

Oracle® Retail Xstore Point-of-Service

Mobile User Guide

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Preface

Oracle Retail Xstore Mobile is a mobile point-of-sale (POS) extension of the Xstore register software. Using Xstore Mobile, many of the actions that employees normally performed on a register can now be performed out on the sales floor. This guide describes the activities supported by Oracle Retail Xstore Mobile.

Audience

This guide is for staff who implement, support, or use Xstore Mobile.

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Related Documents

For more information, see the following documents in the Oracle Retail Xstore Suite Release 16.0 documentation set.

- *Oracle Retail Xstore Suite Implementation and Security Guide*
- *Oracle Retail Xstore Suite Release Notes*
- *Oracle Retail Xstore Point-of-Service User Guide*
- *Oracle Retail Xstore Point-of-Service Manager's Guide*
- *Oracle Retail Xstore Point-of-Service for Grocery User Guide*
- *Oracle Retail Xstore Point-of-Service Reports Guide*
- *Oracle Retail Xstore Point-of-Service Shipping, Receiving and Inventory Guide*

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- Exact error message received
- Screen shots of each step you take

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Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, emphasis, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, 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.

Introduction to Oracle Retail Xstore Mobile

Oracle Retail Xstore Mobile is a mobile point-of-sale (POS) extension of the Xstore register software. Using Xstore Mobile, many of the actions that employees normally performed on a register can now be performed out on the sales floor.

Xstore Mobile is built utilizing the existing Xstore core frameworks and work flows to ensure a consistent experience for the associate. It is platform independent and runs on iOS and Android. The application is built as a thin client, enabling speed of deployment and without operating system dependencies. The new UI on the Mobile Tablet is simple to use and takes advantage of the look and feel of the current desktop application where relevant.

Note: The appearance of Xstore Mobile differs depending upon the operating system and the specific device on which it runs. Therefore, your screens may differ from the screens that appear in this manual.

About this Guide

The *Oracle Retail Xstore Point-of-Service Software Mobile User Guide* describes how to perform the functions available in Xstore Mobile Handheld and Mobile Tablet. These functions are described in the following chapters:

- [Chapter 2, Custom Branding](#) - Describes how to customize the Xstore Mobile user interface for your brand.
- [Chapter 3, Sale](#) - Describes the sale transaction process.
- [Chapter 4, Return Transactions](#) - Describes the return transaction process.
- [Chapter 5, Item Lookup](#) - Describes how to look up an item to view information about it.
- [Chapter 6, Time Clock](#) - Describes clocking in, clocking out, and changing the work code under which time is logged.
- [Chapter 7, Admin](#) - Describes the administrative functions that can be performed in Xstore Mobile.
- [Chapter 8, Receiving](#) - Describes inventory receiving.
- [Chapter 9, Shipping](#) - Describes inventory shipping.
- [Chapter 10, Inventory Counts](#) - Describes how to create, perform, update, and submit inventory counts.

- [Chapter 11, Inventory Adjustment](#) - Describes how to make adjustments to inventory counts.
- [Chapter 12, Item Transfer](#) - Describes how to transfer items between inventory buckets.
- [Appendix A: Item Adjustment](#) - Explains each of the adjustments that can be made to sale items in Xstore Mobile.

Interface

The interface for Xstore Mobile is made up of common elements in any mobile application. These elements include text fields, buttons, links, lists, and menus used to select options, enter data, or open new screens.

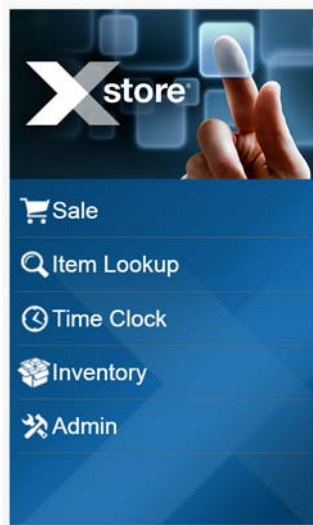
There is a consistent use of color for key associate functions such as blue for sales, teal for orders, red for returns and so on.

Note: The appearance of Xstore Mobile differs depending upon the operating system and the specific device on which it runs. Therefore, your screens may differ from the screens that appear in this manual.

Main Menu

Mobile Handheld

The main menu for Xstore Mobile is the first screen displayed when opening the application. This screen displays a list of buttons, each of which accesses certain areas of Xstore Mobile.



Select the respective option to access the appropriate functionality.

- **Sale** - Perform sale transactions. See [Chapter 3, Sale](#).
- **Item Lookup** - Look up information about items in the system. See [Chapter 5, Item Lookup](#).
- **Time Clock** - Perform time clock functions, such as clocking in and clocking out. See [Chapter 6, Time Clock](#).
- **Inventory** - Perform inventory actions. See [Chapter 8, Receiving](#), [Chapter 9, Shipping](#), [Chapter 10, Inventory Counts](#), [Chapter 11, Inventory Adjustment](#).
- **Admin** - Access administrative tasks that can be performed in Xstore Mobile. See [Chapter 7, Admin](#).

Mobile Tablet

The main menu for Xstore Mobile Tablet is the first screen displayed when opening the application. It has been designed specifically for use with tablets and has the look and

feel of the Mobile Handheld and desktop versions. An example of the home screen on a tablet is shown below:

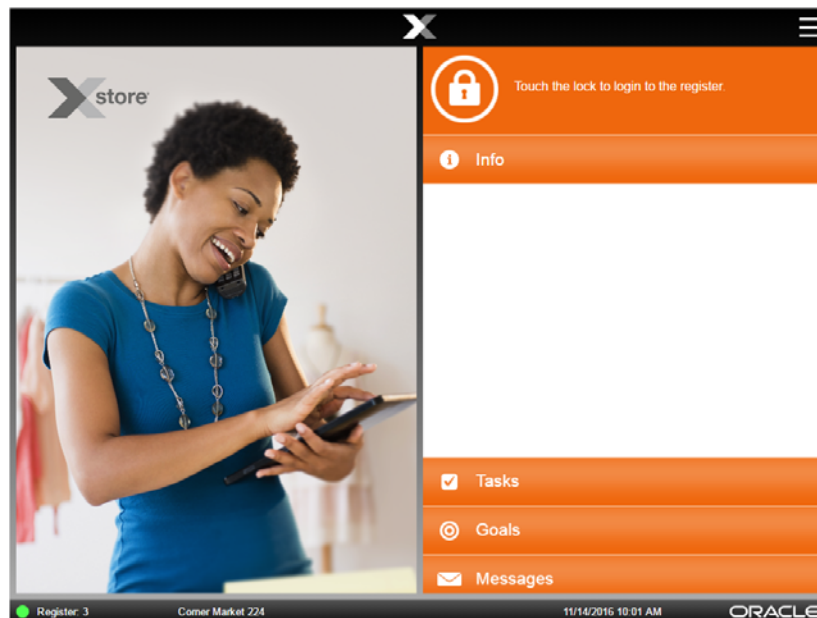
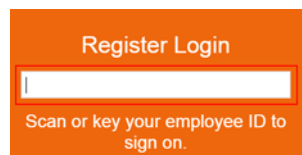


Figure 1-1: Tablet Home Screen

The tabs (now known as a scrolling list), are shown on the right hand side rather than the left. This is because most associates will hold a tablet in their left hand and naturally drive the device with their right hand. This is a configurable option so for left-handed users the format can be transversed.

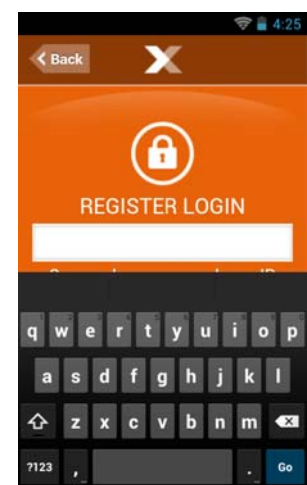
Rolling your finger up and down the tab section will give you access to the list selection. Select an option to put it in the focus area.

Text Field



A text field is used for keying in information. When a text field is selected, an on-screen keyboard opens on the mobile device, which you can use to enter the requested information.

Note that the appearance of the keyboard will depend upon the device on which you run Xstore Mobile.



Button

By selecting a button on the screen, you select the action that button performs. Buttons can take many forms, depending on their use.

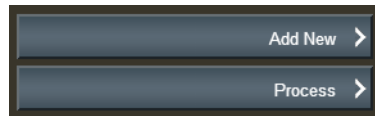


Figure 1-2: Standard Buttons

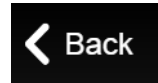


Figure 1-3: [Back Button](#)



Figure 1-4: [Context Menu Button](#)



Figure 1-5: Item Lookup Button

Back Button

The Back button exits out of the current activity and returns to the previous activity. The text in a Back button may differ and the activity to which it returns depends upon its location in the application.



Figure 1-6: Back Buttons

Context Menu Button



- The Context Menu Button opens a context menu.
- When it is present, the Context Menu Button (touch icon) will always be in the upper-right hand corner of the screen.
- The Context Menu Button will not be present on all screens.
- The options in the context menu itself will depend upon the screen in which it is located.
- The options available are equivalent to the Function buttons shown on the desktop.

Examples of the Context Menu for the Mobile Handheld and Mobile Tablet are shown below:

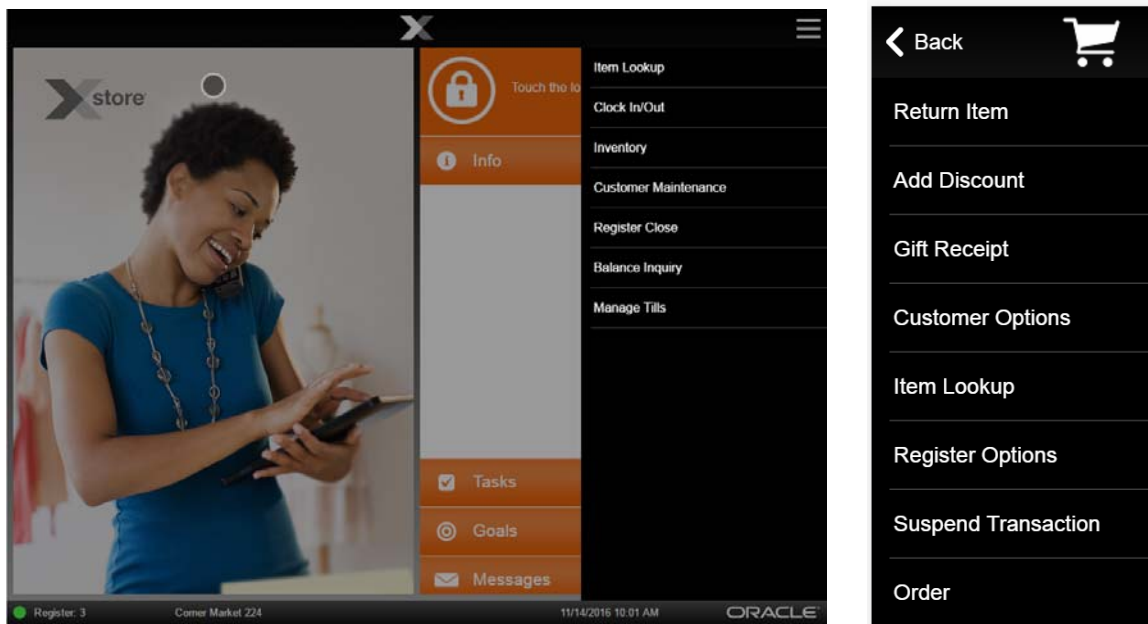


Figure 1-7: Example Context Menu on Mobile Tablet and Mobile Handheld

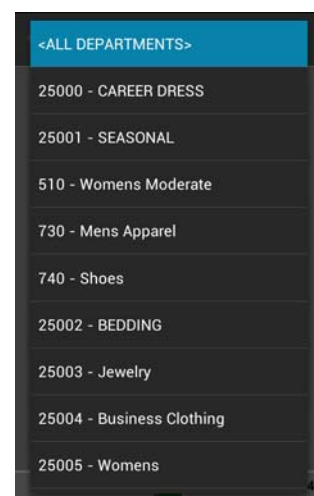
Selection Menu

A selection menu displays a list of options among which one item can be picked. Selection menus are generally used as part of a set of entry fields within a form.

A closed selection menu displays the option that has been selected (below).



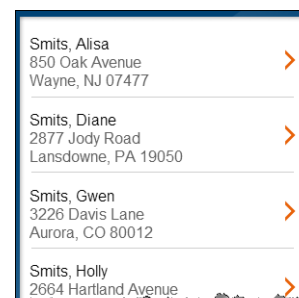
To change the option selected, select the selection menu to display the list of possible options (right), then select the correct option in the list.



List

A list displays a series of items. Each item in the list can be selected to open it.

- Lists are frequently used to display search results, such as customers returned by a [Customer Search](#), or documents returned when you [Search for a Receiving Document](#).



- Lists are also used for standard menus throughout the Xstore Mobile application.

Status Bar



The status bar is shown on the bottom of the screen. It is divided into three parts, each displaying information about the system.

The status bar has the following organization:

- On the left, the name of the logged-in user. If no user is currently logged in, nothing will be displayed in the lower-left corner.
- In the center, the register number and whether the store is open or closed.
 - If the store is open, the indicator will be green: 
 - If the store is closed, the indicator will be red: 
- On the right, Xstore Mobile displays the business date.

Custom Branding

Xstore Mobile allows you to set up the user interface so that it is configured specifically for your organization. Setting up your brand on Xstore Mobile is done by configuring a custom skin on the Xstore Mobile server.

Custom branding in Xstore Mobile is performed by placing override configurations in the `XstoreMobileBranding.properties` override file within the `cust_config` directory.

The configurations in this file are described in [XstoreMobileBranding.properties](#).

XstoreMobileBranding.properties

This file has the following properties:



The top section shows the main menu logo image.

This image has the following configurations and applies to the Mobile Handheld:

- `mainMenuLogoImageUrl` - The file location for the image. This can be a URL or a file location within the root directory for Xstore Mobile.

Examples:

```
mainMenuLogoImageUrl=res/graphics/
branding/xstoremobile/
XstoreM_MainImage.png
```

```
mainMenuLogoImageUrl=http://www.example.
com/xstoremobileimages/main_image.png
```

- `mainMenuLogoStyles` - CSS style information that configures how the image is displayed.

Example:

```
mainMenuLogoStyles=background-size:
cover; background-repeat: no-repeat;
background-position: 50%; min-height:
150px;
```

The lower section shows the main menu background image.

This image has the following configurations:

- `mainMenuMainBackgroundImageUrl` - The file location for the image. This can be a URL or a file location within the root directory for Xstore Mobile.

Examples:

```
mainMenuMainBackgroundImageUrl=res/graph
ics/ branding/xstoremobile/
XstoreM_MainBackground.png
```

```
mainMenuMainBackgroundImageUrl=http://
www.example.com/xstoremobileimages/
main_menu_background_image.png
```

- `mainMenuMainBackgroundStyles` - CSS style information that configures how the image is displayed.

Example:

```
mainMenuMainBackgroundStyles=background-
size: cover; background-repeat: no-
repeat; background-position: 50%;
```



The header image for a sale without an assigned customer. This images has the following configurations and applies to both the Mobile Handheld and Mobile Tablet:

- `saleItemHeaderNoCustomerImageUrl` - The file location for the image. This can be a URL or a file location within the root directory for Xstore Mobile.

Examples:

```
saleItemHeaderNoCustomerImageUrl=res/
graphics/branding/xstoremobile/
XstoreM_SmallXLogo.png
```

```
saleItemHeaderNoCustomerImageUrl=http://
www.example.com/xstoremobileimages/
small_logo.png
```

- `saleItemHeaderNoCustomerStyles` - CSS style information for the image. This configures how the image is displayed.

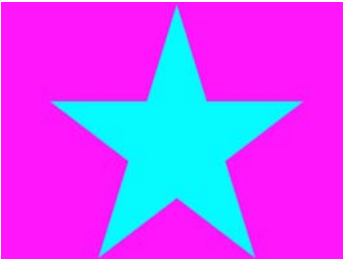
Example:

```
saleItemHeaderNoCustomerStyles=
background-repeat: no-repeat; background-
position:10px 50%;
```

Example Configuration

Figure 2-1: This sample configuration uses the following images, placed in the `res/graphics/branding/Sample` folder in the Xstore Mobile root directory.:

Table 2-1: Images Used in XstoreMobileBranding.properties Example

Image	Used in Section...
Star.png 	Main menu logo image
Diamond.png 	Main menu background image
Lightning 	Header image for a sale without a customer

Configuration Descriptions

The configurations in the XstoreMobileBranding.properties configure the following areas of Xstore Mobile.



Main Menu logo configuration
 mainMenuLogoImageUrl=res/graphics/branding/Sample/Star.png
 mainMenuLogoStyles=background-size: cover;
 background-repeat: no-repeat; background-position: 50%; min-height: 150px;



Main Menu background configuration
 mainMenuMainBackgroundImageUrl=res/graphics/branding/Sample/Diamond.png
 mainMenuMainBackgroundStyles=background-size: auto; background-repeat: repeat; background-position: 50%;

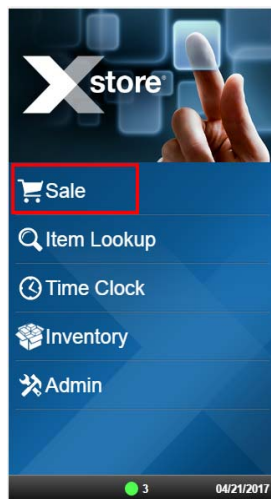


Image shown on the item list header when no customer is assigned.
 saleItemHeaderNoCustomerImageUrl=res/graphics/branding/Sample/Lightning.png
 saleItemHeaderNoCustomerStyles=background-repeat: no-repeat; background-position: left center;

File Contents

The complete file, as described in [Configuration Descriptions](#), would be the following:

```
# Main Menu logo configuration
mainMenuLogoImageUrl=res/graphics/branding/Sample/Star.png
mainMenuLogoStyles=background-size: cover; background-repeat: no-repeat; background-position: 50%; min-height: 150px;
# Main Menu background configuration
mainMenuMainBackgroundImageUrl=res/graphics/branding/Sample/Diamond.png
mainMenuMainBackgroundStyles=background-size: auto; background-repeat: repeat; background-position: 50%;
saleItemHeaderNoCustomerImageUrl=res/graphics/branding/Sample/Lightning.png
saleItemHeaderNoCustomerStyles=background-repeat: no-repeat; background-position: left center;
```



The Sale option in Xstore Mobile provides users with the ability to perform sale transactions. To begin a sale transaction, select the **Sale** option (left) on the [Main Menu](#) of Xstore Mobile.

Note: The process for a sale transaction in Xstore Mobile follows the steps configured for Xstore.

Note: The process for your version of Xstore Mobile may differ from the procedure(s) described below.

This chapter covers the following functions:

- [Start Transaction](#)
- [Register Login](#)
- [Choose Commissioned Associate](#)
- [Assign a Customer](#)
- [Loyalty Registration](#)
- [Add an Item](#)
- [Adjust an Item](#)
- [Context Menu Options](#)
- [Tender Transaction](#)

Start Transaction

To start a sale transaction:

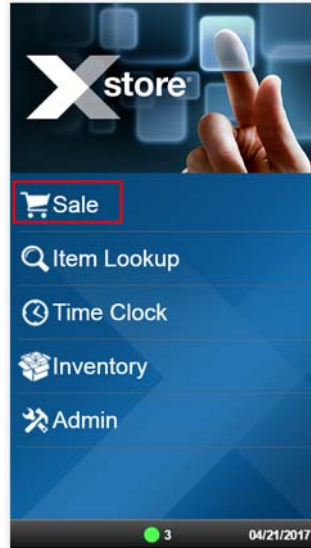


Figure 3-1: Main Menu - Sale

1. Select **Sale** in the [Main Menu](#) to start a new transaction.

Register Login

To log in to a register:

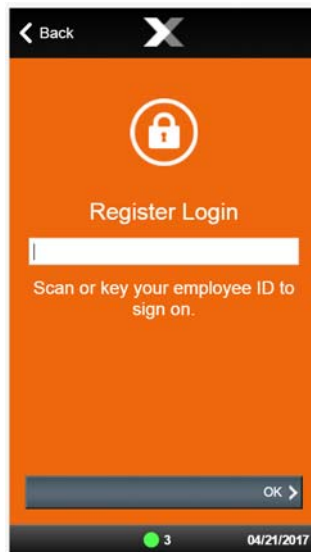


Figure 3-2: Register Login - ID

1. Enter Employee ID.
2. Select **OK**.

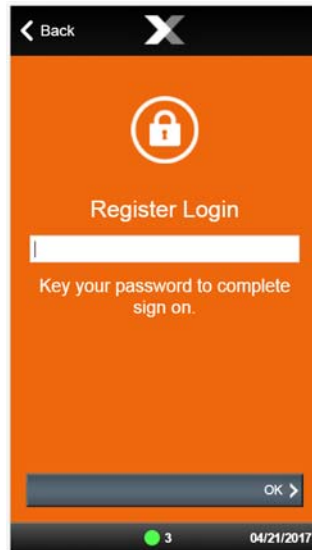


Figure 3-3: Register Login - Password

3. Enter Password.
4. Select OK.

Choose Commissioned Associate

There are two ways to select a commissioned associate for a transaction:

Select Associate



Figure 3-4: Select Associate

1. Select the associate(s) in the list.
2. Select OK.

Continue the transaction with:

- [Loyalty Registration](#)

<OR>

- [Add an Item](#)

Enter Associate ID



Figure 3-5: Associates - Select by ID

1. Select the **Select By Associate ID** button.

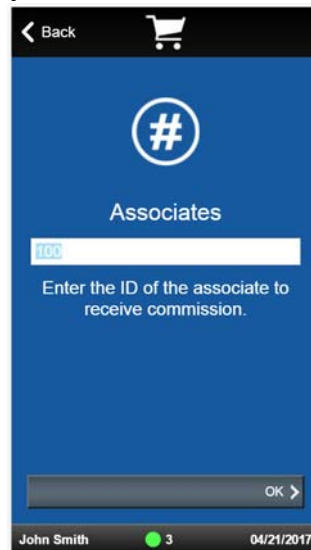


Figure 3-6: Associates - Enter ID

For each associate to add to the transaction:

2. Enter Associate ID. *The ID of the logged-in user is the default value.*
3. Select **OK**.

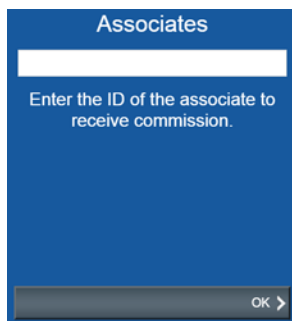


Figure 3-7: Associates - Blank Field

When you are finished adding associates:

4. Leave the associate ID field blank.
5. Select **OK**.

Continue the transaction with:

- [Loyalty Registration](#)

<OR>

- [Add an Item](#)

Assign a Customer

Note: To continue the transaction without adding a customer, select the **Skip** button.



To assign a customer to a transaction:

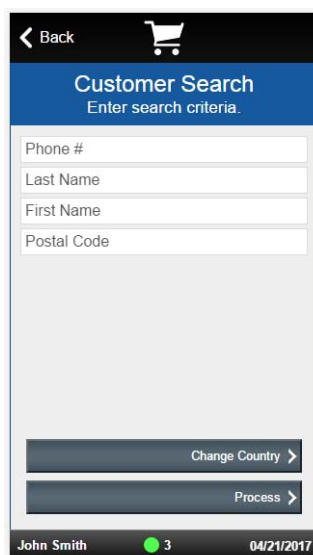


Figure 3-8: Customer Search Criteria

1. Enter search information.
2. Select the **Process** button.

To change the states/provinces in the State search menu, see [Change Country](#).



Figure 3-9: Customer Search Results



Figure 3-10: Customer Search - No Results

Do one of the following:

3. Select the customer. Continue the transaction with either [Loyalty Registration](#) or [Add an Item](#).

<OR>

Long-select the proper customer for additional options. See [View Customer Menu](#) for more information.

<OR>

Select the **New** button to add a customer. See [Create a Customer](#) for more information.

Continue the transaction with either:

- [Loyalty Registration](#)

<OR>

- [Add an Item](#)

Change Country

To change the states/provinces in the State field (if present) to those of a different country:

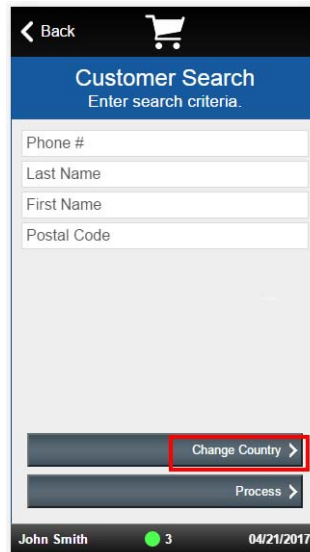


Figure 3-11: Customer Search Criteria

1. Select the **Change Country** button.

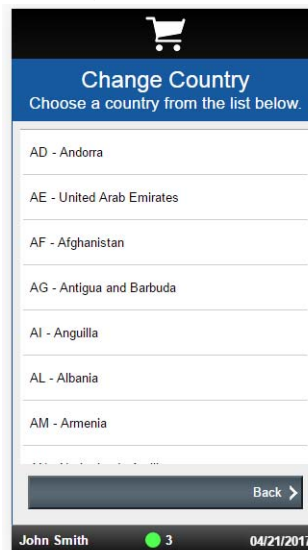


Figure 3-12: Change Country

2. Select the proper country.

Return to [Assign a Customer](#).

View Customer Menu

By long-selecting a customer in the customer search list, you can open a customer options menu that provides additional options:

Assign the Customer

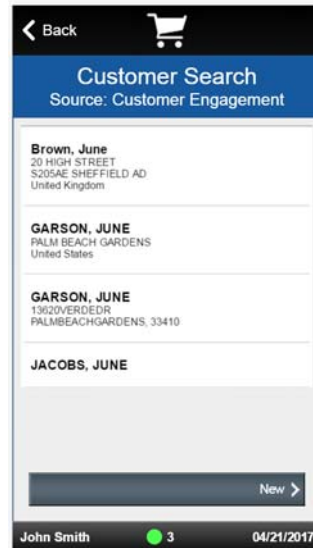


Figure 3-13: Customer Search Results

1. Select the **desired Customer**. Continue the transaction with either:

- [Loyalty Registration](#)

<OR>

- [Add an Item](#)

<OR>

View the Customer

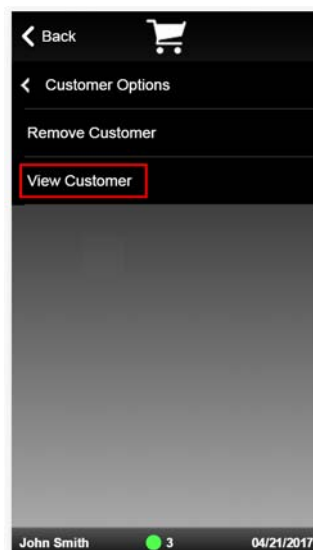


Figure 3-14: View Customer Option

1. Select the **View Customer** button.



Figure 3-15: Customer Detail

Use the Context Menu to do one of the following:

- Select **Edit Customer** to edit the customer information. See [Edit a Customer](#).
- Select **Enroll in Loyalty** to assign a loyalty card to the customer. See [Enroll in Loyalty](#).

Loyalty Registration

If a customer is not registered with a loyalty program, Xstore Mobile prompts to add a loyalty card. Do one of the following:

Register a Card

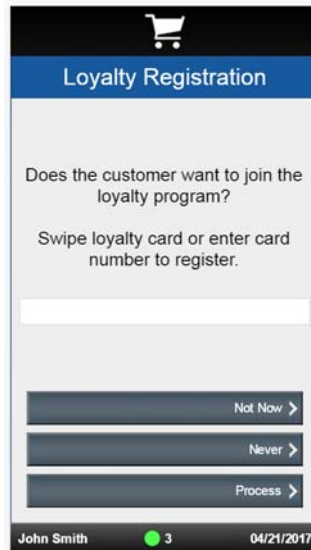


Figure 3-16: Loyalty Registration

1. Swipe a loyalty card, or enter the card number.
2. Select the **Process** button.

Continue Without Adding a Card

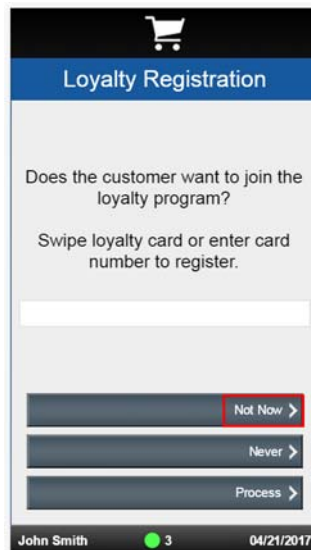


Figure 3-17: Loyalty Registration - Not Now

1. Select the **Not Now** button.

Never Ask Again About a Card

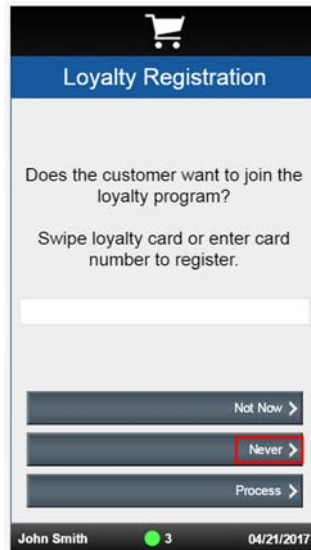


Figure 3-18: Loyalty Registration - Never

1. Select the **Never** button.

Add an Item

To add an item to a transaction:

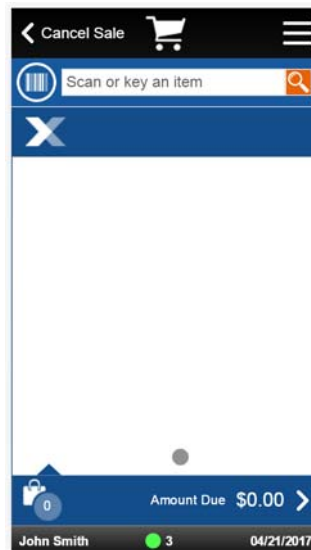


Figure 3-19: Sale Screen

1. Scan an item to add it to the transaction or enter an Item ID.

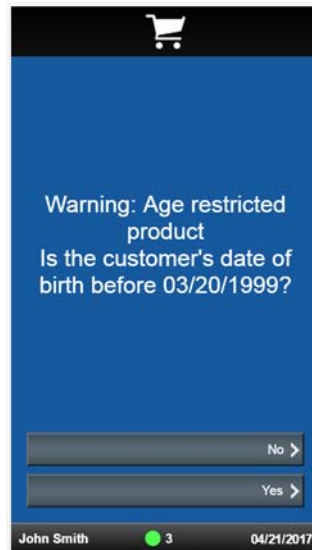


Figure 3-20: Age Restricted Product

If the entered item is age-restricted:

2. Select either **Yes** or **No**.

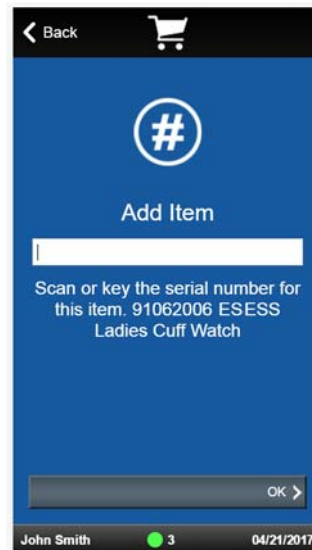


Figure 3-21: Serial Number Product

If prompted for an item serial number:

3. Enter the item serial number.
4. Select **OK**.

To add another item, repeat these steps.

To adjust an item, see [Adjust an Item](#).

When you are finished entering/adjusting items, tender the transaction. See [Tender Transaction](#).

Adjust an Item

To adjust an item that has been added to a transaction:

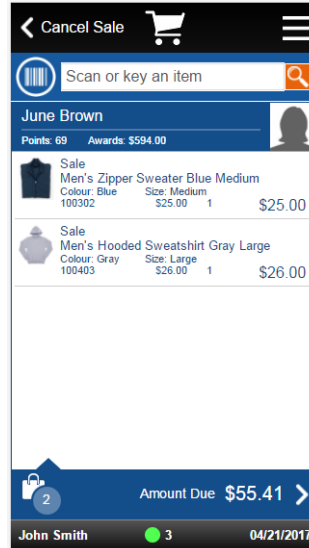


Figure 3-22: Sale Screen

1. Select the item in the item list.

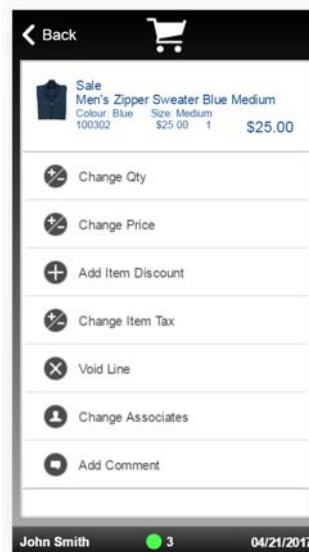


Figure 3-23: Item Adjustment Menu

2. Select the change to make to the item.

See [Appendix A: Item Adjustment](#) for information about the changes that can be made to an item.

To make another item adjustment, repeat these steps.

To add another item to the transaction, see [Add an Item](#).

When you are finished entering/adjusting items, tender the transaction. See [Tender Transaction](#).

Context Menu Options

To access all additional transaction options through the context menu, select the [Context Menu Button](#) in the upper-right corner of the transaction screen. This opens the context menu for transactions.

Add Discount

Add a Transaction Discount

To add a discount to a transaction:

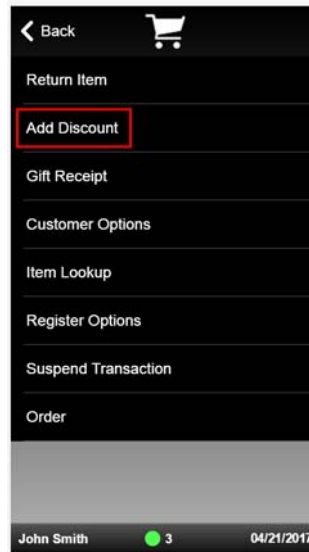


Figure 3-24: Add Discount Option

1. Select **Add Discount** in the Context Menu.

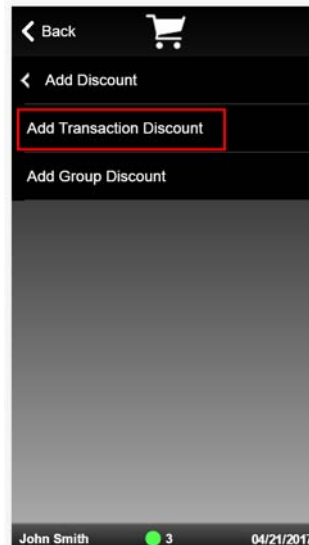


Figure 3-25: Add Transaction Discount Option

2. Select **Add Transaction Discount**.

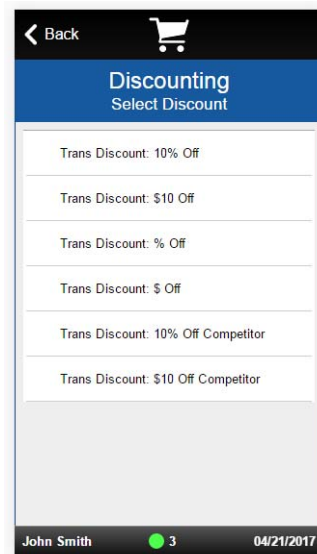


Figure 3-26: Select Discount Menu

3. Select the discount to apply.

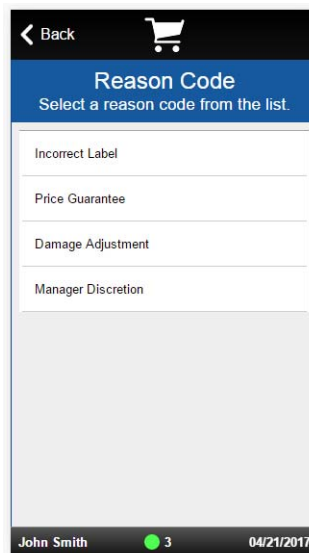


Figure 3-27: Reason Code List

4. Select the reason for applying the discount.

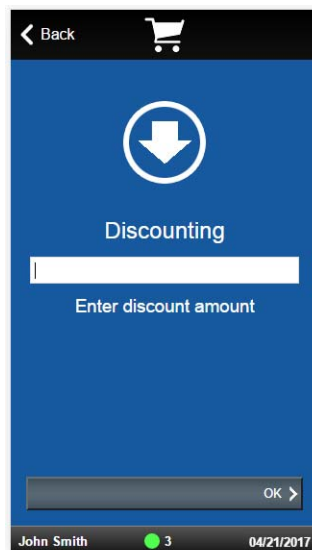


Figure 3-28: Enter Discount Amount

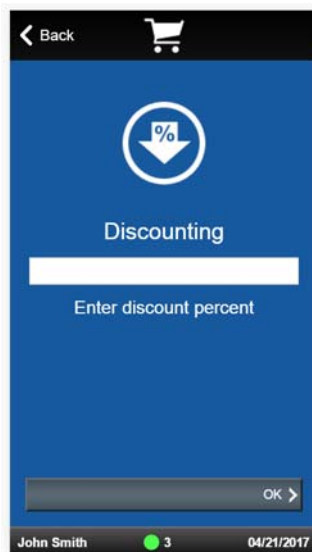


Figure 3-29: Enter Discount Percent

5. If the discount is not fixed, enter the amount or percentage of the discount.
6. Select **OK**.

The discount is applied to the transaction. Return to the sale screen.

Add a Group Discount

To add a discount to a group of items in a transaction:

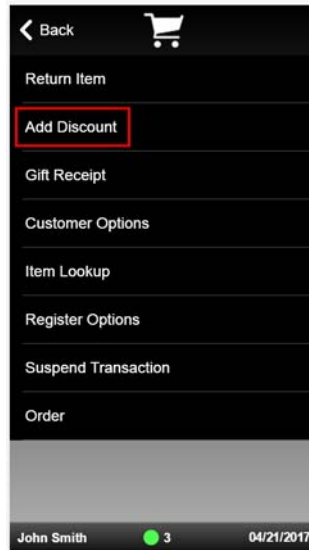


Figure 3-30: Add Discount Menu

1. Select **Add Discount** in the Context Menu.

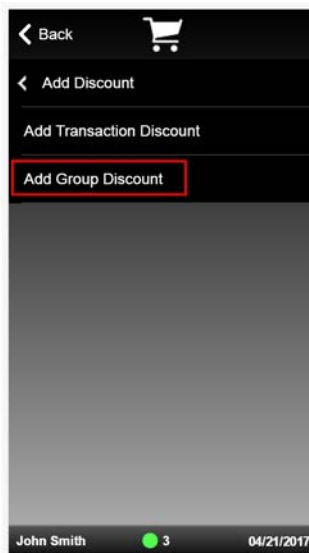


Figure 3-31: Add Group Discount

2. Select **Add Group Discount**.

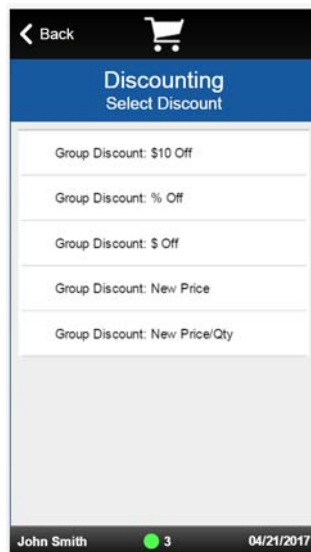


Figure 3-32: Select Discount

3. Select the discount to apply.

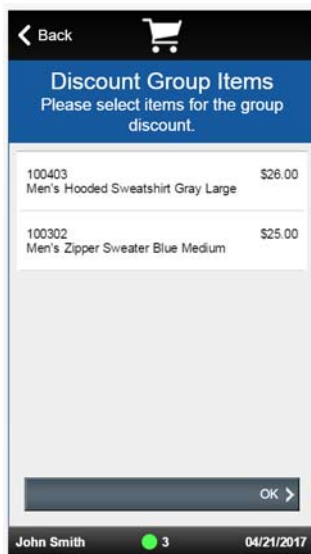


Figure 3-33: Select Discount Items

4. Select the items to include in the group.
5. Select **OK**.

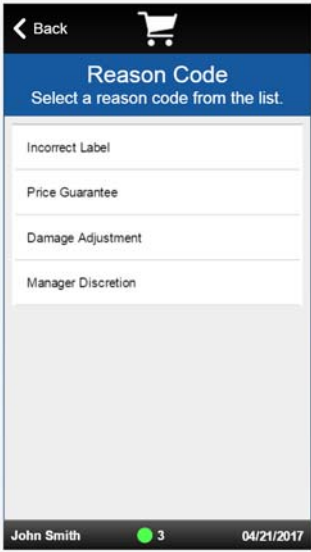


Figure 3-34: Reason Code List

- 6. Select the reason for applying the discount.

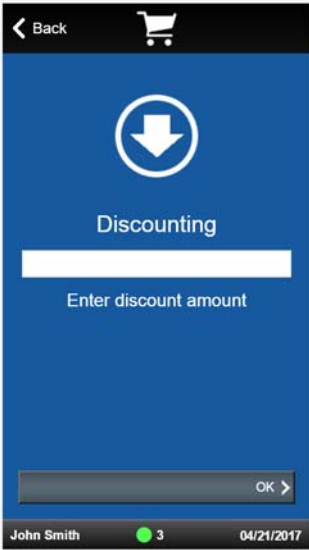


Figure 3-35: Enter Discount Amount

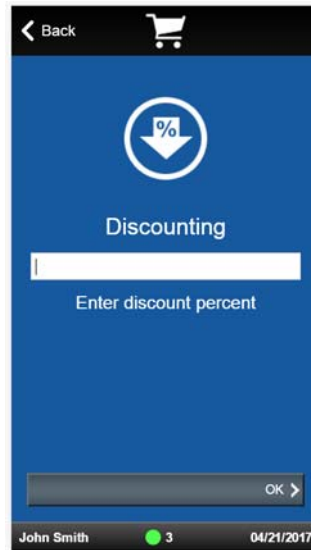


Figure 3-36: Enter Discount Percent

7. If the discount is not fixed, enter the amount or percentage of the discount.
8. Select **OK**.

The discount is applied to the items. Return to the sale screen.

Gift Receipts

Print Gift Receipts

To select items for which gift receipts will be printed:

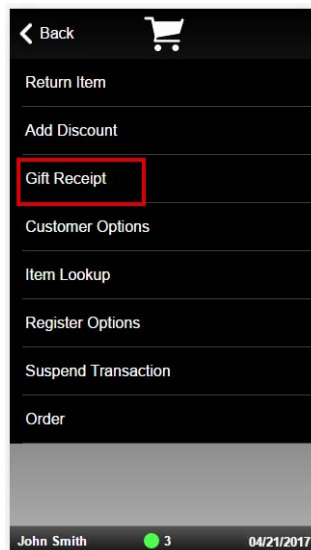


Figure 3-37: Gift Receipt Option

1. Select **Gift Receipt** in the Context Menu.

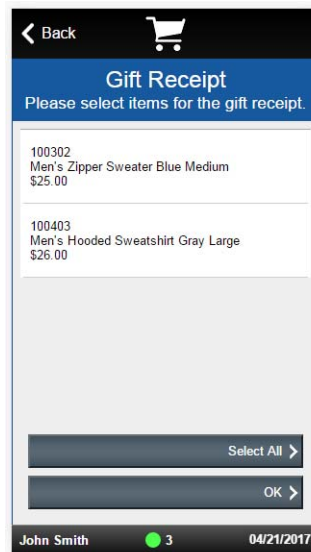


Figure 3-38: Gift Receipt Items

2. Select **Select All** to print gift receipts for all items and select **OK**.

<OR>

Select the items for which to print a gift receipt and select **OK**.

Return to the sale screen.

Customer Options

Assign Customer

To add a customer to a transaction:

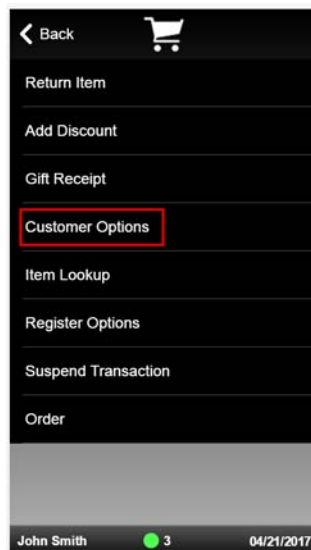


Figure 3-39: Customer Options

1. Select **Customer Options** in the Context Menu.

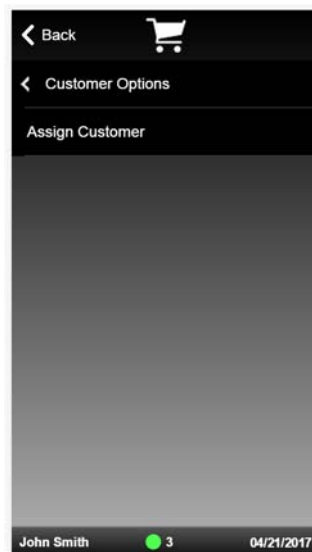


Figure 3-40: Assign Customer

2. Select **Assign Customer**.

Continue with [Assign a Customer](#).

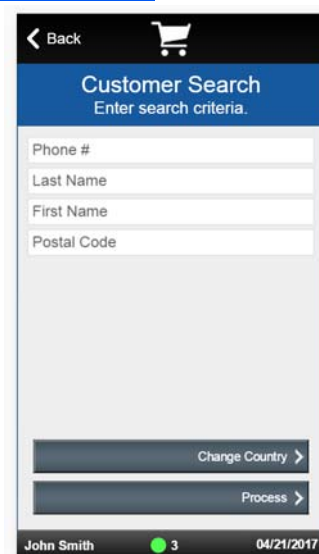


Figure 3-41: Customer Search Criteria

Remove Customer

To remove a customer from a transaction:

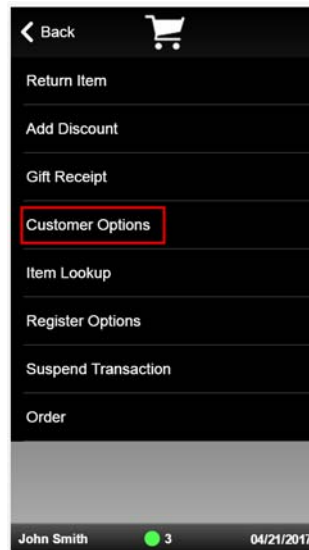


Figure 3-42: Customer Options

1. Select **Customer Options** in the Context Menu.

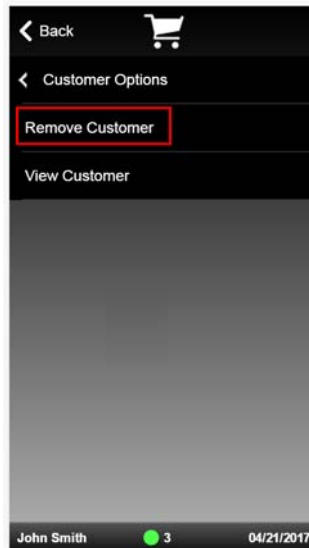


Figure 3-43: Remove Customer

2. Select **Remove Customer**.

The customer is removed from the transaction. Return to the sale screen.

View/Edit Customer Information

To view or edit information about the customer assigned to a transaction:

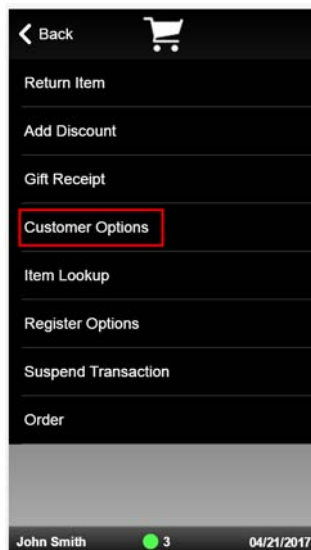


Figure 3-44: Customer Options

1. Select **Customer Options** in the Context Menu.

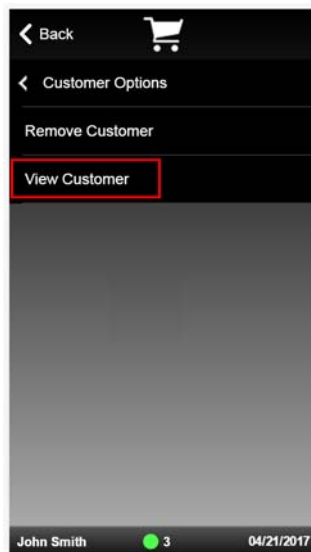


Figure 3-45: View Customer

2. Select **View Customer**.

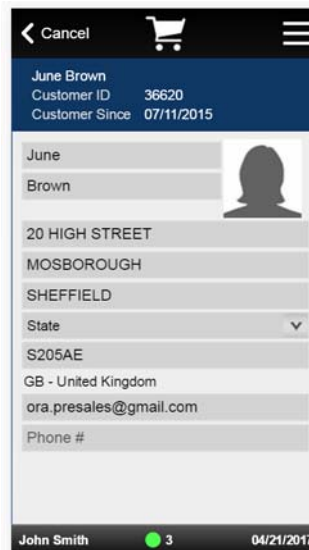


Figure 3-46: Customer Detail

- Do one of the following:
- Select **Cancel** to return to the sale screen.
- Select **Edit Customer** to edit the customer information. See [Edit a Customer](#).
- Select **Enroll in Loyalty** to assign a loyalty card to the customer. See [Enroll in Loyalty](#).

Item Lookup

Find an Item

To search for an item to add to the transaction:

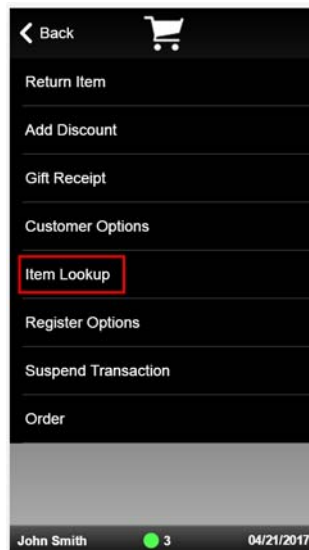


Figure 3-47: Item Lookup

1. Select **Item Lookup** in the Context Menu.

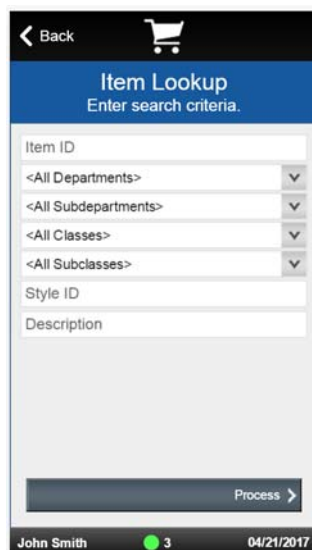


Figure 3-48: Item Lookup Criteria

2. Scan an item to proceed directly to the item detail screen or enter the item search criteria and select **Process**.

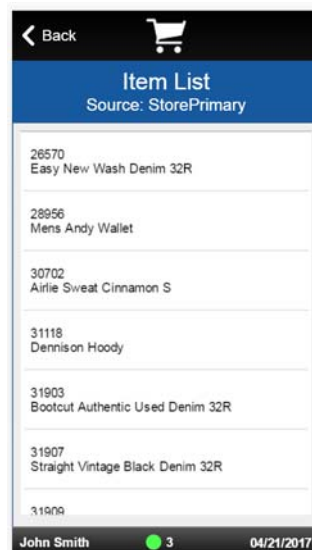


Figure 3-49: Item List

3. Select an item in the list.
Xstore Mobile displays details about the item.



Figure 3-50: Item Details

4. Select **Back** to return to the sale screen.

<OR>

Continue with the appropriate procedure:

- [Add Item to Transaction](#)
- [Print Rain Check](#)

Add Item to Transaction

To add the searched-for item to a transaction:

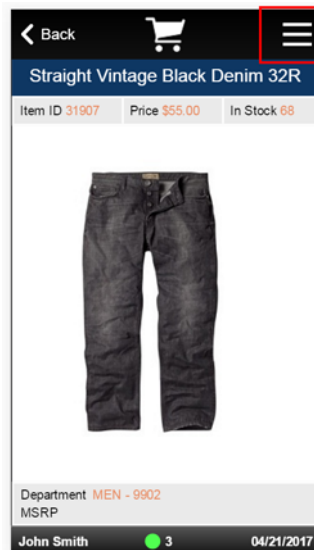


Figure 3-51: Context Menu Button

1. Select the [Context Menu Button](#) in the Item Detail screen.

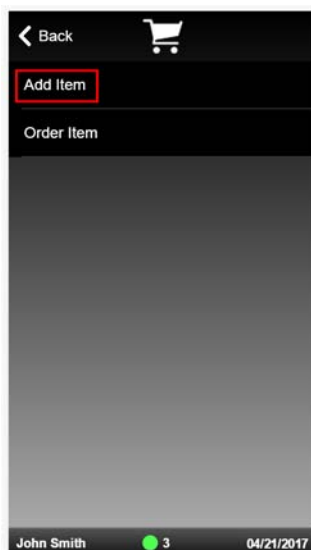


Figure 3-52: Add Item Option

2. Select **Add Item** in the Context Menu.

The item is added to the transaction. Return to the sale screen.

Print Rain Check

To print a rain check for the item:

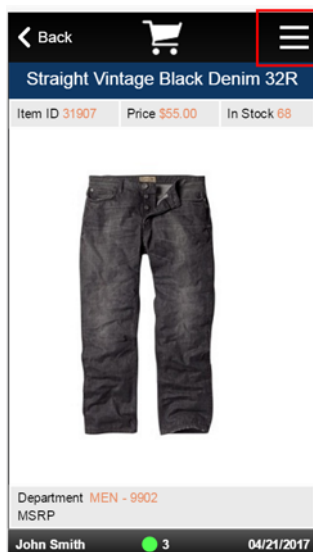


Figure 3-53: Context Menu Button

1. Select the [Context Menu Button](#) in the Item Detail screen.

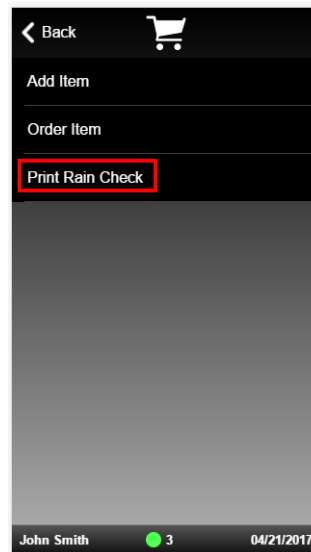


Figure 3-54: Print Rain Check Option

2. Select **Print Rain Check** in the Context Menu.

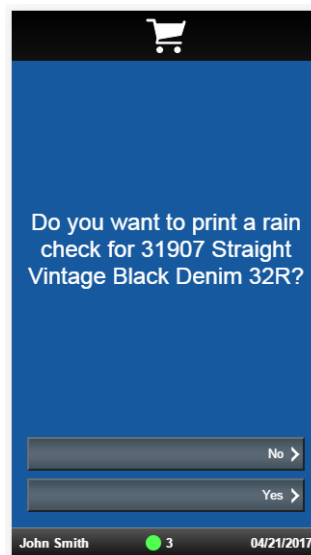


Figure 3-55: Print Rain Check

3. Select **Yes** to confirm the rain check.

The rain check prints and Xstore Mobile returns to the sale screen.

Register Options

Balance Inquiry

To find the balance for any account or tender possessed by or associated with a customer:

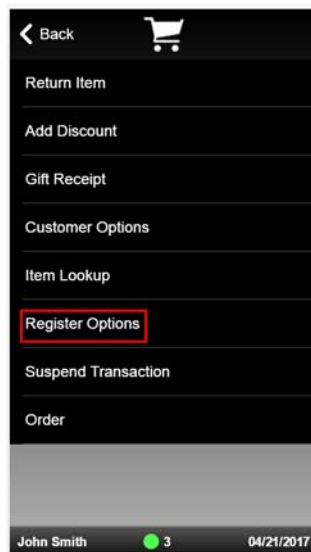


Figure 3-56: Register Options

1. Select **Register Options** in the Context Menu.

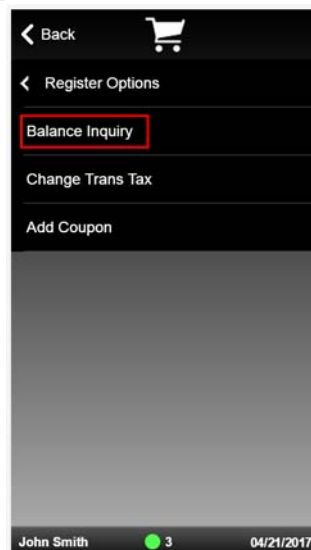


Figure 3-57: Balance Inquiry

2. Select **Balance Inquiry** in the Register Options Menu.

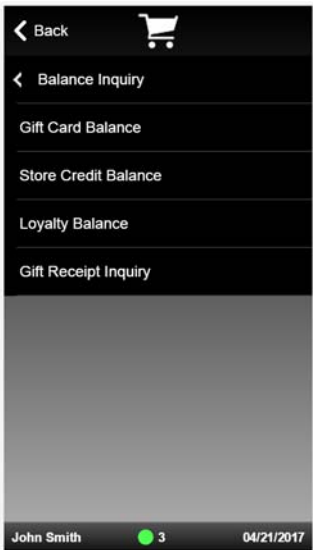


Figure 3-58: Balance Inquiry Menu

3. Select the item for which you would like a balance.

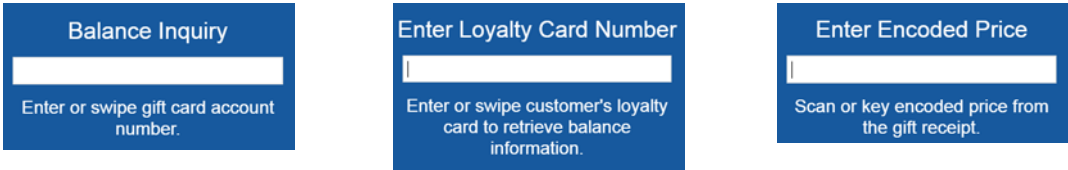


Figure 3-59: Balance Inquiry Examples

Scan or swipe the appropriate item or enter the appropriate number or identifier for the item or account.

4. Select OK.

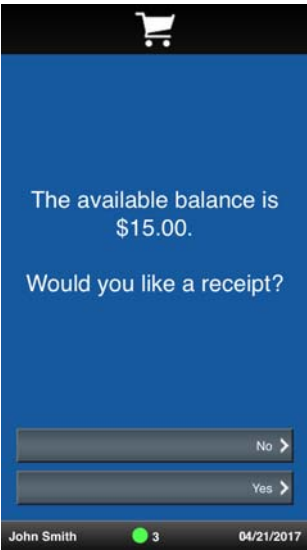


Figure 3-60: Balance Inquiry Receipt Prompt

Card #3710357061621955
has the following account
balances: LOYALTY = 57
Would the customer like a
receipt?

5. Select **Yes** to print a receipt with the balance or select **No** to exit without printing a receipt.

Xstore Mobile returns to the sale screen.

Change Transaction Tax

To change the tax applied to a transaction:

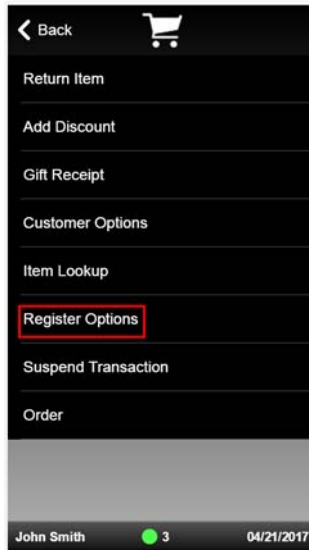


Figure 3-61: Register Options

1. Select **Register Options** in the Context Menu.

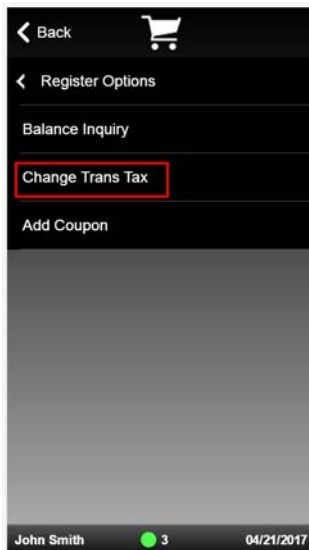


Figure 3-62: Change Trans Tax

2. Select **Change Trans Tax** in the Register Options Menu.

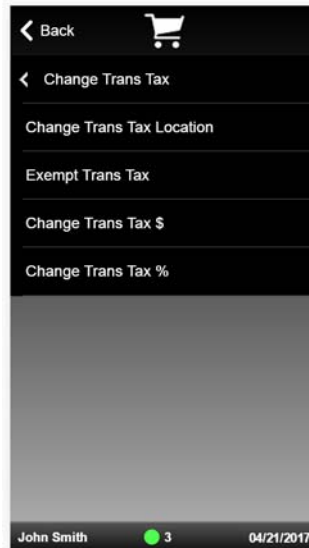


Figure 3-63: Change Trans Tax Menu

Continue with the proper procedure:

- [Change Transaction Tax Location](#)
- [Exempt a Transaction From Tax](#)
- [Change Transaction Tax Amount](#)
- [Change Transaction Tax Percentage](#)

Change Transaction Tax Location

To change the location used to determine the tax on a transaction:

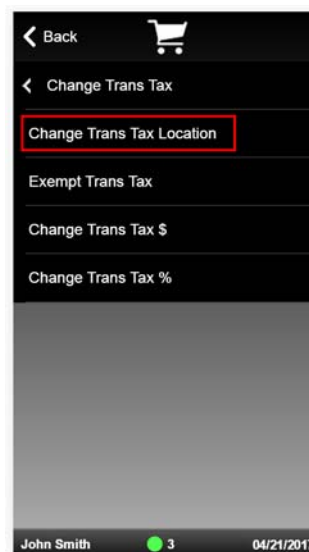


Figure 3-64: Change Trans Tax Location

1. Select **Change Transaction Tax Location** in the Change Transaction Tax Menu.



Figure 3-65: Enter Postal Code

2. Enter the postal/zip code from the new location.
3. Select **OK**.

The transaction tax location is changed and Xstore Mobile returns to the item entry screen.

Exempt a Transaction From Tax

To exempt a transaction from tax:

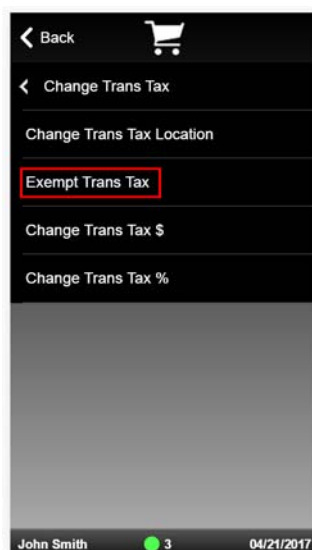


Figure 3-66: Exempt Trans Tax

1. Select **Exempt Trans Tax** in the Change Transaction Tax Menu.

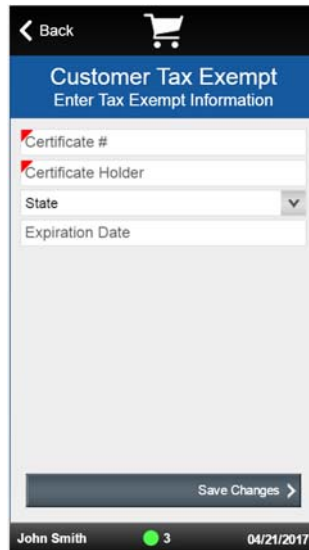


Figure 3-67: Change Trans Tax

2. Enter the information about the customer's tax exemption certificate.
3. Select OK.



Figure 3-68: Select Reason Code

4. Select the reason for the tax change.

The tax exemption is applied to the transaction and Xstore Mobile returns to the item entry screen.

Change Transaction Tax Amount

To change the amount of the transaction tax:

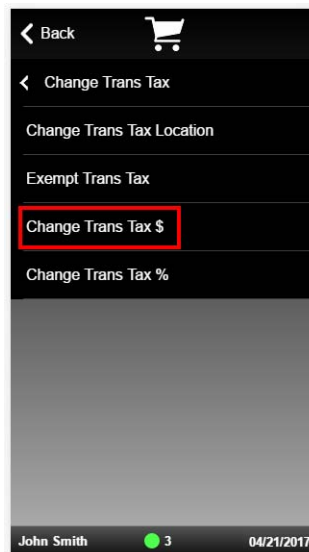


Figure 3-69: Change Trans Tax Amount

1. Select **Change Tax \$** in the Change Transaction Tax Menu.

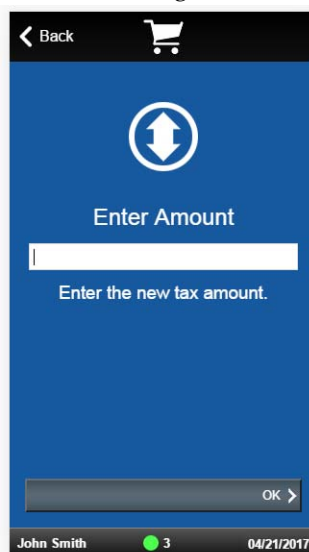


Figure 3-70: Enter Tax Amount

2. Enter new tax amount.
3. Select **OK**.

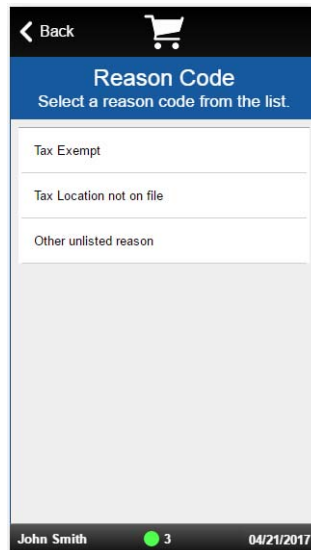


Figure 3-71: Select Reason Code

4. Select the reason for the tax change.

Change Transaction Tax Percentage

To change the percentage of the transaction tax:

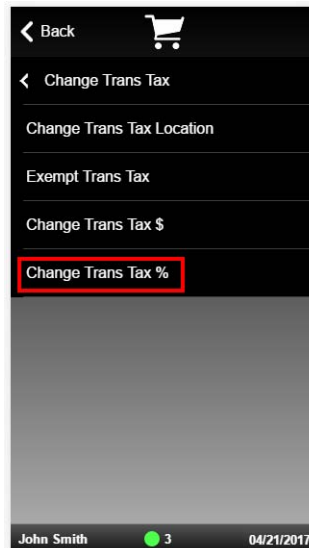


Figure 3-72: Change Trans Tax Percent

1. Select **Change Tax %** in the Change Transaction Tax Menu.

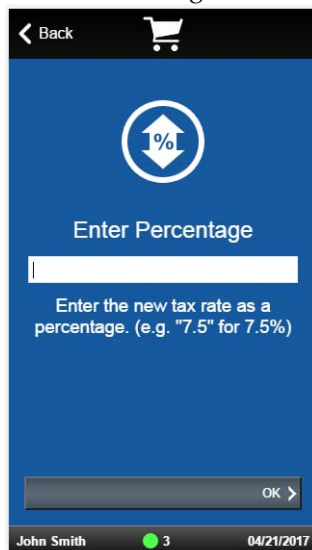


Figure 3-73: Enter Tax Rate

2. Enter new tax percentage.
3. Select **OK**.

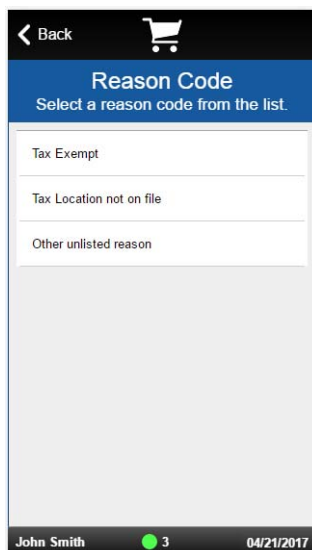


Figure 3-74: Select Reason Code

4. Select the reason for the tax change.

The percentage of the tax for the transaction is changed to the new value and Xstore Mobile returns to the item entry screen.

Add Coupon

To add a coupon to a transaction:

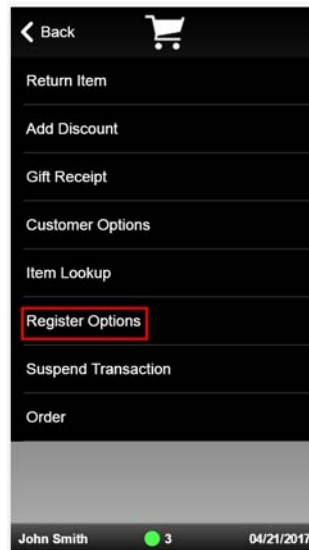


Figure 3-75: Register Options

1. Select **Register Options** in the Context Menu.

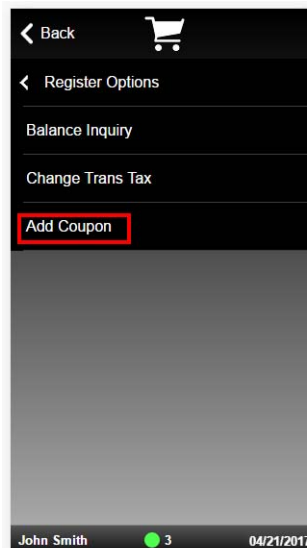


Figure 3-76: Add Coupon

2. Select **Add Coupon** in the Register Options Menu.

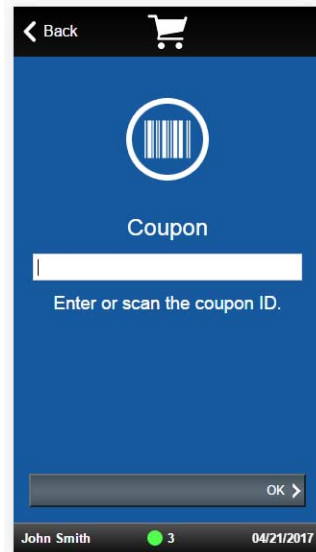


Figure 3-77: Enter Coupon ID

3. Scan the coupon or enter the ID of the coupon.
4. Select **OK**.

The coupon is applied to the transaction and Xstore Mobile returns to the item entry screen.

Redeem Rain Check

To redeem a rain check:

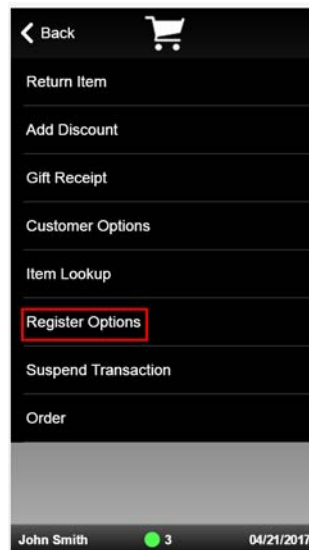


Figure 3-78: Register Options

1. Select **Register Options** in the Context Menu.

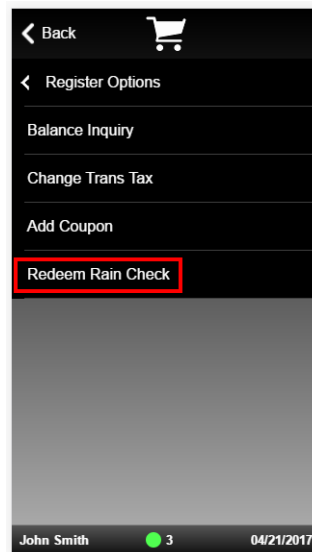


Figure 3-79: Redeem Rain Check

2. Select **Redeem Rain Check** in the Register Options Menu.

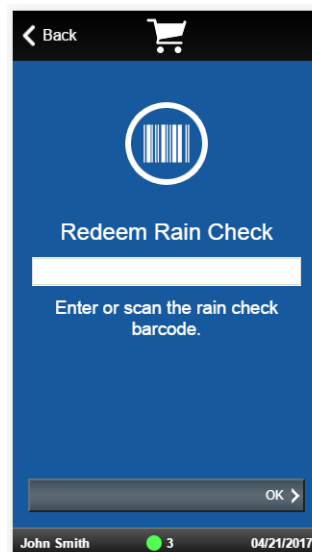


Figure 3-80: Redeem Rain Check Barcode

3. Scan the rain check or enter the ID of the rain check.
4. Select **OK**.

The rain check is applied to the transaction and Xstore Mobile returns to the item entry screen.

Suspend Transaction

To suspend a transaction:

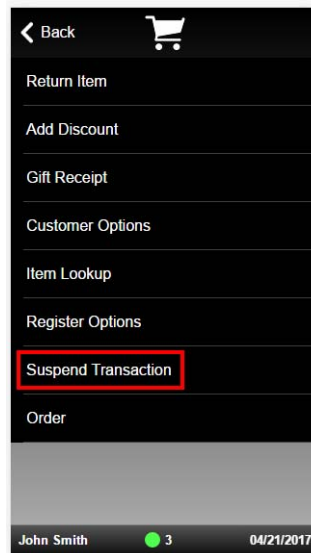


Figure 3-81: Suspend Transaction

1. Select **Suspend Transaction** in the context menu to suspend a transaction.

Xstore Mobile returns to the [Main Menu](#).

Resume Transaction

Note: A transaction must have no customer assigned and no items added for it to be used for resuming a suspended transaction.

To resume a suspended transaction:

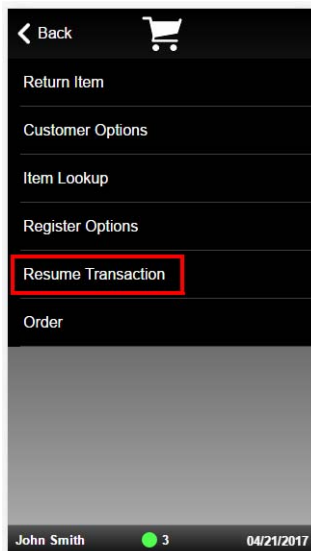


Figure 3-82: Resume Transaction

1. Select **Resume Transaction** in the context menu.

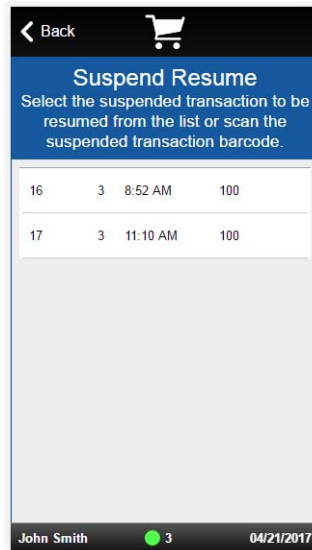


Figure 3-83: Suspend Resume

2. Select the proper transaction to resume.

The transaction resumes. Xstore Mobile returns to the sale screen.

Order

An Order transaction is typically performed when a customer wants to purchase an item that is not currently available in the store. The item may be out of stock or unavailable for any reason. An order item may be any saleable item from the store's inventory. Non-inventory items may also be ordered if your store policy permits it.

When an item is out of stock, the customer cannot take possession of the item immediately, so the store orders it from a vendor, warehouse, or another store. When the order item arrives in the store, it is shipped to the customer or the customer is notified to pick it up at the store.

The Order function includes the order-entry process for a order item, entering the related customer information, and processing any special fees that may be associated with the order.

1. At the Sale screen, select the **Context Menu** button.

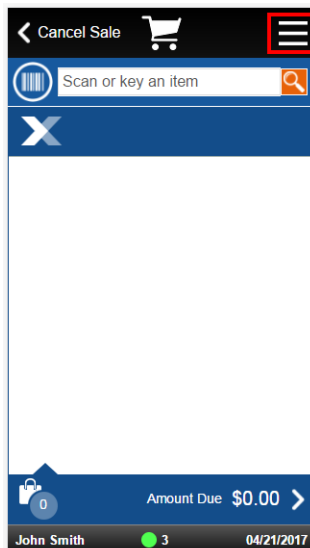


Figure 3-84: Context Menu

2. Select **Order** in the Context Menu.

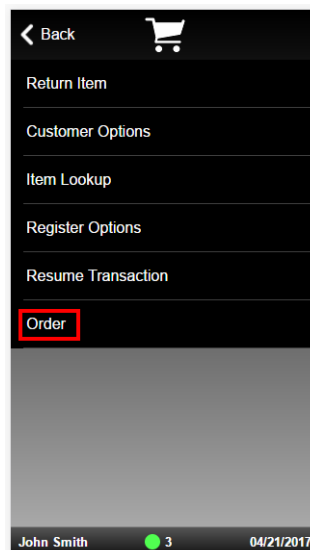


Figure 3-85: Order Option

The Order Search window appears.

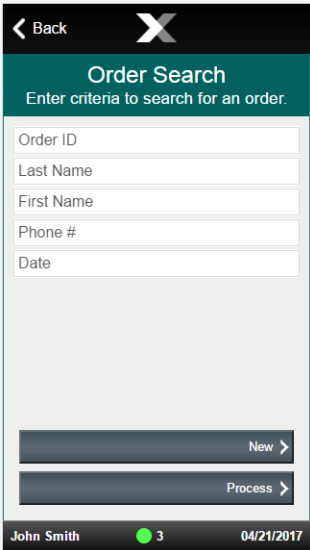


Figure 3-86: Order Search

Tip: To search for an existing order account, enter the search criteria information at the Order Search form and select **Process**. There must be an entry in at least one field. You may type a partial entry, such as the first few letters of the customer’s last name in the Last Name field to find all accounts where the owner’s last name begins with the letters you entered.

- If no customer is associated with the transaction, select the **New** option at the Order Search form. Enter the information and press **Process** to continue. Go to step 4.

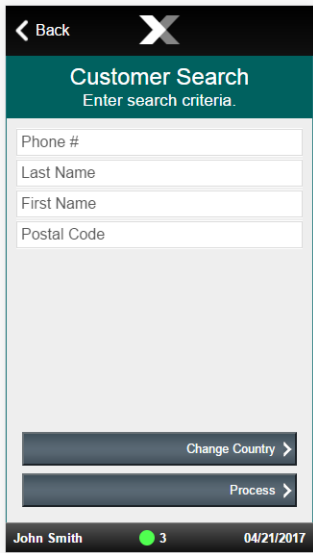


Figure 3-87: Order Customer Search

- If a customer is associated with the transaction, select **New** at the No Order found prompt. Skip to step 4.

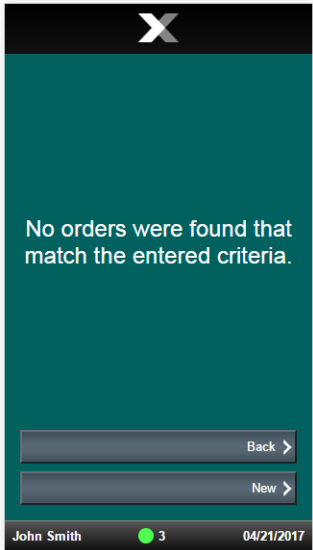


Figure 3-88: No Order Found prompt

When the customer's record has been located, or information added to the database, the customer's record is associated with this transaction.

- At the Order Ship Options form, select where the order is to be shipped:

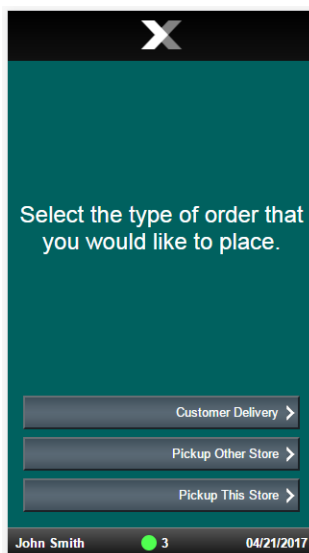


Figure 3-89: Shipping/Pick Up Options

- If the customer would like to have the item shipped directly to home, select the **Customer Delivery** option.
- If the customer is going to collect from another location, select the **Pickup Other Store** option.
- If the customer is going to return to the store to pick up the item, select the **Pickup This Store** option.

Depending upon the option chosen above, proceed as follows:

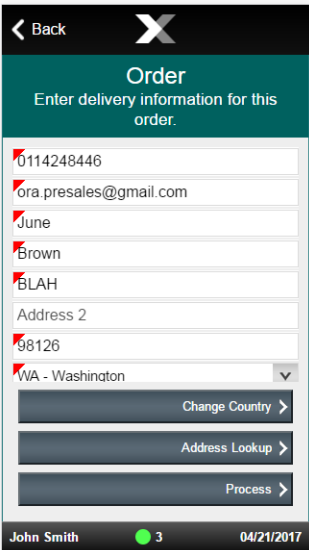
Table 3-1: Shipping Options

If you chose...	Then...
Customer Delivery	Continue with Shipping an Order Item to the Customer.
Pickup Other Store	Continue with Shipping an Order Item to Another Store
Pickup This Store	Continue with Shipping an Order Item to the Store.

Shipping an Order Item to the Customer

...continued from step 3

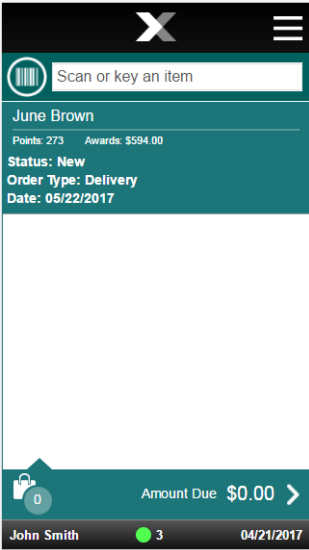
- At the prompt for shipping destination information, enter/verify the customer and address information for this order and select the **Process** option.



A mobile application screen titled "Order" with a subtitle "Enter delivery information for this order." The screen contains several input fields, each with a red location pin icon on the left: a phone number field with "0114248446", an email field with "ora.presales@gmail.com", a date field with "June", a name field with "Brown", a street address field with "BLAH", an "Address 2" field, a ZIP code field with "98126", and a state dropdown menu currently showing "WA - Washington". Below these fields are three buttons: "Change Country >", "Address Lookup >", and "Process >". At the bottom of the screen is a status bar showing "John Smith", a green dot next to the number "3", and the date "04/21/2017".

Figure 3-90: Shipping Destination Address Form

- 2. At the Order screen, scan or enter the item ID to be ordered. All items are entered as order items.



A mobile application screen for order entry. At the top is a header with a large "X" logo and a menu icon. Below the header is a section with a barcode icon and the text "Scan or key an item". The main content area displays the following information: "June Brown", "Points: 273 Awards: \$594.00", "Status: New", "Order Type: Delivery", and "Date: 05/22/2017". Below this information is a large empty rectangular box. At the bottom of the screen is a status bar showing a shopping cart icon with the number "0", the text "Amount Due: \$0.00 >", and the same status information as the previous screen: "John Smith", a green dot next to "3", and "04/21/2017".

Figure 3-91: Order Entry Screen

Note: When entering items for an order you may be notified that the item is in stock. You can choose to order the item anyway, or return to the sale to sell the item from stock merchandise. If an item cannot be added to an order, Xstore Mobile prompts you with a message indicating the item is ineligible to order.

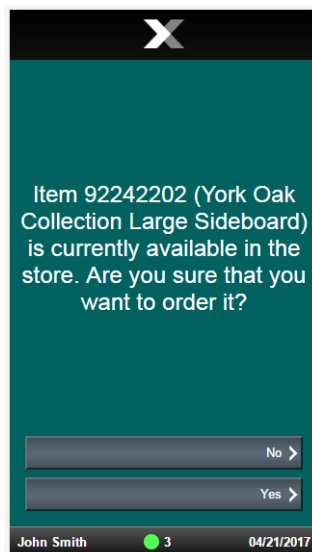


Figure 3-92: Order Item

3. Select a Shipping Method.

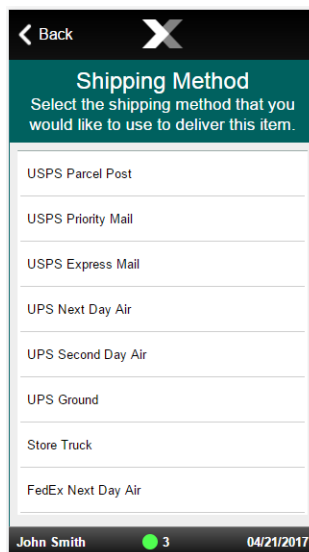


Figure 3-93: Order Shipping Method

- Depending upon your system's configuration, you may be prompted that a shipping fee has been automatically added to the order. If prompted, press **Enter** to acknowledge this prompt.

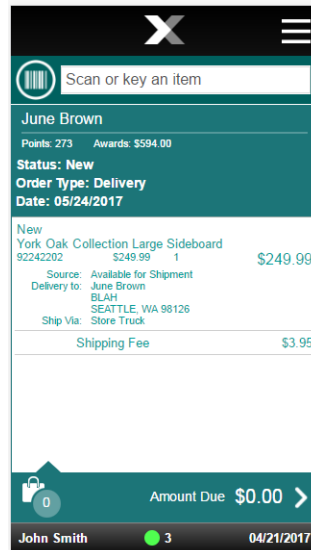


Figure 3-94: Order

- When finished entering order items, select the **Exit Order** option in the Context Menu to complete the transaction and begin the tendering process.

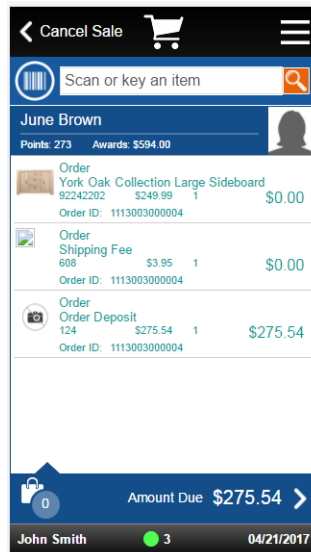


Figure 3-95: Order

- Tender the sale using the normal tendering process.

When the transaction is complete, the system creates receipts as required by your store policy.

Note: The order must be paid in full for items shipped directly to the customer.

Important: If your store issues email receipts, additional/different prompts display.

Shipping an Order Item to Another Store

...continued from step 3

1. At the Order screen, scan or enter the item ID to be ordered. All items are entered as order items.

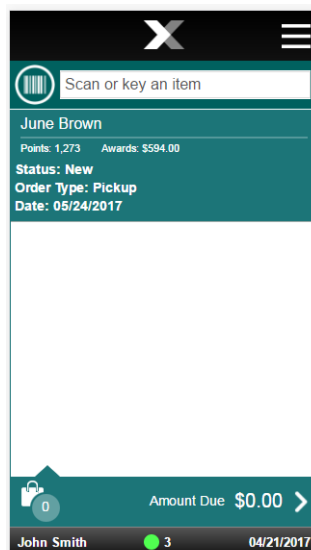


Figure 3-96: Order Entry Screen

Note: When entering items for an order you may be notified that the item is in stock. You can choose to order the item anyway, or return to the sale to sell the item from stock merchandise. If an item cannot be added to an order, Xstore Mobile prompts you with a message indicating the item is ineligible to order.

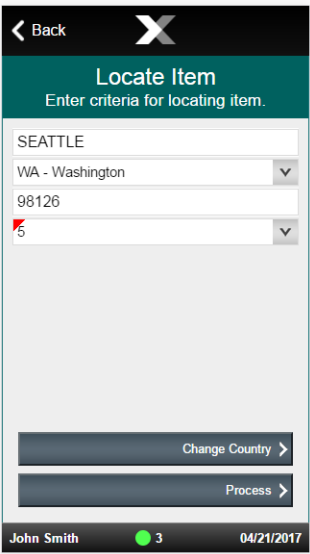


Figure 3-97: Locate Item

- 2. Enter information to search for the location where the item is stocked and select the location.

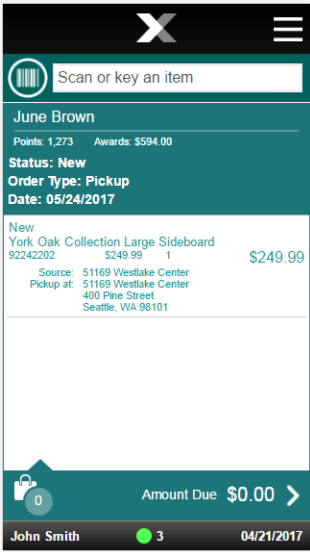


Figure 3-98: Order

- 3. When finished entering order items, select the **Exit Order** option in the Context Menu to complete the transaction and begin the tendering process.

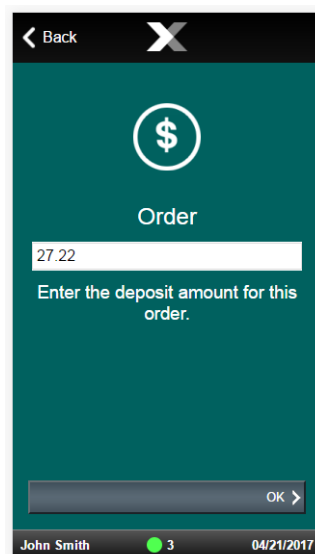


Figure 3-99: Order Deposit

Note: This option is only available for items shipped to the store for pickup. When items are shipped directly to the customer, they must be paid in full.

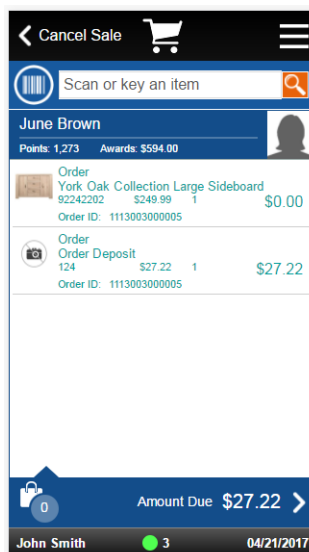


Figure 3-100: Order Deposit Tender

4. Tender the deposit using the normal tendering process.

When the transaction is complete, the system creates receipts as required by your store policy.

Important: If your store issues email receipts, additional/different prompts display.

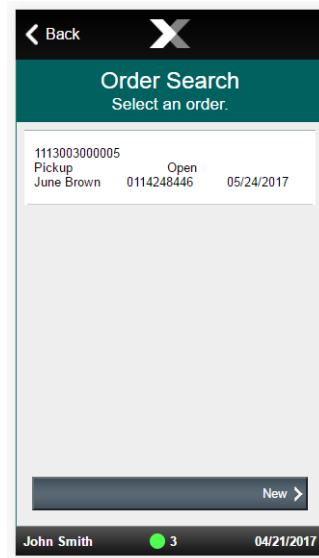


Figure 3-101: Order Collection

Shipping an Order Item to the Store

...continued from step 3

1. At the Order screen, scan or enter the item ID for the order. All items are entered as order items in this mode.

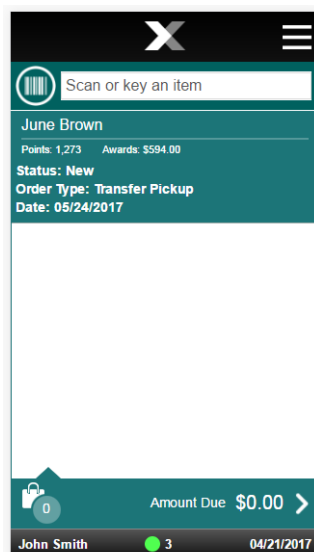


Figure 3-102: Order Screen

Note: When entering items for an order, you may be notified that the item is in stock. You can choose to special order the item anyway, or return to the sale to sell the item from stock merchandise. If an item cannot be added to an order, you are prompted with a message indicating that the item is ineligible to order.

2. When finished entering order items, select the **Exit Order** option in the Context Menu to complete the transaction and begin the tendering process.

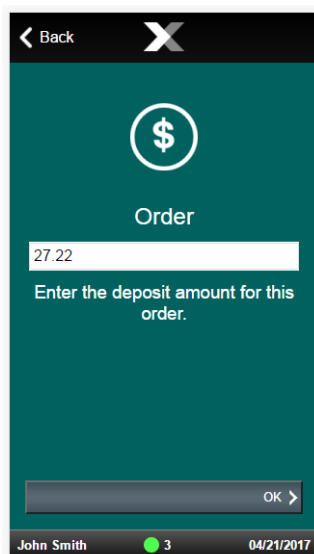


Figure 3-103: Order Deposit

3. At the prompt for the order deposit, enter the dollar amount (without a decimal point) that the customer wants to apply to the order, and press **OK**.

Note: This option is only available for items shipped to the store for pickup. When items are shipped directly to the customer, they must be paid in full.

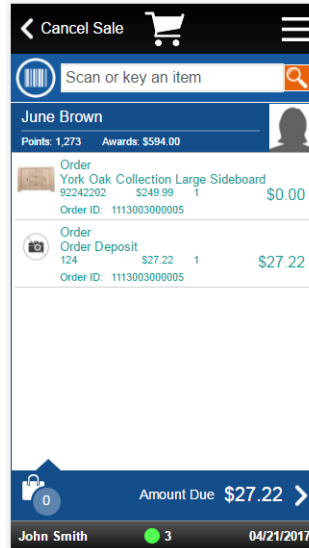


Figure 3-104: Order Deposit Tender

4. Tender the deposit using the normal tendering process.

When the transaction is complete, the system creates receipts as required by your store policy.

Important: If your store issues email receipts, additional/different prompts display.

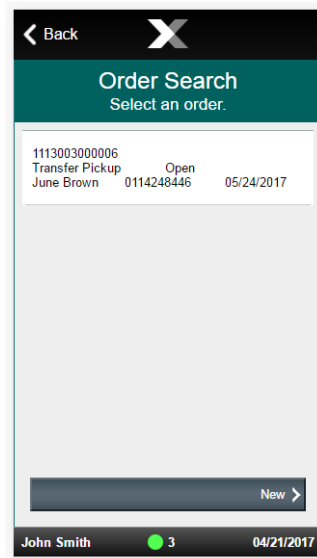


Figure 3-105: Order Collection

5. Select the Order to pick.

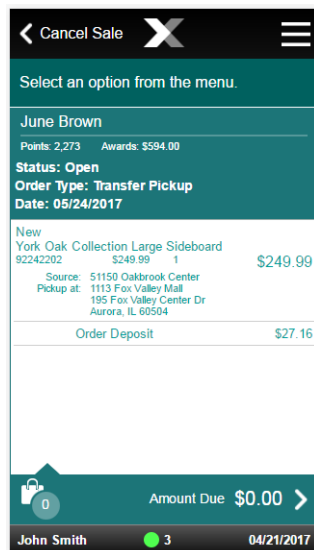


Figure 3-106: Order Collection Details

Pickup Items

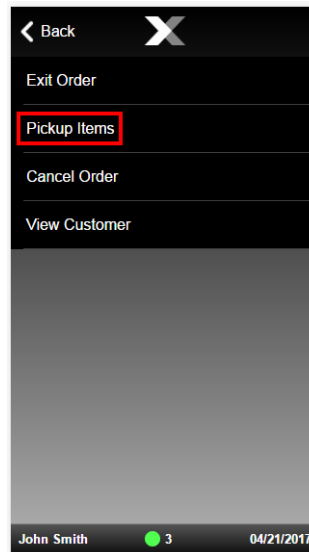


Figure 3-107: Context Menu - Pickup Items Option

1. After selecting the order to pickup, select the **Pickup Items** option in the Context Menu.
2. If you chose to tender the sale, the tender list is displayed. Tender the sale using the normal procedure. When the transaction is complete, the system creates receipts as required by your store policy.

Important: If your store issues email receipts, additional/different prompts display.

Tender Transaction

To tender a transaction:

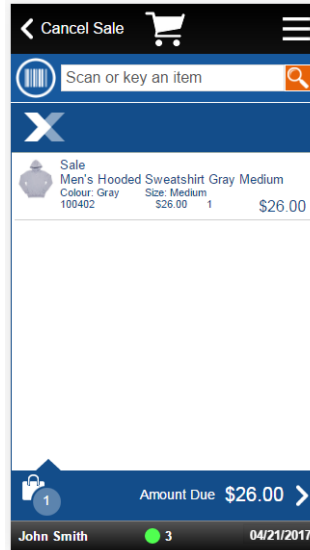


Figure 3-108: Sale Screen

1. Select the **AMOUNT DUE** area to begin transaction tendering.

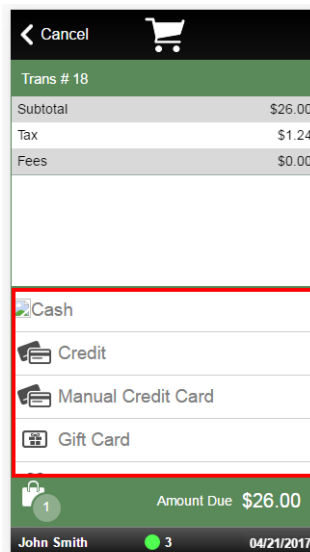


Figure 3-109: Amount Due

2. Select the proper tendering method.

Tender and complete the transaction. For more information:

- [Cash](#)
- [Credit Card](#)
- [Gift Card](#)
- [Redeem Store Credit](#)

Cash

Cash is one type of tender that can be exchanged for merchandise.

1. When all items have been entered or scanned, use the up and down arrow keys to select the **Cash** option and then press **Enter**.

Note: Depending upon the configuration of your system, the Cash Amount Due prompt may default to the total amount owed for the transaction.

2. Enter the amount of cash presented by the customer and then press **Enter**.

Enter dollar amounts.

<OR>

Choose one of the **Quick Cash** options.

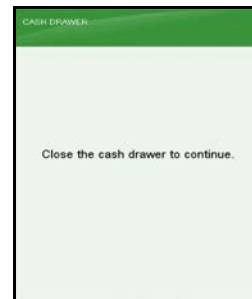
A prompt may display asking if the sale is complete.

If prompted, press **Y** for Yes to complete the transaction. Press **N** for No to return to the Sale Tender screen to re-tender with another tender type. See Split Tenders for more information.

Note: Your system may be configured to print receipts without prompting you to confirm that the sale is complete. In that case, the system prints receipts as soon as the total of all tenders selected equals or exceeds the amount due.

3. When you complete the sale, Xstore Mobile opens the cash drawer. You can accept money from the customer, place it in the cash drawer and return the change due amount, if the total of all tenders exceeds the amount due.

If configured, a prompt displays reminding you to close the cash drawer. After the cash drawer has been closed, the sale receipt is printed and the system is ready for the next transaction.



The receipt indicates that the purchase was paid with cash, shows the amount tendered, the change amount, and the tender type received.



Figure 3-110: Customer Sale Receipt - Cash Tender Example

Credit Card

Note: This section applies to Credit and Debit Cards.

Note: Debit Cards are supported via Oracle Retail EFTLink.

To tender a transaction with a credit card:

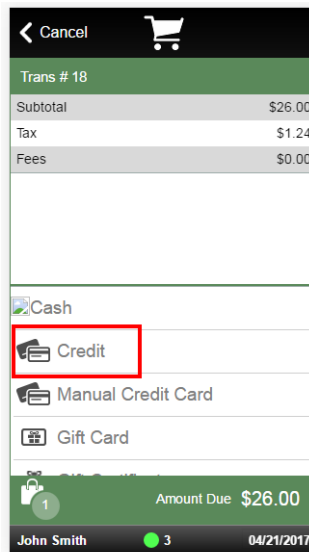


Figure 3-111: Tender - Credit

1. Select **Credit**.

Enter the card information by doing one of the following:

Swipe the card on the Xstore Mobile device or enter the card manually. See [Manual Entry](#).

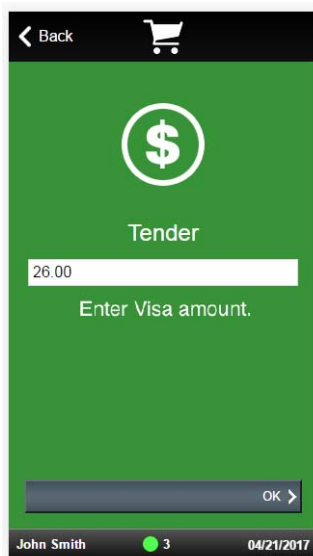


Figure 3-112: Enter Tender Amount

2. Enter the tender amount. *Default value is the total for the transaction.*
3. Select **OK**.

Xstore Mobile attempts to authorize the tender.

- If authorization is successful, continue the transaction.
- If authorization fails, either use a different tender, or continue with [Tender Authorization](#).

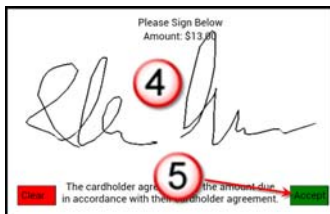


Figure 3-113: Authorization Signature

4. The customer should provide their signature.

5. After the customer signs, select **Accept**.

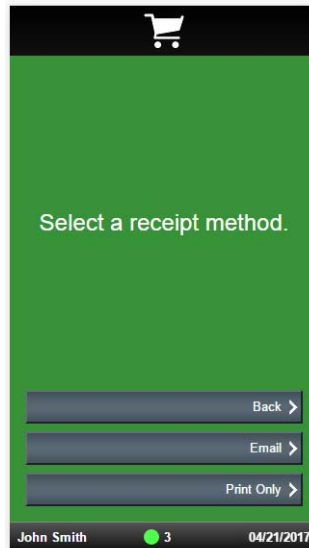


Figure 3-114: Receipt Method

6. Select the method for providing the receipt:
 - Click **Email** to email the receipt and, if necessary, also provide a printed copy.
 - Click **Print Only** to provide only a printed copy. The transaction ends.

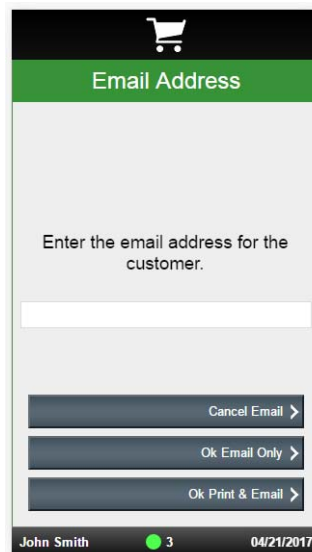


Figure 3-115: Email Address

7. If you selected an email receipt, enter the customer's email address.

8. Indicate whether to only create an email receipt, or whether to both email and print the receipt.



Figure 3-116: Receipt Signature Prompt

9. If necessary, confirm that the customer signed the receipt.
The transaction is complete.

Manual Entry

To enter a card manually:

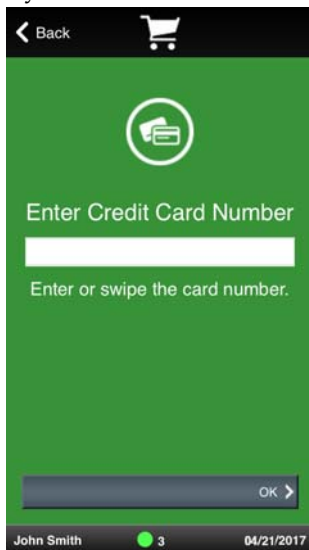


Figure 3-117: Enter Credit Card Number

1. Enter the card number.
2. Select OK.

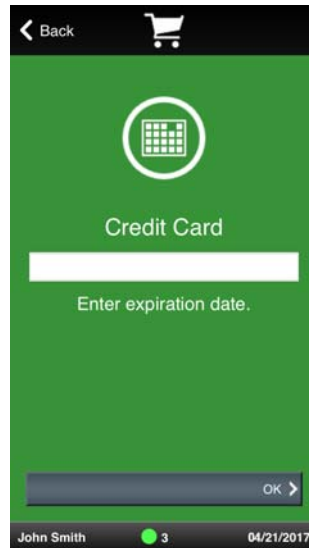


Figure 3-118: Enter Expiration Date

3. Enter the card expiration date in MMY format.
4. Select **OK**.

Continue the transaction.

Gift Card

To tender a transaction with a gift card:

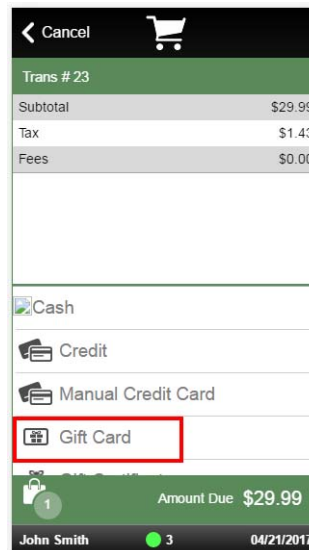


Figure 3-119: Tender - Gift Card

1. Select **Gift Card**.

Enter the card information by doing one of the following:

Swipe the card on the Xstore Mobile device or enter the card manually. See [Manual Entry](#).

Figure 3-120: Enter Gift Card Amount

2. Enter the amount to tender on the gift card.
3. Select **OK**.

Xstore Mobile attempts to authorize the tender.

- If authorization is successful, continue the transaction.
- If authorization fails, either use a different tender, or continue with [Tender Authorization](#).
- 4. Select the method for providing the receipt:
 - Click **Email** to email the receipt and, if necessary, also provide a printed copy.
 - Click **Print Only** to provide only a printed copy.

Figure 3-121: Email Address

5. If you selected an email receipt, enter the customer's email address.

6. Select the receipt creation method.
 - Click **Ok Email Only** to only email the receipt.
 - Click **Ok Print & Email** to both email and print the receipt.

The transaction is complete. Return to the [Main Menu](#).

Manual Entry

To enter a card manually:

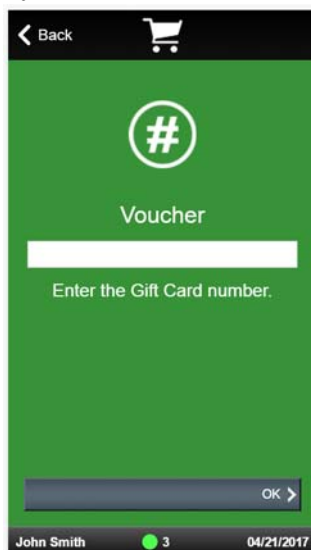


Figure 3-122: Enter Gift Card Number

1. Enter the card number.
2. Select **OK**.

Continue the transaction.

Redeem Store Credit

To tender a transaction by redeeming store credit:

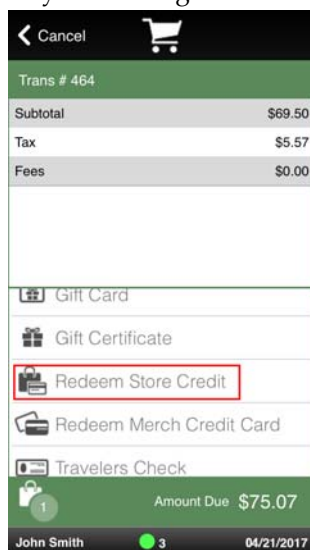


Figure 3-123: Tender - Redeem Store Credit

1. Select **Redeem Store Credit**.

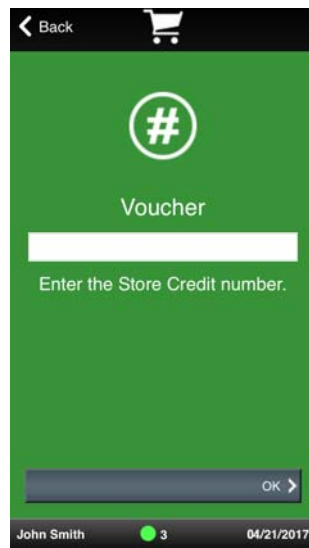


Figure 3-124: Enter Store Credit Number

2. Scan the store credit receipt or enter store credit number.
3. Select **OK**.

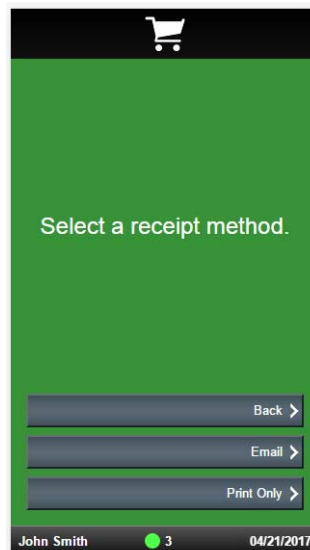


Figure 3-125: Select Receipt Method

4. Select the method for providing the receipt.
 - Click **Email** to email the receipt and, if necessary, also provide a printed copy.
 - Click **Print Only** to provide only a printed copy.

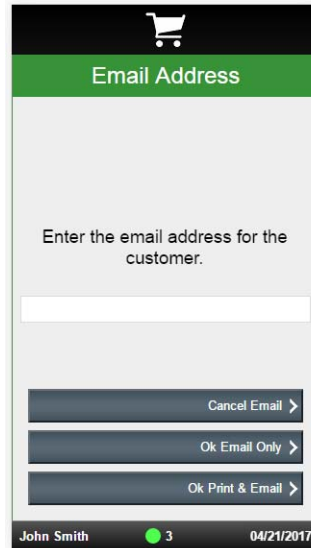


Figure 3-126: Email Address

5. If you selected an email receipt, enter the customer's email address.
6. Select the receipt creation method.
 - Click **Ok Email Only** to only email the receipt.
 - Click **Ok Print & Email** to both email and print the receipt.

The transaction is complete. Return to the [Main Menu](#).

Tender Authorization

If an attempt to authorize a tender fails, perform one of the following procedures to continue with the same tender:

Retry Authorization

To attempt the authorization again:

Troubleshoot the connection to the authorizer.

- Check the network connection for the Xstore Mobile server.
- Check whether the Xstore Mobile server can connect to the internet.

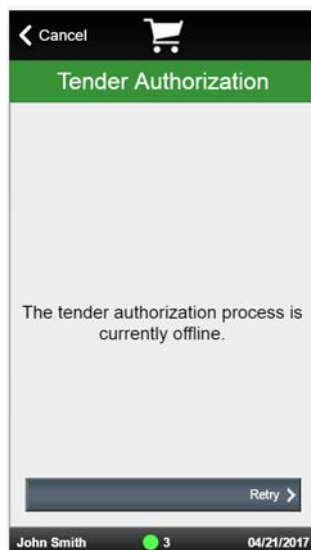


Figure 3-127: Tender Authorization Offline

1. Select the **Retry** button.

If the retry is successful, continue the transaction.

If the retry fails, either perform another retry, or continue with [Manual Authorization](#).

Manual Authorization

Note: Call the appropriate authorization provider to manually authorize a tender. Xstore Mobile does not provide manual authorization numbers.

To enter manual authorization information:

1. Select the **Manual** button.



Figure 3-128: Enter Authorization Code

2. Enter the authorization number.
3. Select **OK**.

Continue the transaction.

Return Transactions

Overview

Returns allow you to create transactions for returned merchandise and to associate the reason the item was returned with the transaction. Oracle Retail Xstore Mobile allows you to create return transactions both with and without the original receipt.

Depending on your store policy, you may not be able to return merchandise purchased in another country. If your store restricts cross-border returns, a message displays indicating that cross-borders returns cannot be processed.

With Original Receipt or Credit Card

Verified Returns (With Original Receipt or Credit Card)

If the customer has the original receipt or credit card, the system verifies that the receipt that accompanies the return, or the original credit card used in the sale, is found either on the local system or the home office system. When the original transaction is found, the system displays the original sale information. A return using the customer's original sale receipt or credit card to locate the transaction information stored in the database is a *verified* return.

If you scan the transaction barcode at the Sale screen:

1. At the Sale screen, scan the barcode on the customer's original receipt. The system recognizes that this is a sale receipt barcode rather than an item identifier. If the original transaction is found in the database, the system immediately transitions to return mode and the original transaction information is shown. Refer to [What happens if the original transaction is not found or is missing data](#) for the return process if the original transaction cannot be found.
 - If a customer record was associated with the original sale transaction, the customer's record is automatically associated with the return.
 - If a customer record was not associated with the original sale transaction, you may be prompted to associate a customer record with the return transaction before continuing.
2. Skip to step 6.

If you select the Return Item menu option:

1. Select the **Return Item** option from the Context Menu. Perform the following steps to create a **verified** return.

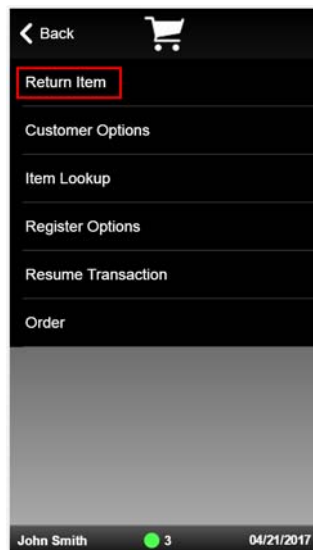


Figure 4-1: Return Item Screen

2. Depending upon your system's configuration, you may be prompted for customer information if a customer has not been associated with the current transaction. Enter the customer's information and select the **Process** option. When the customer information is found or added, the customer record is associated with this transaction.

A screenshot of a mobile application interface for a 'Customer Search' form. The form has a red header with the text 'Customer Search' and 'Enter search criteria.' Below the header are four input fields: 'Phone #', 'Last Name', 'First Name', and 'Postal Code'. At the bottom of the form are three buttons: 'Skip >', 'Change Country >', and 'Process >'. The bottom of the screen features a status bar with the text 'John Smith', a green dot, the number '3', and the date '04/21/2017'.

Figure 4-2: Customer Search Form

Note: For more information about the *Change Country* option on the Customer Search form, see [Change Country](#).

3. The system displays a prompt asking if the customer has the original receipt, original credit card, gift receipt or serial number for the item. Press **Yes**.

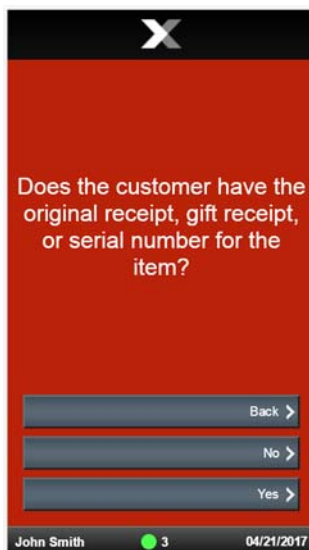


Figure 4-3: Return Original Receipt Prompt

Note: Depending on your payment system, the original credit card may not be an option.

4. The system displays a prompt asking for the original transaction information for the return item. Scan the transaction barcode on the receipt, swipe the credit card, or manually enter the required receipt information and select the **Process** option to continue.

Note: Depending on your payment system, the credit card search field may not be available.

Back X

Return Information
Enter the original transaction information for the return item.

Gift Receipt? ☐

Web Order ID

Or

Trans Barcode

Or

Orig Ticket ID

Orig Trans Date

Orig Store ID

Orig Register ID

Or

Process >

John Smith 3 04/21/2017

Figure 4-4: Original Transaction Return Information

Note: What happens if the original transaction is not found or is missing data

If your store accepts cross-channel returns (for example, items purchased on your website and returned in your store), a field on the Original Transaction Return Information form displays where you can enter the Web Order ID in order to perform a verified return.

The customer must present a shipping document to process the return. If the customer does not have the shipping document for the web purchase, or the shipping document cannot be verified, you must perform a blind or unverified return.

Freight, handling, or other delivery changes are not returnable.

If the customer used a credit card in the original purchase transaction and, you can swipe or enter the credit card number (if field is available) and enter the Item ID to locate the original transaction. Your payment system may only allow swiping of the card and not manual entry.

Back X

Return Information
Enter the original transaction information for the return item.

Gift Receipt? ☐

Web Order ID

Or

Trans Barcode

Or

Orig Ticket ID

Orig Trans Date

Orig Store ID

Orig Register ID

Or

Process >

John Smith 3 04/21/2017

5. Oracle Retail Xstore Mobile searches the database for the original transaction information.
 - If you swiped or entered the customer's credit card number, enter or scan the item ID. If more than one transaction is found, select the transaction from the Available Transactions list when prompted.

Oracle Retail Xstore Mobile displays the original item information (Figure 4-5).

- If you entered the receipt information, Oracle Retail Xstore Mobile displays the original item information.

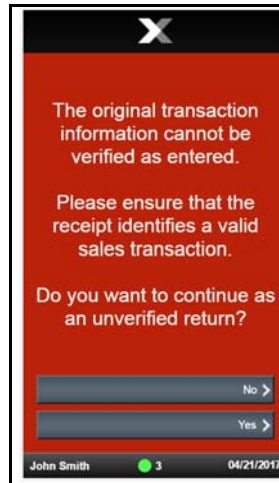
Note: If the original receipt is not found in the database, this prompt displays.

- Select **No** to enter/scan the receipt information again.
- Select **Yes** to process the return as an unverified return. See [Entering Returns without Original Receipt](#) for processing information

If you want to search for the original transaction using the customer's credit card, go to step 1.

Note: If the original receipt is found in the database, but is missing any data required to process the return, a message displays indicating the transaction must be processed as an unverified return.

Note: See [Entering Returns without Original Receipt](#) for processing information.



6. With the original transaction information displayed, select the return item from the list and then select either the **Return All** or the **Return Selected Item(s)** option. You can also scan or type the item ID for the return item.

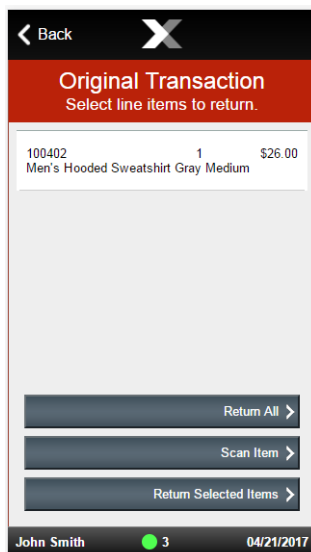


Figure 4-5: Original Transaction Information

-
- Depending upon your system's configuration and the number of items in the transaction, you may be prompted for the item quantity to be returned. If prompted, enter the quantity and press **Enter** to continue.
 - Serialized items within a kit can be exchanged through functionality in the Back Office. See the *Oracle Retail Xstore Mobile Manager's Guide* for more information about Back Office processing.
-

7. Oracle Retail Xstore Mobile prompts for a reason for the return. Use the up and down arrow keys to select a reason for the return and then press **Enter**.

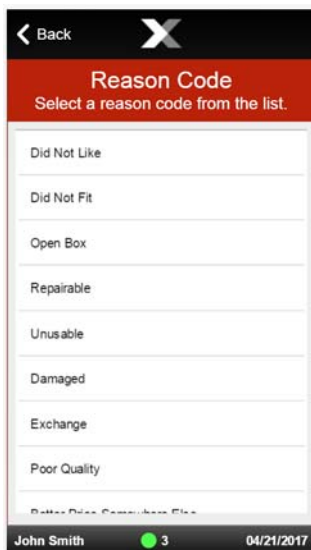


Figure 4-6: List of Return Reasons

8. Depending upon the return reason you chose, you may be prompted for additional information as shown in [Figure 4-7](#) below. Enter the required information and press **Enter** to continue.

Figure 4-7: Return Comment Form

9. If you are prompted for a serial number, enter the serial number and press **Enter** to continue.

Note: If you the item being returned is a kit that includes one or more serial numbers, you will be prompted for a serial number for each serialized item in the kit.

10. If the return item is a Kit composed of multiple items, all items that make up the kit must be returned. You may be prompted with a list showing all items that make up the Kit.

If prompted, choose **No** if all component items are not available. The current return item entry is cancelled and the system goes back to the return item prompt.

Choose **Yes** to continue with the return process to return all component items from the Kit.

11. Depending upon your store policy, you may be prompted with additional information about the return transaction. If prompted, press **Enter** to acknowledge the message.

Note: Depending upon your return policy, certain items may be returned at a prorated value from their original purchase price. If so, the amount refunded for these prorated items is determined by the number of days between the original date of purchase and the date of return.

For example, some store return policies offer a full refund if the item is returned within 30 days. After 30 days, a reduced refund (declining over time following the purchase date) is calculated automatically.

12. Oracle Retail Xstore Mobile returns to the Return screen. Note that the return item quantity has been decremented by the quantity returned. In the example below, the original purchase quantity was 1 and 1 item was returned; $1 - 1 = 0$.
13. When all of the return items are selected, perform one of the following functions to complete the process:
 - Select **Add Tenders** or press **Enter** to tender the refund.
 - Select **Exit Return** to return to the Register Sale screen to continue selling items.
 - Select **New Return** if the customer would like to return additional items that do not appear on this original receipt.

When the transaction is complete, the system prints receipts.

Entering Returns without Original Receipt

Blind Returns & Unverified Returns

A **blind** return is a return without a receipt. An **unverified** return is a return where the customer has a sale receipt, but it cannot be found in the database. These two return procedures are essentially the same.

If the customer does not have the original receipt for the return item, or the customer's receipt cannot be verified, perform the following procedure to complete the return transaction.

Note: If your store is set up to use customer purchase history to determine return item pricing, see [Entering Returns without Original Receipt, Using Customer Purchase History](#).

1. Select the **Return Item** option from the Context Menu. Use the following steps to perform a **blind (or unverified)** return.

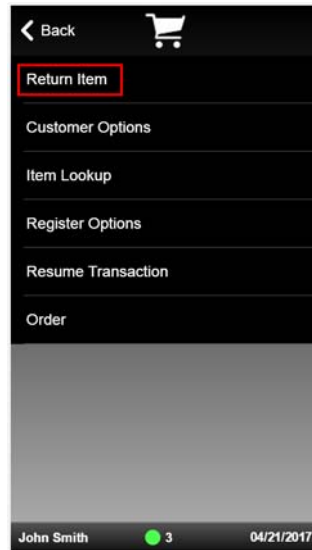


Figure 4-8: Return Item Screen

2. Depending upon your system's configuration, you may be prompted for customer information if a customer has not been associated with the current transaction. Enter the customer's information and select the **Process** option.

Figure 4-9: Customer Search Form

3. A prompt displays asking if the customer has the original receipt or a gift receipt for the item. Press **No**.

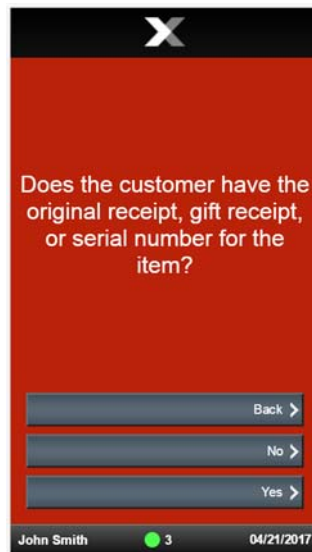
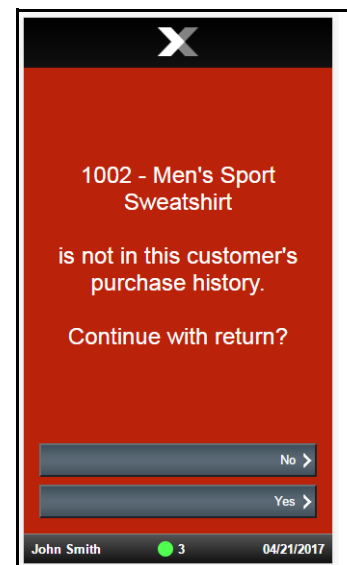


Figure 4-10: Return Original Receipt Prompt

Note: Depending on your payment system, original credit card may not be listed as an option.

4. Scan the item's barcode, or enter the item ID manually and then press **Enter**.
5. If prompted for the quantity, enter the item quantity and then press **Enter**.
6. If prompted that the item was not found in the customer's purchase history, select **Yes** to continue with the blind return.

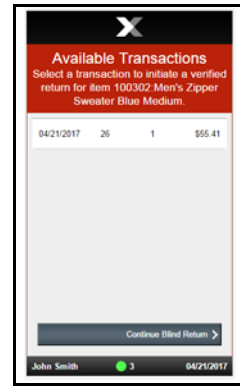
Go to step 7 below.



If the item is found in the customer's purchase history, select a transaction from the list and press **Enter** to create a verified return. Continue with step 6 of [With Original Receipt or Credit Card](#).

<OR>

Press **Esc** and continue with the blind return.
Go to step 7 below.



7. Use the up and down arrow keys to select a reason for the return and then press **Enter**.

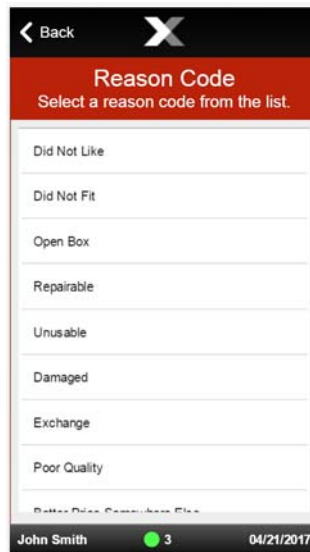


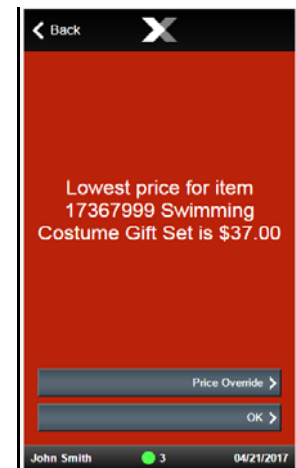
Figure 4-11: List of Return Reasons

8. Depending upon the return reason you chose, you may be prompted for additional information as shown in [Figure 4-12](#) below. Enter the text of your comment and press **Enter** to continue.



Figure 4-12: Return Comment Form

9. Depending upon your system's configuration:
- You may be prompted with additional information about the return transaction. Press **Enter** to acknowledge the message.
 - The price history window may display a list of previous promotional prices. Use the up and down arrow keys to select the correct price for the return item and press **Enter** to continue.
 - A prompt may appear stating that a restocking fee has been added based on the item returned. This amount is deducted from the amount of the refund. Press **Enter** to continue.
 - The lowest price for the item may display. To override the price, select **Price Override**. A manager will need to enter an **Employee ID** and **Password** to override.



10. If you are prompted for a serial number, enter the serial number and press **Enter** to continue.

Note: If you the item being returned is a kit that includes one or more serial numbers, you will be prompted for a serial number for each serialized item in the kit.

11. If the return item is a Kit composed of multiple items, all items that make up the kit must be returned. You may be prompted with a list showing all items that make up the Kit.

If prompted, choose **No** if all component items are not available. The current return item entry is cancelled and the system goes back to the return item prompt.

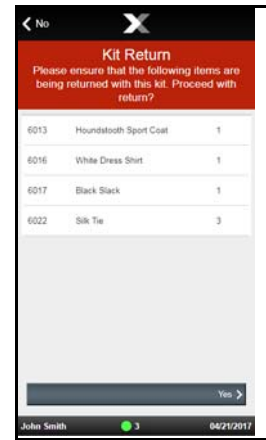
Choose **Yes** to continue with the return process to return all component items from the Kit.

12. When all return items have been entered, perform one of the following functions to complete the process:

- Select **Add Tenders** or press **Enter** to tender the refund.

Note: Your store may have a blind return threshold. If the amount of the return exceeds this threshold, a Blind Return Threshold Amount security prompt displays. A manager will need to enter an *Employee ID* and *Password* to override.

If your store does not allow overrides, you will be unable to complete the return.



- Select **Exit Return** to return to the Sale screen to continue selling items.
- Select **Return Item** if the customer would like to return additional items (for example, items that appear on an original receipt).
- Select **Change Item** to modify an item. You may change quantity, change price, change tax, void line, modify discount (if the item was discounted), or change the commissioned associate. Refer to [Item Adjustment](#) for more information about these options.
- Select **Add Discount** if the return item is on sale at the time it is returned. Then select a type of discount from a list, and select the specific item that is discounted. The discount you apply may be a percentage discount or a dollar amount discount. This ultimately reduces the amount due to the customer when the return is tendered.
- Select **Return Non-Merch** to return a non-merchandise item.
- Select **Item Lookup** to find the Item ID for the return item. Refer to [Look Up An Item](#) for more information about looking up item information.

Returning Non-Merchandise Items Without a Receipt

1. Select the **Return Item** option from the Context Menu. The system prompts you to specify whether or not the customer has a receipt or serial number for the return item.
2. Respond to the prompt by selecting **No**. After confirming that the customer does not have the original receipt, select the **Return Non-Merch** option from the Context Menu.

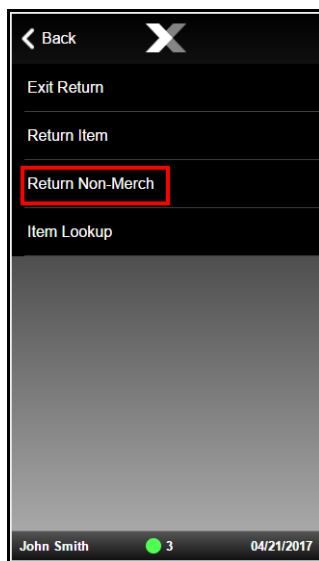


Figure 4-13: Register Return Screen

3. Select the category of non-merchandise item to be returned from the list and press **Enter** to continue.

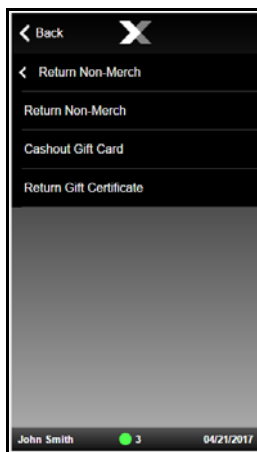


Figure 4-14: List of Non-Merchandise Categories

4. The options to return a gift card or a gift certificate may require a security login, depending on store policy. To perform those two options, you must have the

required security level. Enter your login ID and password when prompted, and select **Process**.

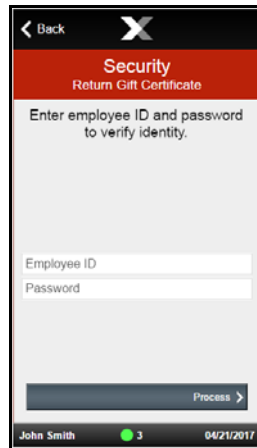


Figure 4-15: Security Verification Prompt

5. Enter the appropriate information when prompted. For example the voucher ID for a Gift Certificate, the Gift Card number for a gift card, or the item price. The prompts vary, depending on the item selected.
6. You may be prompted to select a reason for returning the non-merchandise item. If so, select a reason from the list and press **Enter** or select **OK**.
7. When all return items have been selected, choose one of the following functions to complete the process:
 - Select **Add Tenders** or press **Enter** to tender the refund. Return tenders are the tendering types used when money is owed to the customer. The tender types available for sales may be different than those available for refunds.
 - Select **Exit Return** to return to the Sale screen to continue selling items.
 - Select **Return Item** if the customer would like to return additional items (for example, items that appear on an original receipt).
 - Select **Return Non-Merch** if the customer would like to return additional non-merchandise items (for example, non-merchandise items that appear on an original receipt).
 - Select **Change Item** to modify an item: change quantity, change price, change tax, void line, modify discount (if item was discounted), or change the commissioned associate. Refer to [Item Adjustment](#) for more information about these options.
 - Select **Add Discount** if the non-merchandise return item is on sale at the time it is returned. You must select a type of discount from a list, and then select the specific item that to be discounted. The discount you apply may be a percentage discount or a dollar amount discount. This ultimately reduces the amount due to the customer when the return is tendered.

Entering Returns without Original Receipt, Using Customer Purchase History

If a customer does not have the original receipt, or the receipt cannot be verified, the return item price may be determined from the customer's purchase history, when available.

- If the return item(s) can be found in the customer's purchase history record, the transaction is processed like a verified return as described in [With Original Receipt or Credit Card](#).
- If the item(s) cannot be found in the customer's purchase history record, the transaction is processed like a blind return as described in [Entering Returns without Original Receipt](#).

Perform the following steps to determine return item pricing using customer purchase history.

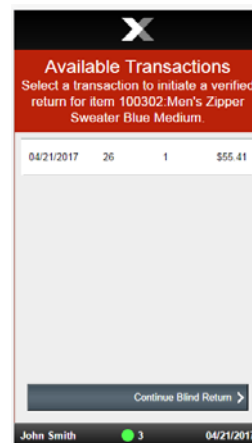
1. At the Sale screen, select the **Return Item** option from the Context Menu.
2. If a customer has not been associated with the current transaction, enter the customer's information when prompted and select the **Process** option.
3. When prompted if the customer has the original receipt or a gift receipt for the item, press **No**.
4. At the item prompt, scan or enter the return item ID:

ITEM FOUND

If the item is found in the customer's purchase history, the system lists the customer's previous transaction(s) that include the return item.

This Available Transaction list shows the following information for each transaction:

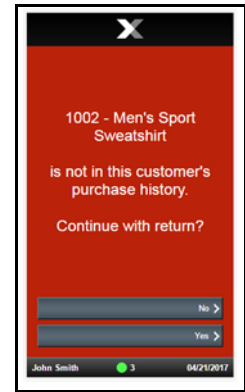
- **Date** – The original transaction date.
 - **Trans** – The original transaction ID number.
 - **Qty Avail** – The item quantity available for return from the original transaction.
 - **Trans Total** – The original *transaction* total amount.
- To use the customer's purchase history record for return pricing, select a transaction from the list and press **Enter**. Go to step 6 to complete the return.
 - To use Blind Return processing rather than selecting the item from the customer's purchase history record, select the **Continue Blind Return** menu option and go to step 5 to complete the return.



ITEM NOT FOUND

If the item is not found in the customer's purchase history, the Item Not in Purchase History prompt displays.

- Select **Yes** to continue with a blind return. Go to step 5. (This option may be controlled by security permissions. If so, you may be prompted for a manager override to continue).
- Select **No** to cancel the return from customer's purchase history process. The system returns to the **Scan or Enter the Return Item** prompt in return mode.



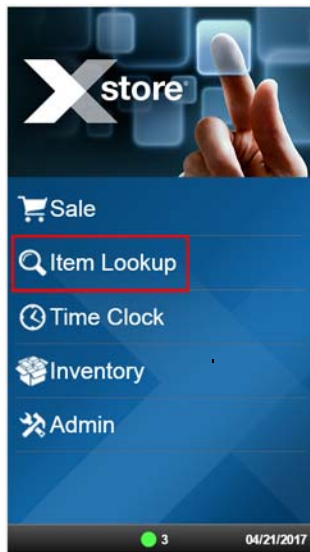
Taxes For Return Items

Taxes for return items are determined by the original store number entered in the original Receipt Information form.

Note: If an original store number is not entered (because the customer does not have the original receipt), the return store's tax rate is used.

You can change the tax on the return item using the **Change Item** option on the menu. Refer to [Change Commissioned Associate](#) for more information about changing taxes.

Item Lookup



The Item Lookup option in Xstore Mobile provides the ability to look up and find information about items in the database.

The procedure for performing an item lookup is described in [Look Up An Item](#).

Look Up An Item

To perform an item lookup:

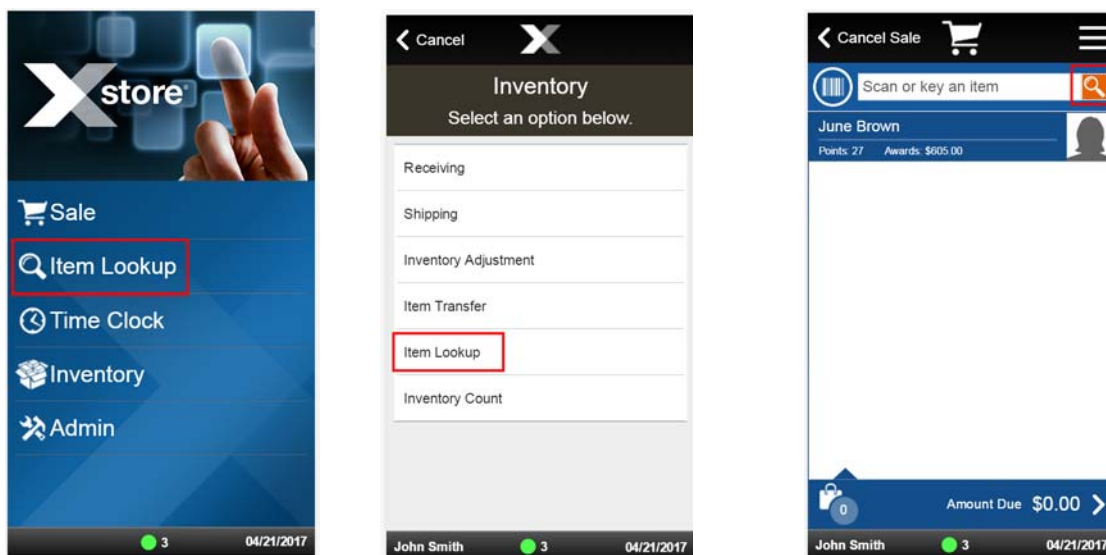


Figure 5-1: Item Lookup Options

1. Select **Item Lookup** in the [Main Menu](#).

<OR>

Select **Item Lookup** in the [Inventory](#) area of the [Admin](#) menu.

<OR>

Select the Item Lookup button in the Item Entry screen.

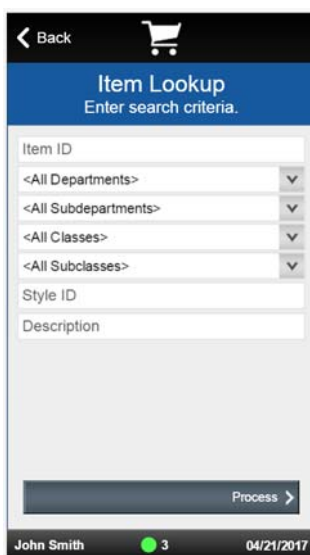


Figure 5-2: Item Lookup Search Criteria

2. Scan an item to go directly to the Item Detail screen or enter the item search criteria.

3. Select **Process**.



Figure 5-3: Item List

4. Select an item in the list.

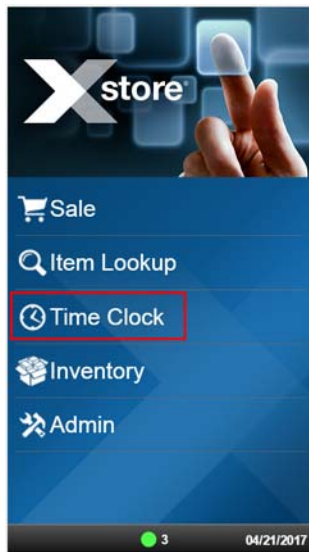


Figure 5-4: Item Details

Xstore Mobile displays details about the item.

When you are finished, select **Back** to return to the item lookup criteria screen.

Time Clock



The time clock area in Xstore Mobile provides users with the ability to clock in, clock out, and change the work code used for logging their time. All time clock options are accessed through the Time Clock button on the [Main Menu](#) (left).

About This Chapter

This chapter contains the following procedures:

- [Clock In](#) - Describes how to clock in.
- [Clock Out](#) - Describes how to clock out.
- [Change Work Code](#) - Describes how to change the work code under which your time is to be logged.

Clock In

Important: You must be clocked out to clock in.

To clock in:

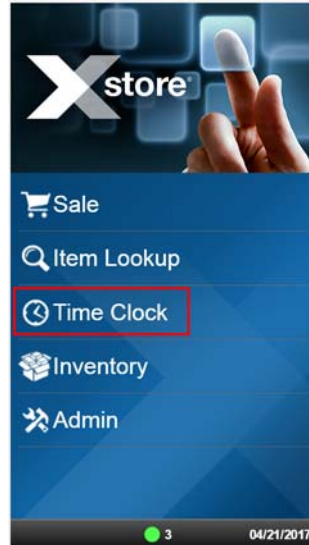


Figure 6-1: Time Clock

1. Select **Time Clock** in the [Main Menu](#).

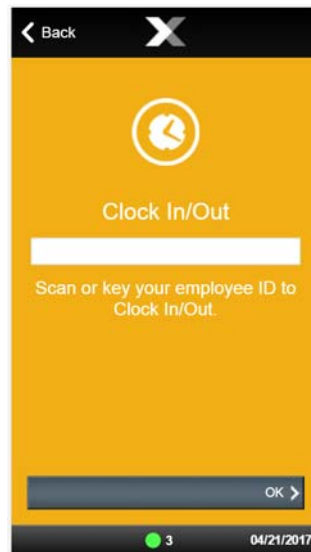


Figure 6-2: Enter Employee ID

2. Enter Employee ID.
3. Select **OK**.

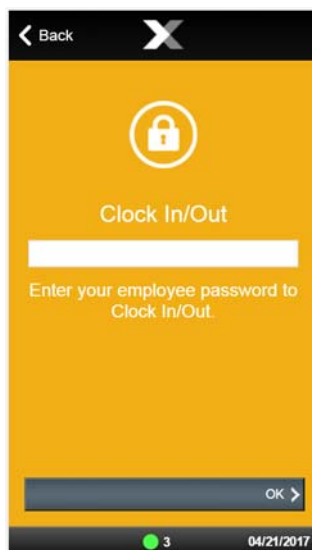


Figure 6-3: Enter Employee Password

4. Enter Password.
5. Select OK.

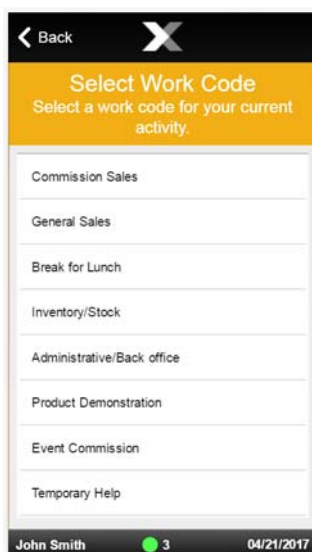


Figure 6-4: Select Work Code

6. Select the proper work code.
- You are now clocked in.
- Xstore Mobile returns to the [Main Menu](#).

Clock Out

Important: You must be clocked in to clock out.

To clock out:

1. Select **Time Clock** in the [Main Menu](#).

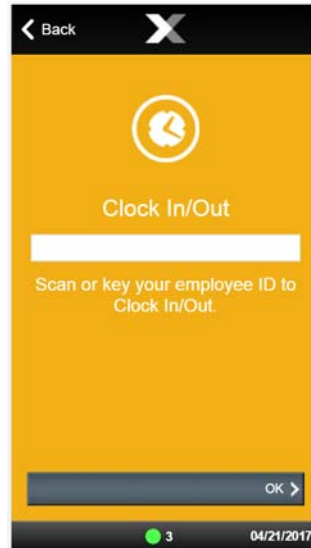


Figure 6-5: Enter Employee ID

2. Enter Employee ID and select **OK**.
3. Select the employee ID field to select it.

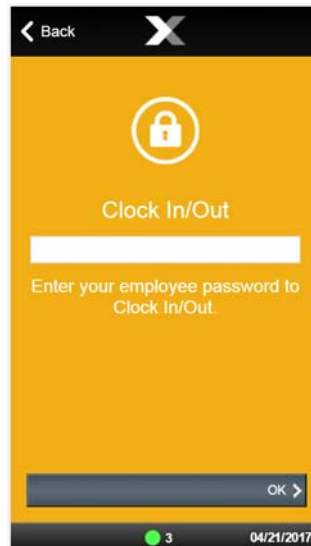


Figure 6-6: Enter Employee Password

4. Enter Password and select **OK**.
5. Select the password field to select it.



Figure 6-7: Change Work Code or Clock Out

6. Select **Clock Out**.

You are now clocked out.

Xstore Mobile returns to the [Main Menu](#).

Change Work Code

Important: You must be clocked in to change your work code.

To change your work code:

1. Select **Time Clock** in the [Main Menu](#).

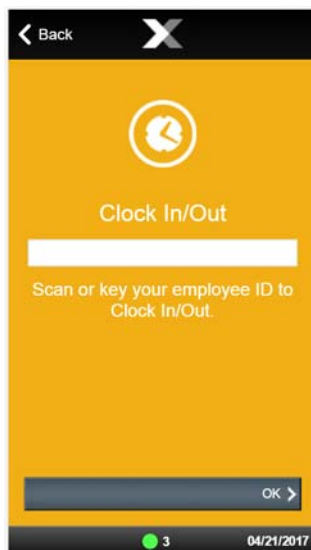


Figure 6-8: Enter Employee ID

2. Enter Employee ID and select **OK**.
3. Select the employee ID field to select it.

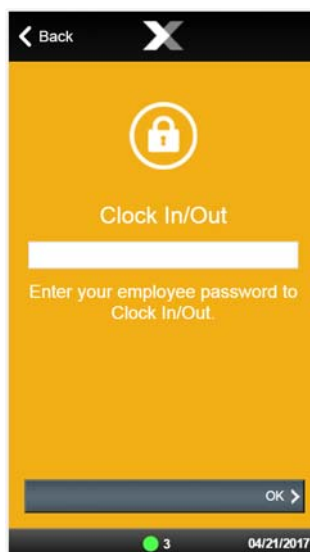


Figure 6-9: Enter Employee Password

4. Enter Password and select **OK**.
5. Select the password field to select it.



Figure 6-10: Change Work Code or Clock Out

6. Select **Change Work Code**.

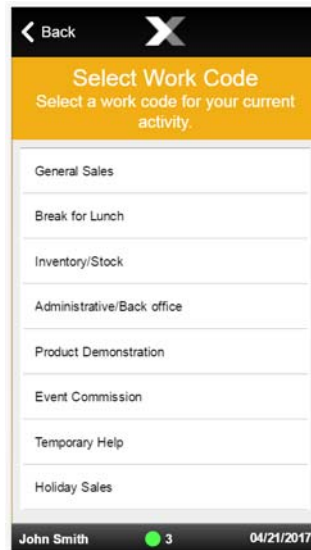
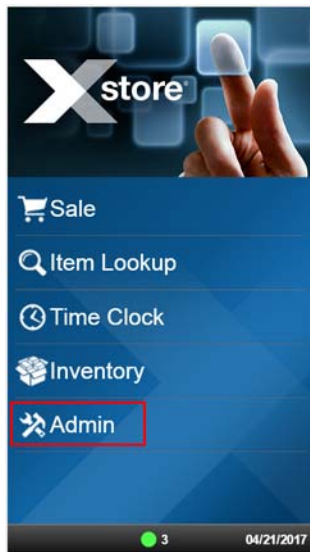


Figure 6-11: Select Work Code

7. Select the proper work code.

Your work code has been changed.

Xstore Mobile returns to the [Main Menu](#).



The Admin option provides access to Xstore back office functions available in Xstore Mobile.

About This Chapter

This chapter provides information about the following procedures:

- [Using Admin Functions](#)
- [Inventory](#)
- [Register Open/Close](#)
- [Customer Maintenance](#)
- [Reinitialize Hardware](#)
- [EFTLink Admin Functions](#)
- [Manage Tills](#)

Using Admin Functions

To use Admin functions in Xstore Mobile:

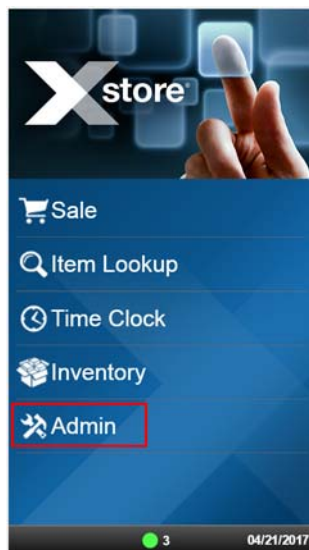


Figure 7-1: Admin Option

1. Select **Admin** in the [Main Menu](#).

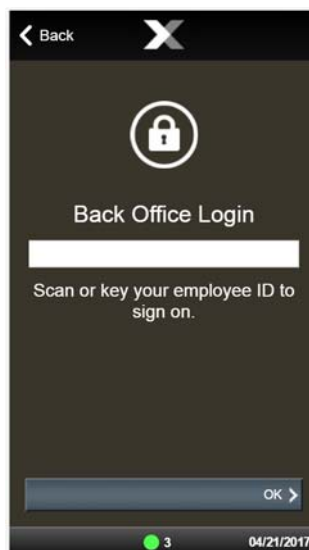


Figure 7-2: Enter Employee ID

2. Enter Employee ID.

3. Select OK.

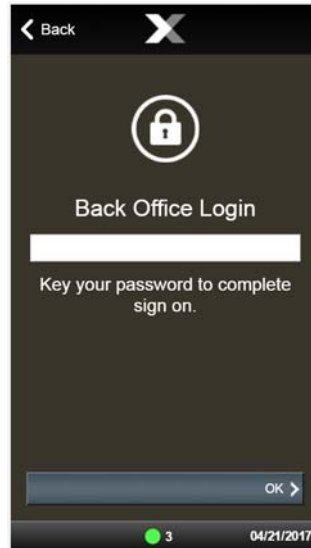


Figure 7-3: Enter Password

4. Enter Password.
5. Select OK. The Admin menu opens.

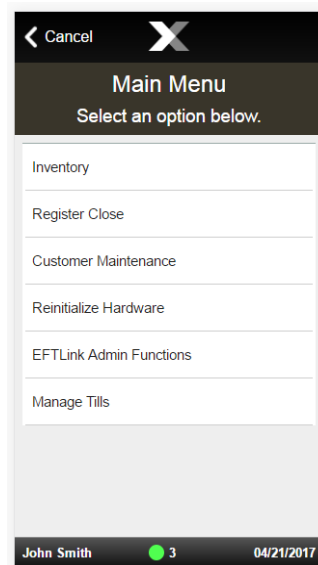


Figure 7-4: Admin Menu

Continue with the appropriate procedure:

- [Inventory](#)
- [Register Open/Close](#)
- [Customer Maintenance](#)
- [Reinitialize Hardware](#)
- [EFTLink Admin Functions](#)
- [Manage Tills](#)

Inventory

The inventory options in the Admin menu can be accessed from other areas of the application. See [Receiving](#) or [Shipping](#) for more information.

Register Open/Close

The Xstore Mobile register is opened and closed through the Admin menu. The following procedures describe the method for opening and closing the register.

Note: Xstore Mobile only supports Register Accountability.

Open Register

To open a closed Xstore Mobile register:

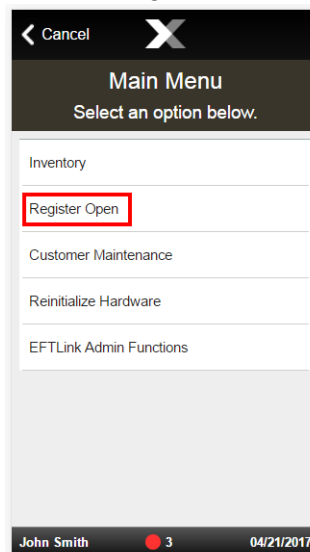


Figure 7-5: Register Open

1. Select **Register Open**.



Figure 7-6: Open Register Prompt

2. Select **Yes** to confirm that you want to open the register.

The store opens and Xstore Mobile returns to the Admin menu.

Close Register

To close an open Xstore Mobile register:

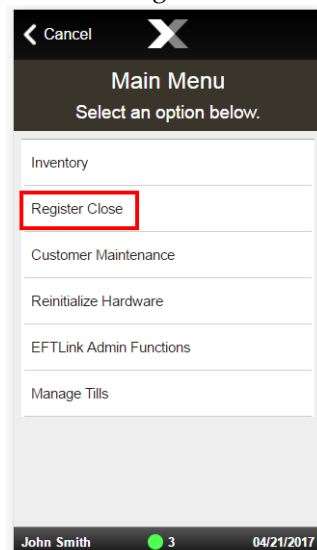


Figure 7-7: Register Close

1. Select **Register Close**.



Figure 7-8: Register Close Prompt

2. Select **Yes** to confirm that you want to close the register.

The store closes and Xstore Mobile returns to the Admin menu.

Customer Maintenance

The Customer Maintenance option provides the ability to search for, view, and edit customer information, including adding loyalty cards to customer records.

Customer Search

To search for a customer:

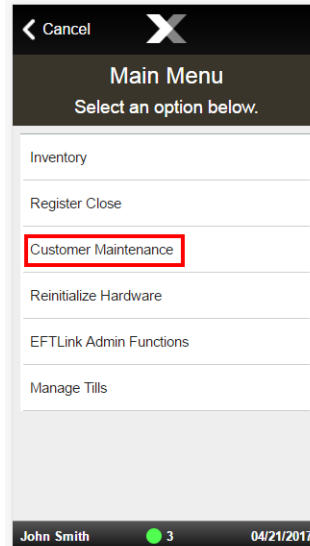


Figure 7-9: Customer Maintenance

1. Select **Customer Maintenance**.

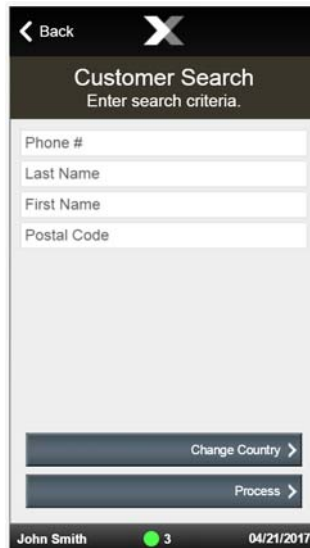


Figure 7-10: Customer Search Criteria

2. Enter the customer search criteria.
3. Select the **Process** button.

To change the states/provinces in the State search menu, see [Change Country](#).

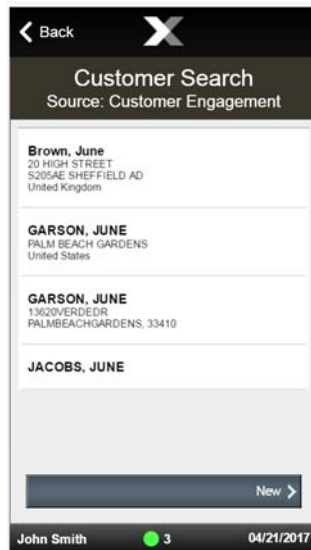


Figure 7-11: Customer Search Results

4. Select a customer to view or edit customer information or select the **New** button to add a customer. See [Create a Customer](#).

The customer record opens.

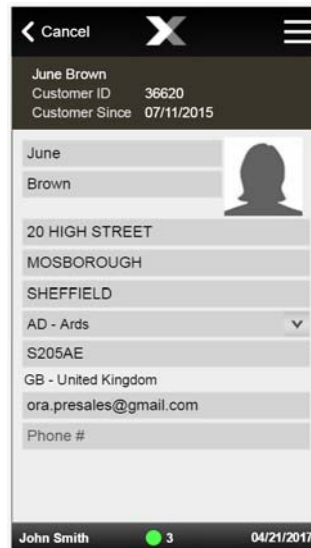


Figure 7-12: Customer Record

Continue with the appropriate procedure:

- [Edit a Customer](#).

<OR>

- [Enroll in Loyalty](#).

Change Country

To change the states/provinces in the State field (if present) to those of a different country:

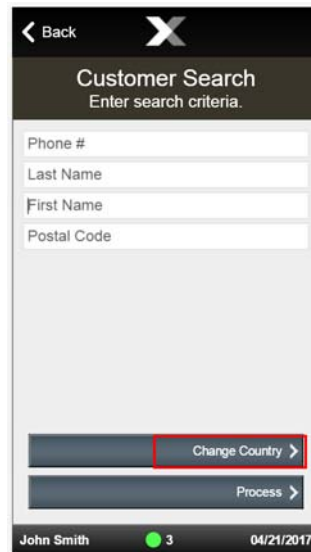


Figure 7-13: Change Country

1. Select the **Change Country** button.

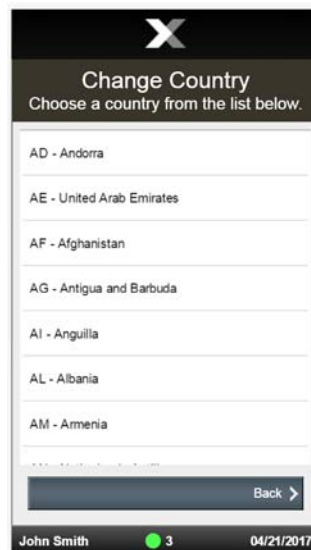


Figure 7-14: Change Country List

2. Select the country.

Return to [Customer Maintenance](#).

Create a Customer

To create a new customer record:

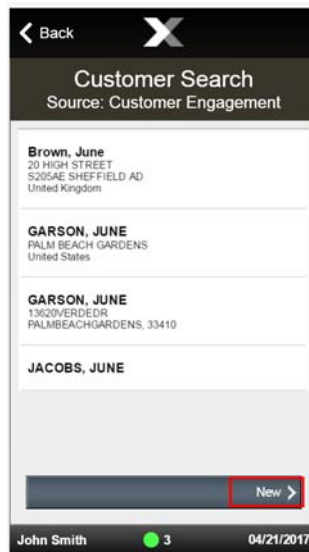


Figure 7-15: Customer Search Results

1. Select the New button.



Figure 7-16: New Customer

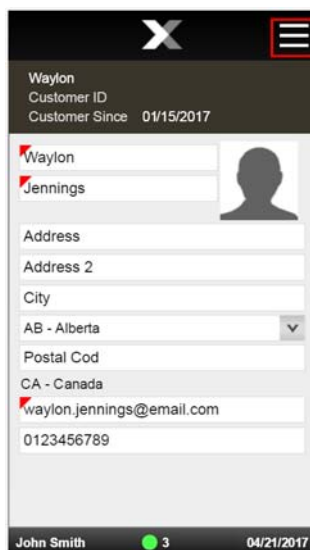


Figure 7-17: New Customer Criteria

2. Enter the information for the customer.

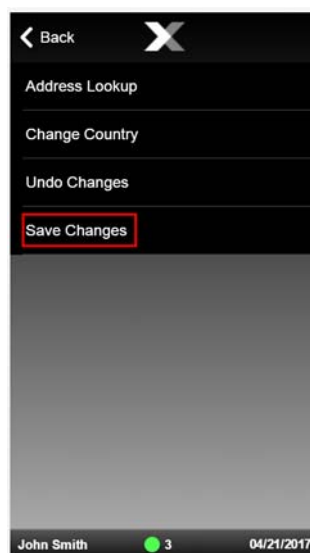


Figure 7-18: New Customer Save Changes

3. Select the **Save Changes** button from the Context Menu.
The customer is created.

Edit a Customer

To edit customer information:

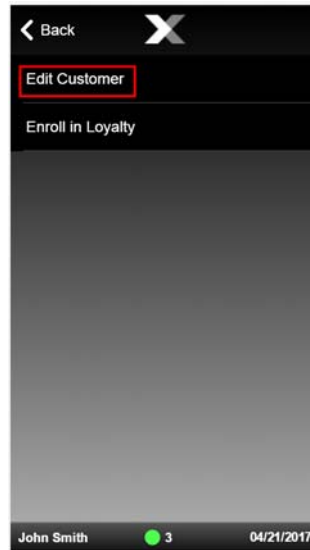


Figure 7-19: Edit Customer

1. After performing a [Customer Search](#), select **Edit Customer**.

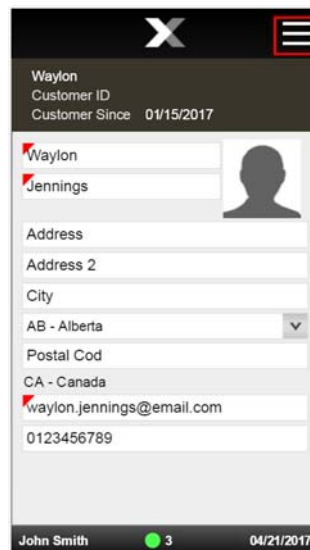


Figure 7-20: Customer Search Results

2. Enter the new information for the customer.

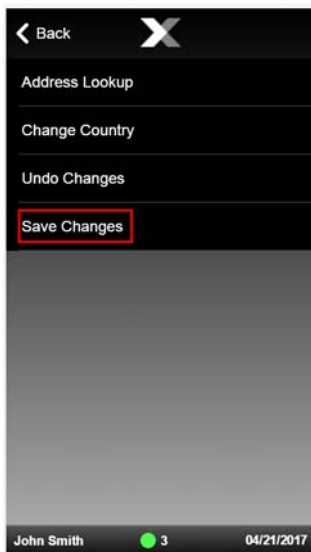


Figure 7-21: Customer Save Changes

3. Select the **Save Changes** button from the Context Menu.

Enroll in Loyalty

To add a loyalty card to a customer account:

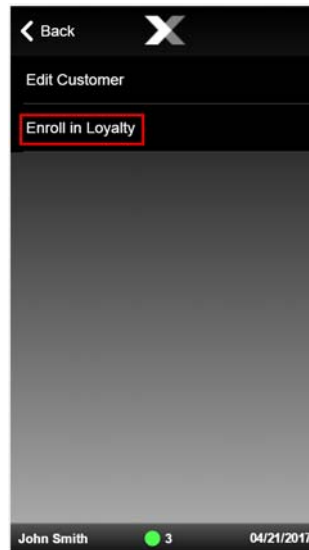


Figure 7-22: Enroll in Loyalty

1. After performing a [Customer Search](#), select **Enroll in Loyalty** from the Context Menu.

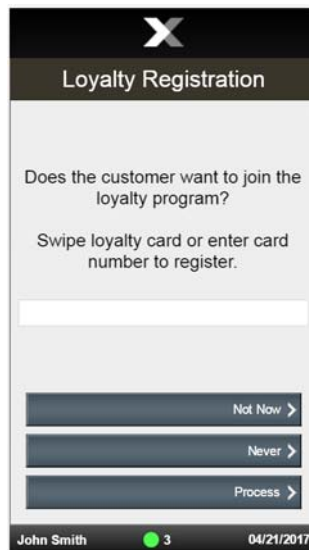


Figure 7-23: Loyalty Registration

2. Swipe a loyalty card, or enter the card number.
3. Select the **Process** button.

The loyalty card is assigned to the customer and Xstore Mobile returns to the view customer screen.

Reinitialize Hardware

Select the **Reinitialize Hardware** menu option to reset the peripheral hardware devices.

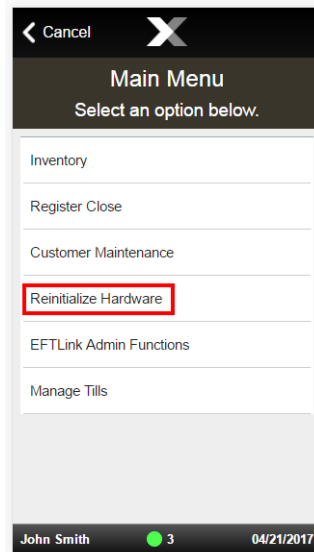


Figure 7-24: Reinitialize Hardware

The system performs the following process for the hardware devices:

close ?]]>release?]]>claim?]]>open

When prompted, select **Yes** to confirm you want to re-initialize the hardware.

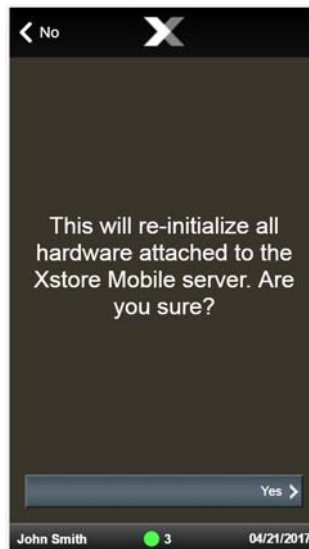


Figure 7-25: Reinitialize Hardware Prompt

EFTLink Admin Functions

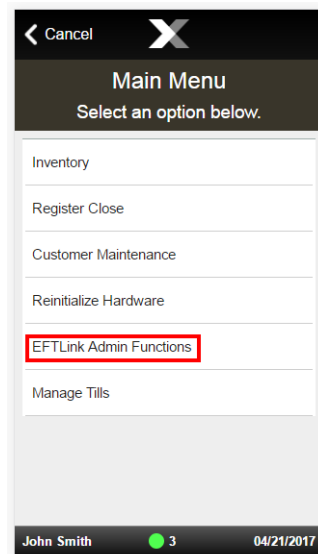


Figure 7-26: EFTLink Admin Functions

Manage Tills

Till options and maintenance functions are primarily related to the movement of money into and out of a till (a cash drawer). Till options include No Sale and Post Void. Other till maintenance options deal with the control of funds in the till. They include Cash Pickup and Cash Transfer.

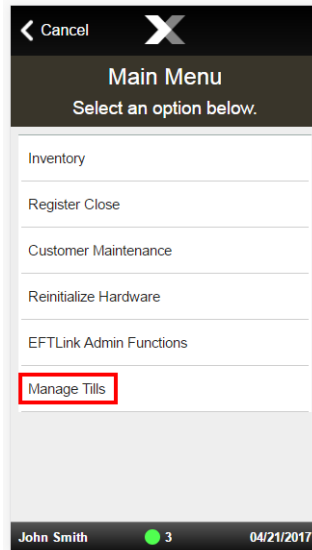


Figure 7-27: Manage Tills

Post Void

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.

Certain kinds of sale transactions may involve extended transactions that occur outside the system. For example, special orders, work orders and layaways are extended transactions. Although the system checks for such conditions when a post void is executed, some aspects of the transaction may need to be reversed by an additional transaction such as a return. If the system detects an extended transaction, you are prompted about whether or not you want to continue the post void process.

Performing a Post Void

1. At the Admin Menu screen, select **Manage Tills** then **Post Void**.

- When the system prompts for the transaction barcode, scan the receipt barcode or enter the information manually and select **Process**.

Figure 7-28: Prompt for Transaction Barcode

Note: If you scan or enter a barcode for a transaction type that cannot be post voided (such as a suspended transaction), the system displays a message informing you that the transaction cannot be post voided.

- The system displays a message that prompts you to confirm that you want to post void the transaction. Select **Yes** to continue or **No** if you have changed your mind.
- The system may require that you select a reason for post-voiding a transaction, depending upon your store policy. If prompted, select a reason from the list and select **Ok**. Use the up and down arrow keys to scroll through the list.
- If necessary, scan the cash drawer with which to perform the post void.
- Your system may also be configured to require a comment entry about the Post Void transaction. If it does, a free-form text screen displays where you can type a comment. The kind of information you enter may be determined by your store policy. After entering a comment, select **Ok**.

Note: If awards were used to reduce the customer's cost on the original transaction, the awards are reversed after the Post Void transaction and added back to the customer's account.

The system voids the transaction, prints void receipts for your records, and returns to the previous screen where you can continue working.



Figure 7-29: Void Receipt Example

No Sale

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

1. At the Admin Menu screen, select **Manage Tills**, then select **No Sale**.

The system prompts you to select the reason you are opening the cash drawer. Select a reason from the list and press **Enter**.

2. If necessary, scan the cash drawer on which to perform the no sale.
3. The system may prompt you to enter a comment about the reason for opening the cash drawer. If it is required, enter the pertinent information in the comment entry form and press **Enter**.

The system prints a No Sale receipt for your records.

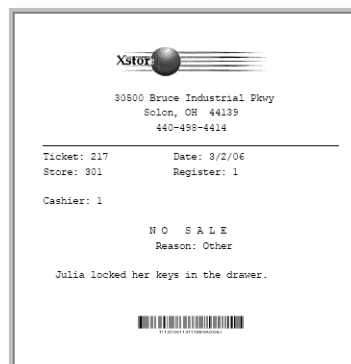


Figure 7-30: No Sale Receipt Sample

Cash Pickup

Cash Pickup is a till feature that allows an associate to take cash from a till so that the amount does not exceed a specified threshold amount. The system may be configured to

prompt for an associate to make a cash pickup when the amount in the till is greater than the threshold amount.

Note: Your system's configuration may specify the maximum amount that should be kept in a till.

If that amount is exceeded after completing the tendering process for a transaction, the system may display a prompt indicating that a cash pickup should be made.

However, you do not have to wait for this prompt to make a cash pickup.

After you have assigned a customer to a transaction or added items to a sale, you cannot perform a cash pickup.

1. At the Admin Menu screen, select **Manage Tills** to display the Till Maintenance Options menu.
2. Select **Cash Pickup** from the menu.
3. If necessary, scan the cash drawer on which to perform the cash pickup.
4. If your store is configured for foreign cash currency tenders to be given as change, select the type of tender from the list.

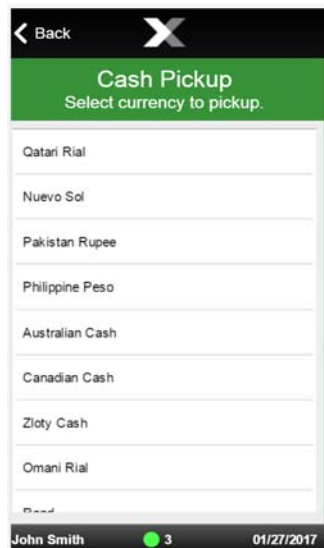


Figure 7-31: Cash Pickup Currency List

- At the Cash Pickup prompt, enter the cash amount that you are picking up and press **Enter**.

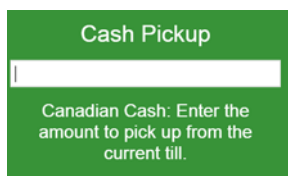


Figure 7-32: Cash Pickup Amount - Canadian

Note: Your system's configuration may specify the minimum amount that should be kept in a till. If you try to remove an amount that results in the till amount going below this level, the system displays a prompt indicating the amount that must remain in the till after a pickup. Press **Enter** to return to the Cash Pickup amount prompt.

- Remove the cash from the till and close the drawer.

The system prints a receipt for this cash pickup transaction.



- The system returns to the till options menu. Select the **Back** option to return to the previous screen.

Cash Transfer (From Store Bank To Till)

To perform a Cash Transfer from the store bank to a till, do the following:

- At the Admin Menu screen, select **Manage Tills** to display the Till Maintenance Options menu.
- In the Till Maintenance menu, select the **Cash Transfer** option.

Note: If the register has more than one cash drawer, you may be prompted to select the till to be used for this process.

- If necessary, scan the cash drawer on which to perform the cash transfer.

- If your store is configured for foreign cash currency tenders to be given as change, select the type of tender from the list.

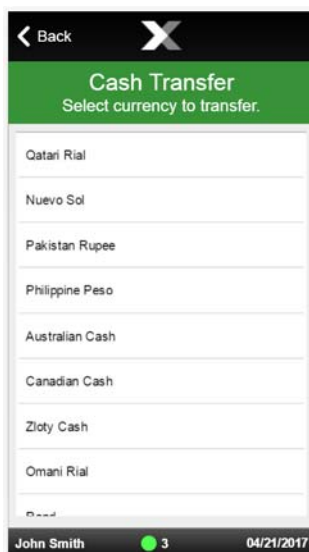


Figure 7-33: Cash Transfer Currency List

- Enter the amount of cash you would like to transfer and then press **Enter**.

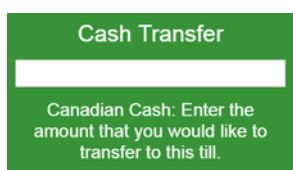


Figure 7-34: Cash Transfer Amount Prompt- Canada Cash

- A receipt prints for the cash transfer and Xstore Mobile returns to the Till Maintenance menu.



Figure 7-35: Cash Transfer Receipt

Receiving

Inventory receiving can be performed through Xstore Mobile. Through a handheld device, you can create a receiving document, open a receiving document, scan in items, and scan items directly into Xstore's inventory.

About This Chapter

This chapter includes the following procedures:



- [Start Receiving](#)
- [Search for a Receiving Document](#)
- [Create a New Receiving Document](#)
- [Select or Add a Carton](#)
- [Item Entry Screen](#)
- [Add a Comment to a Document](#)
- [Receive Document in Total](#)
- [Save Document](#)

Start Receiving

The receiving process can be started through either the [Main Menu](#), or the Admin menu.

Main Menu

To start the receiving process through the [Main Menu](#):

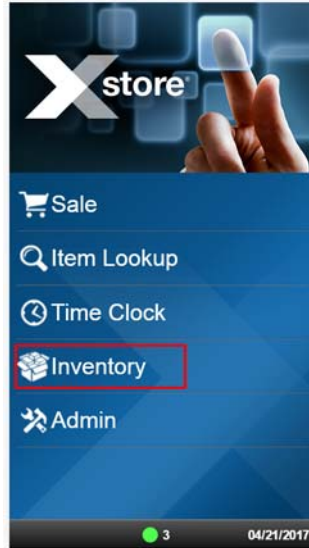


Figure 8-1: Inventory Option

1. Select **Inventory** in the [Main Menu](#).

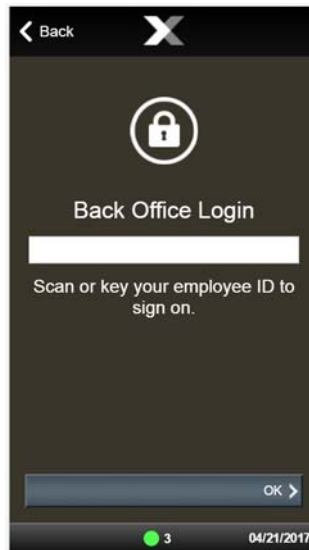


Figure 8-2: Enter Employee ID

2. Enter Employee ID.

3. Select OK.

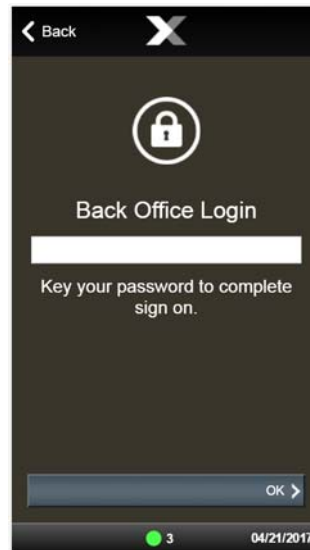


Figure 8-3: Enter Employee Password

4. Enter Password.
5. Select OK.

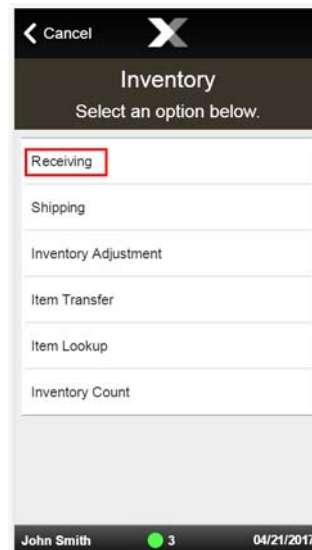


Figure 8-4: Receiving Option

6. Select **Receiving**.
- Continue with [Search for a Receiving Document](#)

Admin Menu

To start the receiving process through the Admin menu:

Open the Admin menu. See [Using Admin Functions](#).

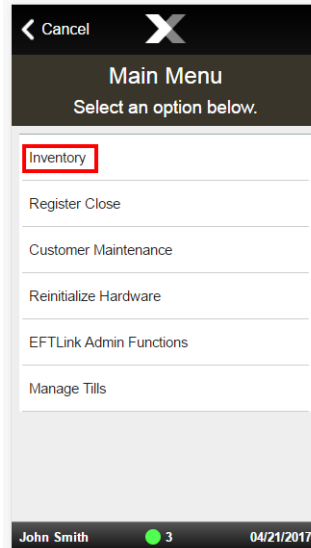


Figure 8-5: Admin Menu

1. Select **Inventory** in the Admin Menu.

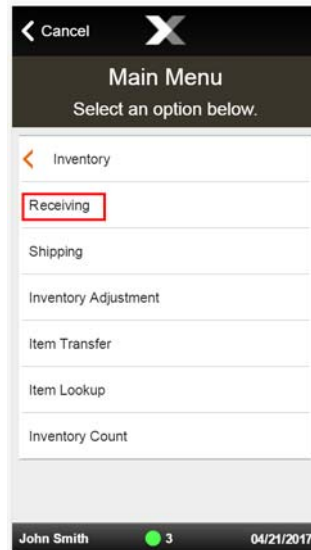


Figure 8-6: Inventory Menu

2. Select **Receiving** in the Inventory menu.
The Receiving Document Search screen opens.

The screenshot shows a mobile application interface for 'Receiving Document Search'. At the top, there is a 'Back' button and a logo. Below the title, a subtitle reads 'Scan a document barcode or enter search criteria.' The main form contains several input fields: 'Document ID', 'Customer Acct. ID', 'Document Type' (with a dropdown arrow), and 'Document Status'. Under 'Document Status', there are three radio button options: 'Closed', 'In Process', and 'Open'. At the bottom of the form are two buttons: 'Add New >' and 'Process >'. The footer of the app displays the user's name 'John Smith', a green status indicator with the number '3', and the date '04/21/2017'.

Figure 8-7: Receiving Document Search

Continue with [Search for a Receiving Document](#) or [Create a New Receiving Document](#).

Search for a Receiving Document

To search for and select a receiving document:

This screenshot is identical to the one in Figure 8-7, showing the 'Receiving Document Search' mobile app interface. It includes the 'Back' button, logo, title, subtitle, search criteria fields, status radio buttons, and 'Add New' and 'Process' buttons, all within the same footer context.

Figure 8-8: Receiving Document Search

1. Scan a receiving document ID to open the carton list for the document or enter the search criteria and select **Process**.

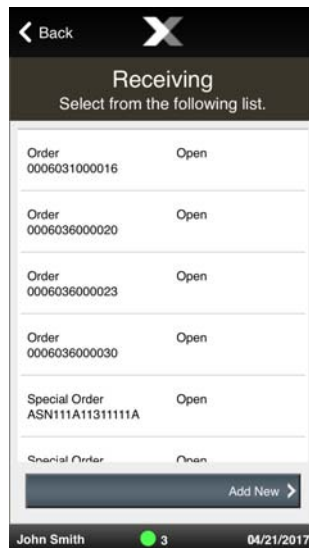


Figure 8-9: Receiving Document Search Results

2. Select the correct receiving document in the list.

The carton list opens.

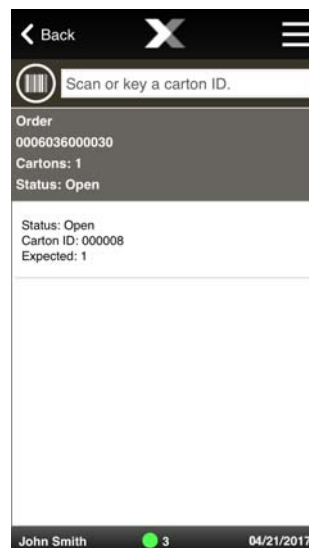


Figure 8-10: Carton List

Continue with the appropriate procedure:

- [Select or Add a Carton](#)
- [Add a Comment to a Carton](#)
- [Save Document](#)

Create a New Receiving Document

To add a new receiving document:

Receiving Document Search

Scan a document barcode or enter search criteria.

Document ID

Customer Acct. ID

Document Type

Document Status

Closed

In Process

Open

Add New >

Process >

John Smith 3 04/21/2017

Figure 8-11: Receiving Document Search Criteria

1. Select **Add New**.

Add Receiving Document

Enter information for your new receiving document.

Document ID

Document Type

Received From

Address

Postal Code

City

State

Country

Process >

John Smith 3 04/21/2017

Figure 8-12: New Receiving Document

2. Enter the document information.
3. Select **Process**.

The new receiving document opens.

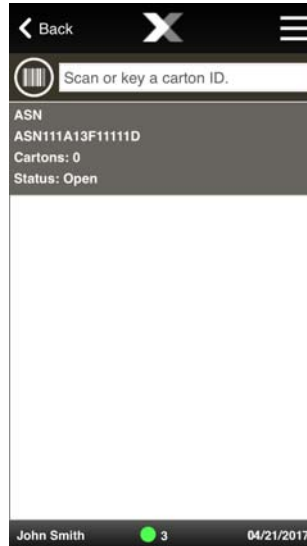


Figure 8-13: New Receiving Document

Continue with [Select or Add a Carton](#)

After adding one or more cartons:

- [Add a Comment to a Carton](#)
- [Save Document](#)

Select or Add a Carton

To select or add a carton for a receiving shipment:

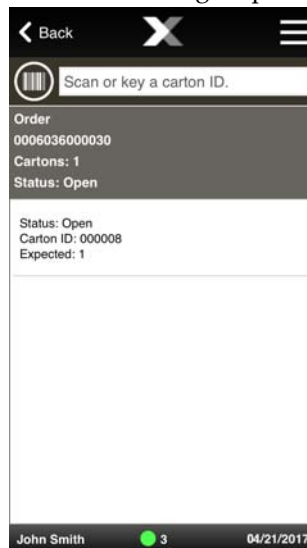


Figure 8-14: Select or Add a Carton

1. Scan a carton ID or enter a carton ID or select to select the proper carton.

The [Item Entry Screen](#) opens.

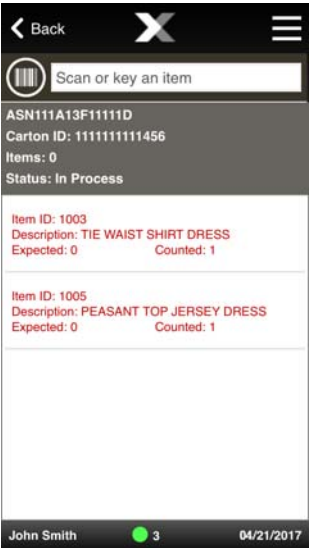


Figure 8-15: Item Entry Screen

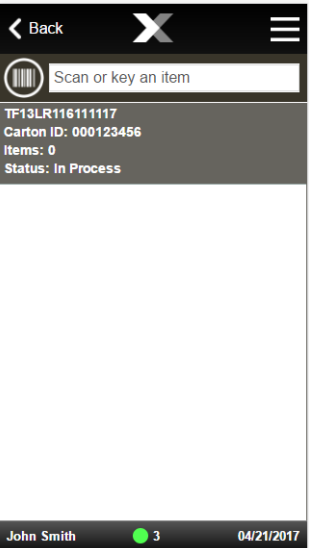


Figure 8-16: Item Entry Screen - New

If you added a new carton, the [Item Entry Screen](#) will not have any items listed.

Item Entry Screen

The item entry screen can be used for the following functions:

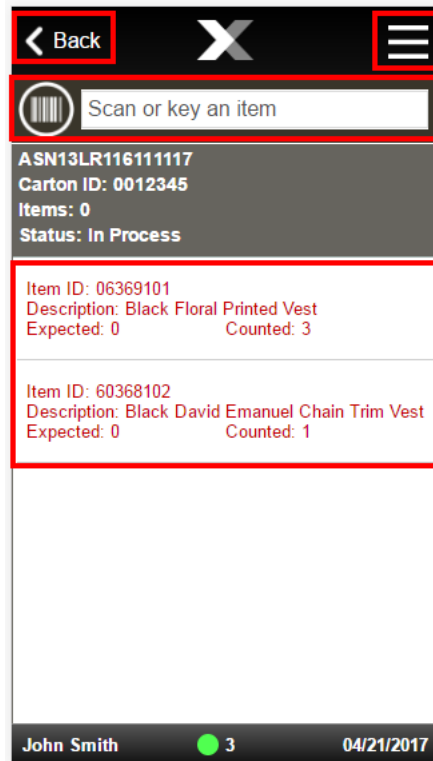


Figure 8-17: Item Entry Screen

1. **Back button.** Select this [Back Button](#) to return to the carton selection screen.
2. **Item entry field.** See [Enter Items](#).
3. **Context Menu Button.** Select the [Context Menu Button](#) for access to:
 - [Add a Comment to a Carton](#)
 - [View Exceptions](#)
4. **Receiving Items.** Each item displays information about an item in the receiving document. Select an item for access to:
 - [Change Item Quantity](#)
 - [Void a Line Item](#)

Enter Items

To enter items into a received shipment:

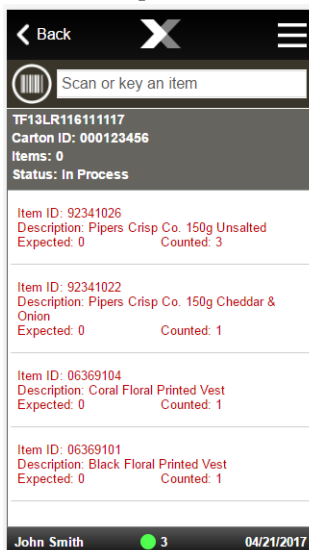


Figure 8-18: Item Entry Screen - Scan

1. Scan an item or enter an Item ID.

If prompted for an item quantity:

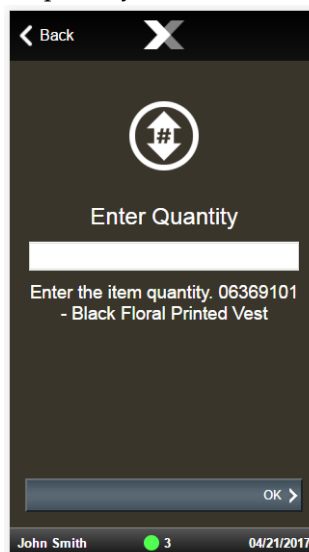


Figure 8-19: Item Entry Screen - Enter Quantity

2. Enter the item quantity.
3. Select **OK**.

Xstore Mobile returns to the item entry screen.

Repeat these steps for each item in the carton.

When you have finished entering the items in a carton, select **Back** to return to the carton entry screen.

Change Item Quantity

To change the number of an item in a carton:

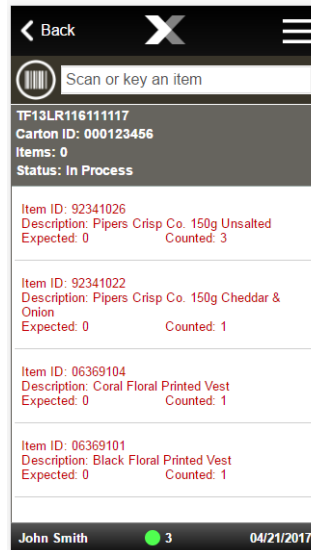


Figure 8-20: Item List

1. Select the item in the item list.

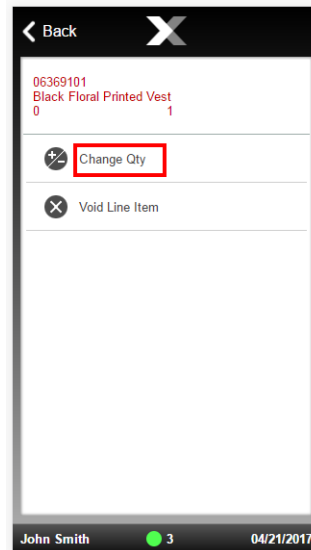


Figure 8-21: Change Quantity Option

2. Select **Change Qty.**

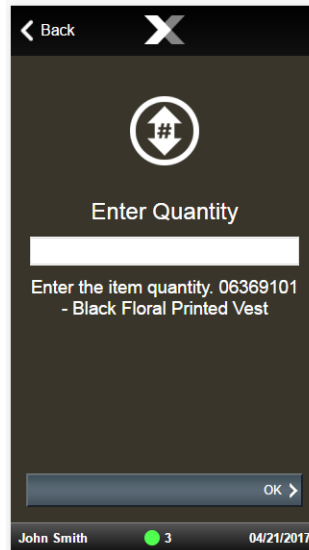


Figure 8-22: Enter Quantity Prompt

3. Enter the new quantity.
4. Select **OK**.

The item quantity is changed and Xstore Mobile returns to the item entry screen.

Void a Line Item

To remove a line item from a carton:

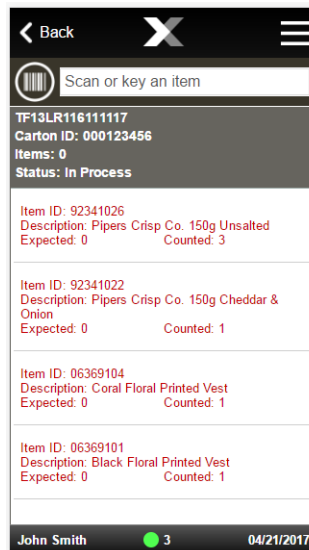


Figure 8-23: Item List

1. Select the item in the item list.

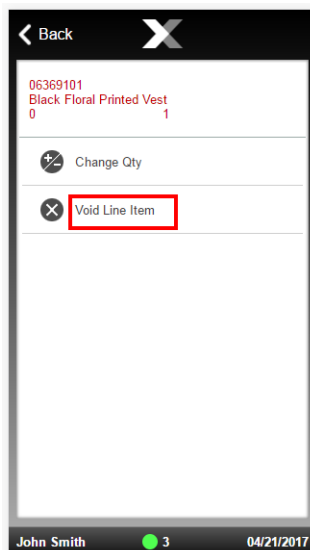


Figure 8-24: Void Line Item

2. Select **Void Line Item**.

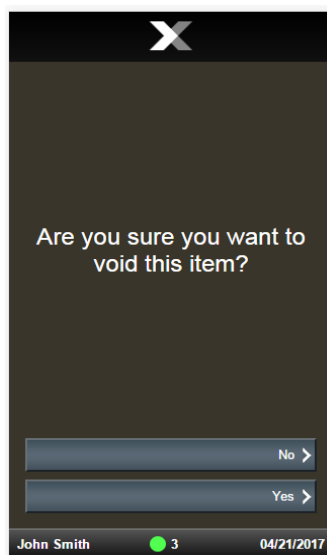


Figure 8-25: Void Line Item Confirmation Prompt

3. Select **Yes** to confirm the void.

The item is removed and Xstore Mobile returns to the item entry screen.

Change Item Cost

Important: This option is only available if Stock Valuation is enabled in Xstore Mobile.

To change the cost of an item for Stock Valuation:

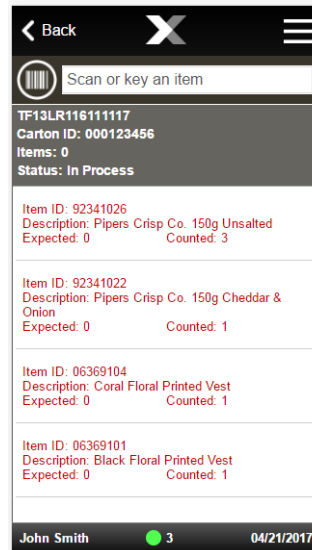


Figure 8-26: Item List

1. Select the item in the item list.
2. Select **Change Cost**.
3. Enter the new item cost.
4. Select **OK**.

The cost of the item is updated and Xstore Mobile returns to the item entry screen.

Receive Carton in Total

To receive all items within a carton:

Important: The Receive Carton in Total option is only available on cartons with a status of OPEN, and for which no items have yet been received.

1. Select the [Context Menu Button](#) in the [Item Entry Screen](#).

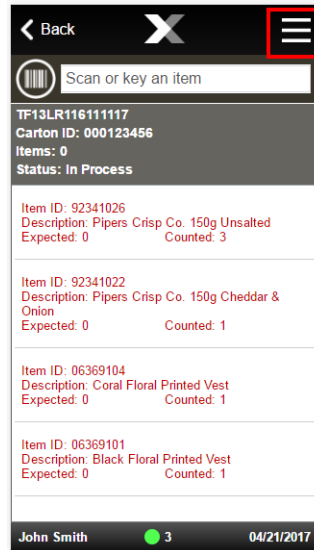


Figure 8-27: Item List - Context Menu

2. Select **Receive Carton in Total**.

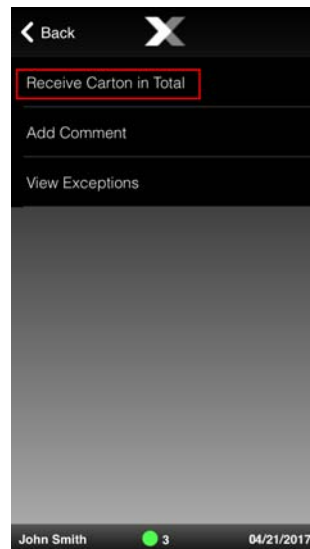


Figure 8-28: Receive Carton in Total

The received quantities of the items in the carton are set to the expected quantities, the carton is closed, and Xstore Mobile returns to the carton selection screen.

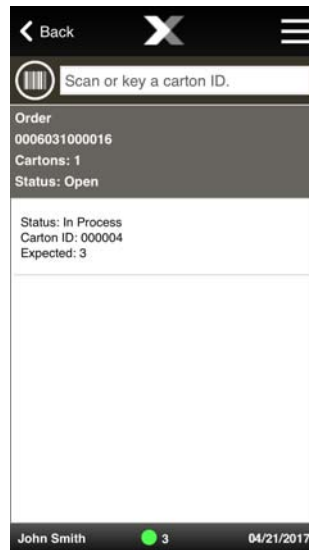


Figure 8-29: Expected Quantities

Add a Comment to a Carton

To add a comment to a carton:

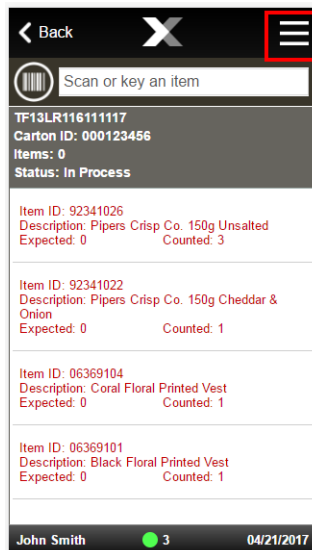


Figure 8-30: Item List - Context Menu

1. Select the [Context Menu Button](#) in the [Item Entry Screen](#).

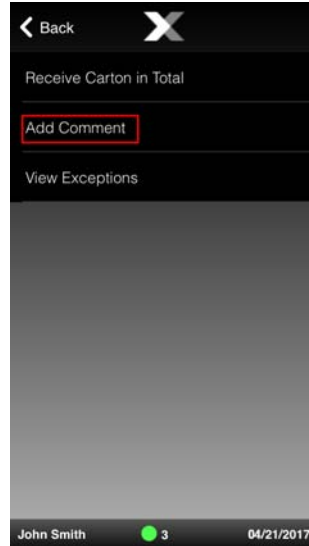


Figure 8-31: Add Comment

2. Select **Add Comment**.

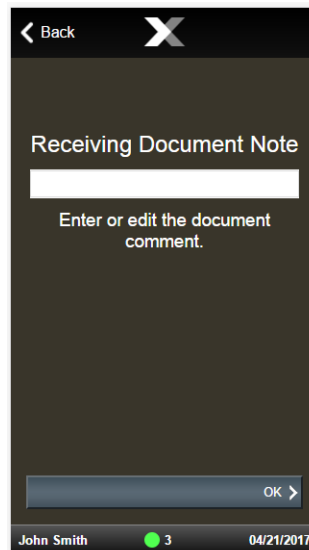


Figure 8-32: Receiving Document Note - Add Comment

3. Enter the comment.
4. Select **OK**.

The note is added and Xstore Mobile returns to the [Item Entry Screen](#).

View Exceptions

To search for items with differences between their expected and received quantities:

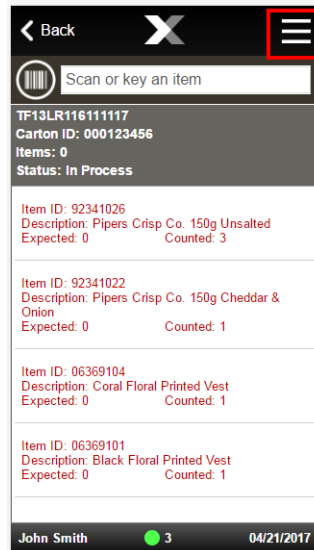


Figure 8-33: Item List - Context Menu

1. Select the [Context Menu Button](#) in the [Item Entry Screen](#).

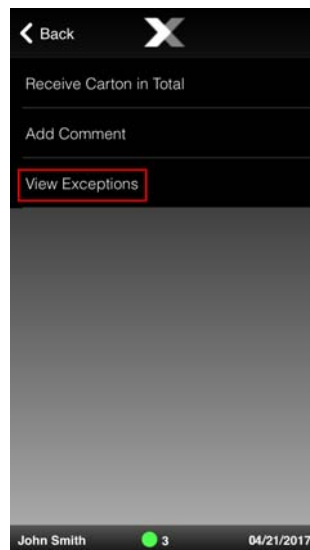


Figure 8-34: View Exceptions

2. Select View Exceptions.

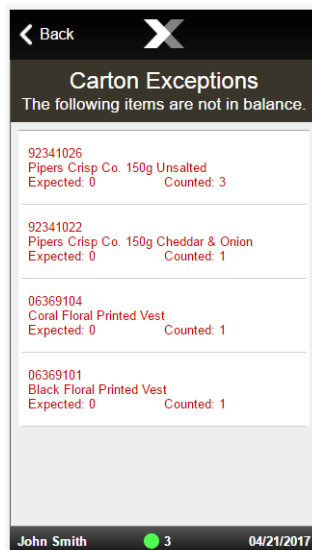


Figure 8-35: Carton Exceptions List

Xstore Mobile displays a list of the items in the carton with differences between their expected and received quantities.

When you are finished viewing the item exceptions select **Back** to return to the [Item Entry Screen](#).

Add a Comment to a Document

To add a comment to a receiving document:

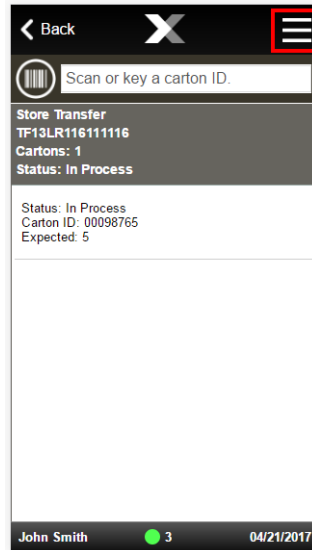


Figure 8-36: Carton List - Context Menu

1. Select the [Context Menu Button](#) in the carton list.

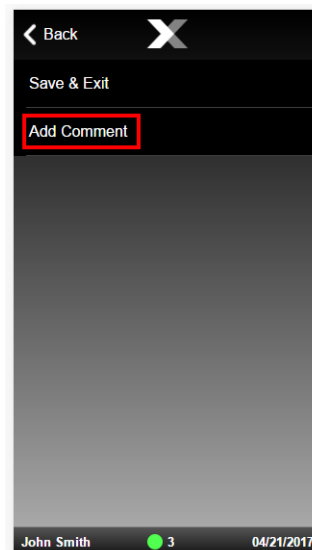


Figure 8-37: Add Comment

2. Select **Add Comment**.

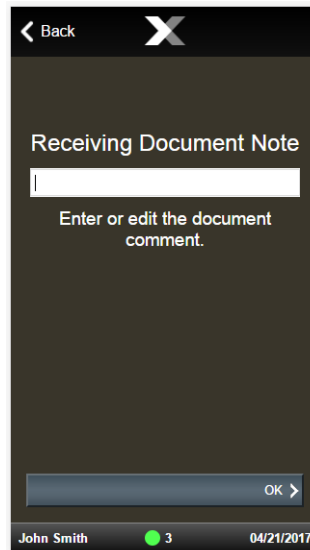


Figure 8-38: Receiving Document Note - Add Comment

3. Enter the comment.
4. Select **OK**.

The note is added and Xstore Mobile returns to the carton list.

Receive Document in Total

Important: The ability to receive a document in total must be enabled for this option to be available in Xstore Mobile.

To receive all items within a document:

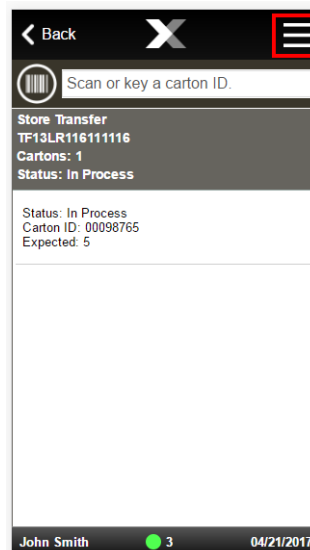


Figure 8-39: Carton List - Context Menu

1. Select the [Context Menu Button](#) in the carton list.

2. Select **Receive Document in Total**.

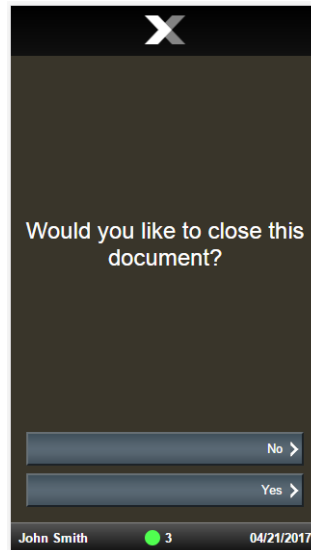


Figure 8-40: Close Document Prompt

3. Select **Yes** to close the document or select **No** to keep the document open.

The received quantities of all the items in all the cartons are set to the expected quantities and the cartons are all closed. Xstore Mobile returns to the carton selection screen.

Save Document

To save changes to a receiving document:

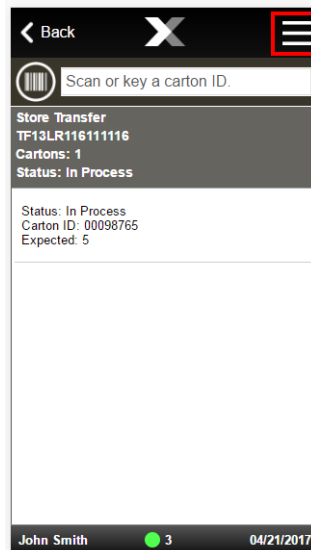


Figure 8-41: Carton List - Context Menu

1. Select the [Context Menu Button](#) in the carton list.

You must be in the carton list. If you are in the [Item Entry Screen](#), select **Back** to return to the carton list.

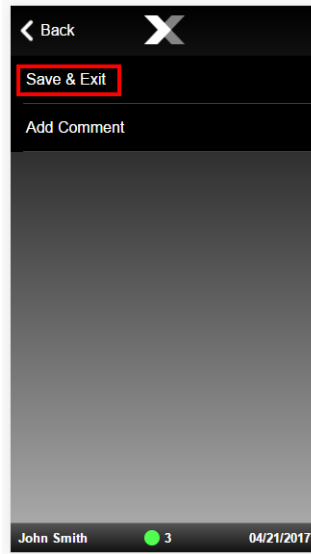


Figure 8-42: Save & Exit

2. Select **Save & Exit**.

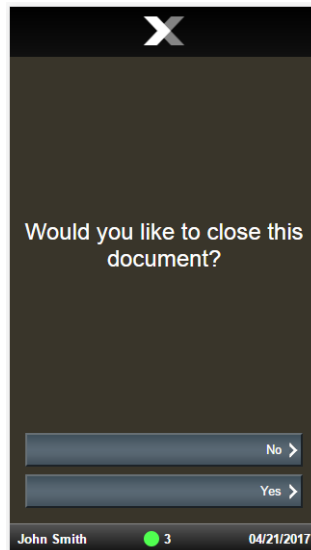


Figure 8-43: Close Document Prompt

3. Select **Yes** to close the document or select **No** to keep the document open.
Xstore Mobile returns to the document search screen.

Shipping

Inventory shipping can be performed through Xstore Mobile. Through a handheld device, you can create a shipping document, open a shipping document, and scan items directly into a shipment.

About This Chapter



This chapter includes the following procedures:

- [Start Shipping](#)
- [Search for a Shipping Document](#)
- [Create a New Shipping Document](#)
- [Edit a Shipping Document](#)
- [Enter Shipping Items](#)
- [Change Item Quantity](#)
- [Void a Line Item](#)
- [Add a Comment to a Shipping Document](#)
- [View Exceptions](#)
- [Save Document](#)

Start Shipping

The shipping process can be performed through either the [Main Menu](#), or the Admin menu.

Main Menu

To start the shipping process through the [Main Menu](#):

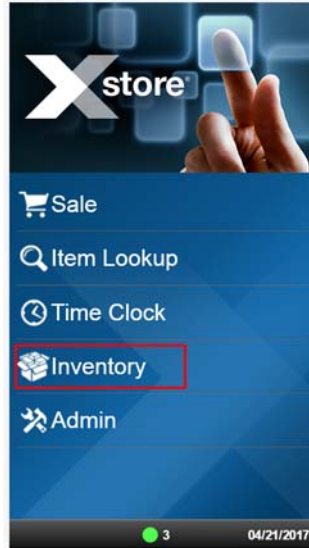


Figure 9-1: Inventory Option

1. Select **Inventory** in the [Main Menu](#).

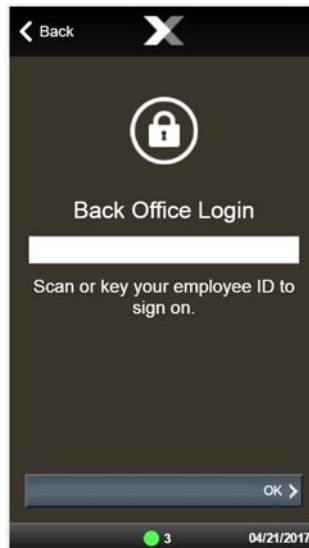


Figure 9-2: Enter Employee ID

2. Enter Employee ID.

3. Select OK.

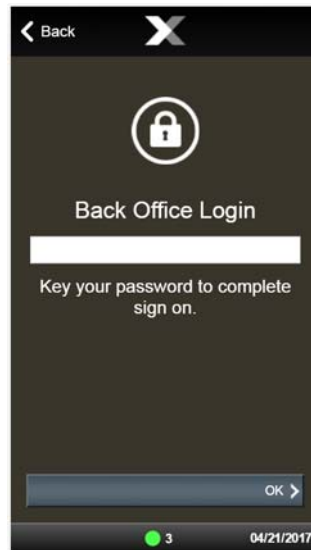


Figure 9-3: Enter Employee Password

4. Enter Password.
5. Select OK.

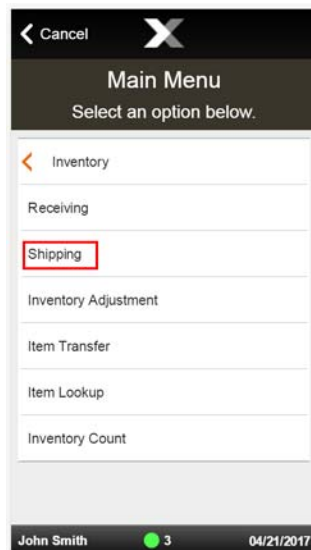


Figure 9-4: Shipping Option

6. Select **Shipping**.
- Continue with [Search for a Shipping Document](#).

Admin Menu

To start the shipping process through the Admin menu:

Open the Admin menu. See [Using Admin Functions](#).

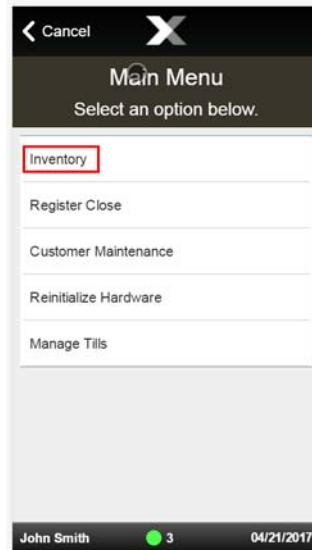


Figure 9-5: Admin Menu

1. Select **Inventory** in the Admin Menu.

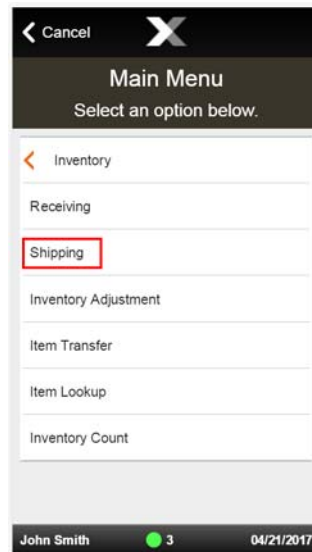


Figure 9-6: Inventory Menu

2. Select **Shipping** in the Inventory menu.

The Shipping document search screen opens.

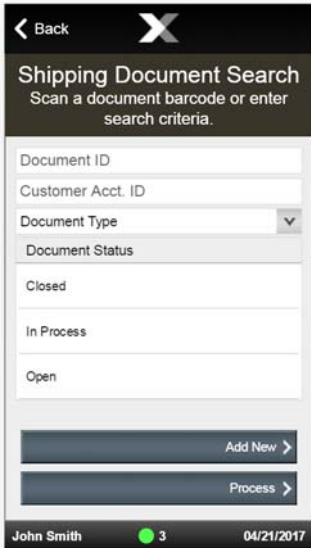


Figure 9-7: Shipping Document Search

Continue with [Search for a Shipping Document](#) or [Create a New Shipping Document](#).

Search for a Shipping Document

To search for and select a shipping document:

1. Scan a shipping document ID to open that document or enter the search criteria and select **Process**.

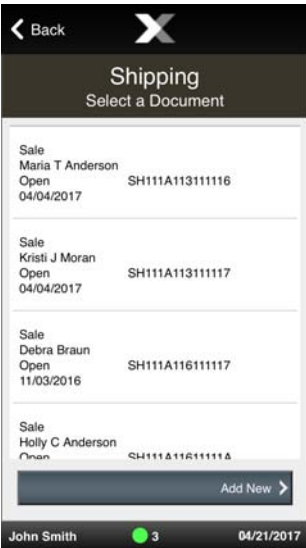


Figure 9-8: Shipping Document Search Results

2. Select the proper shipping document in the list.

The shipping document opens.



Figure 9-9: Shipping Document

Continue with the appropriate procedure:

- [Enter Shipping Items](#)
- [Change Item Quantity](#)
- [Void a Line Item](#)
- [Add a Comment to a Shipping Document](#)
- [View Exceptions](#)
- [Save Document](#)

Create a New Shipping Document

To create a new shipping document:

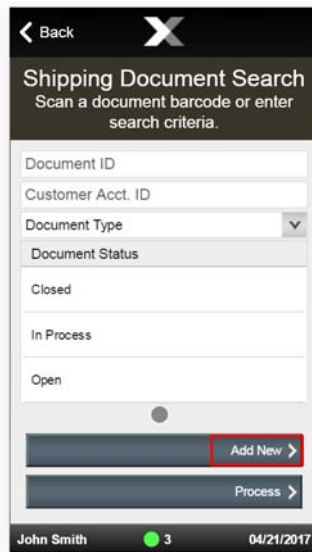


Figure 9-10: Shipping Document - Add New

1. Select Add New.

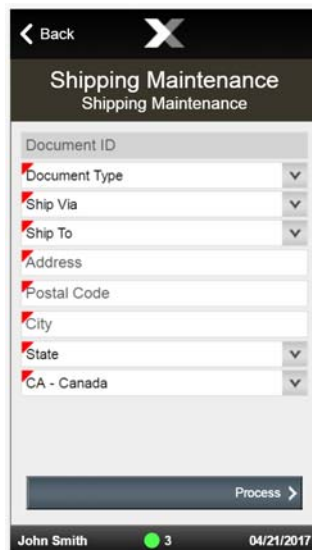


Figure 9-11: Shipping Document Search Criteria

2. Enter the information for the shipping document.
3. Select **Process**.

The new shipping document opens.



Figure 9-12: New Shipping Document

Continue with:

- [Enter Shipping Items](#)

After adding one or more items:

- [Change Item Quantity](#)
- [Void a Line Item](#)
- [Add a Comment to a Shipping Document](#)
- [View Exceptions](#)
- [View Exceptions](#)
- [Save Document](#)

Edit a Shipping Document

To edit a shipping document:



Figure 9-13: Shipping Document - Context Menu

1. Select the [Context Menu Button](#) in the item entry screen.

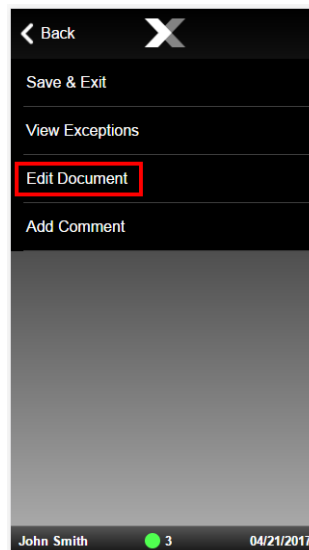


Figure 9-14: Edit Document

2. Select **Edit Document**.
3. Make changes to the document.
4. Select **Process**.

The shipping document is updated and Xstore Mobile returns to the item entry screen.

Enter Shipping Items

To enter shipping items:



Figure 9-15: Scan or Enter an Item ID

1. Scan an item ID or enter an Item ID.

If prompted for an item quantity:

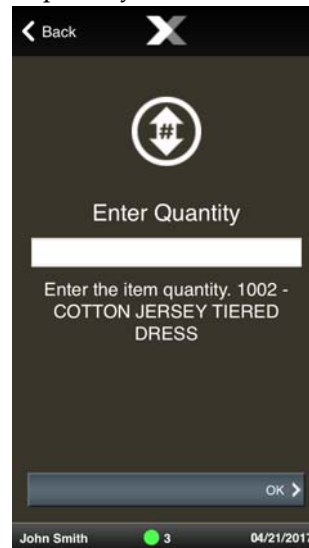


Figure 9-16: Enter Item Quantity

2. Enter the item quantity.
3. Select **OK**.

The item is added to the shipment and Xstore Mobile returns to the item entry screen.

Change Item Quantity

To change the quantity of an item in a shipment:



Figure 9-17: Select Item

1. Select the item in the item list.

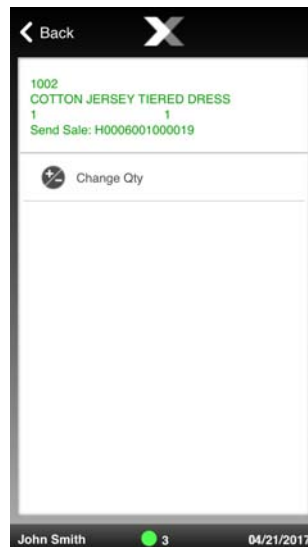


Figure 9-18: Change Quantity

2. Select **Change Qty**.

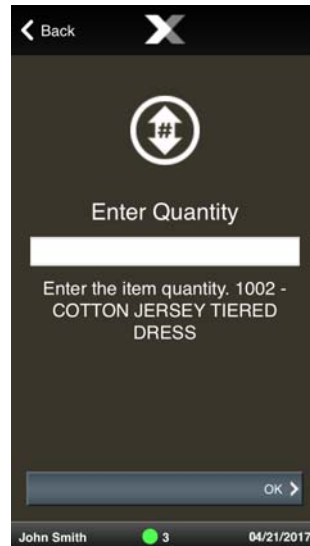


Figure 9-19: Enter Item Quantity

3. Enter the new quantity.
4. Select **OK**.

The item quantity is changed and Xstore Mobile returns to the item entry screen.

Void a Line Item

To remove a line item from a shipment:



Figure 9-20: Select Item

1. Select the item in the item list.

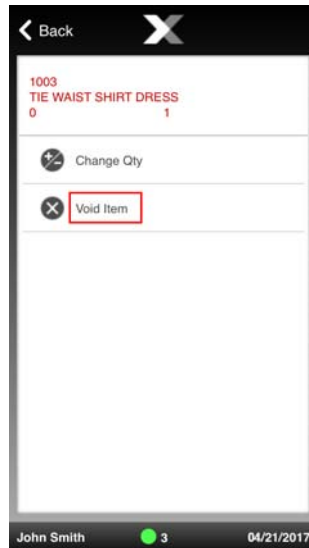


Figure 9-21: Void Item

2. Select **Void Item**.

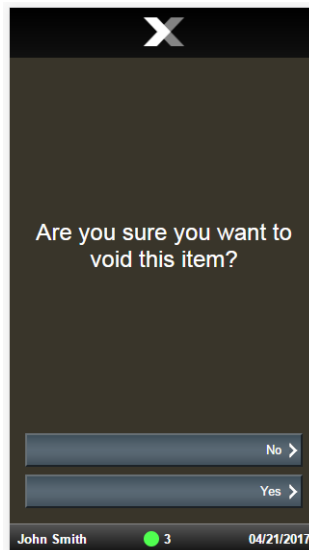


Figure 9-22:

3. Select **Yes** to confirm the void.

The item is removed from the shipment and Xstore Mobile returns to the item entry screen.

Add a Comment to a Shipping Document

To add a comment to a shipping document:

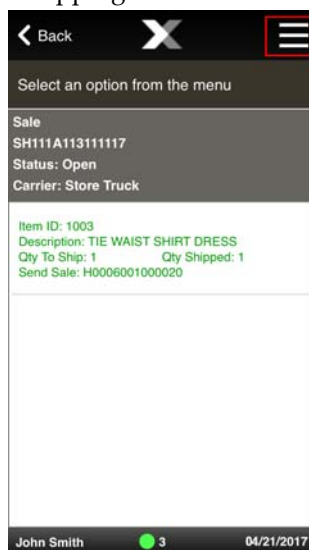


Figure 9-23: Item Entry Screen - Context Menu Button

1. Select the [Context Menu Button](#) in the item entry screen.

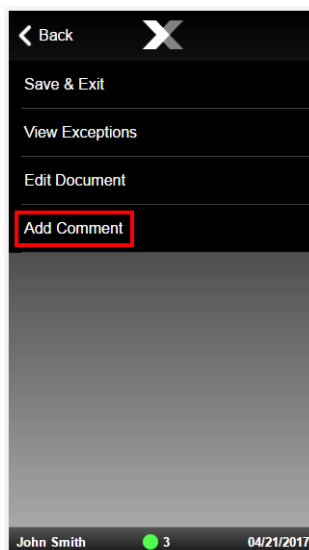


Figure 9-24: Add Comment Option

2. Select **Add Comment**.

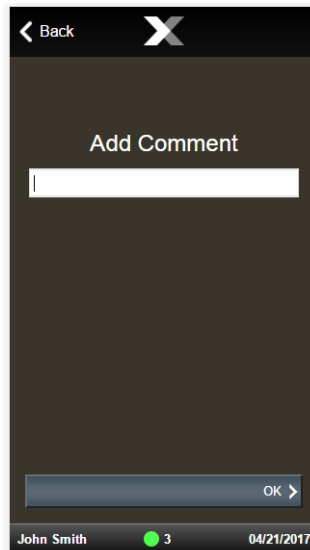


Figure 9-25: Enter Comment

3. Enter the comment.
4. Select OK.

The comment is added and Xstore Mobile returns to the item entry screen.

View Exceptions

To search for items with differences between their expected and shipped quantities:



Figure 9-26: Item Entry Screen - Context Menu Button

1. Select the [Context Menu Button](#) in the item entry screen.

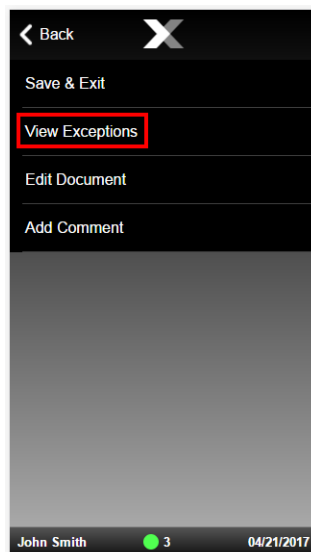


Figure 9-27: View Exceptions Option

2. Select **View Exceptions**.

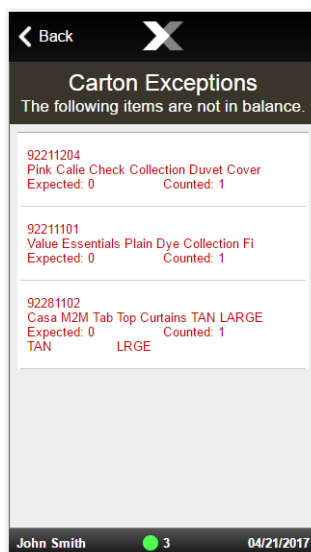


Figure 9-28: Exceptions List

3. Xstore Mobile displays a list of the items in the shipment with differences between their expected and shipped amounts.
Select **Back** to return to the item entry screen.

Save Document

To save changes to a shipping document:

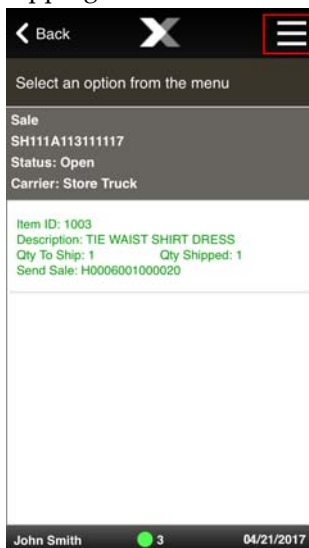


Figure 9-29: Item Entry Screen - Context Menu Button

1. Select the [Context Menu Button](#) in the item entry screen.

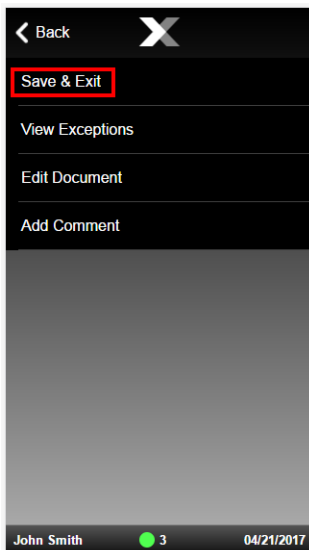


Figure 9-30: Save & Exit Option

2. Select **Save & Exit**.

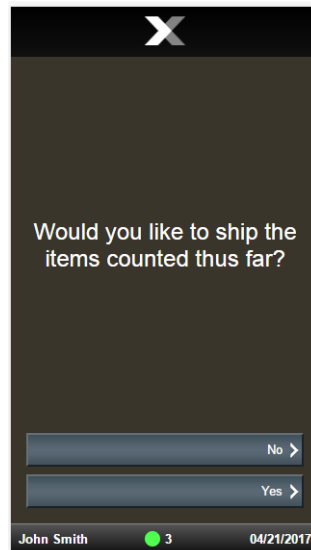


Figure 9-31: Ship Counted Items Prompt

3. Select **Yes** to ship the items counted so far or select **No** to return to the search page without shipping the items.

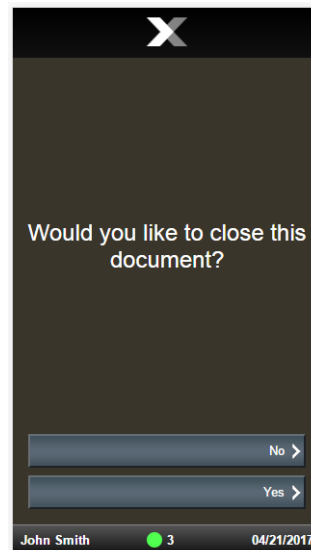


Figure 9-32: Close Document Prompt

If you selected **Yes** in the previous step:

4. Select **Yes** to close the document or select **No** to keep the document open.
Continue with [Shipping Label and Packing Slip](#).

Shipping Label and Packing Slip

To determine the printing options for the label and packing slip:



Figure 9-33: Print Shipping Label Prompt

1. Select **Yes** to print a shipping label or select **No** to continue with [Shipping Label and Packing Slip](#).

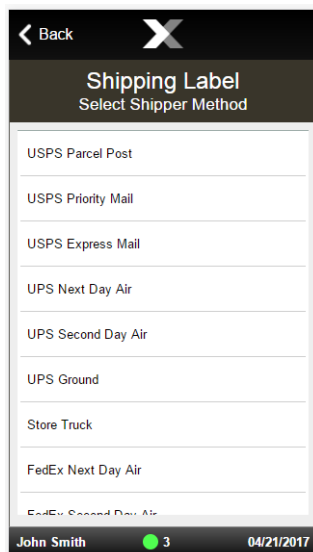


Figure 9-34: Shipping Method

2. If you selected **Yes** in the previous step, select the proper shipper and shipping method

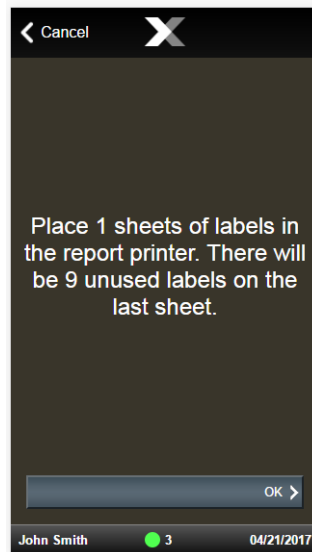


Figure 9-35: Place Labels Prompt

3. Select **OK** when you are ready to print.
Continue with [Shipping Label and Packing Slip](#).
If prompted for a tracking number:

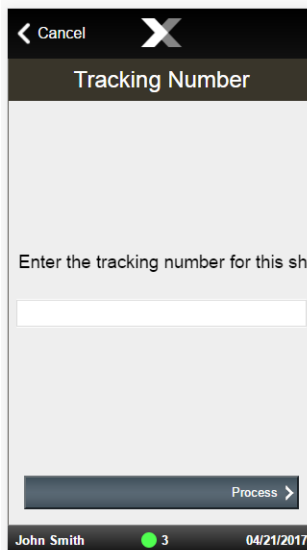


Figure 9-36: Enter Tracking Number Prompt

4. Enter the tracking number.
5. Select **Process**.

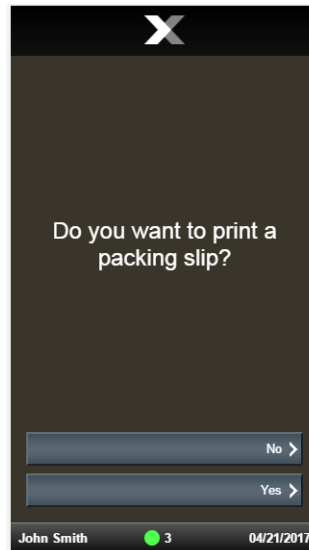


Figure 9-37: Print Packing Slip Prompt

6. Select **Yes** to print a packing slip or select **No** to continue without printing a packing slip.

Xstore Mobile returns to the shipping document search criteria page.

Inventory Counts



Inventory counts can be performed using Xstore Mobile. Using a handheld device, you can create cycle counts and supply counts, perform counts, and submit completed counts.

Xstore Mobile provides two different types of inventory counts:

- Cycle Count: Counting a subset of the entire stock.

Only one count sheet is used for a Cycle Count, although additional cycles of counting can be performed if there are variances from the expected values and from previous counts.

- Supply Count: Counting internally-used supplies, rather than saleable items.

This count type is similar to a Cycle Count; however, it automatically populates the count sheet with all supply items defined for your store.

Note: Physical Counting is not supported in this version of Xstore Mobile.

About this Chapter

This chapter includes the following procedures:

- [Open Inventory Count](#)
- [Inventory Count Search](#)
- [Create a Count](#)
- [Perform an Inventory Count](#)

Open Inventory Count

An inventory count process can be started through the [Main Menu](#), or the [Admin Menu](#).

Main Menu

To start the receiving process through the [Main Menu](#):

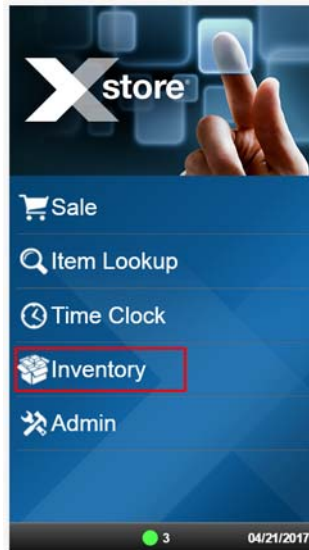


Figure 10-1: Inventory Option

1. Select **Inventory** in the [Main Menu](#).

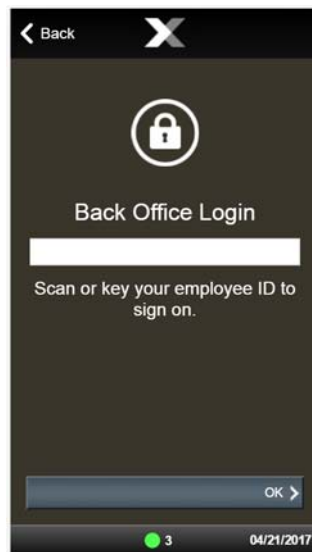


Figure 10-2: Enter Employee ID

2. Enter Employee ID.

3. Select OK.

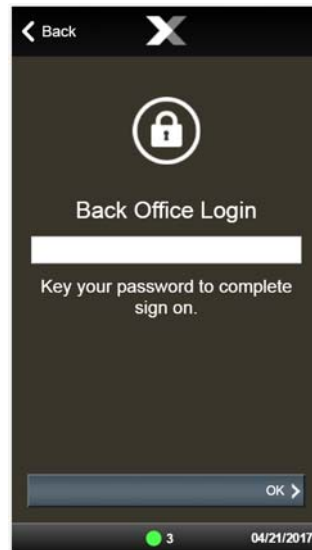


Figure 10-3: Enter Employee Password

4. Enter Password.
5. Select OK.

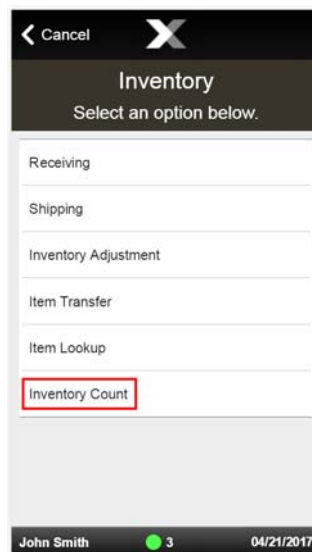


Figure 10-4: Inventory Count Option

6. Select **Inventory Count**.
Continue with [Inventory Count Search](#) or [Create a Count](#).

Admin Menu

To start the shipping process through the Admin menu:

Open the Admin menu. See [Using Admin Functions](#).

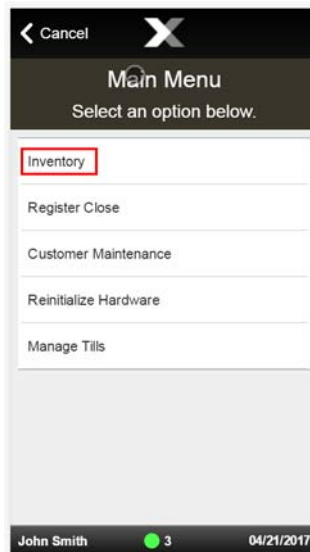


Figure 10-5: Admin Menu

1. Select **Inventory** in the Admin Menu.

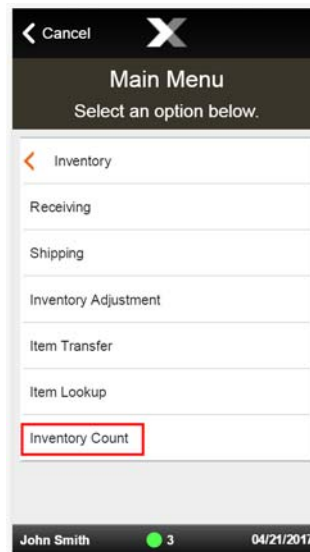


Figure 10-6: Inventory Menu

2. Select **Inventory Count** in the Inventory menu.
Continue with [Inventory Count Search](#) or [Create a Count](#).

Inventory Count Search

To search for an inventory count:

Figure 10-7: Inventory Count Criteria

1. Enter the search criteria.
2. Select **Process**.

Figure 10-8: Inventory Count Record

3. Select the inventory count.
4. To create a count, select **Add New** and follow the procedure [Create a Count](#).

The Inventory count opens.



Figure 10-9: Inventory Count Details

Continue with [Perform an Inventory Count](#).

Create a Count

To create a new inventory count:

The screenshot shows a mobile application interface for 'Inventory Count'. At the top, there is a 'Back' button and a logo. Below the title, it says 'Enter criteria below to search for an inventory count.' The form includes fields for 'Count ID', 'Begin Date', 'Count Type' (a dropdown menu), and 'Status'. Under 'Status', there are radio buttons for 'New', 'Initiated', 'Submitted', and 'Complete'. At the bottom of the form, there are two buttons: 'Add New' and 'Process'. The bottom status bar shows 'John Smith', a red dot, the number '3', and the date '04/21/2017'.

Figure 10-10: Inventory Count Criteria

1. Select **Add New**.

This screenshot shows the 'Inventory Count' screen after selecting 'Add New'. The title is 'Inventory Count' and the instruction is 'Enter information for the new inventory count.' The form has fields for 'Begin Date', 'Count Type' (a dropdown menu), and 'Description'. At the bottom, there is a 'Process' button. The bottom status bar remains the same: 'John Smith', a red dot, '3', and '04/21/2017'.

Figure 10-11: Inventory Count - Add New

2. Enter the information describing the new count.
3. Select **Process**.

If you selected a Cycle Count as the count type, manage the items and hierarchy levels in the count:

- [Add an Item to a Count](#)
- [Add a Hierarchy Level to a Count](#)
- [Remove an Item or Hierarchy Level from a Count](#)

Continue when the correct items are added to the count.

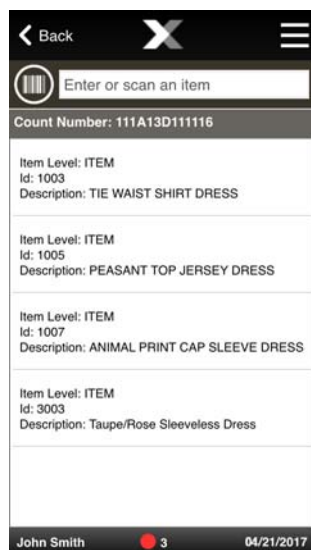


Figure 10-12: Add an Item to Count

4. From the context menu, select **Save & Continue**.

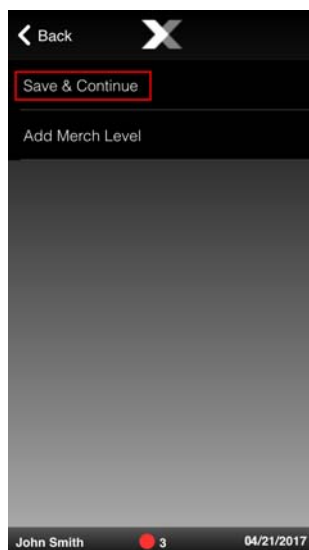


Figure 10-13: Save & Continue Option

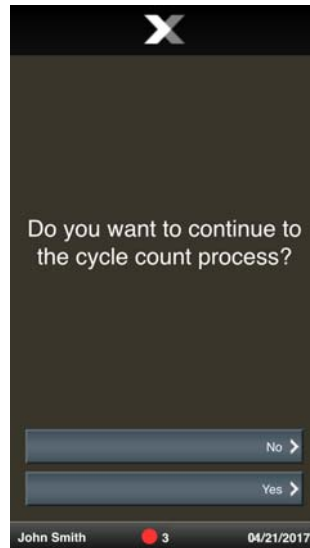


Figure 10-14: Continue Count Process Prompt

5. Select **Yes** to continue with [Perform an Inventory Count](#).

*Once you select **Yes**, the items in the count cannot be changed.*

Select **No** to continue adding and/or removing items and hierarchy levels.

Add an Item to a Count

To add an item to a count:

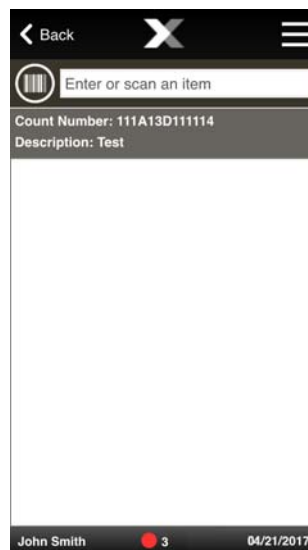


Figure 10-15: Add an Item to Count

1. Scan an item or enter an item ID.

The item is added to the count.

Repeat for each item to add to the count.

Add a Hierarchy Level to a Count

To add a hierarchy level to a count:

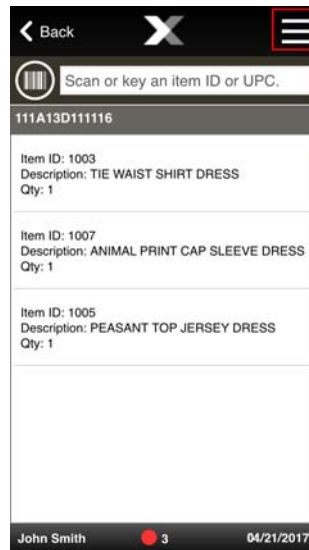


Figure 10-16: Add Items Context Menu Button

1. From the context menu, select **Add Merch Level**.

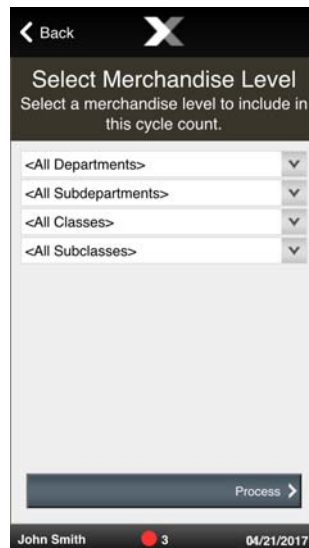


Figure 10-17: Select Merchandise Level

2. Use the menus to select the hierarchy level. *Sublevel menus will be populated as you select hierarchy levels.*
3. Select **Process**.

The hierarchy level is added to the count and Xstore Mobile returns to the item screen.

Repeat for each hierarchy level to add to the count.

Remove an Item or Hierarchy Level from a Count

To remove an item or hierarchy level from a count:

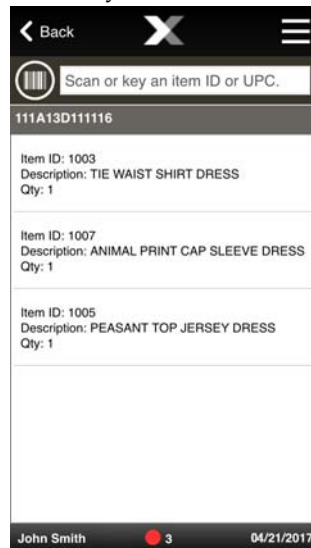


Figure 10-18: Select a Count Item

1. Select the item to remove.

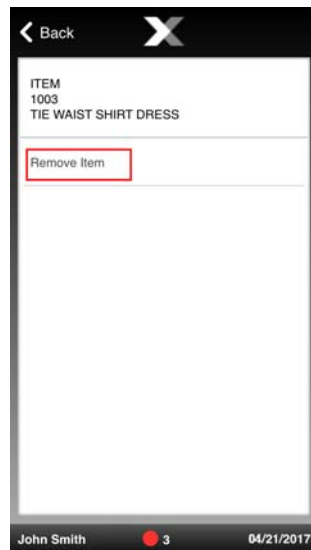


Figure 10-19: Remove Item

2. Select **Remove Item**.

The item is removed and Xstore Mobile returns to the item list.

Perform an Inventory Count

Important: The order in which you perform the actions below depends upon the policies in your store. For example, an actual count of items can be performed before initiating the count.

Important: See the *Xstore Shipping, Receiving, & Inventory Guide* for more information about these processes.

Initiate a Count

Important: When you initiate a count, Xstore Mobile takes a snapshot of the current inventory ledger. This step is usually performed on the day of count. This step can only be performed while the store is closed and online.

To initiate an inventory count

If necessary, close the store.

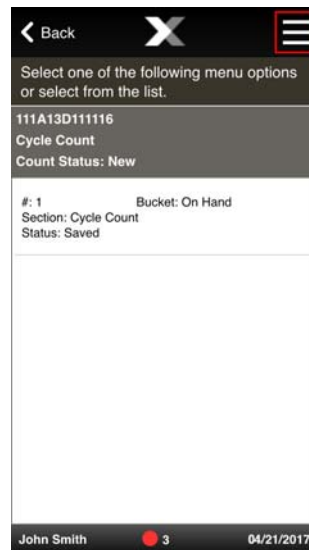


Figure 10-20: Perform Count - Context Menu Button

1. From the Context Menu, select **Initiate Count**.

Continue with [Count Items](#).

Count Items

To count actual items in the store inventory:

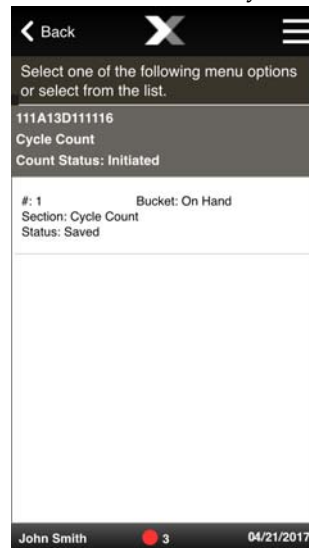


Figure 10-21: Select Count Cycle

1. Select the correct count cycle.

If the count has been initiated:

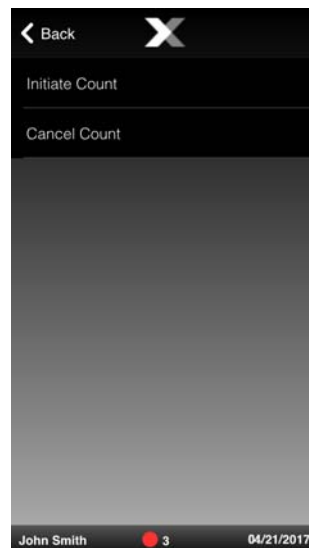


Figure 10-22: Count Item Options

2. Select **Count**.

Scan an item or

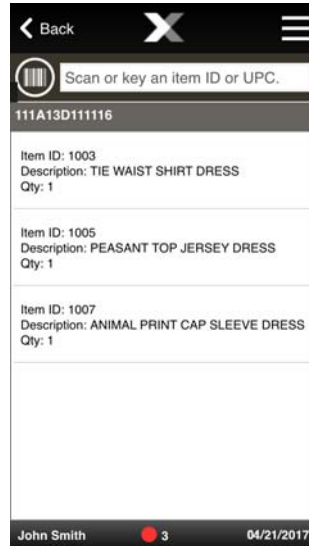


Figure 10-23: Scan or Enter Item ID

3. Enter an item ID or UPC.

If prompted for a quantity:

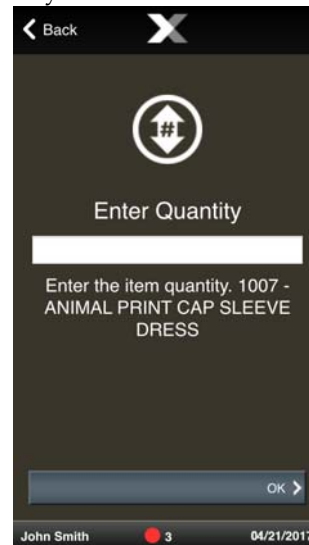


Figure 10-24: Enter Added Item Quantity

4. Enter the item quantity.

5. Select **OK**.

Scan or enter each item in the inventory count.

If necessary, make changes to the item counts:

- [Change Item Quantity](#)

When the count is complete:

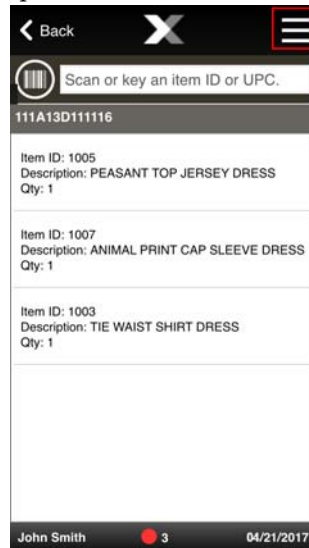


Figure 10-25: Count Complete - Context Menu Button

6. Select the context menu button.

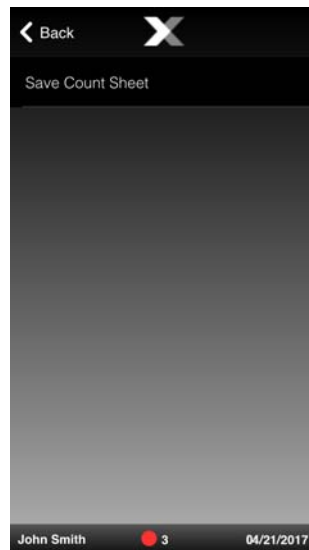


Figure 10-26: Save Count Sheet

7. Select **Save Changes**.



Figure 10-27: Confirm Changes Prompt

8. Select **Yes**.

Xstore Mobile returns to the list of inventory buckets.

Change Item Quantity

To change the quantity of an item in the count:

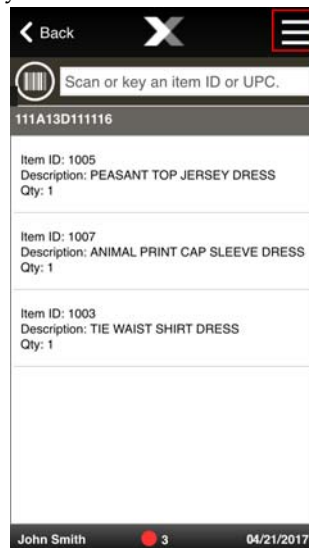


Figure 10-28: Select Item to Change

1. Select the item.
2. Select **Change Qty** from the context menu.

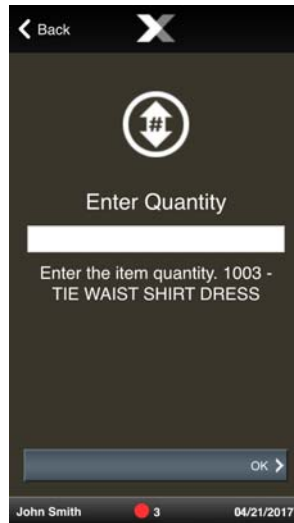


Figure 10-29: Enter New Item Quantity

3. Enter the quantity.
4. Select **OK**.

The item count is updated. Xstore Mobile returns to the item list.

Submit a Count

Important: You can only submit a count that has been initiated. See [Initiate a Count](#) for more information.

Important: After submitting a count, the count cannot be changed or updated.

To submit a count:



Figure 10-30: Count Initiated

1. Select the correct count cycle.

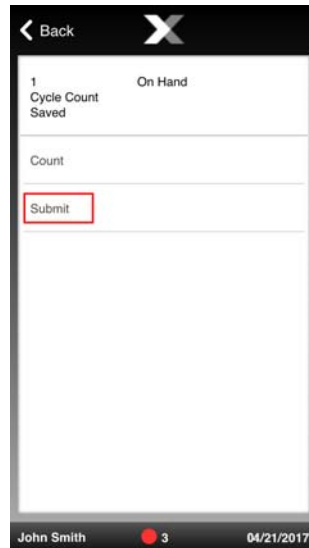


Figure 10-31: Submit Option

2. Select **Submit**.

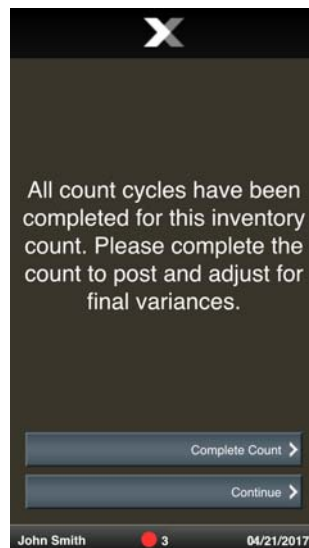


Figure 10-32: Complete Count

3. Select **Complete Count**.

Xstore Mobile submits the count and a new count cycle is listed.

Perform a new count cycle, or select **Back** to return to the inventory count search screen.

Cancel a Count

Important: Once a count is canceled, it cannot be accessed. Canceling a count is the same as deleting a count.

To cancel a count:

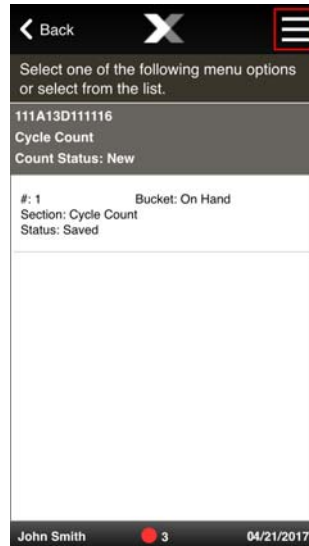


Figure 10-33: Count Item Context Menu Button

1. Select the context menu button in the count item screen.

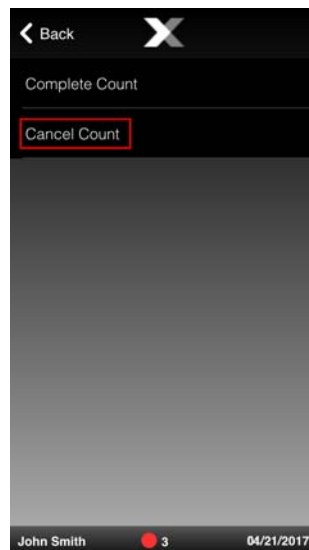


Figure 10-34: Cancel Count Option

2. Select **Cancel Count**.



Figure 10-35: Confirm Cancel Count

3. Select *Yes*.

The count is canceled. Xstore Mobile returns to the inventory count search screen.

Inventory Adjustment



Inventory counts can be changed in Xstore Mobile using the inventory adjustment functionality. Inventory adjustments are performed through the Inventory menu item.

This chapter includes the following procedures:

- [Open Inventory Adjustment](#)
- [Perform an Inventory Adjustment](#)

Open Inventory Adjustment

An inventory count process can be started through the [Main Menu](#), or the [Admin Menu](#).

Main Menu

To start the receiving process through the [Main Menu](#)

Open Inventory Adjustment



Figure 11-1: Inventory Option

An inventory count process can be started through the [Main Menu](#), or the [Admin Menu](#).

1. Select **Inventory** in the [Main Menu](#).

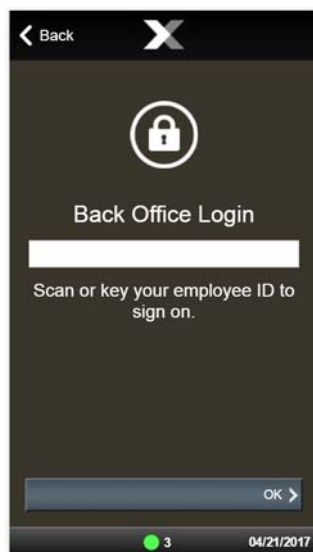


Figure 11-2: Enter Employee ID

2. Enter Employee ID.

3. Select OK.

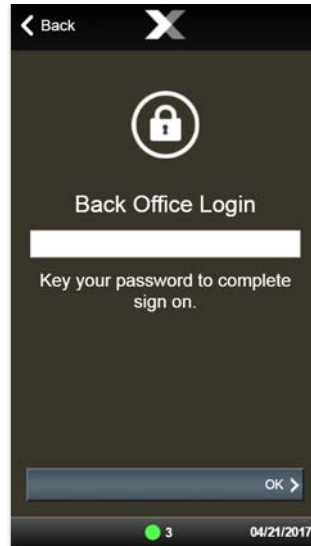


Figure 11-3: Enter Login Password

4. Enter Password.
5. Select OK.

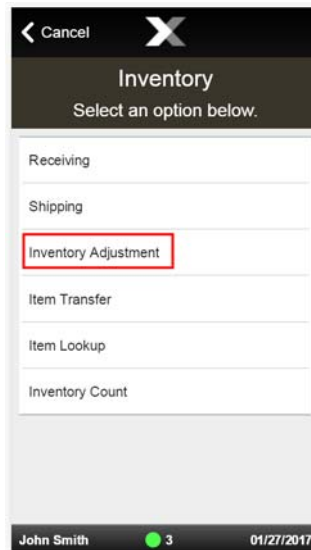


Figure 11-4: Inventory Menu

6. Select **Inventory Adjustment**.

Continue with [Perform an Inventory Adjustment](#).

Admin Menu

To start the shipping process through the Admin menu:

Open the Admin menu. See [Using Admin Functions](#).

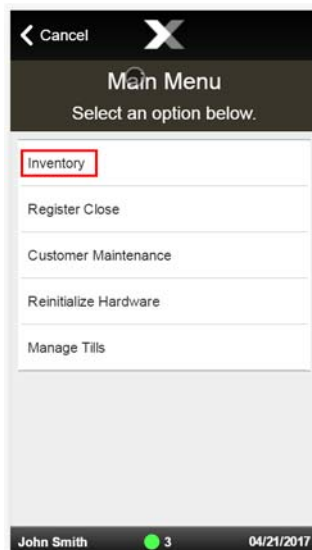


Figure 11-5: Inventory Option

1. Select **Inventory** in the Admin Menu.

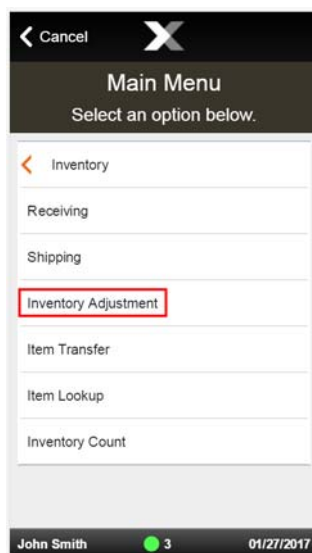


Figure 11-6: Inventory Menu

2. Select **Inventory Adjustment** in the Inventory menu.

The Inventory Adjustment screen opens.

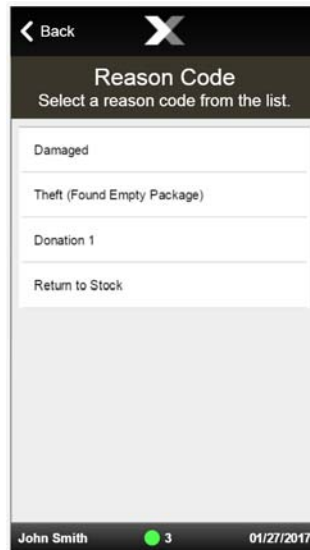


Figure 11-7: List of Reason Codes

Continue with [Perform an Inventory Adjustment](#).

Perform an Inventory Adjustment

To perform an inventory adjustment:

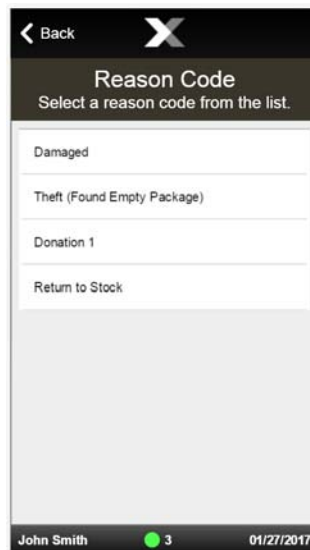


Figure 11-8: Select a Reason Code

1. Select the reason for the adjustment (the reasons may differ from the examples above)

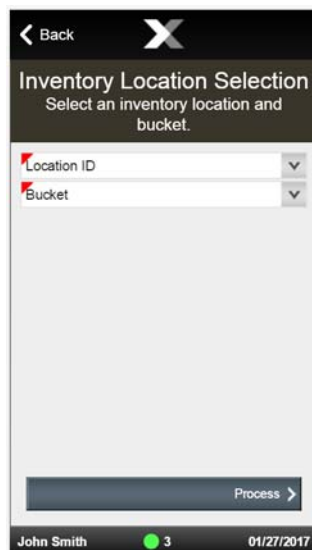


Figure 11-9: Inventory Location Selection

2. Select the location.
3. Select the inventory bucket.
4. Select **Process**.



Figure 11-10: Scan an Item or Enter an Item ID

5. Scan an item or enter an Item ID.

If prompted for an item quantity:

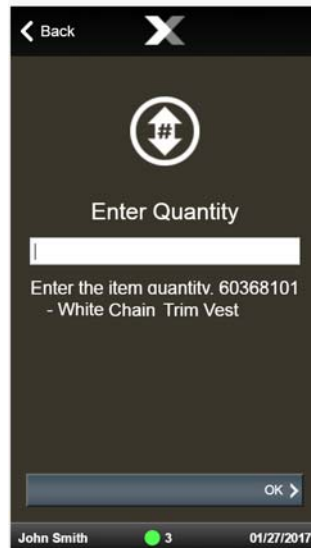


Figure 11-11: Enter Quantity

6. Enter the item quantity.
7. Select **OK**.

Scan or enter each item to adjust with the same reason, location, and bucket.

Do one of the following:

- [Change an Item](#)
- [Save and Exit](#)

Change an Item

To make changes to an inventory item being adjusted:

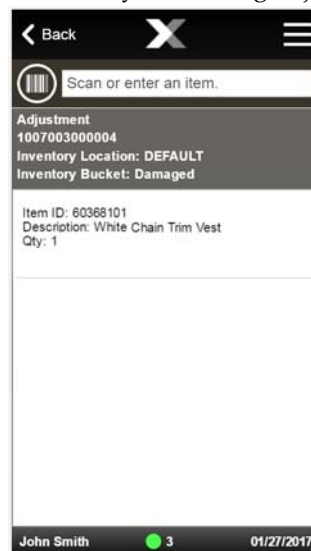


Figure 11-12: Select Inventory Item

1. Select the item to change.

Do one of the following:



Figure 11-13: Inventory Adjustment Options

- [Change Item Quantity](#)
- [Void Item](#)

Change Item Quantity

To change the quantity of an item:

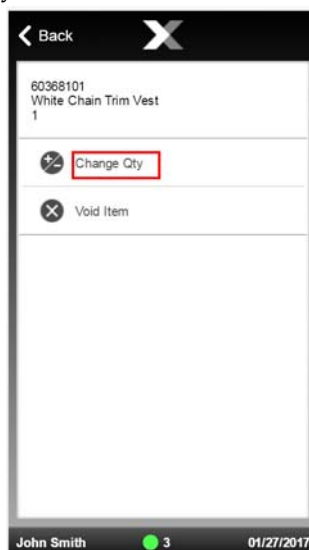


Figure 11-14: Change Item Quantity

1. Select **Change Qty**.

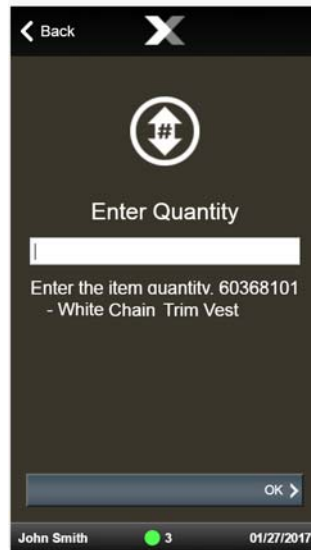


Figure 11-15: Enter Quantity

2. Enter the item quantity.
3. Select **OK**.

Xstore Mobile returns to the item entry screen. The item quantity is updated.

Void Item

To void an item:

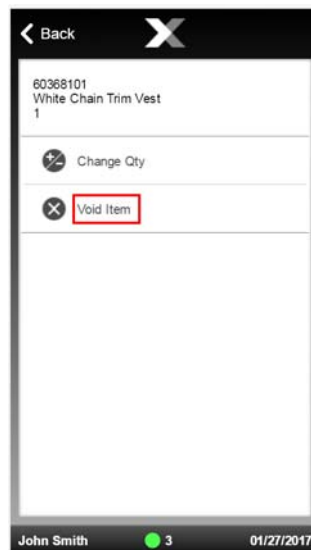


Figure 11-16: Void Item

1. Select **Void Item**



Figure 11-17: Confirm Void Item

2. Select **Yes**.

Xstore Mobile returns to the item entry screen. The item is removed.

Save and Exit

To save the inventory changes and exit:

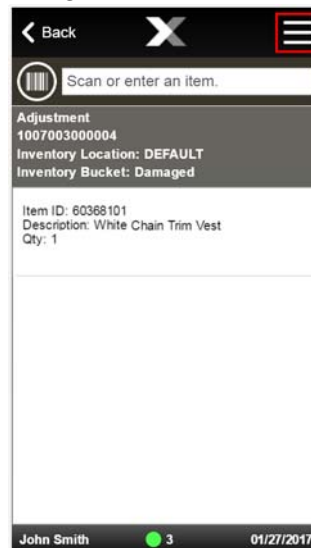


Figure 11-18: Context Menu Button

1. Select the **Context Menu** button.

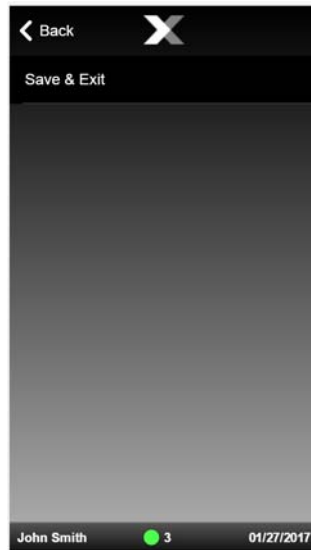


Figure 11-19: Save & Exit Option

2. Select **Save & Exit.**

The inventory changes are saved and Xstore Mobile returns to the inventory menu.

Item Transfer

This chapter describes the procedures for transferring items from one inventory bucket to another.

About This Chapter

This chapter contains the following procedures:

- [Start Item Transfer](#) - Describes how to start an item transfer.
- [Perform Transfer](#) - Describes the procedure for the item transfer.
- [Adjust Item](#) - Describes procedures for adjusting items in the transfer.
- [Additional Options](#) - Describes additional options available in the item transfer screen.

Start Item Transfer

An item transfer can be performed through the [Main Menu](#), or the [Adjust Item](#).

Main Menu

To start the item transfer process through the [Main Menu](#):

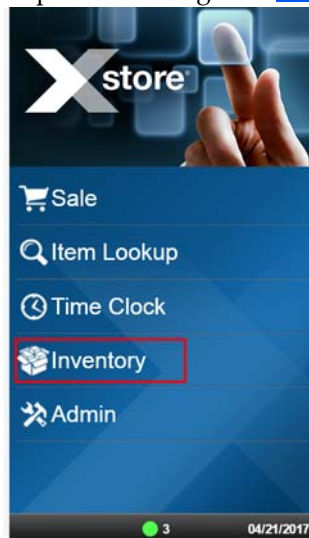


Figure 12-1: Main Menu - Inventory

1. Select **Inventory** in the [Main Menu](#).

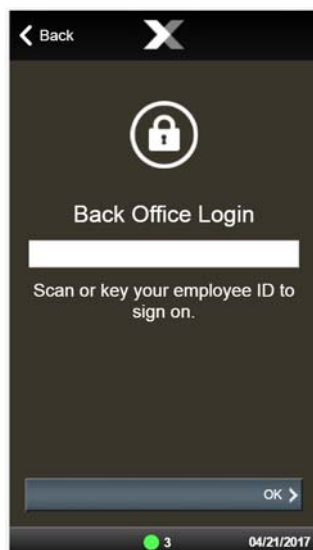


Figure 12-2: Back Office Login ID

2. Enter Employee ID.
3. Select OK.

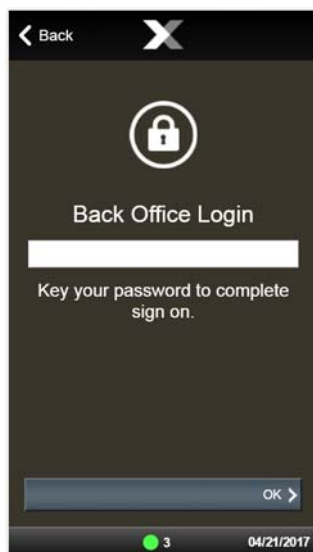


Figure 12-3: Back Office Login Password

4. Enter Password.
5. Select OK.

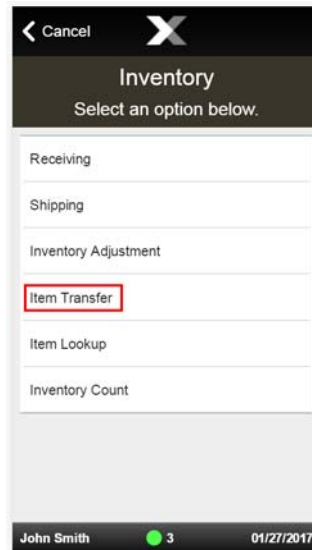


Figure 12-4: Item Transfer

6. Select **Item Transfer**.

Continue with [Perform Transfer](#)

Admin Menu

To start the item transfer process through the Admin menu:

Open the Admin menu. See [Using Admin Functions](#).

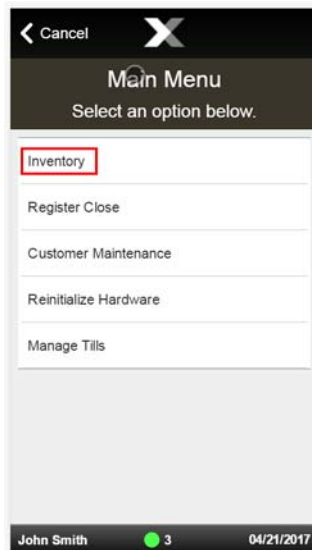


Figure 12-5: Inventory Option

1. Select **Inventory** in the Admin Menu.

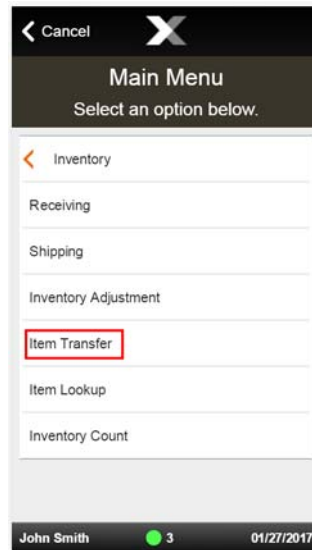


Figure 12-6: Item Transfer Option

2. Select **Item Transfer** in the Inventory menu.

Continue with [Perform Transfer](#).

Perform Transfer

To perform an item transfer:

Select the location from which the item will be transferred:

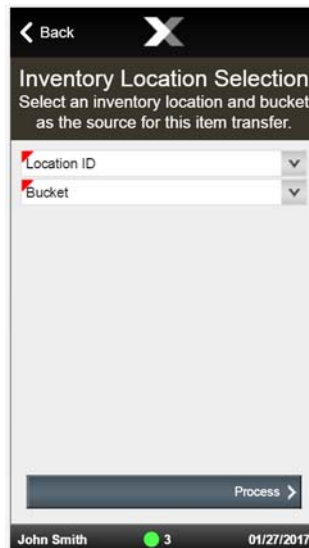


Figure 12-7: Inventory Location Selection

1. Select the source location for the item.
2. Select the source bucket for the item.
3. Select **Process**.

Select the location to which the item will be transferred:

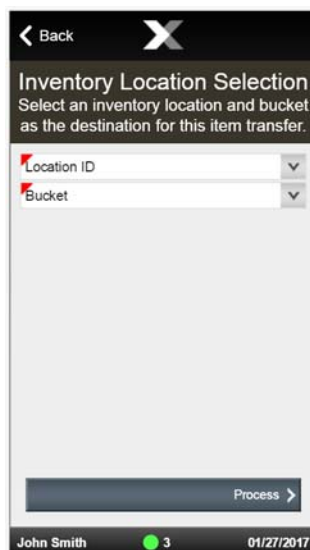
A mobile application screen titled "Inventory Location Selection" with a subtitle "Select an inventory location and bucket as the destination for this item transfer." The screen features two dropdown menus: "Location ID" and "Bucket", each with a red location pin icon to its left. Below these menus is a large, empty light gray rectangular area. At the bottom of the screen is a dark blue button labeled "Process" with a right-pointing arrow. The bottom status bar shows "John Smith", a green circle with the number "3", and the date "01/27/2017".

Figure 12-8: Inventory Location Selection

4. Select the destination location for the item.
5. Select the destination bucket for the item.
6. Select **Process**.

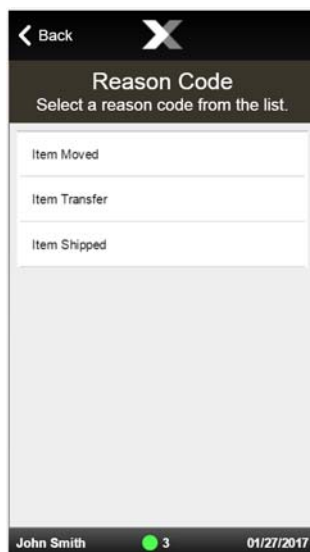
A mobile application screen titled "Reason Code" with a subtitle "Select a reason code from the list." The screen displays a list of three options: "Item Moved", "Item Transfer", and "Item Shipped". Below the list is a large, empty light gray rectangular area. The bottom status bar shows "John Smith", a green circle with the number "3", and the date "01/27/2017".

Figure 12-9: List of Reason Codes

7. Select the reason for the transfer.



Figure 12-10: Select an Item

8. Scan an item **or** enter an item ID **or** select an item to adjust. See [Adjust Item](#) **or** Select the context menu for additional options. See [Change Item Quantity](#)

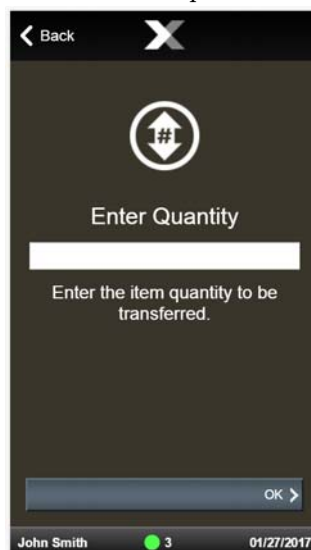


Figure 12-11: Enter Quantity

Adjust Item

Change Item Quantity

To change the quantity of an item:



Figure 12-12: Select an Item

1. Select the item.

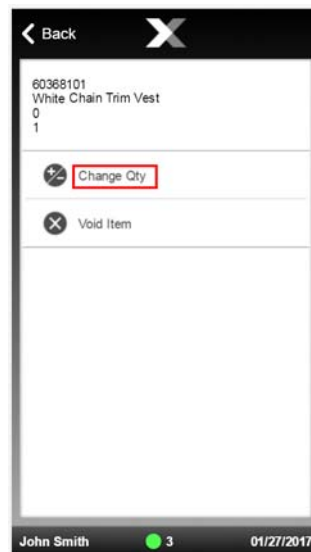


Figure 12-13: Change Quantity

2. Select **Change Qty**.

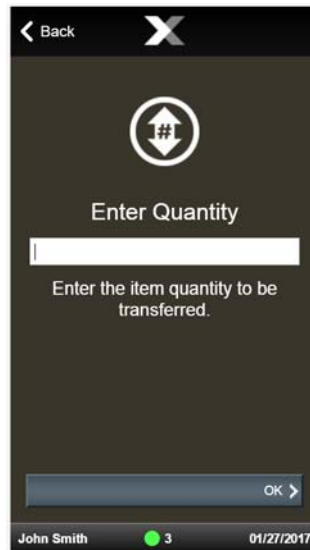


Figure 12-14: Enter Quantity

3. Enter the quantity.
4. Select **OK**.

The quantity is updated.

Return to the transfer item list screen.

Void Item

To remove an item from an item transfer:

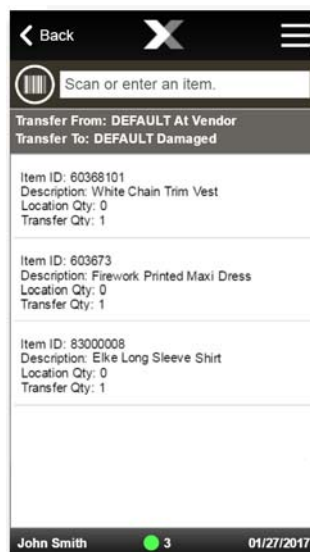


Figure 12-15: Select an Item

1. Select the item.

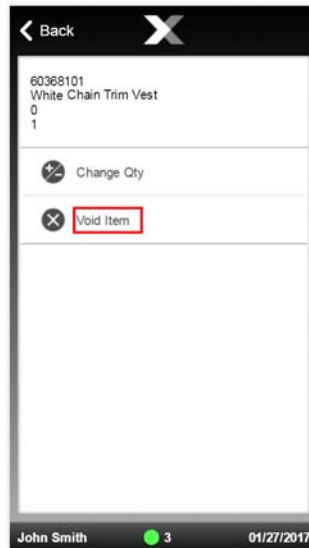


Figure 12-16: Void Item

2. Select **Void Item**.

The quantity is set to zero.

Note that the item is still listed, only the quantity is changed to zero.

Return to the transfer item list screen.

Additional Options

Save & Exit

To save the transfer and return to the inventory screen:



Figure 12-17: Context Menu Button

1. Select the **Context Menu** button.

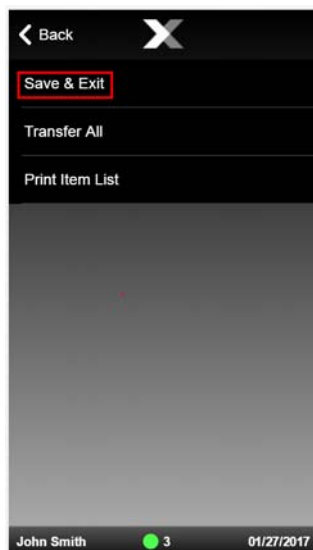


Figure 12-18: Save & Exit Option

2. Select **Save & Exit**.



Figure 12-19: Confirm Save Transfer

3. Select **Yes**.

The item transfer completes. Return to the inventory menu.

Transfer All

To include all the items in the list, setting each item to the maximum quantity:



Figure 12-20: Context Menu Button

1. Select the **Context Menu** button.

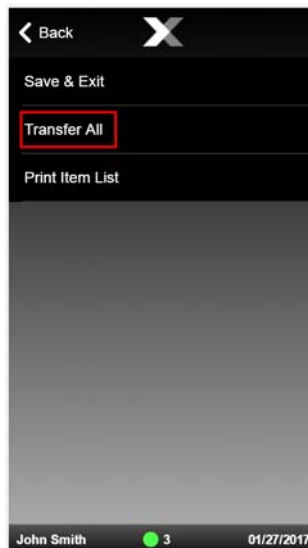


Figure 12-21: Transfer All Option

2. Select **Transfer All**.



Figure 12-22: Confirm Transfer All Items

3. Select **Yes**.

The quantity of every item in the list is set to its maximum value.

Return to the item transfer list screen.

Print Item List

To print a list of items in the transfer:

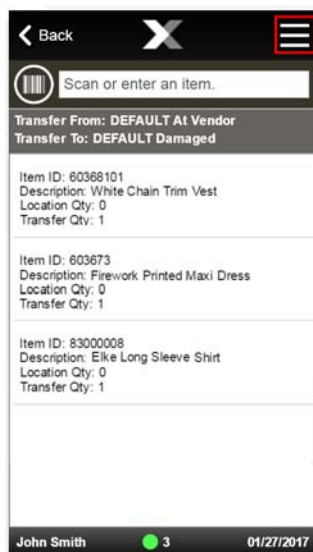


Figure 12-23: Context Menu Button

1. Select the **Context Menu** button.

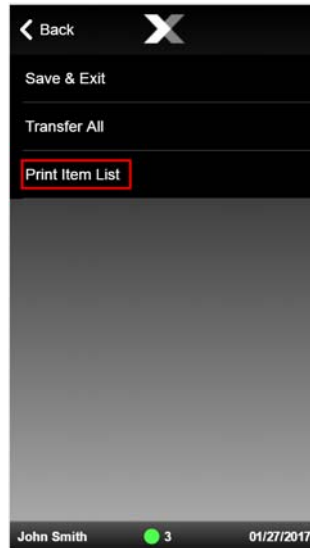


Figure 12-24: Print item List Option

2. Select **Print Item List.**

Follow the print procedure for your system.

The list of items prints.

Return to the item transfer list screen.

Item Adjustment

After items have been added to a sale transaction, adjustments can be made to the items through the sale screen.

About This Chapter

After selecting an item in the sale screen (see [Adjust an Item](#)), the following options are available:

- [Change Item Quantity](#) - Change the quantity of an item in a transaction.
- [Change Item Price](#) - Change the price of an item.
- [Discount an Item](#) - Add a discount to an item.
- [Change Item Tax](#) - Change the tax on an item.
- [Void Item](#) - Remove an item from a transaction.
- [Modify Discount](#) - Modify the discount on an item.
- [Remove Discount](#) - Remove the discount on an item.
- [Change Commissioned Associate](#) - Change the associate who receives the commission on an item.
- [Add a Comment](#) - Add a comment to a line item.
- [Remove Comment](#) - Remove a comment from a line item.

Change Item Quantity

To change the quantity of a selected item (see [Adjust an Item](#)):

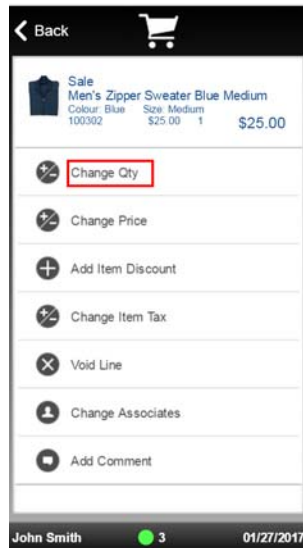


Figure A-1: Change Quantity Option

1. Select the **Change Qty** button.

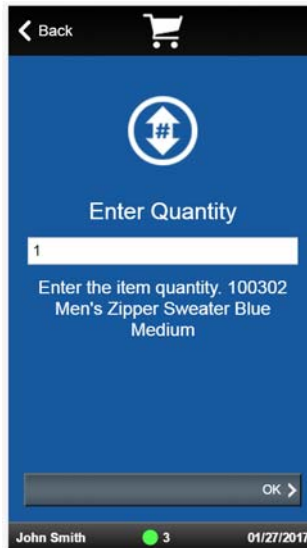


Figure A-2: Enter Quantity Prompt

2. Enter the new quantity for the item.
3. Select the **OK** button.

Return to the transaction screen.

Change Item Price

To change the price of a selected item (see [Adjust an Item](#)):

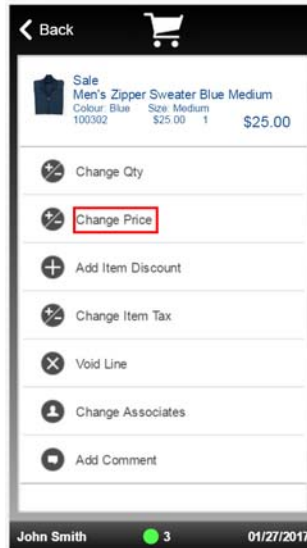


Figure A-3: Change Price Option

1. Select **Change Price**.

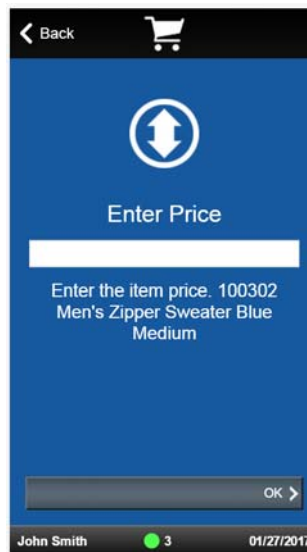


Figure A-4: Enter Price Prompt

2. Enter the new price for the item.
3. Select **OK**.

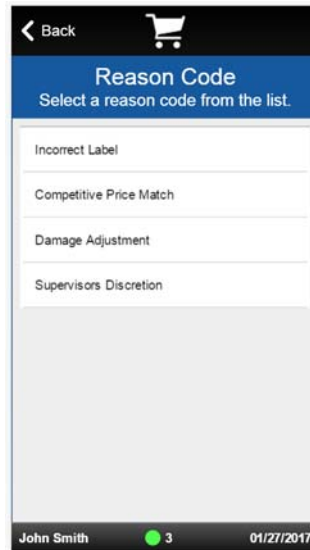


Figure A-5: Reason Code List

4. Select the proper reason for the price change.
Return to the transaction screen.

Discount an Item

To add a discount to a selected item (see [Adjust an Item](#)):

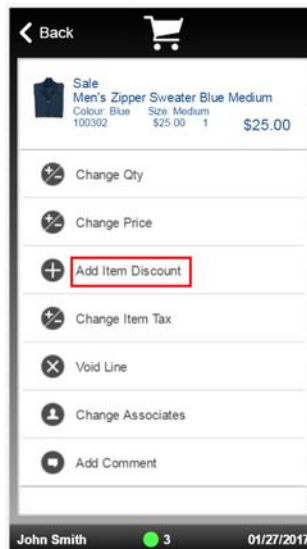
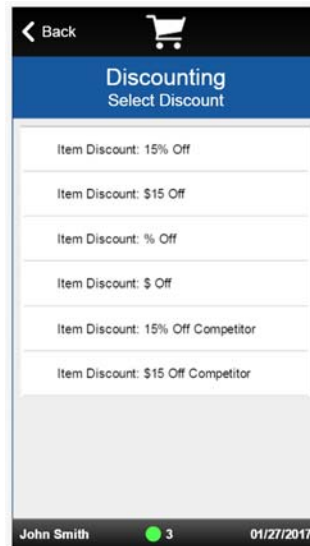
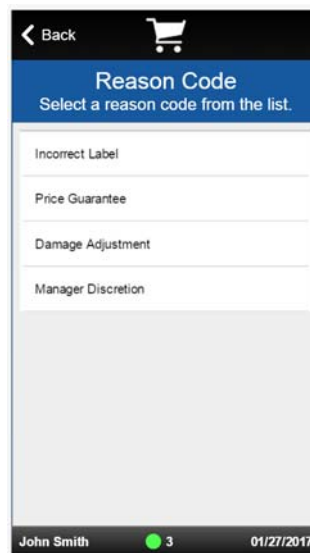


Figure A-6: Add Item Discount Option

1. Select the **Add Item Discount** button.

**Figure A-7: Discount List**

2. Select the proper discount.

**Figure A-8: Reason Code List**

3. Select the proper reason for the discount.

If prompted to enter an amount:

Two mobile application screens for entering discount information. The top screen is titled 'Discounting' and has a text input field followed by the label 'Enter discount amount'. The bottom screen is also titled 'Discounting' and has a text input field followed by the label 'Enter discount percent'.

4. Enter the discount amount.

5. Select OK.

Return to the transaction screen.

Change Item Tax

To change the tax on a selected item (see [Adjust an Item](#)):

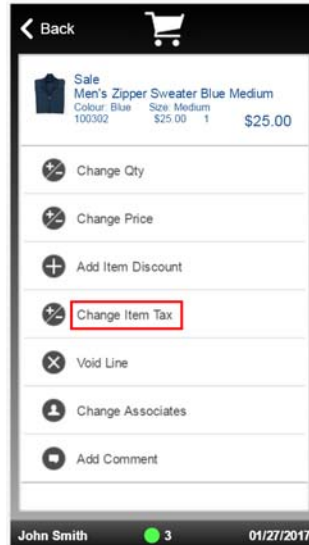


Figure A-9: Change Item Tax Option

1. Select Change Item Tax.

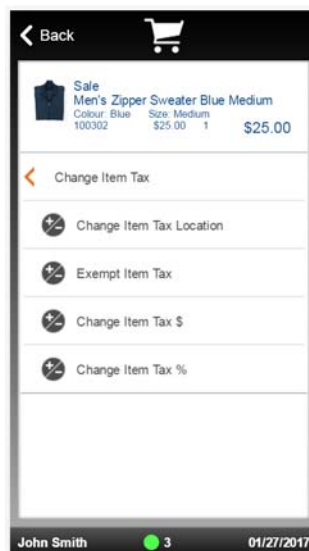


Figure A-10: Change Item Tax Menu

Continue with the proper procedure:

- [Change Item Tax Location](#)
- [Exempt an Item From Tax](#)
- [Change Item Tax Amount](#)
- [Change Item Tax Percentage](#)

Change Item Tax Location

To change the location used to determine the tax on an item:

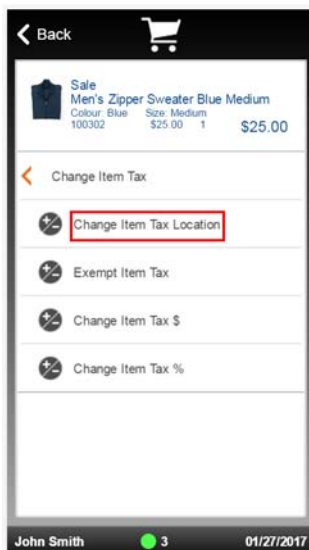


Figure A-11: Change Item Tax Location Option

1. Select **Change Item Tax Location** in the Change Item Tax Menu.



Figure A-12: Enter Postal Code

2. Enter the postal/zip code for the new location.
3. Select **OK**.

The tax location for the item is changed and Xstore Mobile returns to the item entry screen.

Exempt an Item From Tax

To exempt an item from tax:

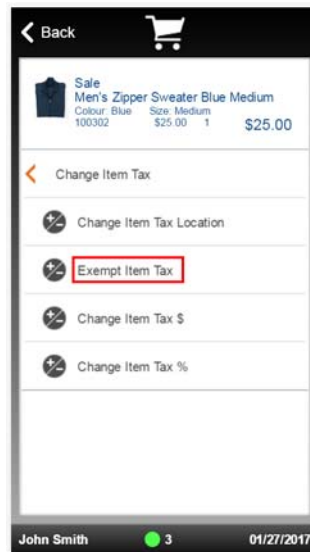


Figure A-13: Exempt Item Tax Option

1. Select **Exempt Item Tax** in the Change Item Tax Menu.

A screenshot of a mobile application interface showing a form titled 'Customer Tax Exempt' with the subtitle 'Enter Tax Exempt Information'. The form contains four input fields: 'Certificate #' with a red checkmark icon, 'Certificate Holder' with a red checkmark icon, 'State' with a dropdown arrow, and 'Expiration Date'. At the bottom of the form is a 'Save Changes' button with a right-pointing arrow. The bottom status bar is identical to the previous screenshot, showing 'John Smith', a green dot, the number '3', and the date '01/27/2017'.

Figure A-14: Customer Tax Exempt Entry Form

2. Enter the information about the customer's tax exemption certificate.
3. Select **Save Changes**.



Figure A-15: Reason Code List

4. Select the reason for the tax change.

The tax exemption is applied to the item and Xstore Mobile returns to the item entry screen.

Change Item Tax Amount

To change the amount of the item tax:

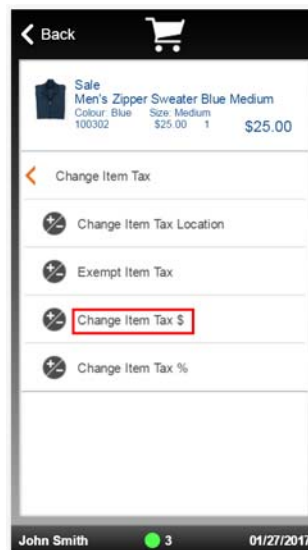


Figure A-16: Change Item Tax Amount

1. Select **Change Tax \$** in the Change Item Tax Menu.

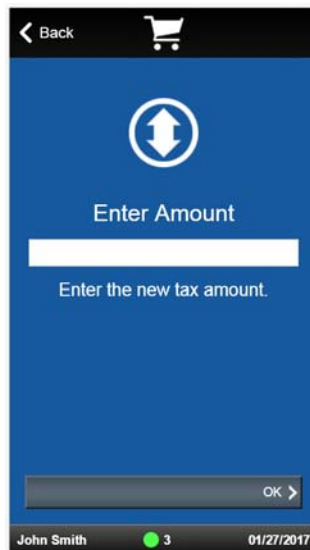


Figure A-17: Enter Tax Amount

2. Enter new tax amount.
3. Select **OK**.

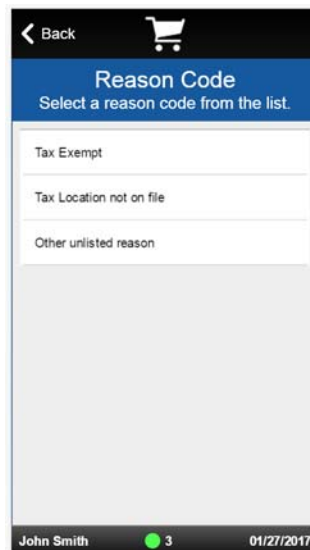


Figure A-18: Reason Code List

4. Select the reason for the tax change.

The amount of the tax for the item is changed to the new value and Xstore Mobile returns to the item entry screen.

Change Item Tax Percentage

To change the percentage of the item tax:

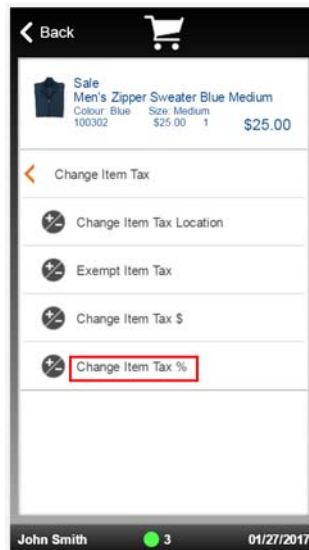


Figure A-19: Change Item Tax Percentage Option

1. Select **Change Tax %** in the Change Item Tax Menu.

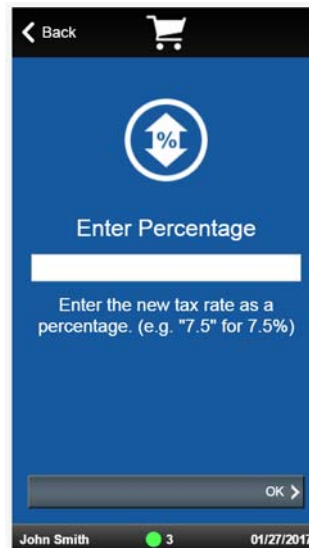


Figure A-20: Enter Tax Rate

2. Enter new tax percentage.
3. Select **OK**.

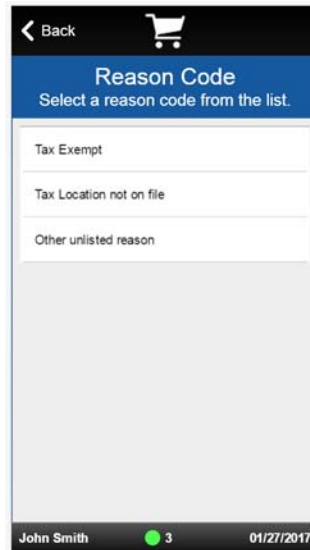


Figure A-21: Reason Code List

4. Select the reason for the tax change.

The percentage of the tax for the item is changed to the new value and Xstore Mobile returns to the item entry screen.

Void Item

To void a selected item (see [Adjust an Item](#)):

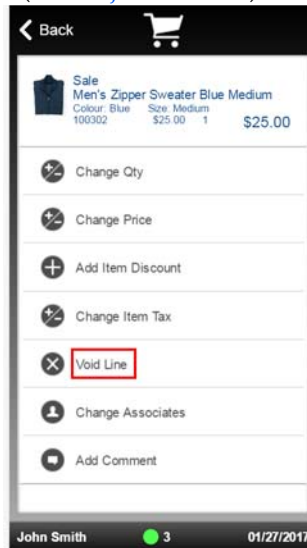


Figure A-22: Void Line Option

1. Select the **Void Line** button.

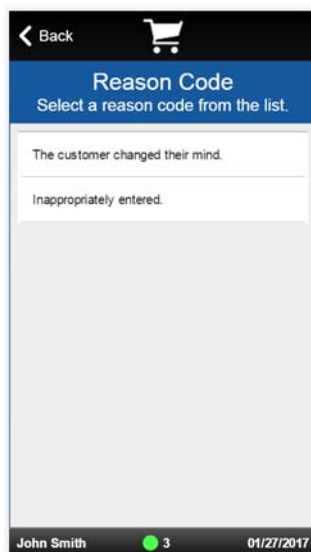


Figure A-23: Reason Code List

2. Select the proper reason for voiding the line.
Return to the transaction screen.

Modify Discount

To change the discount on a selected item (see [Adjust an Item](#)):

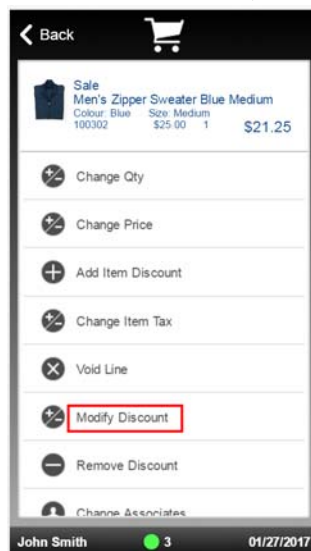


Figure A-24: Modify Discount

1. Select the **Modify Discount** button.
2. Select the discount to modify.

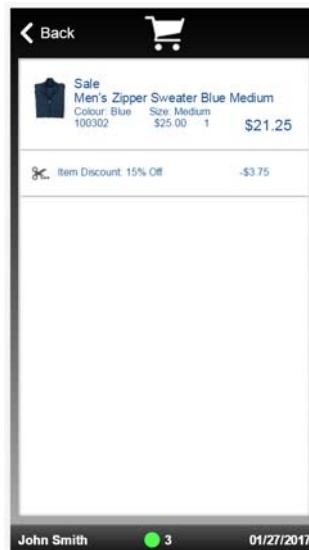


Figure A-25: Select Discount

3. Select the proper discount.

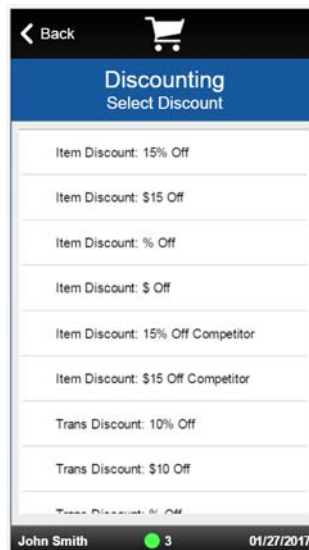


Figure A-26: Discount List

4. Select the proper reason for the discount.

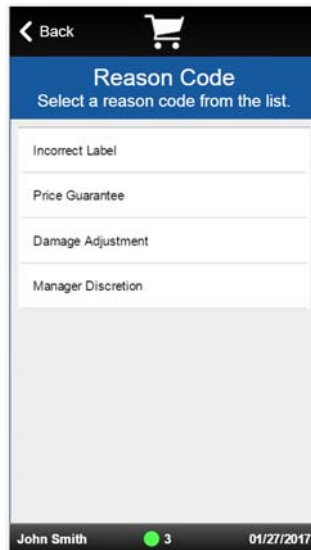
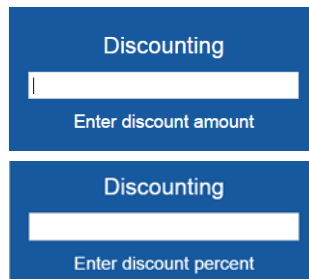


Figure A-27: Reason Code List

If prompted to enter an amount:



5. Enter the discount amount.
6. Select **OK**.

The discount is modified and Xstore Mobile returns to the item entry screen.

Remove Discount

To remove a discount on a selected item (see [Adjust an Item](#)):

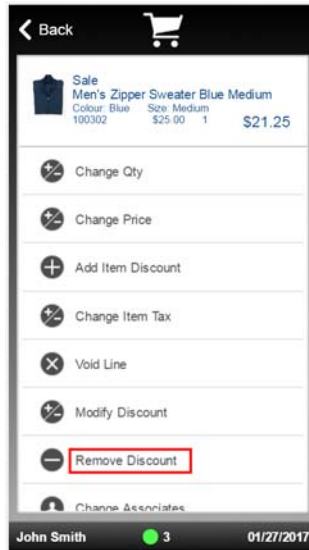


Figure A-28: Remove Discount Option

1. Select the **Remove Discount** button.

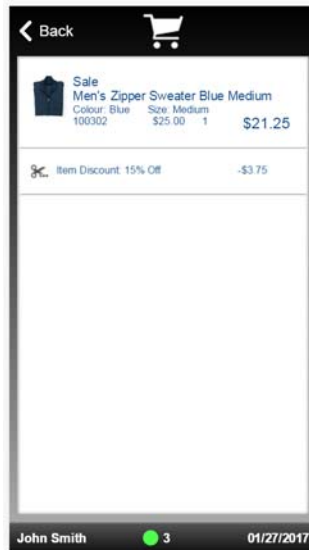


Figure A-29: Discount List

2. Select the discount to remove.

The discount is removed and Xstore Mobile returns to the sale screen.

Change Commissioned Associate

To change the associate receiving a commission on a selected item (see [Adjust an Item](#)), do one of the following:

- [Select the Associate From a List](#)
- [Enter the ID for an Associate](#)

Select the Associate From a List

To select the new commissioned associate from a list of associates:

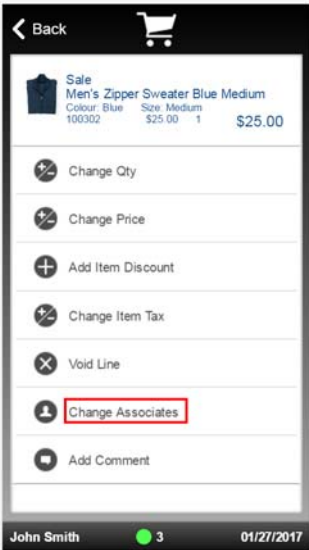


Figure A-30: Change Associates Option

1. Select **Change Associates**.

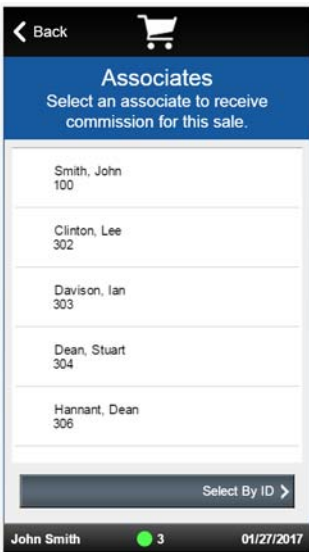


Figure A-31: Associates List

2. Select the proper associate(s) in the list.
Return to the transaction screen.

Enter the ID for an Associate

To select the new commissioned associate by entering an associate ID, do the following:

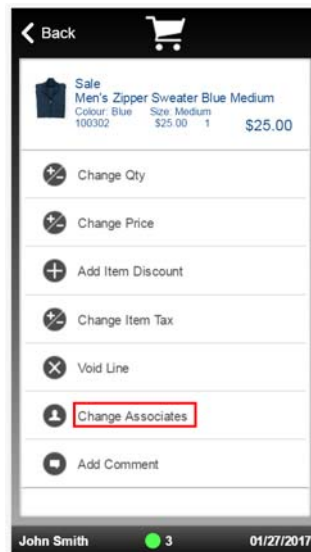


Figure A-32: Change Associates Option

1. Select the **Change Associates** button.



Figure A-33: Associates List

2. Select the **Select By Associate ID** button.

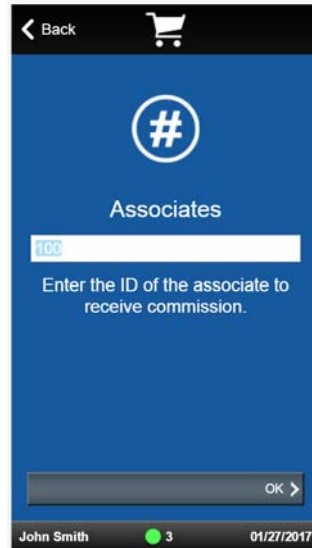


Figure A-34: Associate ID Entry Form

3. Enter Associate ID. *The ID of the current user is the default value.*
4. Select **OK**.

Return to the transaction screen.

When you are finished adding associates:

5. Leave the associate ID field blank.
6. Select **OK**.

Add a Comment

Important: Multiple comments can be entered on one item.

To add a comment to a selected item (see [Adjust an Item](#)):

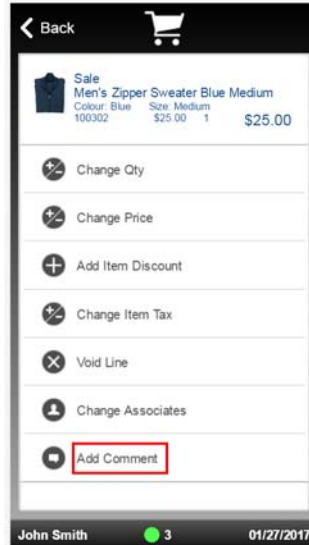


Figure A-35: Add Comment Option

1. Select **Add Comment**.



Figure A-36: Line Item Comments Entry Form

2. Enter the comment.
3. Select **OK**.

Return to the transaction screen.

Remove Comment

To remove a comment from a selected item (see [Adjust an Item](#)):

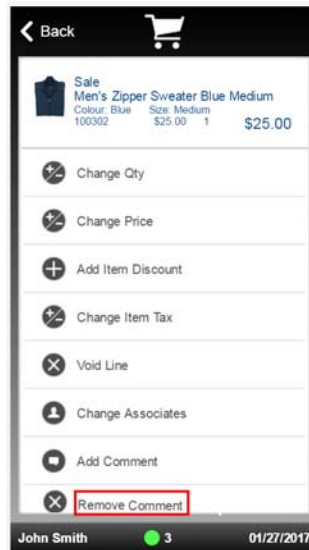


Figure A-37: Remove Comment Option

1. Select **Remove Comment**.

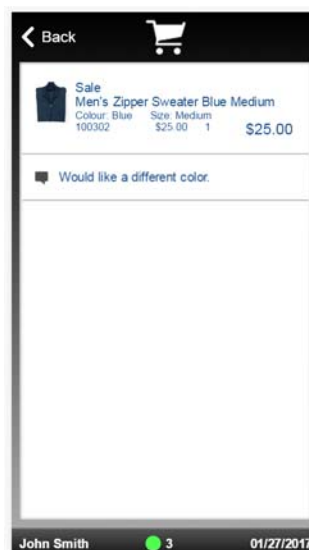


Figure A-38: Comment List

2. Select the comment to remove.

The comment is removed and Xstore Mobile returns to the transaction screen.

Remove Comment
