tender**

Monetary medium exchanged for goods and services, such as cash, gift card, or credit card.

**till**

Physical storage box containing money with separate places for each currency type and that can be put into or taken out of a physical register drawer.

**training mode**

Mode of register operation that provides the ability to train sales associates on certain Point-of-Service functions without affecting business information.

**transaction ID**

Composite key of multiple individual attributes, such as store ID, register ID, and transaction number, that create a unique identifier for a transaction.

**transfer zone**

Set of locations where item transfers are allowed.

**unit of measure**

How an item is measured.

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