Oracle® Retail Xstore Point-of-Service for Grocery

User Guide

Release 15.0

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Oracle® Retail Xstore Point-of-Service for Grocery User Guide, Release 15.0

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Value-Added Reseller (VAR) Language

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Preface

This *Oracle Retail Xstore Point-of-Service for Grocery User Guide* describes all available functions of Oracle Retail Xstore Point-of-Service for Grocery of release 15.0.

Audience

This User Guide is for users and administrators of Oracle Retail Xstore Point-of-Service for Grocery. This includes merchandisers, buyers, business analysts, and administrative personnel.

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Related Documents

For more information, see the following documents in the Oracle Retail Xstore Suite 15.0 documentation set:

- *Oracle Retail Xstore Suite Release Notes*
- *Oracle Retail Xstore Point-of-Service User Guide*
- *Oracle Retail Xstore Point-of-Service Mobile User Guide*
- *Oracle Retail Xstore Point-of-Service Reports Guide*
- *Oracle Retail Xstore Point-of-Service Manager's Guide*
- *Oracle Retail Xstore Point-of-Service Shipping, Receiving, and Inventory Guide*
- *Oracle Retail Xstore Office User Guide*
- *Oracle Retail Xstore Suite Implementation and Security Guide*
- *Oracle Retail Xstore Suite Deal Pricing Guide*
- *Oracle Retail Xenvironment User Guide*

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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, 15.0) or a later patch release (for example, 15.0.1). If you are installing the base release or additional patch releases, 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

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(Data Model documents are not available through Oracle Technology Network. You can obtain them through My Oracle Support.)

Conventions

The following text conventions are used in this document:

Convention	Meaning
Navigate:	This is a navigate statement. It tells you how to get to the start of the procedure and ends with a screen shot of the starting point and the statement "the Window Name window opens."
Note:	This information is provided to improve your understanding, simplify a task, or point out special circumstances.

1

Purpose and Screen Conventions

Overview

The purpose of this user guide is to provide complete documentation of the available functions of Xstore Point-of-Service for Grocery. This chapter describes how to start and log in and out of the application, and describes the operator and customer screen layout, as well as code functions and privileges.

Getting Started

This section provides instructions on starting and logging in and out of Xstore Point-of-Service for Grocery, as well as how to change the current user password.

Starting the Application

Navigate: XFG-Client – Xstore Point-of-Service for Grocery opens.

Login

Use the following steps to log in to Xstore Point-of-Service for Grocery.

1. At the Register Login screen, Xstore Point-of-Service for Grocery prompts for the user name. Enter your user name and confirm with **Enter**.

> **Note:** The initial login requires a password change – see "Change Password".

2. You are prompted for your password. Enter your password and press **Enter**.

> **Note:** For security purposes, your password displays as a row of asterisks.

3. You can now start a sale transaction.

> **Note:** The initial login for the business day prompts the user to complete Till Management tasks, for example, assign a till and enter float amounts (see – "Till Management, Chapter 12"). If your system uses Till Accountability, the receipt Attach Till is printed.

Log Out

Use the following steps to log out.

1. To log out, press the menu button **Logout**.
2. You are logged out.

> **Note:** If your system uses Till Accountability (see – "Till Management, Chapter 12" the receipt Remove Till is printed.

Change Password

To change your current password, follow the steps below.

1. Select menu button **Change Password**.
2. You are prompted for your current user identification. Enter your current user name and confirm with **Enter**.
3. Enter your current password and confirm with **Enter**.
4. The system prompts for the new password. Enter your new password and confirm with **Enter**.

> **Note:** The system may enforce certain rules regarding password, such as the minimum number of characters required.

5. Confirm your new password and press **Enter**. Your password has been changed, and you are logged in to Xstore Point-of-Service for Grocery.

Screen Layout Register

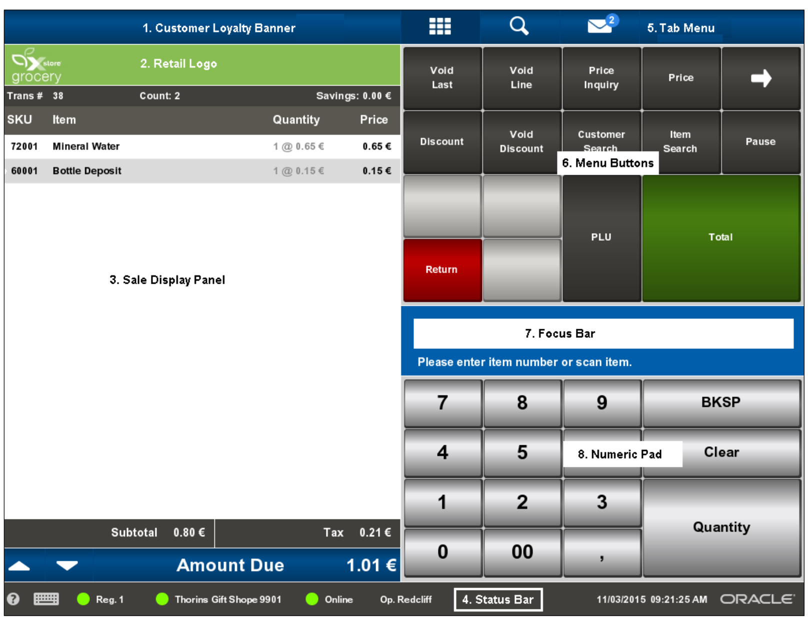
Splash Screen

If you logged in to the register the Splash Screen with the current version of Xstore Point-of-Service for Grocery is displayed. The Splash Screen is also displayed on the Customer Display when no item has been added to the Cart.

Operator Display

The Operator Display is divided into the following 8 sections:

1. Customer Loyalty Banner
2. Retail Logo
3. Sale Display Panel
4. Status Bar
5. Tab Menu
6. Menu Buttons
7. Focus Bar
8. Numeric Pad



Operator Display - Screen Layout

1. **Customer Loyalty Banner:** If a customer is linked to the sale transaction, the Customer Loyalty Banner displays the customer name. If no customer has been linked to the sale transaction the Customer Loyalty Banner stays blank.
2. **Retail Logo:** The display of the retailer logo is configurable. The Xstore Point-of-Service for Grocery logo is displayed by default.
3. **Sale Display Panel:** The Sale Display Panel displays the sale transaction information for items, taxes, tenders or any other detailed data about the current sale transaction.

Table 1: Sale Display Panel - Components and Navigation

Component	Description
Header	The header of the Sale Display Panel lists the **receipt (or transaction) number**, the **count** of all entered items and the total **savings**, discounts and deals (see – "Discounts and Deals, Chapter 7") of the current transaction.
Column Headers	The column headers of the Sale Display Panel list the following entries: **SKU** – Stock Keeping Unit, Item Id assigned to an item by the retailer. **Item** – item description **Quantity**– entered quantity, in format QTY @ Price or Price/Weight **Price** – extended item amount (actual price x quantity)
Subtotal	The field **Subtotal** shows the subtotal amount of the items, which are currently displayed on the Sale Display Panel.
Tax	If configured, the field **Tax** shows the current tax amount of all entered items shown on the Sale Display Panel.
Up- and Down Arrows	Use the up and down arrows to select an item in the Sale Display Panel.
Amount Due	The field **Amount Due** shows the current amount due of the entered items shown on the Sale Display Panel. You can navigate to the Sale Tender screen with a touch on **Amount Due**.

4. **Status Bar:** The Status Bar is a screen component that displays the following sections containing store-related information. It is always visible on every Register screen.

Table 2: Status Bar - Components and Navigation

Component	Description
Question mark	This icon navigates to the About screen – see "About Screen".
Keyboard icon	This icon prompts the alphanumeric keyboard.
Register status icon	This icon indicates the status of the register: ▪ If the icon is green, the register is open and the user is logged in. ▪ If the icon is yellow, the register is open but the user is logged out. ▪ If the icon is red, the register is closed.
Register number	This field shows the register number.
Store status icon	This icon indicates the status of the store: ▪ If the icon is green, the store is open. ▪ If the icon is red, the store is closed.
Store name and number	This field shows the store name and number.
Database Service status icon	This icon indicates the status of the services used by the store: ▪ If the icon is green, the Datasources are online. ▪ If the icon is yellow, at least one WAN Datasource is offline. The system is using the local Datasource. ▪ If the icon is red, at least one LAN Datasource is offline. The system is using the offline process set up for the store.
Store operator	This field shows the operator currently signed into Xstore Point-of-Service for Grocery.
Date	This field displays the current register date.
Time	This field displays the current register time.
Oracle icon	Description?

5. **Tab Menu:** The Tab Menu can hold up to five Tab Menu features. The Tab Menu is configurable. Xstore Point-of-Service for Grocery offers the following Tab Menu features by default:

Menu Button Tab

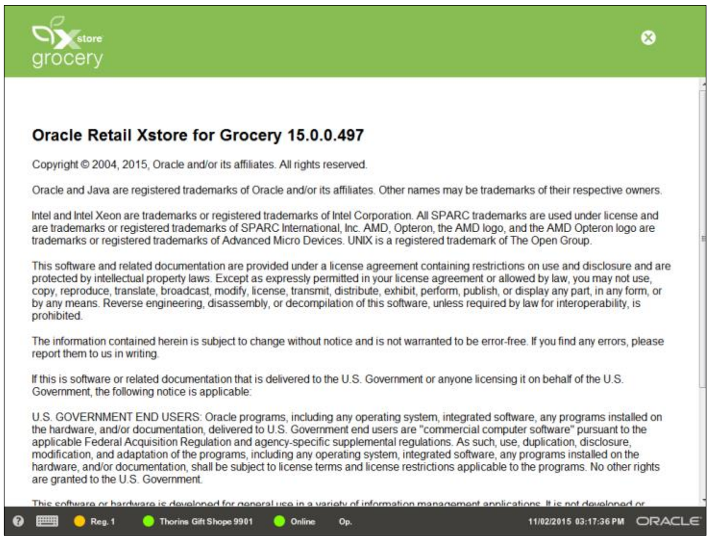
Department Lookup, for more information see – "Department Lookup, Chapter 3"

Store Messages Tab, for more information see – "Store Message, Chapter 8"

6. **Menu Buttons:** The Menu Buttons show the available functions. To switch to additional Menu Buttons, use the left right arrows.
7. **Focus Bar:** The Focus Bar provides a single-entry field, a data entry form in which only one entry for a specified piece of data may be captured and then stored in the database. The message area displays instructions for the current operation.
8. **Numeric Pad:** The Numeric Pad is a numeric keyboard for entering numbers.

About Screen

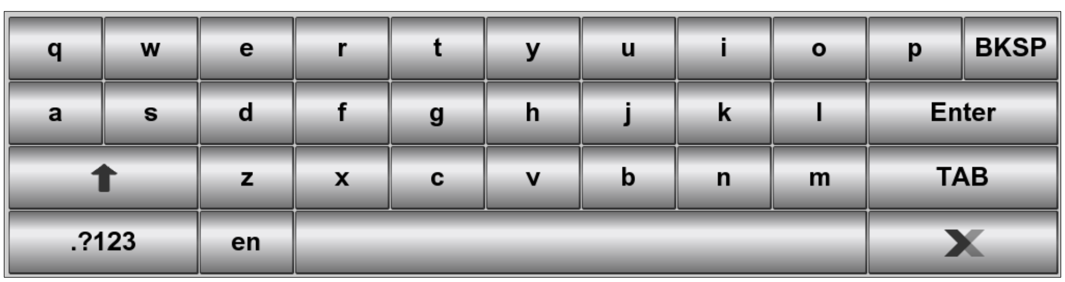
The Question mark in the Status Bar navigates to the About Screen. The About screen contains the Build Version Number, the Copyright information and the general disclaimer.



About Screen

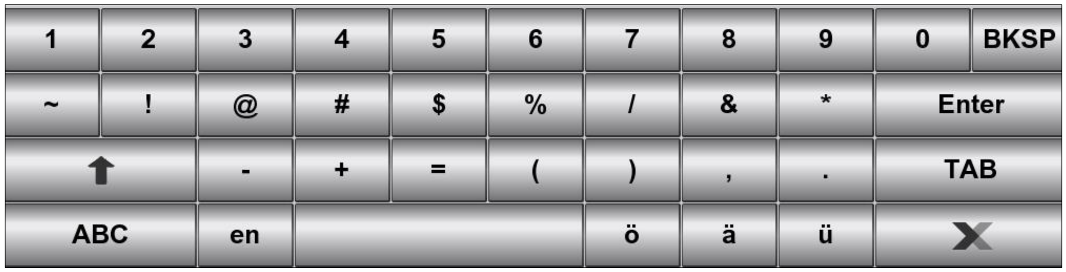
Virtual Keyboard

Whenever an alphanumeric input is possible, the virtual keyboard is shown.



Virtual Alpha Keyboard

> **Note:** You can switch between keyboard layouts in Xstore Point-of-Service for Grocery. For example, press en for the English and de for the German layout. Xstore Point-of-Service for Grocery supports 11 languages. For more information, refer to the *Oracle Retail Xstore Suite Implementation and Security Guide*.



Virtual Numeric Keyboard

Table 3: Virtual Keyboard Navigation

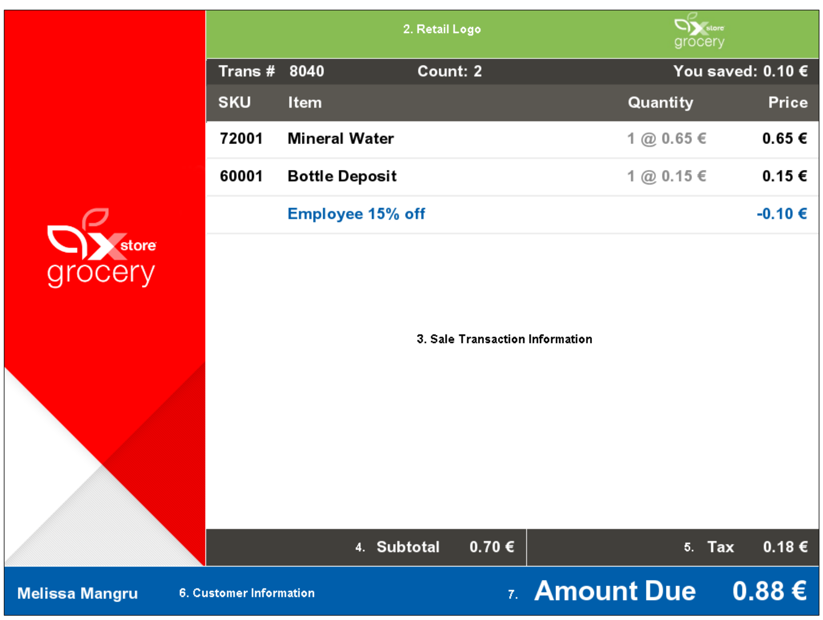
Function	Navigation
Launch virtual keyboard	Choose one of the following options to launch the virtual keyboard: ▪ Tap the icon in the Status Bar to launch the keyboard. ▪ The keyboard is automatically prompted when you select an input field on the item or customer search.
Switch from alpha keyboard entry to numeric entry	The keyboard is alpha-numeric. The default view is the alpha keyboard. To switch to the numeric entry, select the **.?123** button.
Data entry	Tap the keyboard keys to enter information into the field.
Close virtual keyboard	Choose one of the following options to close the virtual keyboard: ▪ Swipe down the keyboard on the Operator Display. ▪ Select the keyboard icon within the Status Bar.

Customer Display

The Customer Display shows the following sections:

1. Advertisement Banner
2. Retail Logo
3. Sales transaction information, such as:
   - Transaction number
   - Count of items added to the Cart
   - Total savings
   - SKU, the Stock Keeping Unit
   - Item Id assigned to an item by the retailer
   - Item, the item description
   - Quantity, the entered quantity, in format QTY @ Price or Price/Weight
   - Price – extended item amount (actual Price x Quantity)
4. Subtotal - The field Subtotal shows the amount of the items that have been entered.
5. Tax - If configured, the field Tax shows the current tax of entered items.
6. Customer Information - If a customer is linked to the sale transaction, the customer name is displayed on the Customer Display.
7. Amount Due - The field Amount Due shows the current amount due of the entered items.

   Change Due - After tendering, the Change Due amount is displayed in this field.



Customer Display – Screen Layout

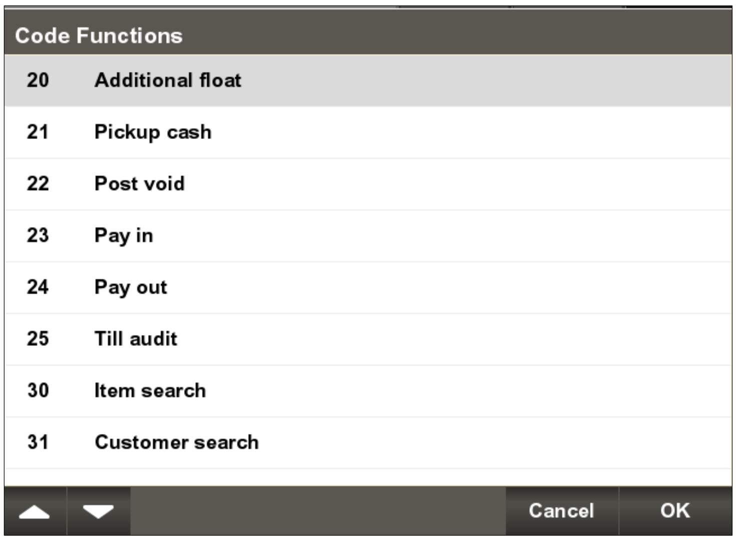
Code Functions

You can view the available code functions in Xstore Point-of-Service for Grocery. There are two ways to view the available code functions.

1. Press menu button **Code**.
2. You are prompted for the code. Enter 88.
3. The system displays the available code functions.

   Or

1. Enter 88 and press the menu button **Code**.
2. The system displays the available code functions.



Code Functions

3. Select the corresponding code function with the up and down arrows. Confirm with **OK**. The system performs the selected function.

Privileges

Xstore Point-of-Service for Grocery offers the possibility to configure privileges for individual users. To access a functionality, you may need a certain privilege.

Override

1. If you do not have sufficient security privilege to carry out a certain activity, Xstore Point-of-Service for Grocery shows the Override information and prompts for the user name.
2. Users holding the required security privilege, must follow the steps below to carry out the security override.
   a. Enter your user name and confirm with **Enter**.
   b. Enter your password and confirm with **Enter.**
3. Carry out the initiated function.

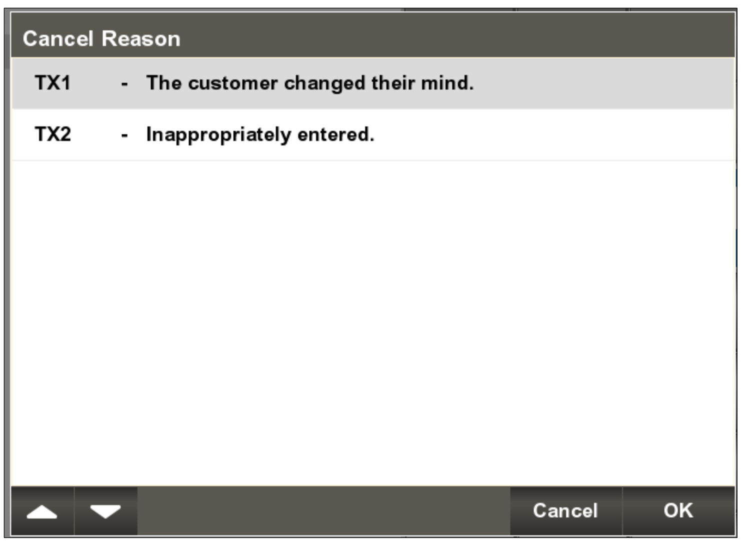
2
Prompts

Overview

During various operations, you may be prompted to confirm a procedure, select from a list of options, acknowledge a system action, or select information. Xstore Point-of-Service for Grocery provides different types of prompts to help you complete a task. This chapter provides an overview of available prompts in Xstore Point-of-Service for Grocery.

Selection Required Prompt

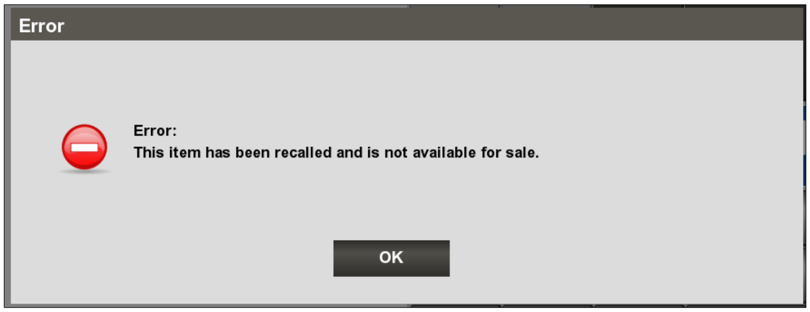
During a transaction process, you may be required to select from a list of options. For example, in the prompt below, you would use the up and down arrows to select a reason from the list. To save your selection press **OK**. To exit without making a selection, press **Cancel**.



Selection Required Prompt

System and Error Information Prompt

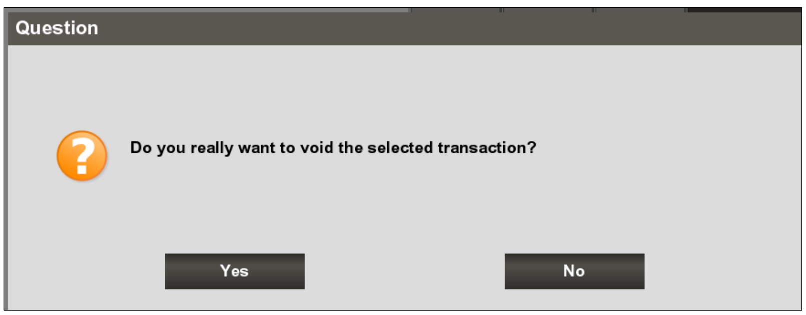
The system displays prompts and messages to indicate that the system is processing a request or transaction, or to provide additional information about a process or error.



System and Error Information Prompt

Response Required Prompts

During a transaction, you may be required to confirm an action. For example, in the prompt below you would press **Yes** to void the selected transaction and **No** to exit the Post Void Transaction function.



Response Required Prompt

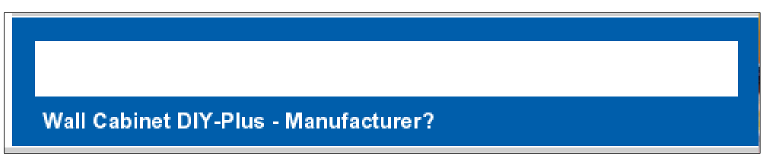
Item Prompts

You can implement various item prompts in Xstore Point-of-Service for Grocery. Possible item prompts are outlined below.

Entry Required Prompt

You can configure an entry required prompt.

1. Enter a corresponding item.
2. The system prompts, for example, for the manufacturer.



Item Prompt – Entry Required Prompt

3. Enter the manufacturer and confirm with **Enter**.
4. The item is displayed on the Sale Display Panel.

Selection Required Prompt

You can also configure a selection required prompt for an item in Xstore Point-of-Service for Grocery.

1. Enter a corresponding item.
2. The system, for example, displays a color selection.

Item Prompt – Selection Required Prompt

3. Select the corresponding color and confirm with **OK**.
4. The item is displayed on the Sale Display Panel.

Information Prompt

You can also configure a system information prompt for an item in Xstore Point-of-Service for Grocery.

1. Enter a corresponding item.
2. An information prompt for the entered item is displayed.
3. Press **OK** to exit information.

Transaction Prompts

You can implement various transactions prompts in Xstore Point-of-Service for Grocery. Currently the following 3 different transaction prompts are available:

- Prompt when starting a sales transaction
- Prompt before tendering takes place
- Prompt after tendering

Pre-Sale

You can implement a prompt at the beginning of a sales transaction, for example, prompt for the customer number.

1. Enter the first item of a sale transaction.
2. The system prompts, for example, for the customer number.
3. Enter the customer number and press **Enter**.
4. Proceed with the sale transaction as usual.

Pre-Tender

You can implement a prompt before tendering a sale transaction.

1. After you entered all items, click **Total**.
2. The system displays, for example, a selection required prompt.
3. Select the corresponding entry and press **OK**.
4. Complete sale transaction as usual.

Post-Tender

You can implement a prompt after tendering a sales transaction, for example, ask for the postal code (zip code).

1. After you selected the type of payment, the system prompts, for example, for the postal (zip) code.
2. Enter the postal code (zip code) and press **Enter**.
3. The transaction is completed.

3

Basic Transaction Entry

Overview

A basic sale transaction consist of the exchange of items for a customer's tender. This chapter describes how to enter items in Xstore Point-of-Service for Grocery and gives an overview on barcodes with properties and attached items.

Basic Transactions

You can enter items in different ways in Xstore Point-of-Service for Grocery.

- Enter item number or UPC manually via Numeric Pad or keyboard, if configured.
- Choose the item from the Department Lookup.
- Scan the barcode of the item (if barcode scanner is attached).

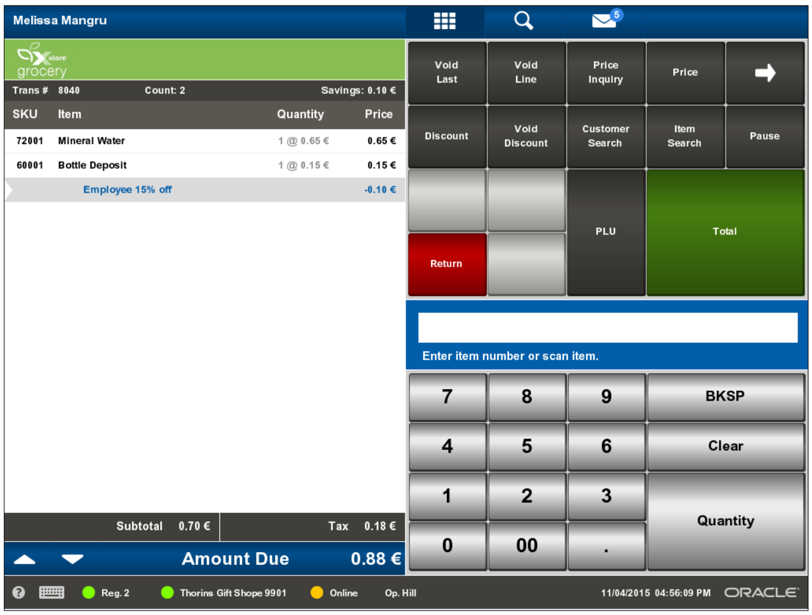
Use the Item Search to look up and add an item to the sale transaction – see "Item Search, Chapter 11".

Enter Items Manually

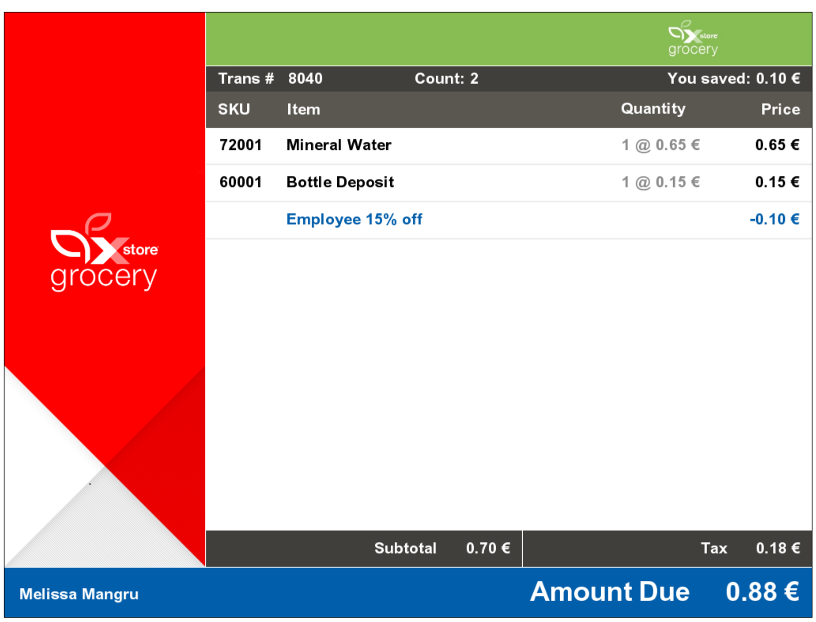
1. Enter the item number or UPC and press menu button **PLU**.

> **Note:** If you want to delete the last entered number, use the menu button **BKSP**. To delete all entered numbers, use **Clear**.

2. Xstore Point-of-Service for Grocery displays the item on the Sale Display Panel and on the Customer Display.



Operator Display - Sale Screen



Customer Display

Department Lookup

1. Select the Department Lookup icon in the Tab Menu.
2. Use the arrows to choose an item from one of the available categories.
3. Xstore Point-of-Service for Grocery displays the item on the Sale Display Panel and on the Customer Display.

Scan Barcode

1. Scan the barcode of the item.
2. Xstore Point-of-Service for Grocery displays the item on the Sale Display Panel and on the Customer Display.

Note: The function is only available, if barcode scanner is attached.

Barcode Items with Properties

Weight in Barcode

If you scan the barcode below, the system converts the data in the given order and sells the weight of the barcode item.

Example: 2150101020006

(21) Weight prefix, (50101) Item number, (02000) weight in grams (2,0 kg), (6) Check sum

Weight in Barcode

Note: If the store has a service or self-service scale, creating barcodes with encoded weight, Xstore Point-of-Service for Grocery decodes the label and sells the item (coded in the barcode) with the calculated price.

Calculated Price = Item price x Weight from the barcode

Quantity in Barcode

If you scan the barcode below, the system converts the data in the given order and sells the quantity of the barcode item.

Example: 2570018000036

(25) Quantity prefix, (70018) Item number, (00003) Quantity number, (6) Check sum

Quantity in Barcode

> **Note:** If the store has a service or self-service scale, creating barcodes where the quantity is coded, Xstore Point-of-Service for Grocery decodes the label and sells the item (coded in the barcode) with the calculated price.
>
> Calculated Price = Item price x Quantity from the barcode.

Price in the Barcode

If you scan the barcode below, the system converts the data in the given order and sells for the price of the barcode item.

Example: 2250102003005

(22) Price prefix, (50102) Item number, (00300) price (3,00 €), (5) Check sum

Price in Barcode

> **Note:** If the store has a service or self-service scale, creating barcodes where price is coded, the system decodes the label and sells the item with the price from the barcode.

Press Barcode with Age Verification

If you scan the barcode below, the system converts the data in the given order and sells the press product barcode with the age verification.

Example: 4343000105396

(43) Prefix with age verification, (4) full VAT, (30001) item number, (0539) price 5,39 €, (6) Check sum

Press Barcode with Age Verification

Press Barcodes without Age Verification

If you scan the barcode below, the system converts the data in the given order and sells the press item barcode without age verification.

Example: 4943010005701

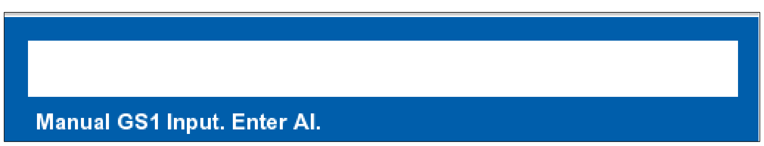
(49) Prefix without age verification, (4) full VAT, (30100) item number, (0570) price 5,70 €, (1) Check sum

Press Barcodes without Age Verification

Manual GS1 Entry

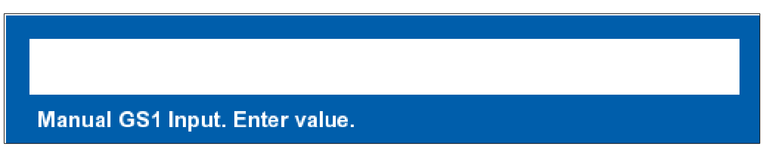
If you cannot scan a barcode, use menu button **Manual GS1 Entry** to enter the barcode, for example, (01) 02570016000052.

1. Press menu item **Manual GS1 Entry**.
2. You are prompted for the AI. Enter the AI - number shown in brackets, for example, (01) and press **Enter**.



Manual GS1 Input - AI

3. You are prompted for the value. Enter the digits after the AI - number in brackets, for example, 02570016000052 and confirm with **Enter**.



Manual GS1 Input – Value

4. The system shows the following prompt.

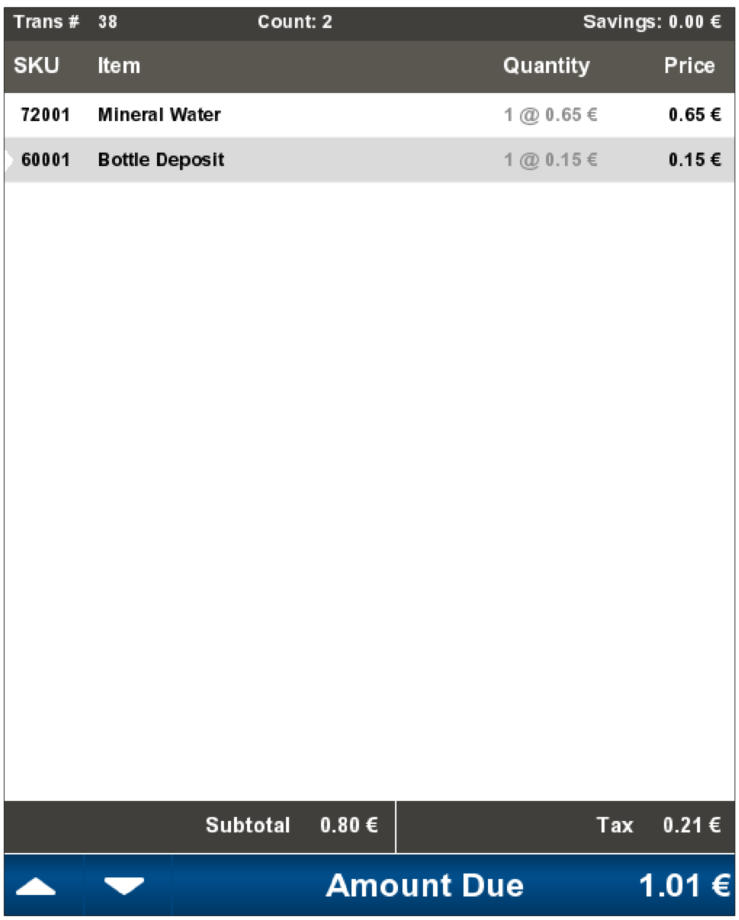
Manual GS1 Input

5. Repeat the process until you have entered the entire barcode. Press **Enter** with no input to finish the Manual GS1 Entry. The item is shown on the Sale Display Panel. Complete the transaction as usual.

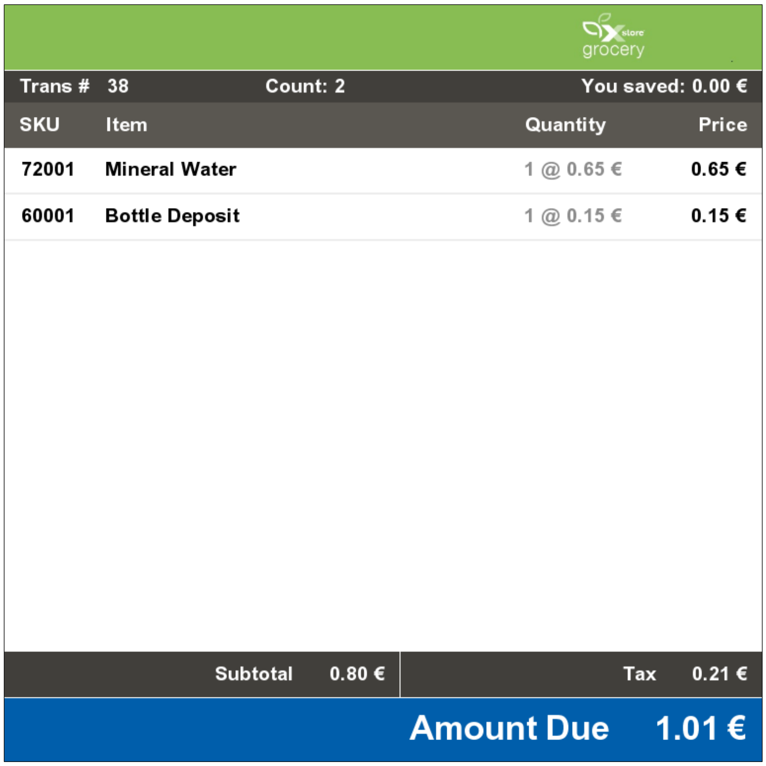
Note: To cancel the Manual GS1 Entry, press **Cancel**.

Attached Items

Xstore Point-of-Service for Grocery offers the possibility to create attached items, to sell bottle deposits, for example, for mineral water. The system shows the attached item on the Operator and Customer Display.



Operator Display - Attached Items Sale Display Panel



Customer Display - Attached Items

> **Note:** If you void the main item, the attached item is also voided – For more information – see "Void Items, Chapter 6".

Weight Items

Overview

Weight items are marked with a weight-required flag in the item record. This chapter describes how to enter weight items in Xstore Point-of-Service for Grocery.

Note: The function Repeat Last Item is not available for weight items - see – "Repeat Last Item, Chapter 6".

Minimum and Maximum Weight

You can define a minimum and maximum weight for the individual item. If the entered weight is more than the maximum or less than the minimum weight, the system displays a corresponding message. In the example below, the weight exceeds the maximum weight for a single sale.

Example – Maximum Weight

Enter Weight Items

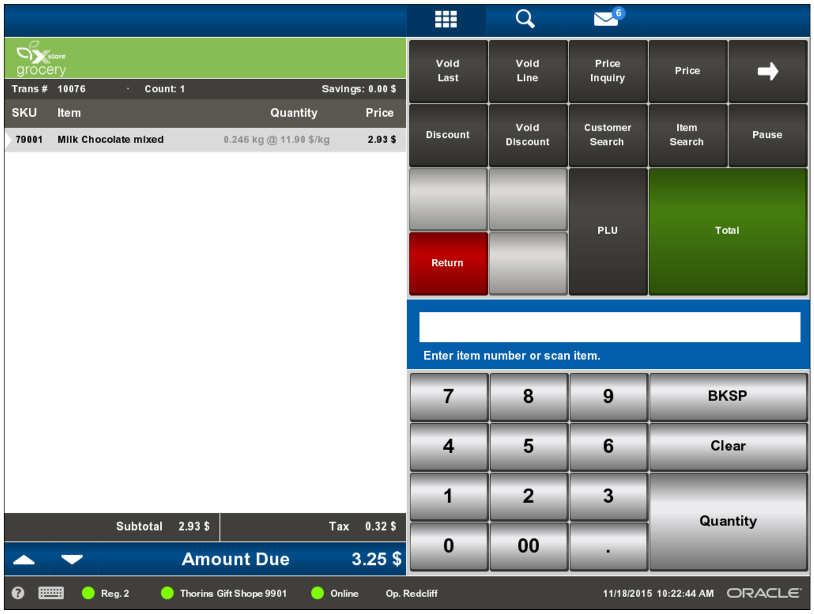
Follow the steps below to key in the weight manually.

1. Select a weight item.
2. You are prompted for the weight.

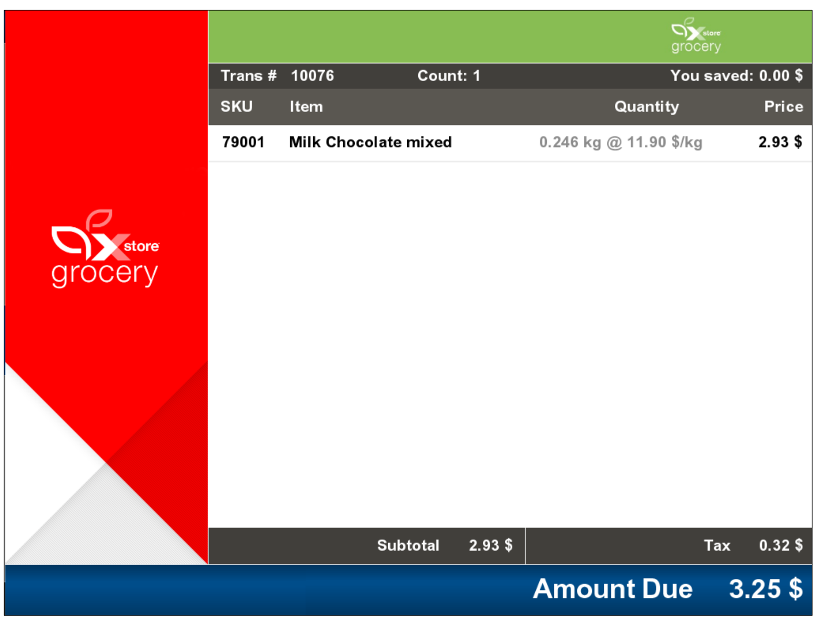
Prompt – Weight Item

3. Enter the weight and confirm with **Enter**.

4. The system displays the item with the calculated price on the Sale Display Panel and the Customer Display.



Operator Display – Weight Item



Customer Display – Weight Item

5

Processing Tender

Overview

Tendering takes place when you select the method of payment and complete the transaction. This chapter describes the tender process with the available tender types and possible receipt printing functions. Currently the following tender types are available:

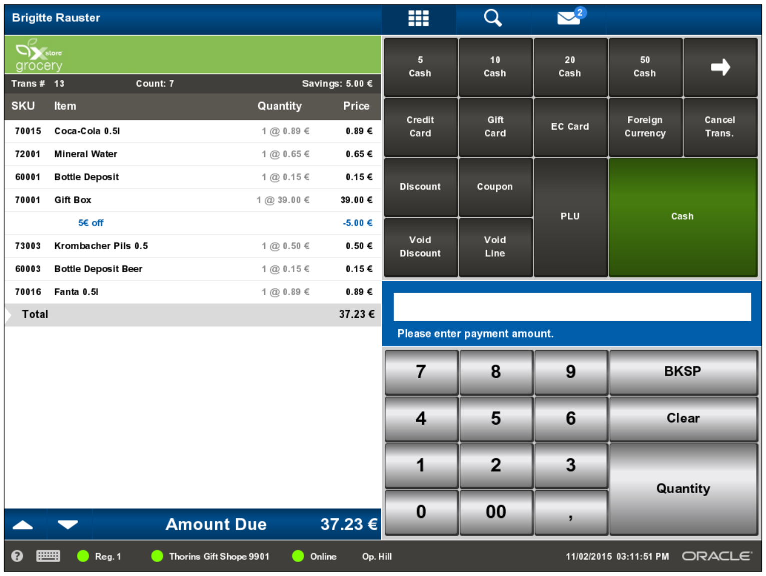
- Cash
- Coupon
- Traveler's Check
- Foreign Currency
- EC Card/Credit Card
- EC Card Manual Authorization
- House Account

> **Note:** The **Clear** button will be enabled after tendering if there is no till (cash drawer) configured for a register.

Cash

If the customer wants to pay Cash, follow the steps listed below.

1. After you have entered all items, press **Total** to complete the sale. The system displays the Sale Tender screen.

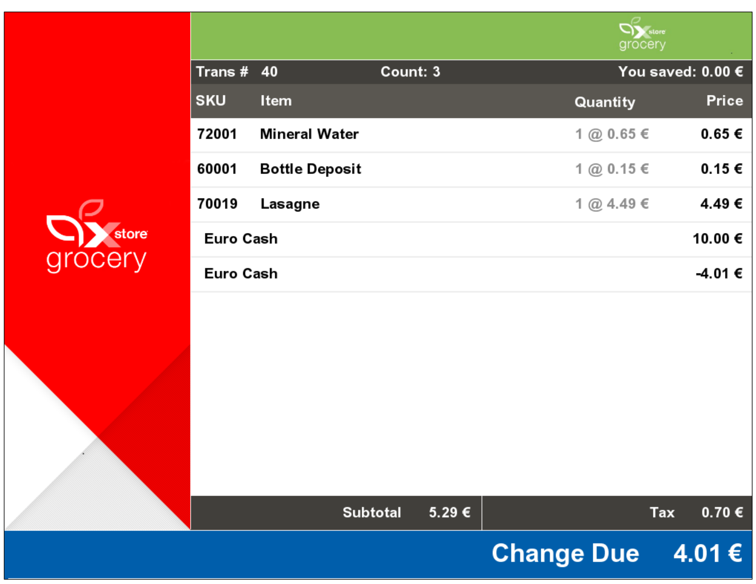


Operator Display - Sale Tender Screen

2. The total amount of the sales transaction is shown. Enter the tender amount via the Numeric Pad or select the amount from the menu bar, for example, 5 Cash.
3. Select tender type **Cash**.

> **Note:** If you enter the received amount via the Menu Bar, the tender amount is applied immediately. You do not have to press tender type **Cash**.

4. The sale is completed. The system displays the Change Due and prints the receipt.



Customer Display - Sale Completed

5. Close the till (cash drawer) or press **Clear** to return to the Sale screen.

Coupon

If the customer wants to use a Coupon for payment, follow the steps listed below.

1. After you have entered all items, press **Total** to complete the sale. The system displays the Sale Tender screen.
2. Enter the amount of the received coupon and press **Coupon**.
3. The Coupon is applied. If no remaining amount is due, the receipt is printed.
4. Close the till (cash drawer) or press **Clear** to return to the Sale screen.

Traveler's Check

If the customer wants to use Traveler's Check for payment, follow the steps listed below.

1. After you have entered all items, press **Total** to complete the sale. The system displays the Sale Tender screen.
2. Enter the amount you received and press **Traveler's Check**.
3. The sale is completed. The system displays the Change Due. The receipt is printed.
4. Close the till (cash drawer) or press **Clear** to return to the Sale screen.

Foreign Currency

If foreign currencies are available for tender, they are listed under **Foreign Currency**.

1. After you have entered all items, press **Total** to complete the sale. The system displays the Sale Tender screen.
2. Press **Foreign Currency**.
3. The system displays a prompt with all available currencies. The Amount Due is shown in the local as well as in all available foreign currencies.
4. Select the corresponding currency and confirm with **OK**. The amount is shown in the Focus Bar.
5. Confirm the amount with **Enter**.
6. The transaction is completed. The amount is shown in the foreign currency and in your local currency. The system displays the Change Due. The receipt is printed.
7. Close the till (cash drawer) or press **Clear** to return to the Sale screen.

EC Card/Credit Card

If the customer wants to use EC Card or Credit Card for payment, follow the steps listed below.

1. After you have entered all items, press **Total** to complete the sale transaction. The system displays the Sale Tender screen.
2. Press **EC Card** or **Credit Card**.
3. The prompts displayed on the terminal may vary depending on the payment system your store uses.

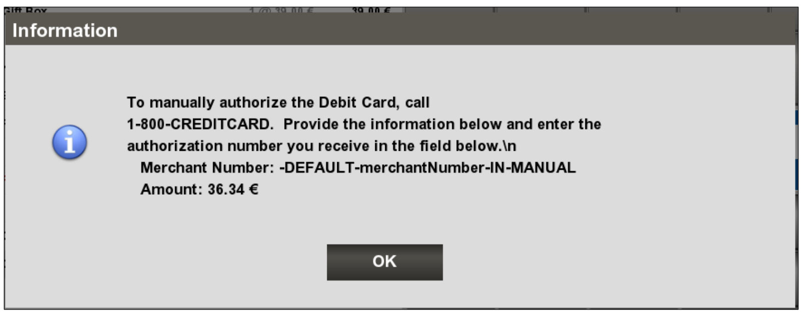
> **Note:** If the authorization is offline, see "EC Card Manual Authorization". If the authorization is declined, see "EC/Credit Card Authorization Fails".

EC Card Manual Authorization

Note: Depending on your provider the EC Card Manual Authorization might not available. If the EC Card Manual Authorization is not available and the authorizer is offline, you cannot tender the transaction with EC Card/Credit Card.

If the customer wants to use an EC Card for payment, follow the steps listed below.

1. After you have entered all items, press **Total** to complete the sale transaction. The system displays the Sale Tender screen.
2. Press **EC Card**.
3. The system sends an authorization request to the EC terminal.
4. If the request is not successful, the following prompt is shown.



EC Card Manual Authorization

5. Call the suggested number and provide the corresponding information. Complete the prompt with **OK**.
6. Enter the authorization number and confirm with **Enter**.
   a. If the authorization number is not accepted, a corresponding prompt is displayed.
      – Press **Cancel** to return to the Sale Tender screen and select a new tender type.
      – Press **Retry** to resend the authorization number.
      – Press **Manual** to return to the manual authorization prompt.
   b. If the authorization number is accepted, the sale transaction is completed. The system prints the receipt.

EC/Credit Card Authorization Fails

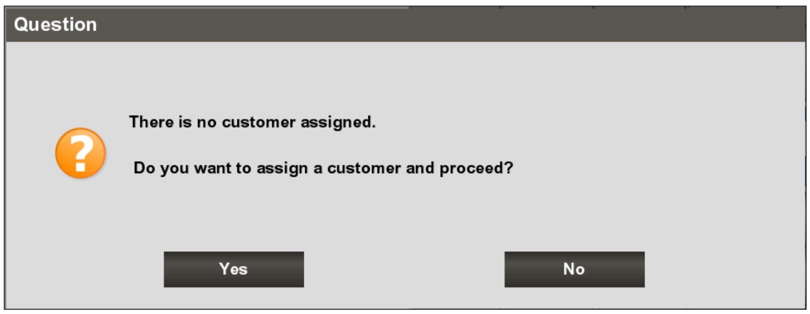
1. If the authorization of the EC or Credit Card fails or is declined, the system shows a corresponding prompt.
   a. Press **Cancel**, the tender type, for example, EC or Credit Card, is voided and displayed on the Sale Display Panel.
   b. Press **Retry** to restart the tender authorization process.

House Account

A House Account allows a customer to use an in-house account as a form of tender and to make payments to this account. This type of account must be activated to be used as tender by the customer.

Several customer names can be saved for one house account. However, the system always gives the primary customer name on the receipt. The field picked up by may contain the name of a different house account user.

1. Assign a customer with an active house account to the sales transaction - see "Customer Search, Chapter 10".
    a. If you do not assign a customer to the current sales transaction, the system prompts you to assign a customer to the transaction.



Prompt – Assign Customer

2. Enter items and press **Total**. The system displays the Sale Tender screen.
3. Select tender type **House Account**.
4. The system shows all users (customers) assigned to this house account. Select the corresponding house account user and press **OK**.
5. You are prompted for the amount you would like to charge to the house account.
    a. Enter the total amount of the sales transaction and confirm with **Enter**. The sales transaction is completed.
    b. Enter the partial amount of the sales transaction and confirm with **Enter**. Select another tender type to complete the sales transaction.

Exceed Credit Limit House Account

> **Note:** You can set a credit limit for house accounts in Oracle Retail Xstore Point of Service (Back Office). You can also overpay a house account up to a configured amount. However, the payment must be authorized by users holding the required security privileges. If the amount exceeds the overpayment amount, the system displays an error message. You cannot complete the transaction with the tender type house account. For further details, see – *Oracle Retail Xstore Point-of-Service User Guide.*

1. Assign a customer with an active house account to the sale transaction - see "Customer Search, Chapter 10".
2. Enter items and press **Total**. The system displays the Sale Tender screen.

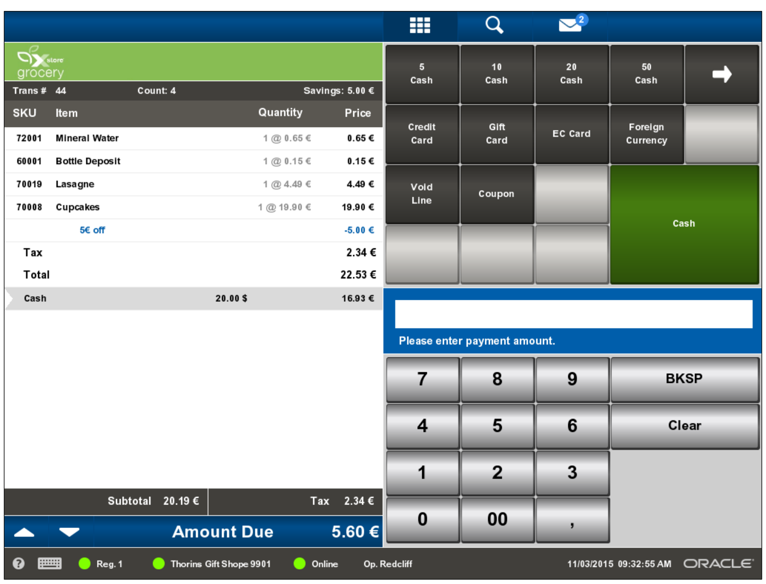
3. If the total of your sale transaction exceeds the credit limit, the system displays a corresponding message.
4. Press **OK** to close message.
5. Users holding the required security privilege can complete the sale transaction.
   a. Enter your user name and confirm with **Enter.**
   b. Enter your password and confirm with **Enter**.
6. Sales transaction is completed.

Split Tenders

> **Note:** You may enter a partial amount if the purchase is paid with more than one tender type. After selecting a tender type, enter the amount and press **Enter**. The system automatically prompts for the remaining balance due and you may select any of the valid tender.

For example, if the customer wants to use the local and a foreign currency for payment, follow the steps outlined below.

1. After you have entered all items, press **Total**. The system displays the Sale Tender screen.
2. Press **Foreign Currency**. Xstore Point-of-Service for Grocery displays a prompt with all available currencies. The Amount Due is shown in the local as well as in all available foreign currencies.
3. Select the corresponding foreign currency.
4. The total Amount Due is show in the Focus Bar. Enter the new amount in the Focus Bar and confirm with **Enter**.
5. The partial tender amount is shown on the Sale Display Panel and the Customer Display.



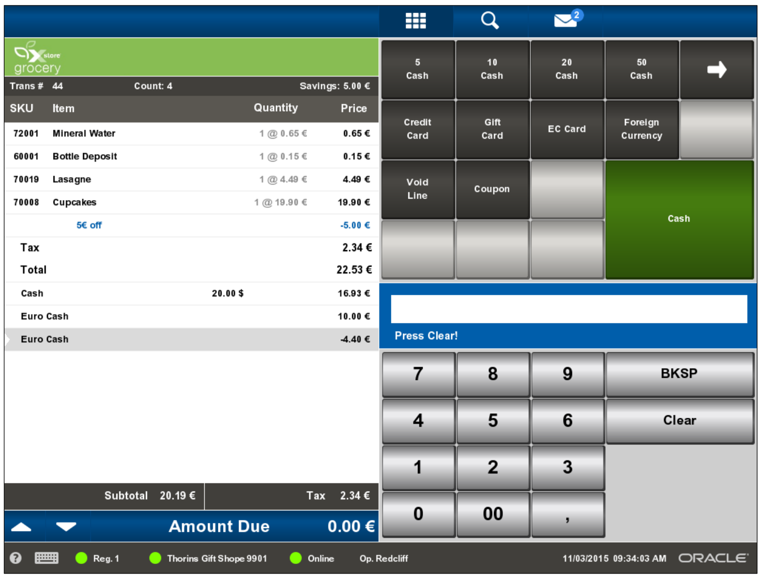
Split Tenders – Foreign Currency

6. Enter the remaining tender amount via the Numeric Pad or select the amount from the menu bar, for example, 5 Cash.

7. Select tender type **Cash**.

> **Note:** If you enter the received amount via the Menu Bar, the sale is completed immediately. You do not have to press tender type **Cash**.

8. The sale is completed. The system displays the foreign and local tender type, as well as Change Due. The receipt is printed.
9. Close the till (cash drawer) or press **Clear** to return to the Sale screen.



Split Tenders – Foreign and Local Currency

House Account Payment

To make payments to a certain house account, follow the steps bellow.

1. Choose a customer with an active house account - see “Customer Search, Chapter 10”.
2. Press **House Account Payment**.
3. The system shows all users (customers) assigned to this house account. Select the corresponding house account user and press **OK**.
4. Enter payment amount and confirm with **Enter**.
5. Enter payment date and confirm with **Enter**.
6. Enter invoice number and confirm with **Enter**.
7. The system shows the house account payment on the Sale Display Panel.
8. Complete the transaction as usual or enter further items.

House Account Reversal

You can also void a payment made to the house account.

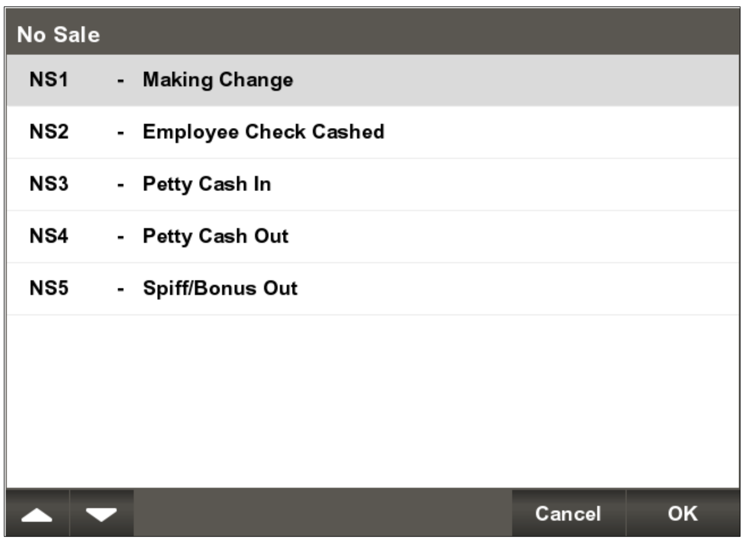
1. Select corresponding customer – see “Customer Search, Chapter 10”.
2. Press **House Account Reversal**.
3. The system displays all house account payments. Select the corresponding payment and confirm with **OK**.

4. The system shows reasons for voiding the house account payment. Select the corresponding reason and confirm with **OK**.
5. The house account payment is voided and shown on the Sale Display Panel.
6. Press **Total** and complete the transaction with the corresponding tender type, for example, Cash.

No Sale

Use the No Sale option to open the cash drawer for a reason other than a normal sale transaction.

1. Press **No Sale**.
2. Users holding the required security privilege can complete the sales transaction.
    a. Enter your user name and confirm with **Enter**.
    b. Enter your password and confirm with **Enter**.
3. The system shows various reasons for no sale transactions.



No Sale - Reasons

4. Choose the corresponding no sale transaction and confirm with **OK**.
5. The cash drawer opens. Carry out the No Sale transaction, for example, make change.

Receipt on Demand

If the function Receipt on Demand is enabled, generally no receipt is printed.

If you want to print a receipt, use menu item **Print Receipt**, after you have completed a sales transaction. You can also activate the receipt print in advance for the current sales transaction, by using menu item **Activate Receipt Printing**.

Print Receipt

1. You have entered all items and completed the sales transaction with a tender type.
2. Press **Print Receipt**.
3. The receipt of the current sales transaction is printed. The sale transaction is completed.

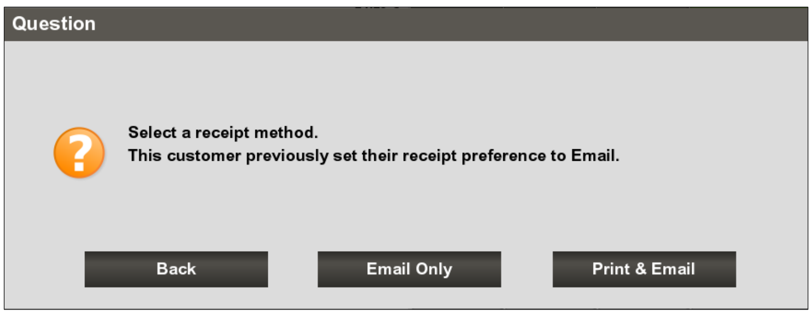
Activate Receipt Printing

1. Enter an item.
2. Select **Activate Receipt Printing**.
3. Enter further items or complete the sale transaction with a tender type.
4. The receipt is printed at the end of the sale transaction.

E-Mail Receipt

E-Mail Receipt – Customer Request

Depending on your system's configuration, the function e-mail receipt might be enabled. If enabled, the operator needs to select the receipt method.



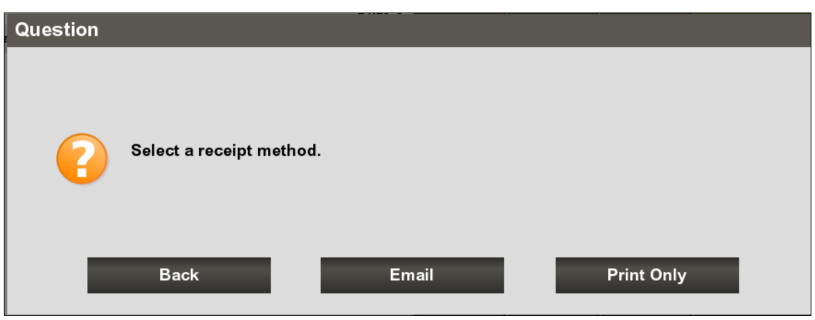
Select Receipt Method

- **E-mail only** - Receipt is e-mailed to the customer (customer copy only).
- **Print & Email** - Receipt is printed and e-mailed to the customer.
- **Back** - Cancel printing and return to tendering.

> **Note:** This prompt replaces the 'transaction complete' prompt, if enabled.

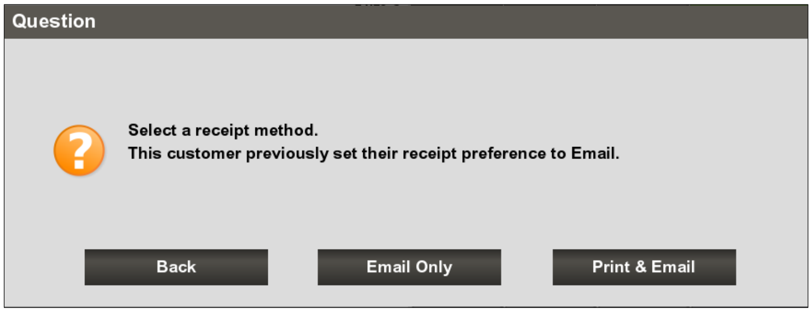
General E-Mail Receipt

1. If the e-mail receipt option is generally enabled, you receive the following prompt. Choose between **Email** and **Print Only**.



Select Receipt Method

a. If you select **E-mail**, a second prompt is displayed. Here you can see the customer preference and you can choose between **E-Mail Only** or **Print & Email**.



Select Receipt Method

– If you select **Email Only**, the system asks for the e-mail address. If you added a customer to the transaction, the stored e-mail address of this customer is used as default entry. The receipt is e-mailed to the corresponding customer.

Update Customer E-Mail

If you add a customer to a transaction and the current e-mail address is different from the stored e-mail address or no e-mail address is stored for the customer, you can update/enter the customer's e-mail address at the cash register.

1. After you selected the tender type, the stored e-mail address is displayed. The virtual keyboard is shown.
2. Change/Enter the e-mail address accordingly and confirm with **Enter**. If you want to change the customer profile, confirm the following prompt.
   a. **Yes** - New address is stored in database and receipt is sent to the new e-mail address.
   b. **No** - Entry is rejected and not stored in database. Receipt is sent to previous e-mail address.

Select Printer

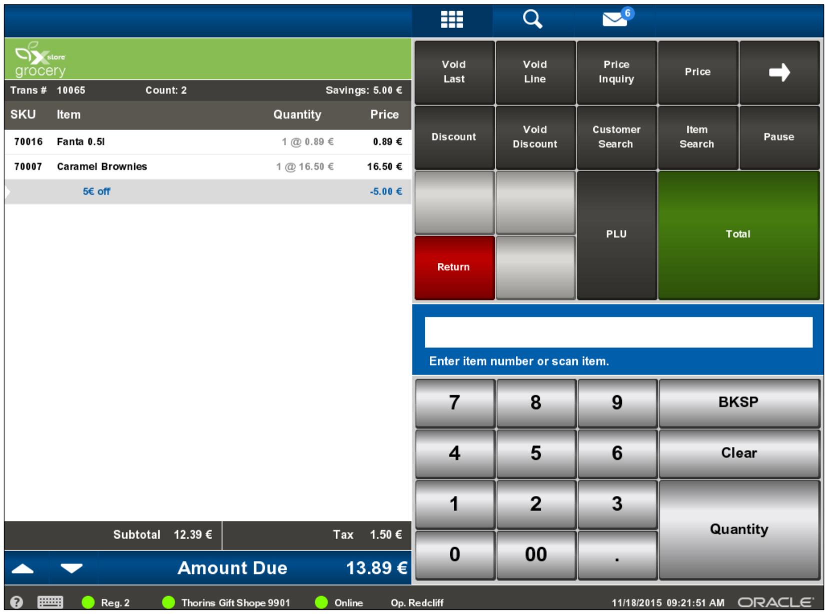
If enabled, you can select a printer for the following receipts:

- Sales receipt
- Cancel transaction
- Post void
- Suspend transaction

1. The system prompts for the printer.
2. Select the corresponding printer and confirm with **OK**.
3. The receipts are printed on the selected printer.

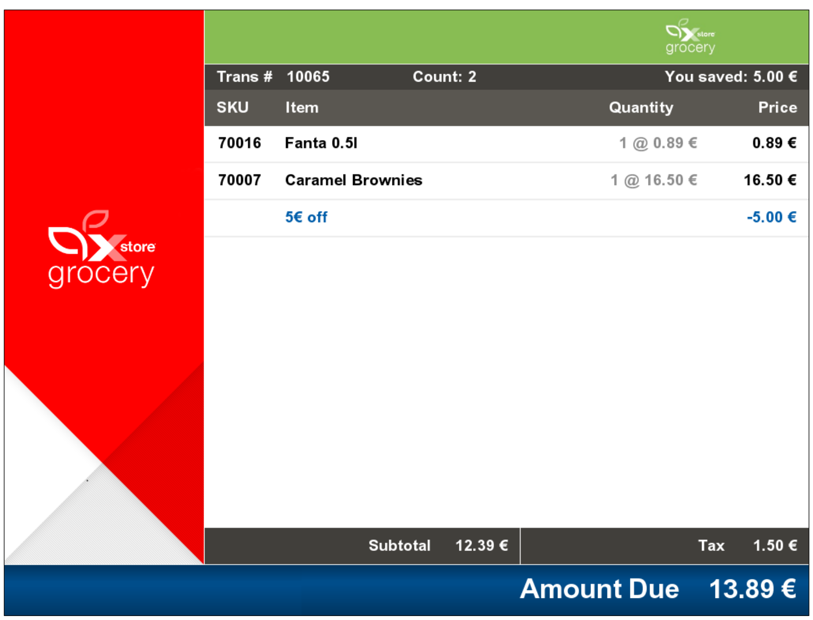
Sales Tax

If the function Sales Tax is enabled, the displays of the operator and customer change slightly. There are additional lines displayed after you press Total. The subtotal and the tax value, are shown on the Operator and Customer Display.



Operator Display - Sales Tax

The Sales Tax is also shown on the Customer Display.



Customer Display - Sales Tax

If the function Sales Tax is activated, the receipt also contains the subtotal and tax.

Pre-Flight Check

Xstore Point-of-Service for Grocery offers a pre-flight check, warning the user that the taxes are not configured correctly. An error occurs when VAT and SALES taxes are mixed up. It is possible to mix up SALES, GST and PST, since all of these are sales taxes. Xstore Point-of-Service for Grocery displays the Pre-Flight Check when you start the system.

Transaction Completed

Depending on your system's configuration, the system may prompt you if the current sale transaction is completed.

a. **Yes** – If you select **Yes**, the transaction is completed and the receipt printed.

b. **No** – If you select **No**, the system returns to tendering.

Note: When selecting No at the prompt, the transaction can be completed by pressing the Cash tender button without entering an amount (the response required prompt will reappear).

6 Modifying a Sale Transaction

Overview

During a sale transaction you may need to modify the transaction prior to tendering. This chapter explains the following functions:

- Repeat Last Item
- Quantity Pre-Selection
- Void Last
- Void Line
- Cancel Transaction
- Change Price
- Suspend Transaction
- Resume Transaction

Repeat Last Item

To repeat the last entered item, press menu button **PLU**.

Quantity Pre-Selection

You can enter the desired quantity before you enter the item in Xstore Point-of-Service for Grocery.

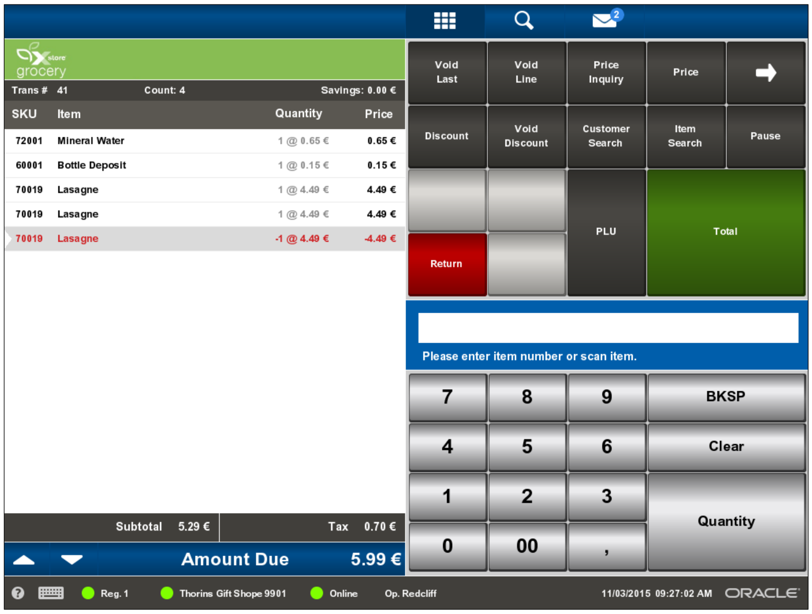
1. Enter the desired quantity, for example, 5 and press **Quantity**.
2. The system records the quantity. Enter the item(s) as usual.

Void Items

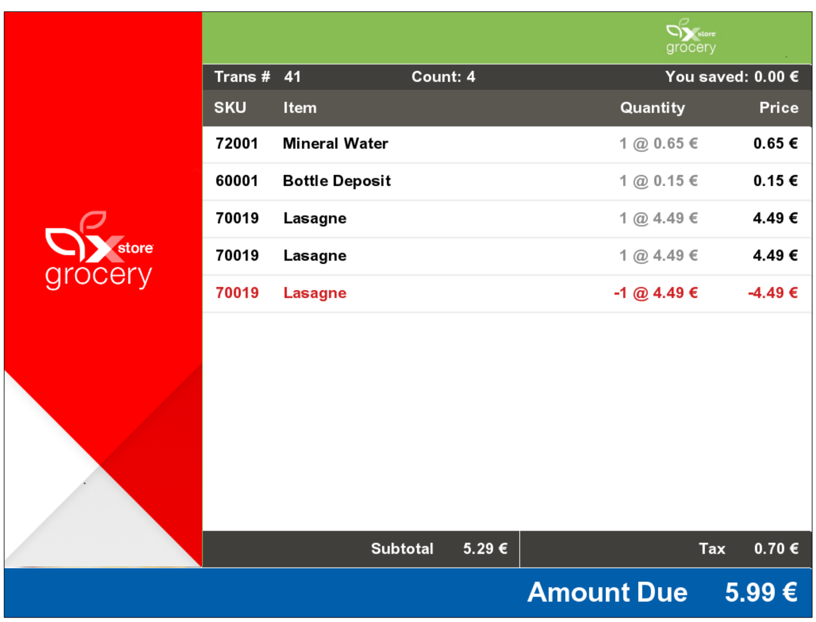
Void Last

The function **Void Last** deletes the last entered item from the sale transaction.

1. To void the last entered item of a sale transaction, press menu button **Void Last**.
2. The last item is voided. The item is indicated as voided (characters turn red and price turns negative) on the Sale Display Panel and on the Customer Display.



Operator Display - Void Last Item



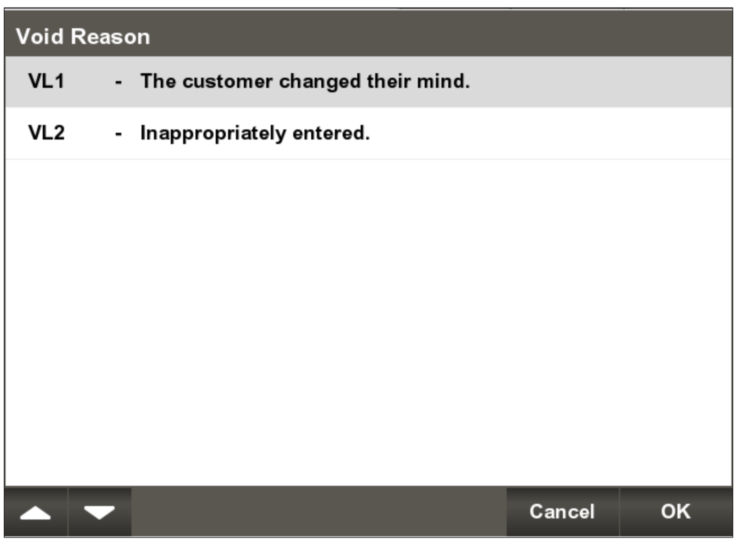
Customer Display - Void Last Item

Note: If only one item is entered, the function Void Last is not available. The error message "Void Item not possible" is displayed. You need to cancel the transaction. See – "Cancel Transaction".

Void Line

The function Void Line deletes the selected item from the sale transaction.

1. Choose **Void Line**.
2. You are prompted for the item you would like to cancel.
   - Enter the item/UPC number or
   - Select the item from the Sale Display Panel with the up and down arrows. If you use the up and down arrows, the selected item is marked grey.
3. Press **Enter**.
4. The system displays void reasons. Select a reason for voiding the line and confirm with **OK**.



Void Line - Reasons

5. The item is indicated as voided (characters turn red and price turns negative) on the Sale Display Panel and Customer Display.

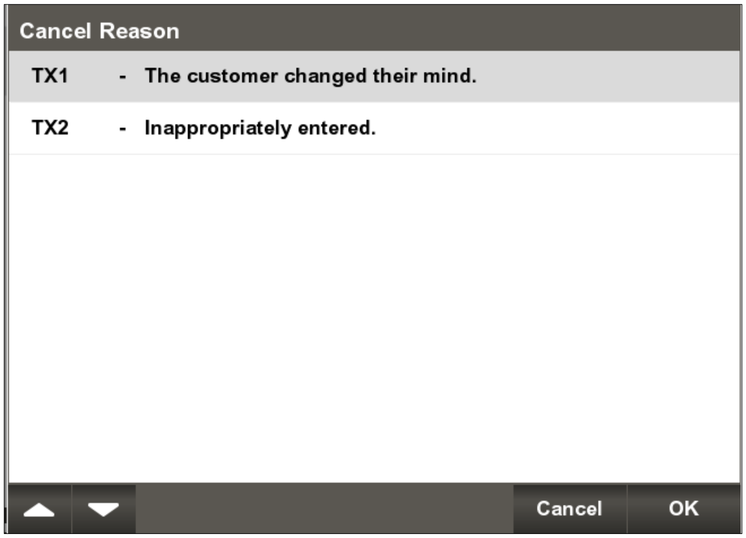
Note: The function Void Line is also available in the Sale Tender screen.

Cancel Transaction

At any time before a sale has been tendered you can cancel the entire sale transaction.

1. If you want to cancel a sale transaction, press **Total** to get to Sale Tender screen.
2. Select the menu button **Cancel Transaction**.

3. You are prompted to enter a reason for cancelling the transaction. Select the corresponding reason and confirm with **OK.**



Cancel Transaction - Reasons

4. The transaction is cancelled. If configured, a cancel transaction receipt is printed and the Sale screen is displayed.

Change Price

You can change the price of an item by using the menu button **Price**.

1. If you want to change the price of an item, enter the new price.
2. Select the menu button **Price**.
3. Choose an item.
4. Select a reason for the price override and confirm with **OK**.
5. The item with the new price is shown on the Sale Display Panel. Complete the sale transaction as usual.

Suspend/Resume Transaction

Suspend Transaction

After a transaction has been started, before tendering, you can suspend the current transaction.

1. Press menu item **Suspend Transaction**.
2. The current transaction is suspended and a receipt with the note suspended is printed.

Resume Transaction

After you have suspended a transaction, there are 2 different ways to resume a transaction.

Resume Transaction with Barcode

1. If you are logged on to a register and no transaction has been started yet, scan the barcode generated during the suspend transaction function.
2. The register decodes the barcode and shows the suspended transaction.
3. After the transaction has been resumed, the register jumps into the Sale Tender screen. You can either continue adding items to the transaction or start the tendering process. In this state you can also suspend the transaction again.

Resume Transaction without Barcode

1. If you are logged on to a register and no transaction has been started yet, press menu item **Resume Transaction**. All suspended transactions are listed.
2. Select the corresponding transaction and press **OK**. The register returns to the Sale Tender screen. You can either continue adding items to the transaction or start the tendering process. In this state you can also suspend the transaction again.

> **Note:** If you already started a new transaction and you scan a suspended transaction receipt, the following message is shown:
>
> "Not allowed in a started transaction."
>
> If you scan an already resumed receipt again the following message is shown:
>
> "Barcode invalid - already resumed."
>
> It's also possible to resume transactions from other registers.

7
Discounts and Deals

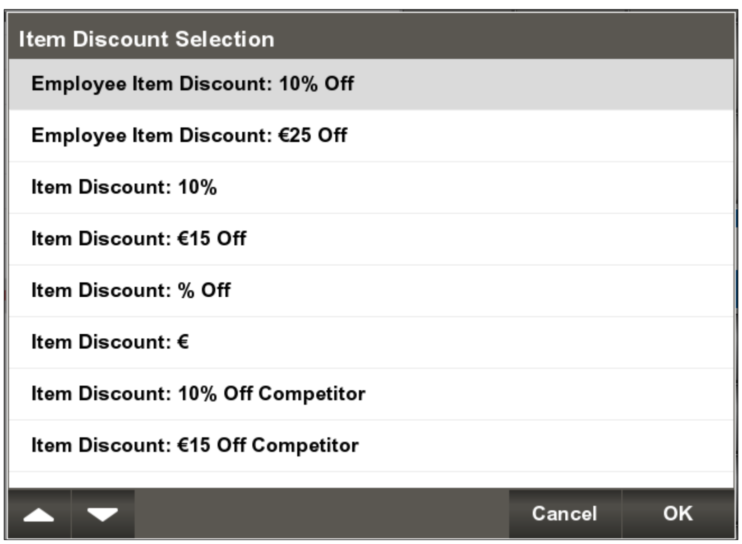
Overview

This chapter describes discounts and deals. You can apply a discount to a single line item, multiple line items, or entire transactions. Transaction-level discounts are applied in the same manner as a line item discount. A transaction discount is applied equally to each eligible item in the transaction, a line item discount is applied to a single item, and a group discount is applied to a group of selected items in a transaction. Discounts may be specified as either amounts (for example, $5.00 off) or percentages (for example, 10% off) for both item and transaction discounts.

Adding a Discount to an Item

You can only add an item discount to the last entered item in the Sale screen. To add an item discount follow the steps outlined below.

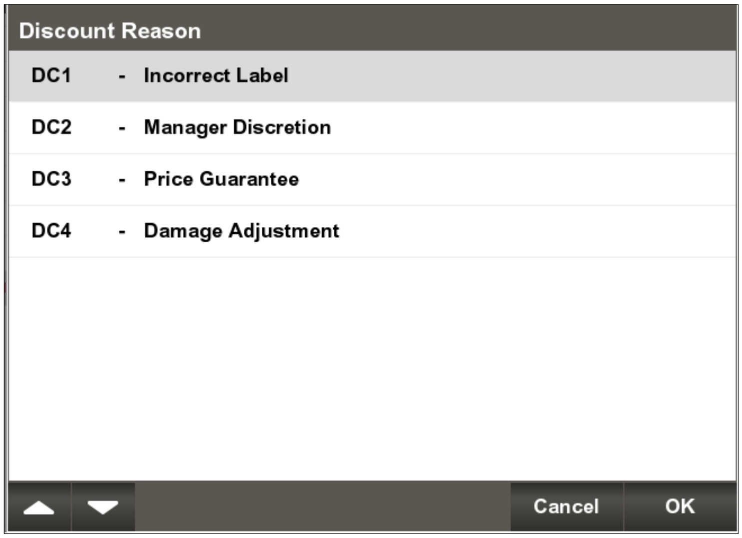
1. Select **Discount** in the Sale screen.
2. You are prompted to select an item discount. Select an item discount and confirm with **OK**.



Item Discount Selection

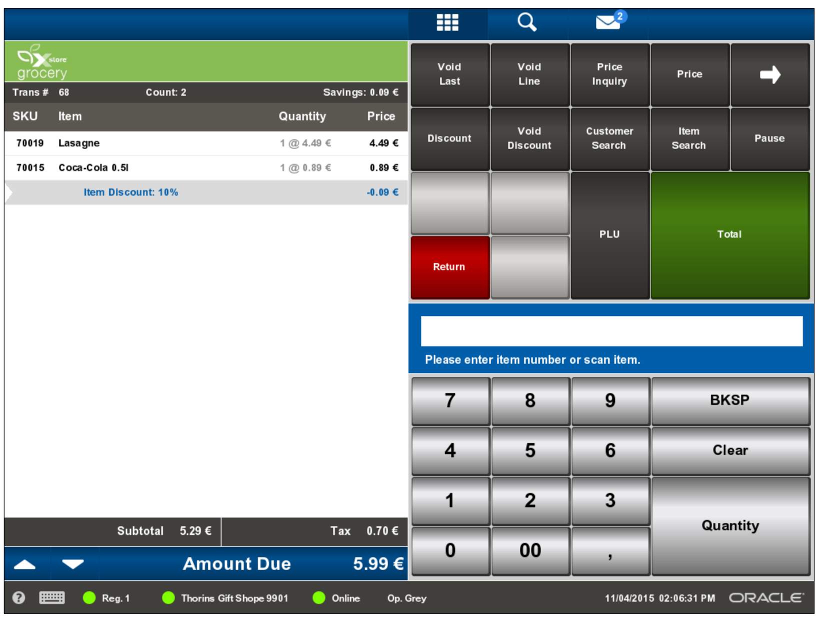
3. Depending on the item discount, you may be prompted for the discount amount, the percentage of the discount or the competitive price. Enter requested input and press **Enter**.

4. You are prompted to select a reason code for applying the item discount. Select the corresponding reason and confirm with **OK**.

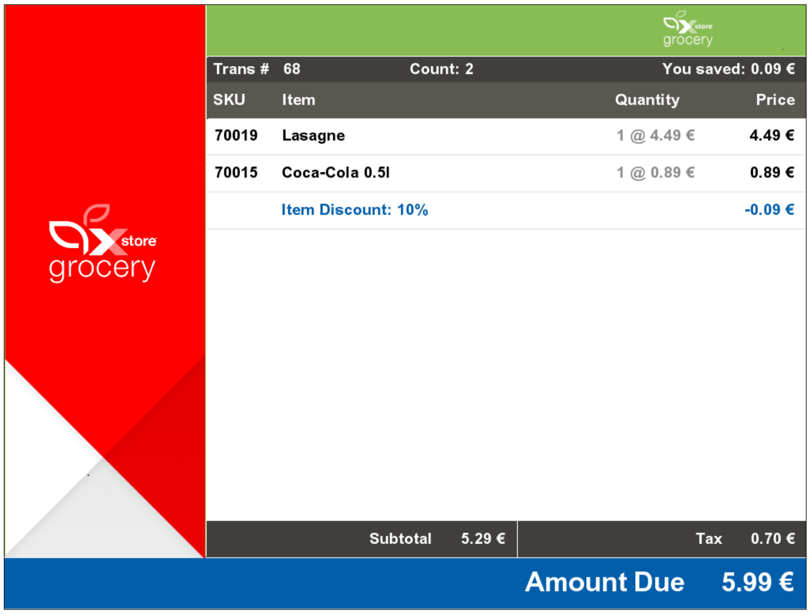


Item Discount Reasons

5. The applied item discount (blue characters and negative price) is shown on the Sale Display Panel and on the Customer Display.



Operator Display - Applied Item Discount



Customer Display - Applied Item Discount

Voiding an Item Discount

You can void an item discount in Xstore Point-of-Service for Grocery. To void an item discount, return to the Sale screen.

> **Note**: If you are already in the Sale Tender screen, press **Clear** to return to the Sale screen.

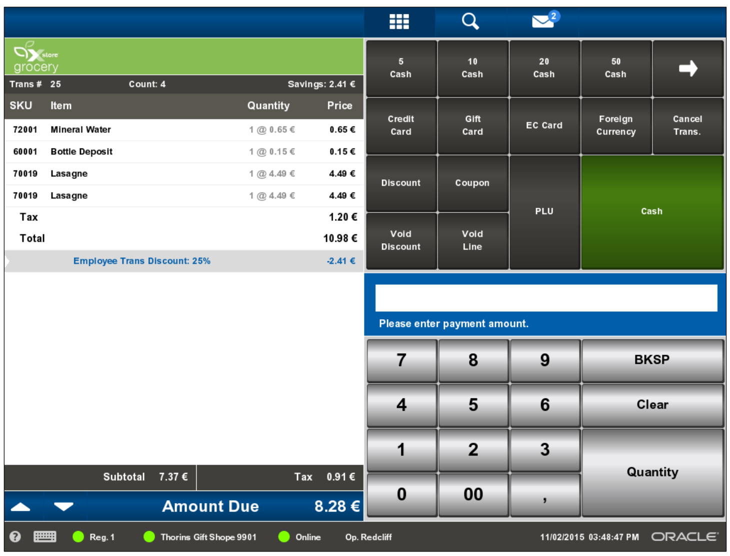
To void an applied item discount follow the steps outlined below.

1. Select **Void Discount**.
2. You are prompted for the discount you would like to void. Select the corresponding discount and confirm with **OK.**
3. The selected discount is voided, as shown on the Sale Display Panel and the Customer Display.

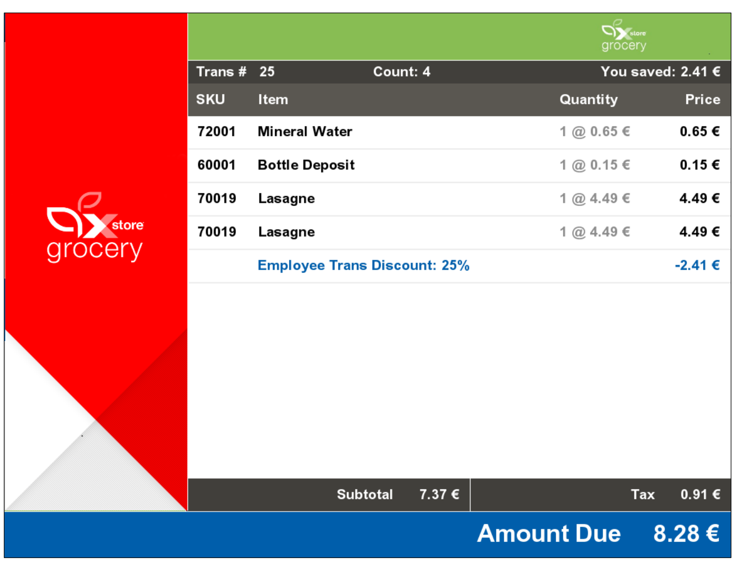
Adding a Transaction Discount

You can also add transaction discounts in Xstore Point-of-Service for Grocery. Transaction discounts can only be applied in the Sale Tender screen.

1. Select **Discount** in the Sale Tender screen.
2. You are prompted to select a transaction discount. Select a transaction discount and confirm with **OK**.
3. Depending on the transaction discount, you may be prompted for the discount amount or the percentage of the discount. Enter requested input and press **Enter**.
4. You are prompted to select a reason for applying the transaction discount. Select the corresponding reason and confirm with **OK**.
5. The applied discount (blue characters and negative price) is shown on the Sale Display Panel and on the Customer Display. Complete the sale as usual.



Operator Display - Applied Transaction Discount



Customer Display - Applied Transaction Discount

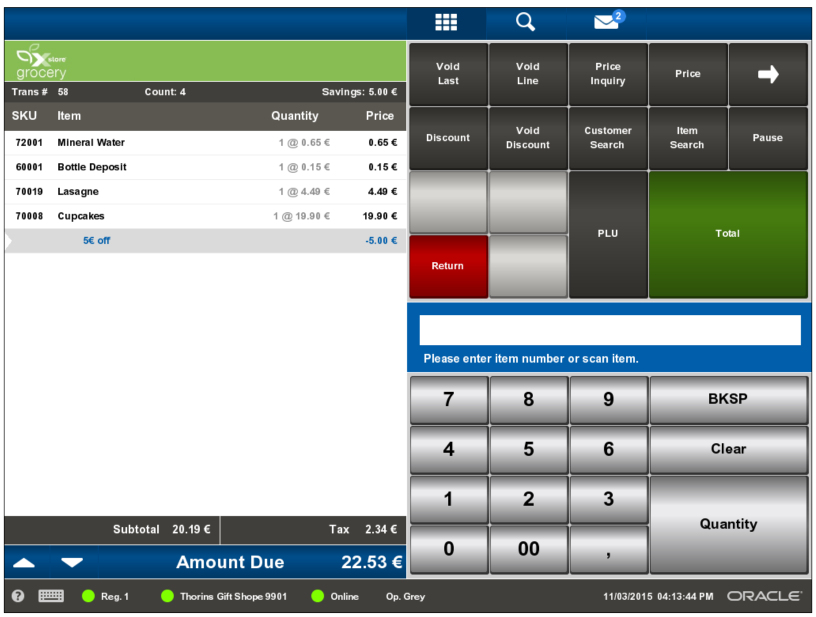
Voiding a Transaction Discount

You can void transaction discounts in the Sale Tender screen.

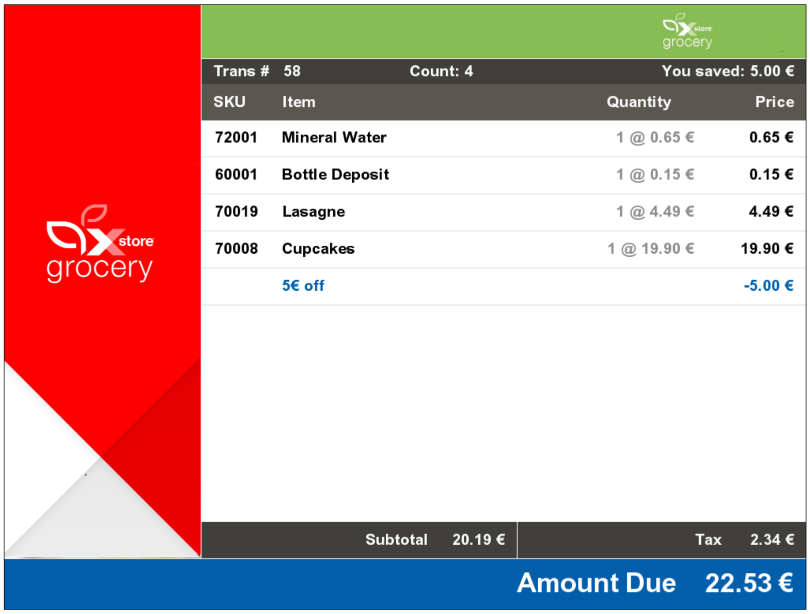
1. Select **Void Discount** in the Sale Tender screen.
2. You are prompted for the transaction discount you would like to void.
3. Select the transaction discount and confirm with **OK**. Transaction discount is voided as shown on the Sale Display Panel and the Customer Display.

Deals

Deal pricing discounts are automatically applied to items that have been scanned. No user interaction is required to apply a deal to a transaction. Once the "trigger" items are added, the system applies the corresponding discount. There are many variations of deal discounts, for example, buy three alcoholic beverages get 10% Off. The deals are displayed as on the Operator and Customer Display.



Operator Display - Deals



Customer Display - Deals

Total Savings

Total savings, all discounts and deals, for a sale transaction are shown in the field Savings on the Sale Display Panel and in "You saved" on the Customer Display.

8

Miscellaneous Functions

Overview

This chapter explains the following miscellaneous functions:

- Age Verification
- Price Inquiry
- Sales Ban
- Recall
- Purchase Limit
- Quantity Query
- Price Query
- Verify Price Tag
- Serial Number
- Post Void Transaction
- Reprint Last Receipt
- Reprint Receipt
- Store Message
- Training Mode
- Open Browser
- Pause
- Close Application

Age Verification

You can set different age levels for verification (for example, 16 years and 18 years) in Xstore Point-of-Service for Grocery.

An additional age verification is only requested, if an item with a higher restriction is added to the transaction.

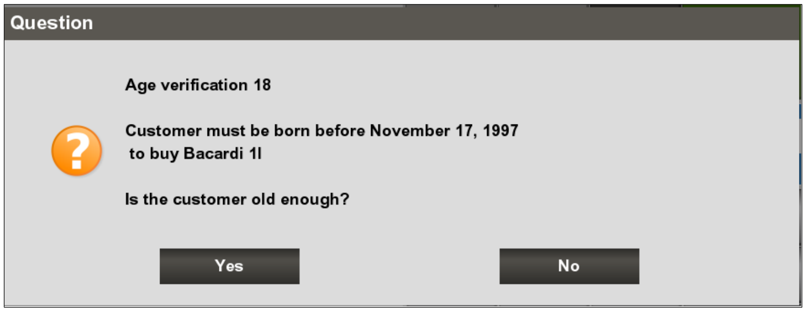
Example 1:

First age limit: > 18; Second age limit > 16; => no additional age verification

Example 2:

First age limit: > 16; Second age limit > 18; => additional age verification necessary

Enter an item where an age verification is necessary. Xstore Point-of-Service for Grocery displays the following prompt.



Age Verification - 16 Years

- If you confirm the message with **Yes**, the item is shown on the Sale Display Panel. For additional items requiring an age verification 16 years, no prompt is shown.
- If you confirm the message with **No**, the item is not sold. If additional items with an age verification are entered, the prompt is shown again.

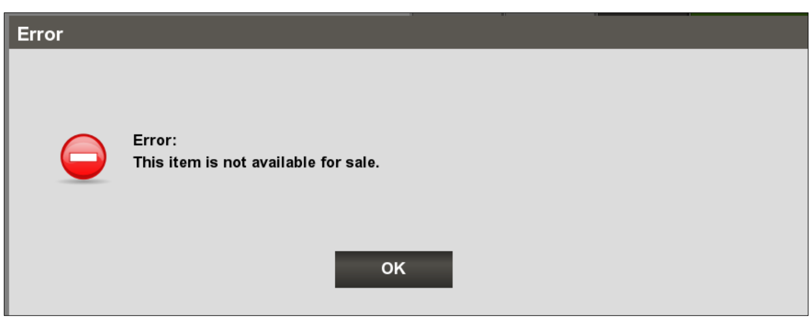
Price Inquiry

If you want to look up the price of an item, use the function **Price Inquiry**.

1. Press **Price Inquiry**.
2. You are prompted for the item. Enter the item. Press **Enter**.
3. The item and the corresponding price are shown in the Focus Bar.
   a. If you press **Clear**, you return to the Sale screen.
   b. If you press **Enter**, the item is added to the current sale and shown on the Sale Display Panel and Customer Display.

Sales Ban

You can flag an item with a sales ban. If you enter the banned item, the system displays the following prompt.

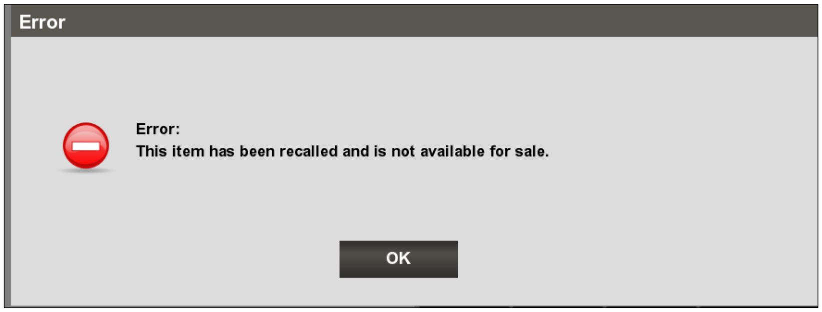


Sales Ban

Note: Sales bans are not restricted to the item (PLU price look up code) itself (PLU), but could include reasons such as batch recall or expired items etc. The system identifies such items through the barcode (GS1 databar barcode field AIs Application Identifiers).

Recall

If an item is recalled by the manufacturer, items can be flagged accordingly. If you enter an item marked for recall, the system displays the following prompt.



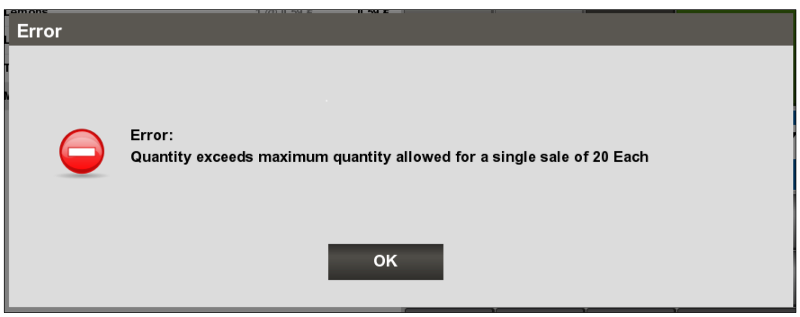
Recall

Purchase Limit

You can flag an item with a purchase limit in Xstore Point-of-Service for Grocery.

Maximum Purchase Limit

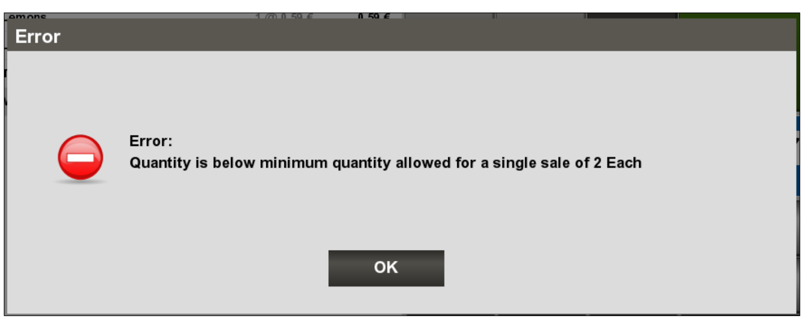
If you enter an item flagged with a maximum quantity, the system displays the following prompt.



Maximum Purchase Limit

Minimum Purchase Limit

If you enter an item flagged with a minimum quantity, the system displays the following prompt.



Minimum Purchase Limit

Quantity Query

You can flag an item with a quantity query in Xstore Point-of-Service for Grocery.

1. If you enter an item flagged with a quantity query, the system prompts for the quantity.
2. Enter the desired quantity and press **Enter**.
3. The item is shown on the Sale Display Panel.

Price Query

You can flag an item with a price query in Xstore Point-of-Service for Grocery.

1. If you enter an item flagged with a price query, the system prompt for the price.
2. Leave the suggested price or enter a new price. Press **Enter**.
3. The item is shown in the Sale Display Panel.

Verify Price Tag

Xstore Point-of-Service for Grocery provides the possibility to flag an item with a price tag verification.

1. If you enter the flagged item, you are asked to verify the shown price.
    a. If the price is correct, press **Enter**.
    b. If the price is not correct, enter the new price and press **Enter**.

Serial Number

You can flag an item with a query for the serial number.

1. Enter the corresponding item. You are prompted for the serial number.
2. Enter the serial number and confirm with **Enter**. The serial number is shown on the Sale Display Panel.
3. Complete the transaction as usual. The serial number is printed on the receipt.

Post Void Transaction

Performing a Post Void transaction changes the status of a sale transaction to void. All records in the system are reset, as if they had never occurred during the original transaction. For example, a post void adjusts the tender totals for the till involved in the transaction. A transaction may be post voided only on the day it is created. Post Voids may be performed on a different register from the one where the original transaction was executed.

1. To carry out a post void transaction, press menu button **Post Void**.
2. If you do not have sufficient security privilege to carry out a return transaction, Xstore Point-of-Service for Grocery shows the override information.
3. Users holding the required security privilege must follow the steps below to carry out the security override.
    a. Enter your user name and confirm with **Enter**.
    b. Enter your password and confirm with **Enter**.
4. You are prompted for the receipt nr.? Enter the receipt number and press **Enter** or scan the receipt.

   a. If you scanned the receipt, you are asked if you really want to void the selected transaction. Confirm with **Yes** to void the scanned receipt.

   Note: If you scanned the receipt, steps 5-6 are omitted.

5. You are prompted for the register number. Enter the register number and press **Enter**.
6. You are prompted for the amount. Enter the corresponding amount and press **Enter**.
7. You are prompted for the reason. Select the reason for the Post Void and press **OK**.
8. The system voids the transaction and prints a void receipt for your record.

   Note: All sold items, discounts, and deals are reversed. All written statistic values are reversed as well. The original receipt can only be voided once.

   a. If you void a Credit Card receipt, the information reversing authorization is displayed.
   b. If the process has been successful, the system shows a corresponding prompt. Close prompt with **OK.**

Reprint Last Receipt

1. To reprint the last receipt of the current register, press **Reprint Last Receipt**.
2. The system prints the last receipt and the receipt is marked as reprint.

Reprint Receipt

1. To reprint a receipt of any register, press **Reprint Receipt**.
2. The register prompts for the receipt number. Enter the receipt number and press **Enter**.
3. The register prompts for the register number. Enter the register number and press **Enter**.
4. The system prints the requested receipt. The receipt is marked as reprint.

   Note: You can reprint any receipt from the current business day.

Store Message

Store messages, created in the back office, can be viewed in Xstore Point-of-Service for Grocery. If you start the cash register, the store messages are displayed. You can also use the letter icon in the Sale screen to view store messages. The number of available store messages is shown right next to the letter icon.

1. Select the letter icon.
2. The available store messages are shown.

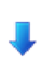
Store Message

3. Exit messages with **OK**. If the message contains a link, the browser opens.

> **Note:** If the message contains a link, the browser opens, when you press **OK**. If the message does not contain a link, you can exit the store messages with **OK** or **Cancel**.
>
> The store messages are available for as long as defined in the back office. For more information on Store Messages – see *Oracle Retail Xstore Point-of-Service Manager's Guide and Oracle Retail Xstore Office User Guide.*

The table below states possible Store Message icons and their meaning.

Table 4: Store Message Icons

Icon	Description
	The icon indicates that the message contains a link (URL), if you press **OK** the browser opens.
	This icon indicates high priority.
None	No icon indicates a medium priority.
	This icon indicates low priority.

Training Mode

Enter Training Mode

Xstore Point-of-Service for Grocery provides the possibility to train your staff.

1. Press **Training Mode** to start the Xstore Point-of-Service for Grocery training. The Training Mode is indicated with the information Training Mode on the Operator as well as the Customer Display.

Training Mode

> **Note:** All created receipts are also marked with training mode.

Exit Training Mode

1. To exit the Training Mode, press **Exit Training Mode**.
2. The system prints the receipt Exit Training Mode.

Open Browser

If you select the menu button **Open Browser**, the browser window opens. To exit the browser window, click on the Exit icon in the top right hand corner.

Pause

To lock the cash register temporarily, press the menu button **Pause**.

To log on again enter your password and press **Enter**.

Close Application

To close Xstore Point-of-Service for Grocery, enter 99 and press **Code**.

9 Return Transactions

Overview

Returns allow you to create transactions for returned items and to associate the reason the item was returned with the transaction. Xstore Point-of-Service for Grocery allows you to create return transactions without the original receipt and within a receipt. If you are in the Return mode, the Operator and Customer Display turn red.

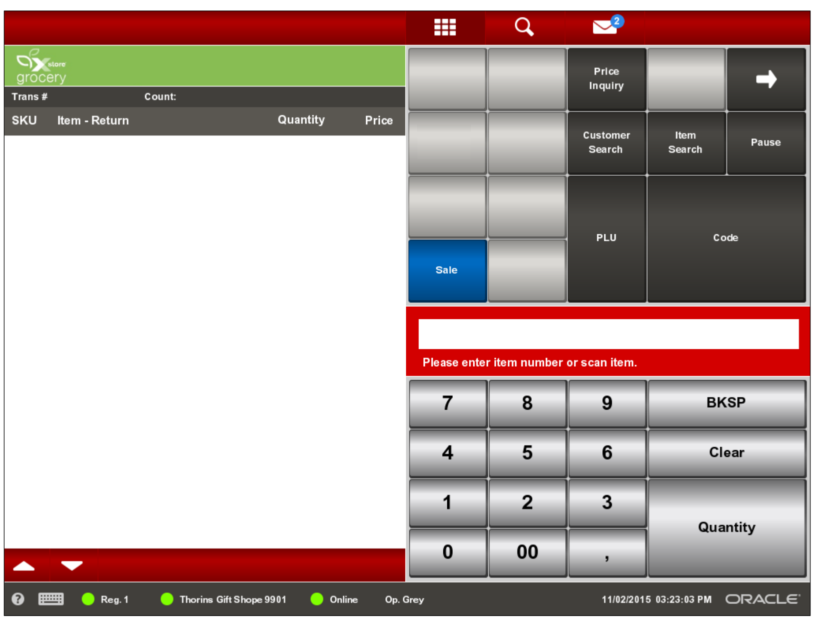
Returns without Original Receipt

Unverified Return

An unverified return is a return without a receipt.

1. To carry out an unverified return transaction, press the menu button **Return**.
2. If you do not have sufficient security privilege to carry out a return transaction, Xstore Point-of-Service for Grocery shows the override information.
3. Users holding the required security privilege, must follow the steps below to carry out the security override.
    a. Enter your user name and confirm with **Enter**.
    b. Enter your password and confirm with **Enter**.
4. You are now in the Return mode, marked red. Enter the returned item.

Note. To return to the Sale screen, press menu button **Sale**.



Operator Display - Return Screen

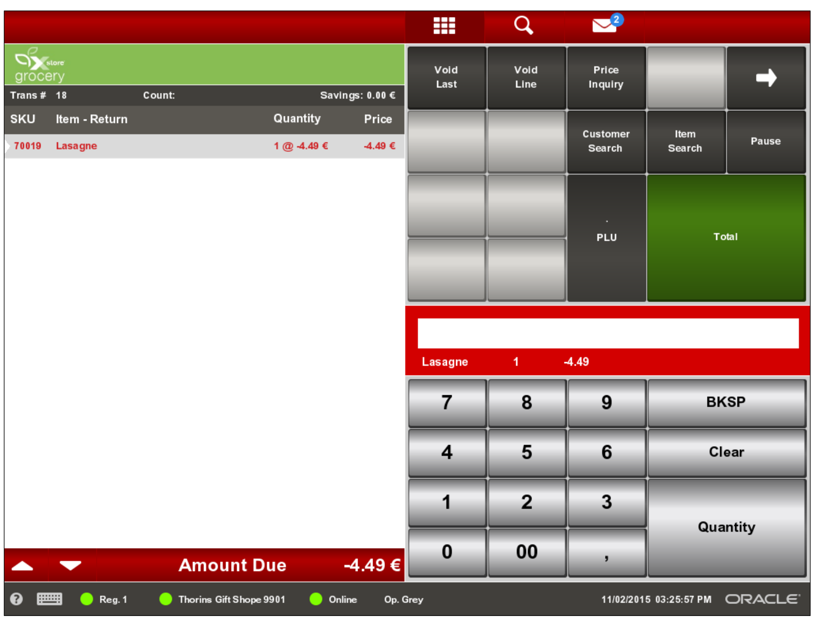
5. Xstore Point-of-Service for Grocery shows a list of return reasons. Select the corresponding reason and press **OK**.

Return Reasons

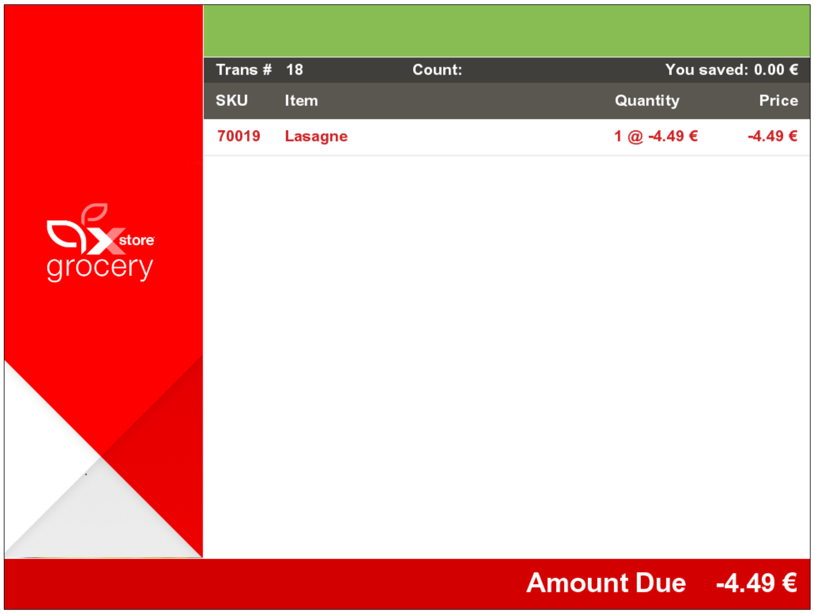
6. You are prompted for the price. Take the suggested price or enter a new price and press **Enter**.
7. You are prompted for the serial number. Enter the number and confirm with **Enter**.

> **Note:** The system only shows the serial number prompt, if the item is configured accordingly.

8. The item is shown on the Sale Display Panel and on the Customer Display. Press menu button **Total**.



Operator Display - Return Item



Customer Display - Return Item

9. Select tender type **Cash**.
10. The Change Due amount is shown. The till (cash drawer) opens. Return the money to the customer. The return transaction is completed and the return receipt is printed. Close till (cash drawer) or press **Clear** to start a new sale transaction.

Returns within a Sale Transaction

You can also return items within a sale transaction in Xstore Point-of-Service for Grocery.

1. After you have entered several items, press the menu button **Return**.
2. If you do not have sufficient security privilege to carry out a return transaction, Xstore Point-of-Service for Grocery shows the override information.
3. Users holding the required security privilege, must follow the steps below to carry out the security override.
    a. Enter your user name and confirm with **Enter**.
    b. Enter your password and confirm with **Enter**.
4. The displays turns red, to indicate that you are in the Return mode.
5. You are prompted for the return item. Enter the corresponding item.
6. Xstore Point-of-Service for Grocery shows a list of return reasons. Select the corresponding reason and press **OK**.
7. You are prompted for the price. Enter the price or take the suggested price and press **Enter**.
8. The returned item is shown on the Sale Display Panel and on the Customer Display. The displays return to the Sales mode again, indicated by the change of color.
9. Press menu button **Total**. Xstore Point-of-Service for Grocery calculates the Amount Due.
10. Complete the transaction with a tender type. The receipt is printed and the Change Due amount is shown. Close the till (cash drawer) or press **Clear** to return to the Sale screen.

10
Customer Maintenance

Overview

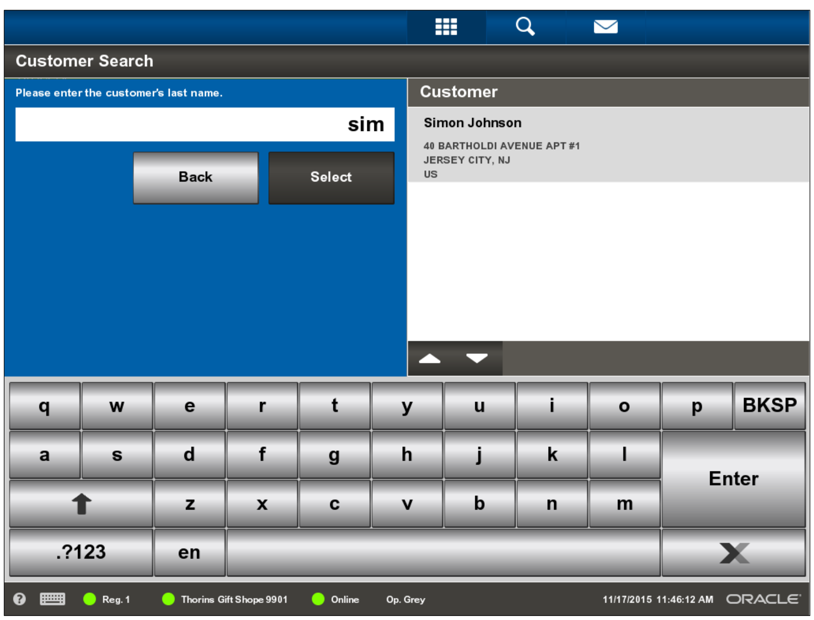
Customer Maintenance includes activities that relate to searching for customers in the customer database, viewing, printing or removing customer information. This chapter describes how to search for a customer as well as how to add and remove a customer to/from a sale transaction.

Customer Search

You can link a customer to the current sale transaction. You can link the customer to the current transaction at the following stages.

- at the beginning of the transaction
- after you have entered several items
- during the tendering process

1. To link a customer to the current transaction, select menu item **Customer Search**.
2. The system shows the screen customer search with the virtual keyboard. Enter the name of the customer.
3. Press **Enter**. The search results are shown.



Customer Search

Note: Depending on your system's configuration, the customer search might vary.

Default Configuration: The search starts automatically, after you have entered 2 characters.

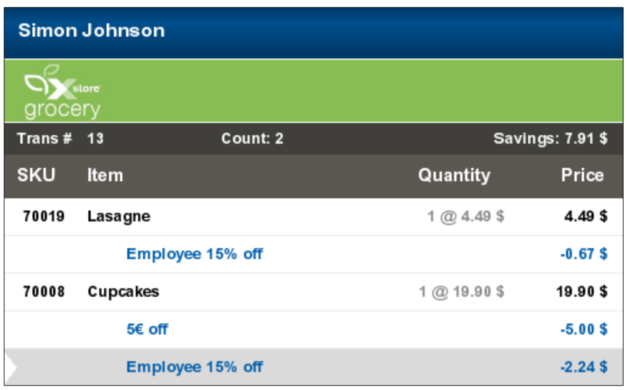
Other possible configurations:

The search starts automatically, after an individually defined number of characters.

You can clear the search result with **BACK.**

If no search result is found, the search window turns red.

4. Select the corresponding customer with the up and down arrows and press **SELECT**. The system links the customer to the transaction. The customer is shown in the Customer Loyalty Banner on the Sale Display Panel as well as on the Customer Display.



Customer added to Transaction

5. Complete the transaction as usual. The selected customer is printed on the receipt.

Change Language of Customer Display

The language of the Customer Display can be switched to the language, stored in the data base for this particular customer. This option is independent from the system user. Therefore, the customer and operator/user languages do not have to be the same.

1. Select a customer with a different language than the user language – see "Customer Search, Chapter 10".
2. Add the customer to the current transaction. If the stored customer language is different than the operator/user language, the system switches the language of the Customer Display.

   For example, the language on the Operator Display is German and the language on the Customer Display is English.

Remove Customer

You can remove a previously added customer from the current transaction.

1. Press **Remove Customer**.
2. The customer is removed from the current transaction and not printed on the receipt.

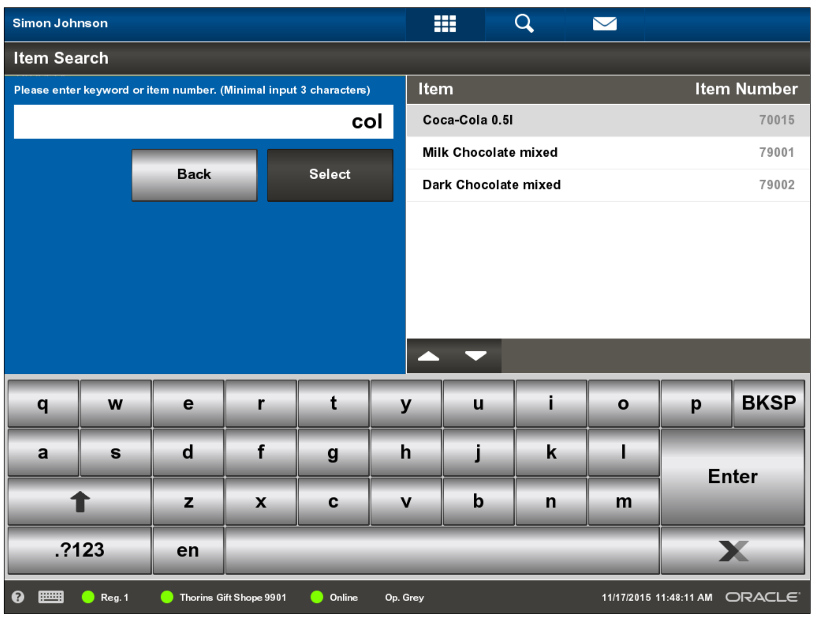
11

Item Search

Item Search

During a transaction you may need to search for a particular item. You can add an item to the current transaction by using the Item Search function.

1. To search for an item and add the item to the transaction, use the **Item Search**.
2. The system shows the item search screen with the virtual keyboard. Enter the item description or item number.
3. Press **Enter**. The search results are shown.



Item Search – Characters

Note: Depending your system's configuration the item search might vary.

Default Configuration:

The search starts automatically, after you have entered three characters.

Other possible configurations:

The search starts automatically, after an individually defined number of characters.

You can clear the search result with **BACK**.

If no search result is found, the search window turns red.

4. Select the corresponding item with the up and down arrows and press **SELECT**. The system adds the selected item to the transaction.

12

Manage Till Options

Till Management

There are two types of till management:

- Till Accountability
- Register Accountability

Till Accountability: A till is assigned to a specific operator. At the automatic store/register open, you have to enter the float amount. The assigned till can be attached to any register the operator may work on during the day.

At the end of the operator's shift, the operator must return the assigned till to the cash management office for reconciliation. This allows two operators to share a single POS register while keeping their tills separate.

Register Accountability: A till is assigned to a register and can be used by any operator that uses the register. The first associate who signs on to the register is responsible for opening the till. The associate is then required to count the drawer. This process assigns the drawer to the current register.

Depending upon your store policy, the operator enters the total amount of cash in the till, or enters the quantity of each cash denomination. If a float amount (a configurable value) has been left in the till, the system calculates the difference between the float amount and the actual opening amount entered, and if there is a difference, allows the operator to recount the till or accept the new amount.

Till Accountability

Automatic Store/Register Open at Login

1. If you switch on the register at the beginning of a business day, the system prompts for the user name. Enter your user name and confirm with **Enter**.
2. Enter your password and press **Enter**. For security purposes, your password displays as a row of asterisks.
3. The system shows the business date. Press **OK**.
4. Xstore Point-of-Service for Grocery opens the store automatically, when you log on to the system. The receipt Store Open is printed.

   Note: Additionally, the system opens the store bank with the current revenues, when the store is opened.

5. Xstore Point-of-Service for Grocery opens the register. The receipt Register Open is printed.
6. You are prompted for a till. Select the corresponding till and press **OK**.
7. The receipt with the issued till, cashier id and starting cash amount is printed.
8. You are prompted for the float amount of the till. Enter the amount and press the corresponding currency.
   a. **Amount correct:** If the entered amount matches the system amount for the till, the system prompts to verify, if the entered starting cash amount is correct.
      – Confirm the entered amount with **Yes**.
   b. **Amount not correct:** If the entered amount does not match the system amount, the system prompts for whether you want to accept the difference. Confirm the difference with **Yes** or press **No** to enter another amount.

      If you confirm the difference with **Yes**:
      – You are prompted for the reason. Select a reason and press **OK**.
      – You are prompted for a comment. Enter your comment and press **OK**.
9. The system prints the receipt Begin Count.
10. Additionally, the system prints the receipt Attach Till, for example, till 1 has been attached to register 1.
11. You are now logged on to the register. You can start your sale transactions.

Register Accountability

Automatic Store/Register Open at Login

1. If you start the register at the beginning of a business day, the system prompts for the user name. Enter your user name and press **Enter**.
2. Enter your password and press **Enter**. For security purposes, your password displays as a row of asterisks.
3. The system shows the business date.
4. Xstore Point-of-Service for Grocery opens the store automatically, when you log on to the system. The receipt Store Open is printed.

> **Note:** Additionally, the system opens the store bank with the current revenues when the store is opened.

5. You are prompted for the float amount of the till. Enter the amount and press the corresponding currency.
   a. **Amount correct**: If the entered amount matches the system amount for the till, the system prompts to verify whether the amount is correct.
      – Confirm the entered amount with **Yes**.
   b. **Amount not correct:** If the entered amount does not match the system amount, the system prompts to verify whether you want to accept the difference. Confirm the difference with **Yes** or press **No** to enter another amount.

      If you confirm the difference with **Yes**:
      – You are prompted for the reason. Select a reason and press **OK**.
      – You are prompted for a comment. Enter your comment and press **OK**.
6. The system prints the receipt Begin Count.
7. Xstore Point-of-Service for Grocery opens the register. The receipt Register Open is printed. You can start your sale transactions.

Configurations Automatic Store/Register Open

The following configurations are possible for the automatic store/register open.

Business Date: The system prompts for a business date during the store open process. If a wrong date has been entered, the system date is used.

Store Reopen: The store can be closed and re-opened on the same day.

Unscheduled Business Date: The system allows the operator to open the store on unscheduled business dates, for example, holidays.

Open at Primary Register: The system can only be opened at the primary register.

Display Message: The system displays the store close message the operator entered during the store close procedure, when the store is opened.

Till Accountability

Automatic Store Bank Count: The system carries out an automatic store bank count with the last closing cash amounts.

Register Accountability

Till Count at Register Close: The system prompts the operator to perform a till closing count at register close.

Transfer No Till Count: Used for registers that do not have a cash drawer or do not handle cash. If enabled, no prompt is shown for begin or end count during the register open or close procedure. The system automatically moves all tender amounts from the register to the store bank.

Paid In/Paid Out Transaction

A Paid In transaction allows you to move funds into a till from non-sale sources. A Paid Out transaction moves funds out of a till for non-refund purposes.

Note: The system's configuration controls which operators are allowed to move funds in or out of the till. It also specifies the list of valid reasons (reason codes) that an operator can select when performing a paid in or paid out transaction.

Paid In Transaction

A Paid In Transaction allows you to move funds into a till from non-sale sources.

1. To move funds to the till, use menu button **Pay In**.
2. If you do not have sufficient security privilege to carry out a return transaction, Xstore Point-of-Service for Grocery shows the override information.
3. Users holding the required security privilege must follow the steps below to carry out the security override.
    a. Enter your user name and confirm with **Enter**.
    b. Enter your password and confirm with **Enter**.
4. The defined pay in reasons are shown. Select the corresponding reason and press **OK**.
5. You can specify the reason in the next screen. Select the reason and confirm with **OK**.
6. You are prompted for the pay in amount. Enter the amount and press **Enter**.
7. You are prompted for the tender of the paid in transaction. Select the corresponding tender type and confirm with **OK**.
8. The register prints the Paid In receipt and the till (cash drawer) opens.

Paid Out Transaction

A Paid Out transaction moves funds out of a till for non-refund purposes.

1. To move funds out of the till, use menu button **Pay Out**.
2. If you do not have sufficient security privilege to carry out a return transaction, Xstore Point-of-Service for Grocery shows the override information.
3. Users holding the required security privilege, must follow the steps below to carry out the security override.
    a. Enter your user name and confirm with **Enter**.
    b. Enter your password and confirm with **Enter**.
4. The configured pay out reasons are shown. Select the corresponding reason and press **OK**.

5. You can specify the reason in the next screen. Enter a comment and confirm with **OK.**
6. You are prompted for the payout amount. Enter the amount and press **Enter**.
7. You are prompted for the corresponding currency. Select the currency and confirm with **OK**.
8. The register prints the Pay Out receipt and the till (cash drawer) opens.

Add Float

The "Float" is the total value of cash counted and removed from the till, but not included in the store bank amount. With the Add Float function, money is taken out of the store bank and put into the till. The register shows a prompt if the cash in the till is under the set minimal amount.

1. To add a new float amount, when an operator is logged on to a till, press **Add Float**.
2. If you do not have sufficient security privilege to carry out a return transaction, Xstore Point-of-Service for Grocery shows the override information.
3. Users holding the required security privilege, must follow the steps below to carry out the security override.
    a. Enter your user name and confirm with **Enter**.
    b. Enter your password and confirm with **Enter**.
4. You are prompted for the additional float amount.
5. Enter the additional float amount and confirm with **Enter**. The system updates the float amount to the new value of the till and a receipt is printed.

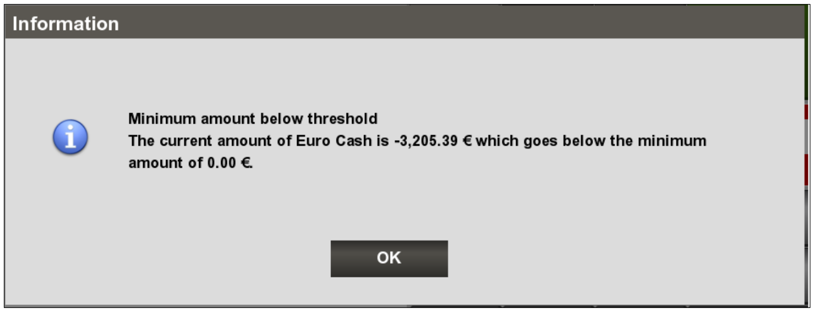
> **Note:** You can add a float amount multiple times per day.
>
> Every time the till is running low on some denominations, the till can be refilled using this function.

Cash Level Warning

Xstore Point-of-Service for Grocery warns the operator if the float amount of the till is over or under the set maximal or minimal values. Cash Level Warnings are shown during the following functions.

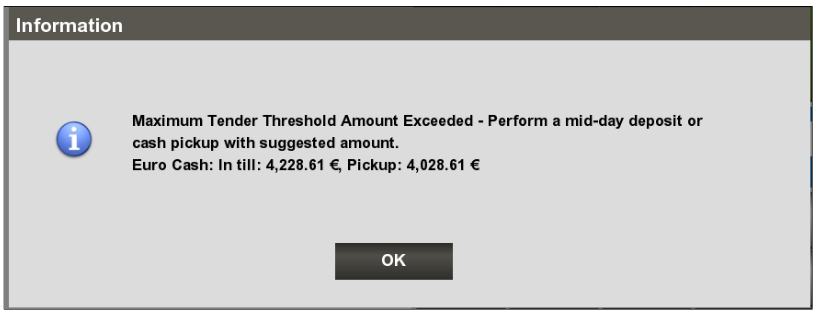
- Sales transaction
- Return
- Post Void
- Pay In Transaction
- Pay Out Transaction
- Add Float
- Cash Pickup

If the entered amount is below the threshold amount, the following prompt is shown.



Amount below Threshold

If the entered amount is above the threshold amount, the following prompt is shown.



Amount above Threshold

> **Note:** If the cash amount of the till exceeds the set maximum amount, the system prompts the operator to perform a cash pickup (see – "Cash Pickup") with the amount that is the current cash total minus the set maximum amount.

Cash Pickup

Cash pickup is a cash drawer feature that allows an operator to take cash from a till so that the amount does not exceed a specified threshold amount. Each tender type that is physically in the till can be picked up, for example, cash, foreign currencies, or coupons. The register shows a prompt, if the cash in the till is over the set maximal amount.

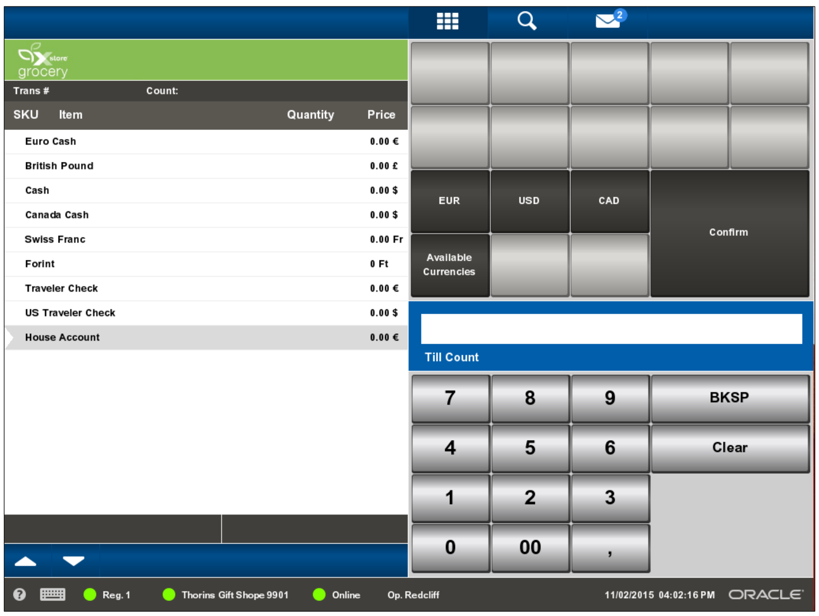
1. Press **Cash Pickup**.
2. If you do not have sufficient security privilege to carry out a return transaction, Xstore Point-of-Service for Grocery shows the override information.
3. Users holding the required security privilege must follow the steps below to carry out the security override.
    a. Enter your user name and confirm with **Enter**.
    b. Enter your password and confirm with **Enter**.
4. You are prompted for the cash pick up amount. Enter the amount and confirm with **Enter**.
5. If foreign currencies are enabled on your system, you are prompted to select the corresponding currency. Select for example, EUR and press **OK**.
6. The till (cash drawer) opens, remove the appropriate amount. The entered amount is transferred from the till to the safe and the system prints a receipt of the cash transfer.

> **Note:** You can perform Cash Pickups multiple times a day.
>
> Every time the cash in the till exceeds a specific threshold amount, the amount can be reduced using this functionality.

Till Audit

At a till audit, the user counts the tenders in a till. Till audits typically occur when issuing and returning tills to and from the store bank. Counts may also occur at arbitrary times or when performing cash pickups.

1. Select menu button **Till Audit**.
2. All available tenders are listed in the Sale Display Panel.



Till Count

3. Enter the amount per tender type.
4. If you have entered all tender types, confirm your entries with **Confirm**.
5. The till audit is completed, the system prints the receipt Till Count.

Close Register

Depending on your system's configuration the close register function varies as outlined below.

Till Accountability

If your system has till accountability, follow the steps below to close the register.

1. Press **Close Register**.
2. The system prints the receipts Remove Till and Register Closed. Remove the till from register. The register is closed. The till count is carried out in the Back Office.

Register Accountability

If your system has register accountability, follow the steps below to close the register.

1. Press **Close Register**.
2. You are prompted to count the till. Enter the amount for the individual tender types and press **Confirm**.
   a. **Out of balance:** If tender types are out of balance, you are prompted to accept the difference.
      – **Yes** - accept the difference and close register.
         * You are prompted for the reason. Select reason and press **OK**.
         * Additionally, you can enter further comments. Confirm with **OK**.
      – **No** - repeat till count again.
   b. **In balance:** If all entered tender types are in balance, an Information prompt "Till is in balance" is shown. Press **OK** to close the Information prompt.
3. The register is closed, the receipt End Count is printed.
4. The receipt Register Closed is printed. The close register process is completed.