

Oracle Retail Xstore Point-of-Service
Manager's Guide
Release 16.0.0.1

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Preface

Oracle Retail Xstore is point-of-sale (POS) software. This guide describes the activities supported by Oracle Retail Xstore.

Audience

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

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at

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Related Documents

For more information, see the following documents in the Oracle Retail Xstore Suite Release 16.0.0.1 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 Mobile User Guide*
- *Oracle Retail Xstore Point-of-Service, Lane Checkout User Interface UserGuide*
- *Oracle Retail Xstore Point-of-Service Reports Guide*
- *Oracle Retail Xstore Point-of-Service Shipping, Receiving and Inventory Guide*

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

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 16.0) or a later patch release (for example, 16.0.1). If you are installing the base release and additional patch releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

Improved Process for Oracle Retail Documentation Corrections

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

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

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

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

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

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

Conventions

The following text conventions are used in this document:

Convention	Meaning
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.

Contents

1	Documentation and Screen Conventions.....	1
	Overview	1
	Documentation Conventions Overview.....	1
	Information Conventions	2
	Where to Look for Additional Help	2
	Back Office Touch-Screen Navigation	2
	Active Keyboard Keys	4
	Back Office Screen Conventions	5
	Bread Crumbs	5
	Menu List Options	5
	Screen Layout.....	7
	Tabs.....	7
	Menu Buttons.....	8
	Function Keys	8
	Message Bar	9
	Status Bar	10
	Static Information Area.....	11
	Information Areas	12
	Prompts and Forms	12
	Response Required Prompt	13
	Selection Required Prompt	13
	Required Prompt	13
	System Information Prompts.....	14
	Search Form.....	14
	Data Entry Form	15
2	Customer Maintenance	17
	Customer Maintenance Overview.....	17
	Accessing the Back Office.....	17
	Accessing Customer Maintenance and Accounts.....	19
	Customer Maintenance.....	20
	Adding a New Customer Record.....	21
	Associations Tab.....	25
	Addresses Tab.....	26
	Adding a Comment to a Customer Record	26
	Viewing a Customer Record	27
	Customer List Report	29

3	Gift Registry	31
	Overview	31
	Accessing the Gift Registry	31
	Creating a New Registry.....	34
	Modifying a Gift Registry.....	35
	Adding Items.....	36
	Changing the Quantity	37
	Deleting an Item.....	37
	Viewing and Modifying Details	37
	Viewing and Modifying Owners	38
	To modify the primary owner	38
	To create a new owner.....	38
	To edit registry owner information	39
	To delete an owner	40
	Viewing and Modifying Attributes	40
	To create a new attribute	41
	To edit an attribute	41
	To delete an attribute	42
	Viewing and Modifying Addresses	42
	To create a new address	43
	To edit an existing address	43
	To delete an existing address.....	44
	Print Registry	44
4	Employee Maintenance	47
	Employee Maintenance Overview	47
	Accessing Back Office Employee Maintenance Functions.....	47
	Maintaining Employee Information	48
	Viewing an Employee Record	50
	Editing an Employee Record	50
	Changing an Employee's Password	51
	Establish Password Challenge Questions	53
	Setting Up an Employee Fingerprint Record	55
	Adding a Comment.....	59
	Adding a New Employee	60
	Voiding (Terminating) an Employee Record	62
	Employee Maintenance Tabs Overview	64
	Fingerprint Scans Panel.....	69
	Finger Selected Panel	69
	Borrow Employee.....	70
	Employee Productivity Report.....	72
	Associate Advance	73
5	Employee Scheduling	77
	Overview	77

	Work shifts	77
	Time Off	77
	Reports	77
	Creating An Employee Schedule	78
	Create New Schedule Options	79
	Adding a Manual Shift	80
	Adding a Pre-Defined Shift.....	82
	Copying a Day Schedule	85
	Copying a Week Schedule.....	87
	Editing a Schedule.....	89
	Edit Existing Schedule Menu Options	90
	Changing a Shift	91
	Deleting a Shift.....	92
	Maintaining Employee Time-Off Schedules	93
	Adding Time-Off Periods.....	93
	Removing an Employee Time-Off Period.....	101
	Editing an Employee Time-Off Period.....	103
	Printing the Time-Off Schedule.....	104
	Maintaining Employee Shifts	105
	Creating a New Shift.....	105
	Editing an Existing Shift	108
	Schedule Reports	109
	Employee Time Off Summary Report.....	110
	Employee Performance Report Overview	110
	Schedule Detail Report Overview.....	111
6	Message Maintenance and Task Management	113
	Overview	113
	Creating and Maintaining Messages	113
	Creating a New Message.....	115
	Editing a Message.....	117
	Deleting a Message.....	119
	Reviewing Task Management Information	119
	Viewing Task Progress	120
	Viewing Black Book Customers	123
7	Payroll and Timecard Maintenance.....	125
	Overview	125
	Accessing Back Office Payroll & Timecard Maintenance Functions	125
	Payroll and Timecard Maintenance	128
	Payroll Maintenance Tab.....	129
	Editing a Payroll Record	131
	Reviewing a Payroll Record.....	131
	Posting the Employee's Payroll Record	132
	Posting all Employee Payroll Records at One Time.....	133
	Viewing and Editing Posted Payroll Records	135

	Payroll Posting Day	135
	Payroll Comments Tab	136
	Adding Comments.....	136
	Timecard Maintenance Tab.....	137
	Editing a Timecard Record	139
	Adding a Timecard Record.....	139
	Changing a Timecard Record	142
	Deleting a Timecard Record	143
	Viewing Timecard Exception Records	145
	Viewing Timecard Record History	147
	Timecard Comment Tab	147
	Adding Comments.....	148
	Posted Timecard Report	149
	Open Timecard Report	149
	Payroll Summary Report.....	149
	Payroll Detail By Employee Report	150
8	Register Open and Close	153
	Overview	153
	Accessing the Back Office Register Open/Close Functions	153
	Closing the Register	154
	Standard.....	155
	Editing Tender Group Counts.....	160
	24/7	161
	Cash Drawer.....	162
	Forcing a Register to Close.....	168
	Print Till Summary Receipt.....	168
	Opening the Register	169
	Standard	169
	To Perform a Begin Count.....	171
	24/7	173
	Cash Drawer Open.....	176
9	Store Open/Close.....	181
	Overview	181
	Store Close	181
	Store Open.....	181
	Closing the Store.....	181
	Opening the Store.....	187
	Calling the Update Service	190
	Manually Refresh Promotions	190
10	Till Management.....	191
	Overview	191
	Till Accountability Process.....	192

Till Start.....	192
Till End.....	193
Accessing Back Office Till Management Functions.....	193
Register Accountability Mode Options.....	195
Till Accountability Mode Only Options	195
Issue a Till (Till Accountability Mode Only).....	196
Attaching a Till (Till Accountability Mode Only)	201
Remove a Till (Till Accountability Mode Only)	202
End Count Other Till (Till Accountability Mode Only)	203
Return a Till (Till Accountability Mode Only).....	204
Reconciling a Till (Till Accountability Mode Only)	207
Open the Store Bank	209
Auditing the Store Bank.....	211
Reconcile the Store Bank.....	213
Preparing the Bank Deposit.....	213
Store Bank Cash Deposit.....	216
Attaching a Cash Drawer Till.....	218
Removing a Cash Drawer Till.....	219
Reconciling a Networked Cash Drawer Till	220
Performing Paid In/Paid Out Transactions	222
Paid In Transaction.....	222
Paid Out Transaction	224
Cash Pickup	226
Cash Transfer.....	227
Till Audit.....	227
Mid-Day Deposit	230
Post Voiding Transactions	232
Changing the Float Amount	235
Foreign Currency Maintenance.....	237
11 Flash Sales Reports	241
Overview	241
Flash Sales Summary Report.....	241
Flash Sales By Department Report.....	242
Flash Sales By Hour Report	242
Flash Sales By Employee Report	242
12 Electronic Journal	243
Overview	243
Accessing Back Office Journal Functions	243
Viewing the Electronic Journal.....	244
Viewing Transaction Detail.....	247
Reprinting a Receipt.....	247
Printing a Gift Receipt.....	249
Multiple Gift Items - Grouping Items for Gift Receipts	250
To Group Gift Items	251

	Finish and Print Option.....	251
	Add Grouping Option.....	251
	To Continue without Grouping Gift Items.....	252
	Printing a Rebate Receipt.....	252
	Post Voiding a Transaction.....	253
	Journal Report	257
13	Order Broker Maintenance.....	259
	Overview	259
	Order Status.....	260
	Fulfilling an Order	261
	View Order	264
	Check Inventory	266
	Accept and Reserve Order	266
	Un-reserve Order.....	269
	Reject Order.....	271
	Shipping an Order.....	273
	Maintaining/Viewing an Order	275
	Allocating an Item	276
14	Balance Inquiry	277
	Overview	277
	About Store Credit and Gift Certificate Balance Inquiry.....	277
	Balance Information.....	277
15	Layaway Maintenance	281
	Overview	281
	Layaway Reports.....	281
	Accessing Back Office Layaway Maintenance.....	282
	Static Information Area	284
	Customer Information	285
	Order Totals	285
	Layaway Tab Information.....	285
	Items Tab Information	286
	Activity Tab Information.....	287
	Comments Tab Information.....	288
	To Cancel a Layaway Account.....	288
	Cancel Layaway - When the Customer Is Present.....	290
16	Work Order Maintenance	293
	Work Order Overview	293
	Accessing Work Order Maintenance Functions	293
	Maintaining Work Orders.....	296
	Maintaining Work Order Records	297
	To View and Edit a Work Order Record.....	297

	To View and Edit Work Order Items.....	300
	To View and Add a Work Order Comment	311
	To View Work Order History	312
	To View and Edit a Work Order Item Record.....	313
	Shipping Work Orders	314
	Receiving Work Orders	317
	Work Order Invoices.....	319
	Viewing Work Order Invoice History.....	323
17	Special Order Maintenance.....	325
	Overview	325
	Accessing Back Office Special Order Maintenance.....	325
	To Cancel a Special Order Account.....	332
18	Shelf Labels.....	337
	Overview	337
	Printing Shelf Labels	337
	ZPL II Label Printers	342
19	Training Mode	351
	Overview	351
	Accessing Training Mode	351
	Starting Training Mode.....	351
	To Exit Training Mode.....	353
20	Miscellaneous Functions	355
	Overview	355
	Changing Your Password.....	355
	Forgot Password Challenge Questions	358
	Opening a Browser	360
	Using the Dashboard	361
	Dashboard Information	362
	Enabling and Disabling Hardware	364
	Reinitialize Hardware.....	368
	Networked Cash Drawers	369
	Managing Networked Cash Drawers.....	369
	Configuring Networked Cash Drawers	371
	Releasing a Cash Drawer.....	371
	Mobile Client Device Access.....	373
	Update PINpad Key (TransArmor)	373
	Tax Free Invoices	374
	Issuing Tax Free Invoices	374
	Issuing a Tax Free Invoice from the Electronic Journal	375
	Issuing a Tax Free Invoice from the Invoice Menu	377

Reprinting Tax Free Invoices	379
Reprinting a Tax Free Invoice from the Electronic Journal.....	379
Reprint a Tax Free Invoice from the Invoice Menu.....	380
Voiding a Tax Free Invoice.....	382
Base Data Update	384
Tax Free Invoice Returns	384

Documentation and Screen Conventions

Overview

This chapter describes the Oracle Retail Xstore Point-of-Service Back Office screen and documentation conventions and provides brief descriptions and examples of the methods used in Oracle Retail Xstore Point-of-Service's Back Office features.

- Refer to the [Documentation Conventions Overview](#) section for a description of the documentation conventions used throughout this Manager's Guide.
- Refer to the [Back Office Screen Conventions](#) section for a description of the Oracle Retail Xstore Point-of-Service application features.
- Refer to the *Oracle Retail Xstore Point-of-Service Shipping, Receiving & Inventory Guide* for step-by-step instructions on shipping and receiving functions, as well as the procedures required for counting and managing inventory through Xstore.
- Refer to the *Oracle Retail Xstore Point-of-Service User Guide* for Register Conventions and touch-screen navigation.

Documentation Conventions Overview

The following explains the conventions used in the *Oracle Retail Xstore Point-of-Service Manager's Guide*.

Table 1-1: Documentation Conventions in the User Guide

When you see...	Then...
Select xxxxx	This refers to a menu button or list option displayed on the Oracle Retail Xstore Point-of-Service application screen. The bold text is the button or menu option text. Since all menu text is configurable, the text you see on your screen may be different from the text used in the procedure.
Press [xxx]	This refers to a key on the keyboard. The text inside the brackets is the name of the key.
Blue, underlined text	This indicates the tagged text is a link to another area of the user document. Click on the link to jump to related information. This feature is used when viewing the document online. For printed documents, a page number has also been provided.

Information Conventions

Note: This information is provided to improve your understanding, simplify a task, or point out special circumstances.

Important: This information is important for the user to be aware of. For example, information that can help prevent the loss of data.

Tip: This information is related to the task at hand, but not required to perform the task. For example, this information may include best practices or practical information that can help the user in the performance of the task.

Where to Look for Additional Help

A variety of guides provide you with complete information about the Oracle Retail Xstore Point-of-Service POS system.

- The *Oracle Retail Xstore Point-of-Service User Guide* provides detailed information for entering sale, refund, and miscellaneous transactions, and is designed to provide training assistance for cashier-level employees. It also provides detailed basic navigation information such as touch-screen components.
- The *Oracle Retail Xstore Point-of-Service Reports Guide* contains a description of each report, step-by-step instructions on how to run each report, an explanation of the criteria selection options, and a report sample.
- The *Oracle Retail Xstore Point-of-Service Shipping, Receiving & Inventory Guide* provides step-by-step instructions for shipping and receiving functions, as well as the procedures required for counting and managing inventory through Oracle Retail Xstore Point-of-Service.

Back Office Touch-Screen Navigation

Xstore uses multi-touch gesture navigation throughout to allow for full touch-screen transactions.

Important: Touch-screen navigation is configurable by your corporate office; all features may not be activated on your system.

The following figure illustrates list navigation options for touch-screen users. The up/down arrows and side-scroll bar will only display if there is a large list.

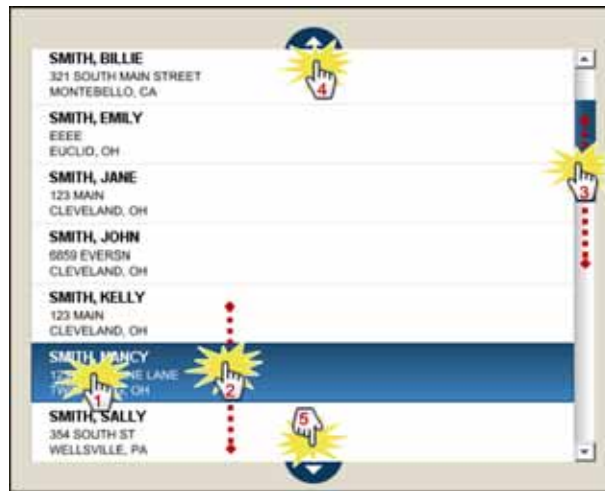


Figure 1-1: Touch-Screen Selection Navigation

Table 1-2: Touch-Screen Navigation

Touch-Screen Component	Description
1. Touch item	Selects and enter the item. Depending on the screen, you may need to select Ok to enter the item.
2. Hold and slide	Moves the list up or down without changing your selection.
3. Side scroll bar	Scrolls list up or down.
4. Tap up arrow	Moves the list up.
5. Tap down arrow	Moves the list down.

Note: For more information regarding touch-screen and virtual keyboard navigation see the *Oracle Retail Xstore Point-of-Service User Guide*.

Active Keyboard Keys

Use the following guidelines to navigate through the Oracle Retail Xstore Point-of-Service system using a keyboard:

Table 1-3: Active Keyboard Keys

Key	Description
arrows	Use the up and down arrow keys to browse through list boxes.
Enter	Press [Enter] to select Ok at any prompt that includes Ok (Enter) as an option. Also, press [Enter] in active list boxes to select the highlighted option.
Esc	Press [Esc] to exit any prompt that has Back or Cancel as an option. You can also press [Esc] to exit the current menu and return to the previous menu. In either case, if changes were made that were not saved, you must verify that you want to exit without saving your changes.
Function keys	On each Oracle Retail Xstore Point-of-Service window, the [F1] through [F12] function keys correspond to the menu options. Press the function key that corresponds to the option to choose it. See Function Keys .
Home/End	Use these keys to jump to the top (Home) or bottom (End) of the current page of a report that you are viewing.
Plus (+)/Minus(-)	Use these two keys to increase (+) or decrease (-) the on-screen magnification level of a report that you are viewing.
Shift-Tab	Press [Shift]-[Tab] to move to the previous list box on an Oracle Retail Xstore Point-of-Service window. When the first list box is reached, press [Shift]-[Tab] to activate the last list box on the window.
Tab	Press [Tab] to move from the first list box to the next list box on the window. When the last list box is reached, press [Tab] to activate the first list box on the window.
Spacebar	Press the spacebar to select items in multiple-select lists.
Ctrl-Tab	Press [Ctrl]-[Tab] to access the Information, Task, Message, and Sales Goals tabs and move one tab forward on the Register Login screen and the Back Office Login screen.
Ctrl-Shift-Tab	Press [Ctrl]-[Shift]-[Tab] to access the Information, Task, Message, and Sales Goals tabs and move one tab backward on the Register Login screen and the Back Office screen.

Back Office Screen Conventions

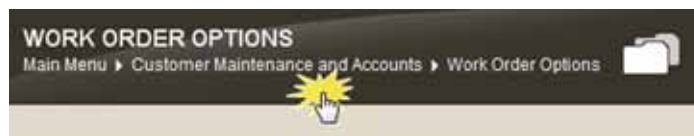
Most Manager tasks are performed using Xstore's Back Office features. To review the screen convention for the register see the *Oracle Retail Xstore Point-of-Service User Guide*.

Note: The Register can be accessed from the Back Office by selecting the Register Menu Button.

Bread Crumbs

The bread crumbs keep track of your steps throughout the Back Office menus. When you first enter the Back Office menu, the bread crumb area contains Main Menu.

Tip: Touch-screen users, tap one of the bread crumbs in a Back Office menu header to return to the menu selected in the bread crumb.



Menu List Options

The Back Office functions are available from the Main Menu that is displayed when you log in to the Back Office. Some functions on the list may not be available to all employees. Individual access is based on menu configuration. Security may be different for each employee, employee group, or register group.

There are several ways to select a menu item:

- Type the corresponding number from your keyboard or virtual keyboard.
- **[TOUCH-SCREEN]** Tap the menu option.
- If there is a long list of options, up and down arrow keys display. Touch-screen users press these arrows to navigate the list. Keyboard users press the keyboard arrows to move the menu list.

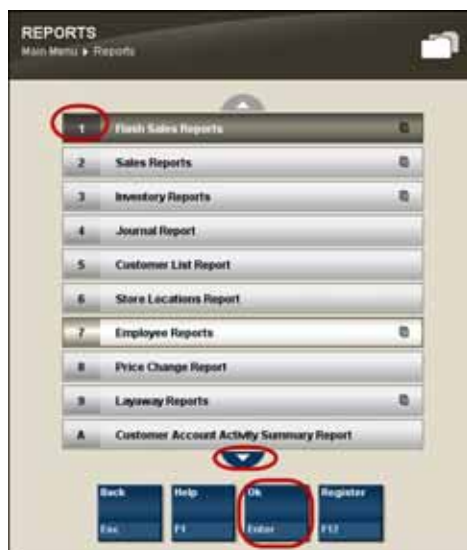


Figure 1-2: Back Office Main Menu

The number to the left of a menu option represents the keyboard number that executes this option. For example, pressing the number 8 on the keyboard launches the **Price Change Report** option as shown in [Figure 1-2](#) above.

8 Price Change Report

This symbol to the right of a menu option indicates that there are additional sub-menus for this option. If you select a menu option with submenus, Oracle Retail Xstore Point-of-Service displays additional functions that are available for that option.



If an option is grayed out, the option is not available to the current user. This is configurable by security level. Other menu options may not be available when the register or store is closed.

7 Tender Exchange

A menu option with a key icon indicates that a security ID is required.

7 Check for Updates



Screen Layout

The screenshot displays a customer profile for Elaine Masterson. The interface includes a top navigation bar with tabs like Dashboard, Contact Information, Associations, Purchase History, Accounts, Tasks, Comments, Addresses, House Account, and Wi. The main content area is divided into sections for Contact Information and Personal Information. The bottom of the screen features a status bar with buttons for Cancel, Help, Edit Customer, and Customer Options, along with a message bar indicating '6 New Orders'.

Numbered callouts in the image:

- 1: Customer ID field
- 2: Accounts tab
- 3: Contact Information section
- 4: Bottom status bar
- 5: Edit Customer button
- 6: 6 New Orders message

Figure 1-3: Screen Layout Areas

For more information about these Back Office screen areas, refer to:

1. [Static Information Area](#)
2. [Tabs](#)
3. [Information Areas](#)
4. [Screen Title](#) (Changes per function)
5. [Menu Buttons](#) (availability determined by function and the user's security). See [Menu Buttons](#).
6. [Message Bar](#) see [Message Bar](#)



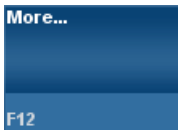
Tabs

To open tab screens:

- Select the **Previous tab** or **Next tab** menu button. Keyboard users can press the associated function key.
- Touch-screen users, can tap the desired tab.

Menu Buttons

The menu button options can be found on the bottom of most menus and forms. If you are using a keyboard, you can press the associated function key. Menu buttons with the following icons denote additional functions:

Icon	Description
	This icon indicates there are more sub-menu choices associated with this option. Selecting an option displaying this icon opens another menu with additional options.
	This icon indicates this function is not available to the user currently signed on to Oracle Retail Xstore Point-of-Service, without manager override. This function is based on security levels.
	The ellipsis (...) after the word “More” indicates that there are additional menu options available at this screen. Selecting the “More...” option displays another set of menu buttons.

Function Keys

Note: Touch-screen users do not use function keys. Instead, tap the menu option to select.

The Xstore menu buttons show the functions that are available for each Xstore window. Each menu button has a function key ([F1] - [F12]) assigned to it. Because each Xstore menu is configurable, the button functions on your system may appear in a different order or have different text than shown throughout this manual.

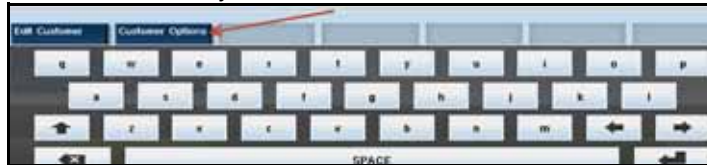
Some of the functions on a menu may not be available to some employees. Availability of a function depends on menu security, and it may be different for each employee, employee group, or register group.

Note: Due to the flexibility of the system, menu options in this guide are not identified by a function key number [F2, F3, etc.]. Instead, the procedures and processes that follow use the name of the button.



Figure 1-4: Back Office Menu Buttons

Tip: Touch-screen users: When your virtual keyboard is visible, you can still access the menu buttons. Tap the desired button above the keyboard.



Message Bar

The message bar is located above the status bar and indicates if there are any new orders. The yellow portions fade in and out when messages are available.

Note: To view the message bar information here, you must have a touch-screen or a mouse. This additional information is view-only.



Figure 1-5: Message Bar

Select the message to view information.

- * **Total New Orders** - The total number of new orders.
- * **Ship Orders** - The number of orders waiting to be shipped from this store.
- * **Customer Pick Up Orders** - The number of orders for pick up in this store.
- * **Items Awaiting Pick** - The number of items to set aside for the orders.
- * **Average Order Age** - The average age of the orders awaiting fulfillment, in days and hours, or minutes.
- * **Oldest Order Age** - The age of the oldest order awaiting fulfillment, in days and hours, or minutes.
- * **Unfulfillable Orders** - The number of orders that cannot be filled. When an order is rejected and cannot be filled at another location, the status becomes unfulfillable.

NEW ORDER STATISTICS	
Total New Orders	40
Ship Orders	30
Customer Pick Up Orders	10
Items Awaiting Pick	80
Average Order Age	48 days 2 hrs
Oldest Order Age	119 days 0 hrs
Unfulfillable Orders	91

Status Bar

The Status Bar is a screen component that displays several sections containing store-related information. It is located immediately below the message bar and is always visible from every Register screen and Back Office screen.

Urgency levels - Stoplight-like color indicators convey urgency:

- * **Red** = High Urgency
- * **Yellow** = Medium Urgency
- * **Green** = Low Urgency (Informational conditions)



Figure 1-6: Status Bar

Table 1-4: Status Bar Components


Component #	Description
1. Keyboard icon	For touch screen monitors, this icon opens the keyboard.
2. Area Locator	Indicates where you are within the system (i.e., Back Office).
3. Signed-In User Identifier	Identifies the user that is currently signed into Xstore.
4. Database Status Indicator	<p>Green indicates the Datasources are online. Yellow indicates at least one WAN Datasource is offline. The system is using the local Datasource. Red indicates at least one LAN datasource is offline. Touch-screen users tap the indicator to view the Datasource Status.</p> 
5. Store Identifier	Identifies your store name and store number.
6. Register Identifier	Identifies the register number.
7. Date	Displays the current register date.
8. Time	Displays the current register time. Touch-screen users swipe the clock area to clock-in/clock-out.

Table 1-4: Status Bar Components

Component #	Description
9. ? F1	<p>This icon is available from all screens. Clicking or touching this icon opens the Xstore's help feature.</p> <p>Note: The [F1] key is a configurable key. It is not automatically assigned to the Help option. If the help option is enabled and available for the function, pressing the [F1] key displays a context-sensitive HTML page.</p>

Static Information Area

The Static Information Area of a record is located in a horizontal bar across the top of the record. The information displayed here is usually some basic identifying information about the current record such as a customer name, an employee ID, or other important information. When viewing a record, the information in the Static Information Area does not change, regardless of which tab is selected for the current record.

The information shown depends upon the kind of record being viewed. If the data originates from another system, the Static Information Area displays the data source where the current record is located. The source varies depending on your system's configuration.

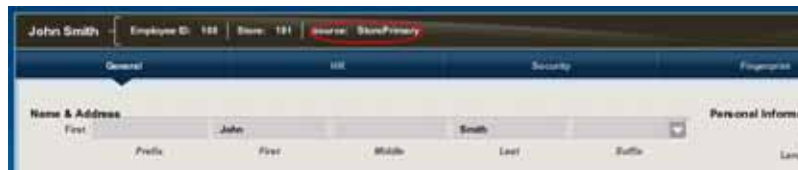


Figure 1-7: Static Information Area - Employee Maintenance Screen

When viewing a customer transaction in the Electronic Journal, the Static Information area displays information about a particular customer transaction.

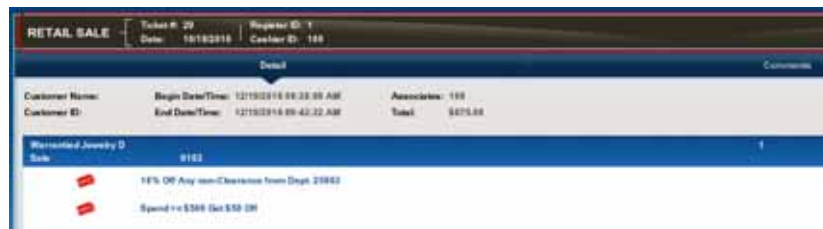


Figure 1-8: Static Information Area - Electronic Journal

When viewing a customer record in the Customer Maintenance screen, the Static Information area displays the customer name, customer account number, enrollment date, and loyalty points (if applicable).

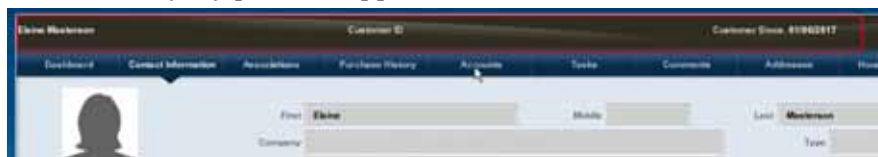


Figure 1-9: Static Information Area - Customer Maintenance

Information Areas

The Information Areas on the screen display information that varies depending on which tab is selected on a record. In that way, the Information Area of a screen is different from the Static Information area at the top of the screen. In the Static Information area, the same set of data displays, regardless of which tab is selected.

An information area is a way of grouping related bits of information that are pertinent to the specific tab currently being displayed.

The screenshot displays the 'Contact Information' tab for a customer record. The interface includes a top navigation bar with tabs: Dashboard, Contact Information (selected), Account History, Purchase History, Accounts, Tools, Comments, Address, Home Account, and Web List. The main content area is divided into two sections: 'Contact Information' (left) and 'Personal Information' (right). The 'Contact Information' section contains fields for First Name (Elise), Middle Name, Last Name (Mackinnon), Company, Address (848 Juniper Drive), Postal Code (4E5B), City (Mount Pleasant), State (MI - Michigan), Home Phone (887-604-321), Work Phone (123-456-789 x.123), Mobile Phone (234-534-2342), and Email (em@emackinnon.org). The 'Personal Information' section contains fields for Anniversary Date (8/18/2017), Birth Date (8/12/1986), Gender (Female), and Language (English (United States)).

Figure 1-10: Information Display Areas: Contact Information Tab

There may be several different Information Areas on a screen, each one containing related information, and visually contained within a boxed area. For example, the customer record may show both Contact Information (such as address and phone information) and Personal information on the **Contact Information** tab.

Data can usually be entered and edited in an Information Area when you are working in an **Edit** mode.

Prompts and Forms

During various system operations, you may be prompted to confirm that a process may continue, select from a list of options, acknowledge a system action, enter/select information, and so on. Oracle Retail Xstore Point-of-Service provides several different types of prompts and forms to help you complete a task.

Response Required Prompt

During a Back Office process, you may be required to confirm an action. For example, in [Figure 1-11](#), below, press [Y] (Yes) to confirm that you want to close the register or press [N] (No) to remove the prompt and return to the transaction.



Figure 1-11: Response Required Prompt Example

Selection Required Prompt

During a Back Office process, you may be required to select from a list of options. For example, in [Figure 1-12](#) below, you would select a shift from the list. Keyboard users can use the up and down arrow keys to select from the list. To continue with the process, press [Enter] to choose **Ok**. To exit without making a selection, press [Esc].



Figure 1-12: Selection Required Prompt Example

Tip: Touch-screen users tap to select an option and then tap **Ok**. See [Back Office Touch-Screen Navigation](#).

Required Prompt

During a Back Office process, you may be required to enter a value before continuing. For example, in [Figure 1-13](#) below, you are prompted to enter your employee ID number and password to continue. To continue with the process, enter your employee ID

number and password and select **Process** to continue. To return to the previous screen, press [Esc] or select **Back**.



Figure 1-13: Entry Required Prompt Example

System Information Prompts

Throughout Oracle Retail Xstore Point-of-Service, the system displays prompts and messages to indicate that it is processing a request or a transaction, or to provide additional information about a process or error. For example, the following system message displays when running a report.



Figure 1-14: System Information Message: Running Report

Search Form

In a search form, you enter parameters, or criteria, to initiate a database search. Oracle Retail Xstore Point-of-Service displays a search form automatically when you must retrieve specific information.

Some forms (but not all of them) require that you enter at least one letter or one number into a field, the minimum requirement to initiate a search.

Note: For example, the Employee Lookup form in the Back Office Employee Maintenance function may not require any criteria to be entered. If you select **Process** without entering criteria, all employee names are retrieved.

The more parameters you enter, the narrower the scope of the search becomes, and fewer records are listed. When one of the parameters is not matched, the system uses the remaining parameters to conduct a broader search. If the system cannot find any matches, Oracle Retail Xstore Point-of-Service displays a message indicating no match was found.

When applicable, the **Change Country** menu option provides the ability to search for customers from countries other than the country where the store is located. For example, if you change the country to Canada, the State form field lists Canadian provinces, and if Mexico is selected as the country, then the State form field lists Mexican states.





Because each Oracle Retail Xstore Point-of-Service search form

is configurable, the search parameters on your system may appear in a different order or have different field names than the search forms shown in this guide. An arrow on the right side of a field indicates the information for this field must be selected from a drop-down list of options rather than typed into a free-text field.


Data Entry Form

A data entry form is used to capture information that is transferred to the database. For example, the figure below shows a Customer Maintenance form where you can enter various kinds of information about a customer. The same form may be used to display information (read-only) and to update, or edit, information. Usually, you must select an **Edit** option from the menu before the current information may be changed.

Figure 1-15: Data Entry Form in Edit Mode (Back Office Example)

Icon	Description
	An arrow on the right side of a field indicates the information for this field must be selected from a drop-down list of options rather than typed into a free-text field.
	A red triangle in the upper left corner of a field indicates that information must be entered.

Back Office Screen Conventions

	A grayed out field indicates the field is non-editable. In some cases, select the Edit menu option to modify the field.
---	--

Enter the information into the form as required and select **Save Changes** to continue, or press [Esc] to return to the previous screen without saving the data. If you select **Save Changes** before completing all the required fields, Oracle Retail Xstore Point-of-Service displays a message explaining the error.

Customer Maintenance

Customer Maintenance Overview

Customer Maintenance includes activities related to entering a new customer into the customer database, updating customer information, and viewing or printing customer information. Customer Maintenance is typically initiated when an employee performs a register transaction and discovers that the customer's name is not in the database and must be entered for the first time. Customer maintenance is also required when customer information is found to be incorrect and must be changed, or when it is incomplete and additional data must be entered.

The Customer Maintenance screens are essentially the same whether accessed through the Back Office or through the register. Refer to the *Oracle Retail Xstore Point-of-Service User Guide* for detailed instructions on modifying customer records.

Note: The Customer Maintenance activities that may be accessed are controlled by each user's security level. An associate must have the proper security privileges to perform any customer maintenance.

Accessing the Back Office

Note: Because each Oracle Retail Xstore Point-of-Service menu is configurable, the button functions and the menu options on your system may appear in a different order or have different text than the examples shown in this guide.

Associates with the correct security privileges may access Customer Maintenance from the Back Office Main Menu.

In addition to all the customer maintenance functions available from the register, the Back Office Customer Maintenance Menu also offers a Customer List Report. Refer to the *Oracle Retail Xstore Point-of-Service Reports Guide* for more information.

1. Select the **Back Office** menu button from the Register Login screen.

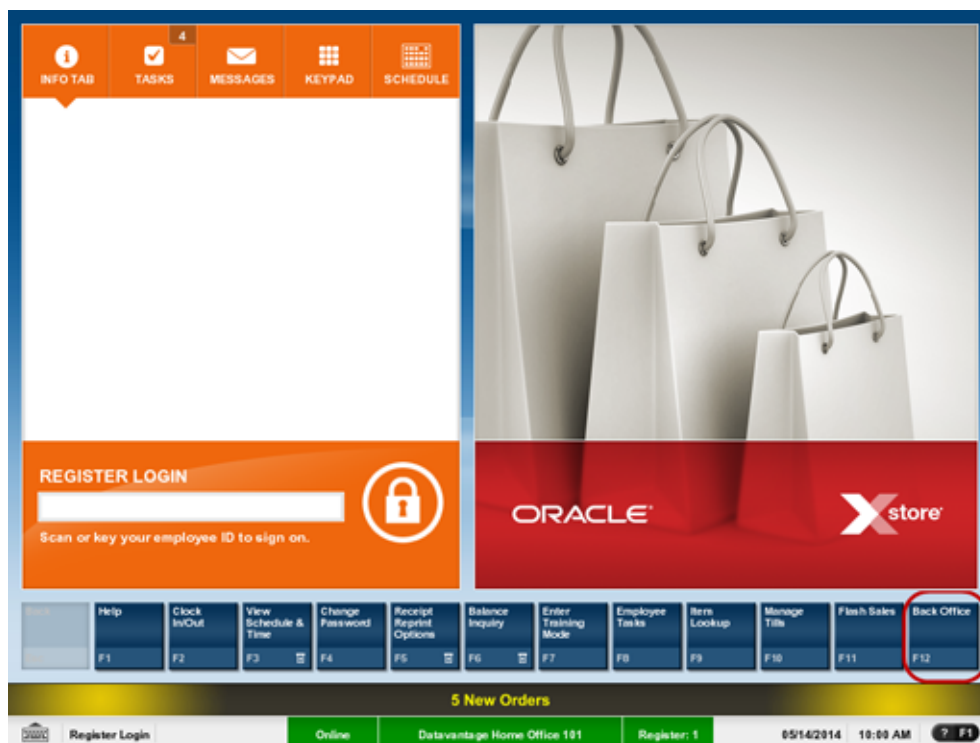


Figure 2-1: Back Office Menu Button

Note: Access to the back office functions is controlled by security levels. You must have the correct security privileges to access the Back Office.

2. When prompted, scan or enter your employee ID and press [Enter].



Figure 2-2: Employee ID Prompt

3. Enter your password and press [Enter].



Figure 2-3: Password Prompt

Note: If your system is set up to use a Biometric Fingerprint device, an Employee ID Login prompt displays. Use the device to scan your fingerprint rather than entering your user ID and password. Scanned and keyed entry is also supported at this prompt.

Accessing Customer Maintenance and Accounts

1. From the Back Office Main Menu, select the **Customer Maintenance and Accounts** option and press [Enter].



Figure 2-4: Back Office Main Menu

2. Several sub-menu options appear:



Figure 2-5: Customer Maintenance and Accounts Options

- * **Customer Maintenance** - Select this option to maintain customer data as explained in this chapter.
- * **Customer List Report** - Select this option to run the Customer List Report. Refer to the *Oracle Retail Xstore Point-of-Service Reports Guide* for more information about this report.
- * **Order Options** - Select this option to maintain Oracle Retail Order Broker Cloud Service (formerly Locate) order accounts. Refer to [Order Broker Maintenance](#) for more information.
- * **Special Order Account Maintenance** - Select this option to maintain special order accounts. Refer to [Special Order Maintenance](#).
- * **Layaway Maintenance** - Select this option to maintain customer layaway accounts. Refer to [Layaway Maintenance](#) for more information.

- * **Work Order Options** - Select this option to maintain customer work order accounts. Refer to [Work Order Maintenance](#) for more information.
- * **Gift Registry** - Select this option to maintain gift registry accounts. Refer to the *Oracle Retail Xstore Point-of-Service User Guide* Gift Registry chapter.

Customer Maintenance

1. From the Customer Maintenance and Accounts menu, select **Customer Maintenance**.
2. Enter your search criteria and then select **Process**.



Figure 2-6: Customer Search Form

Tip: Enter as much information as possible in the Customer Search form to limit the number of customer records that are returned. You may enter partial names in the Last and First name fields.

The maximum number of returned records is configurable. If your search results exceed that number, you may see a message indicating there are too many results.

If the name you want is not listed, select the **Back** option to return to the Customer Lookup form. Enter the customer's full name or make additional entries in the other searchable fields. Select **Process** to search again.

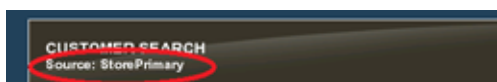
When applicable, the **Change Country** menu option provides the ability to search for customers from countries other than the country where the store is located. For example, if you change the country to Canada, the State form field will list Canadian provinces, and if Mexico is selected as the country, then the State form field will list Mexican states.

If more than one customer record matches your search criteria, the system displays a list of customers.



Figure 2-7: Customer Search Results

Note: The Source field underneath the header Customer Search indicates the data source from which this information was retrieved.



Depending upon your system's configuration, the system may automatically display the Customer Maintenance screen when only one name matches the search criteria, rather than showing a list with only one customer name.

3. Choose one of these options:
 - **Back** – Returns to the Customer Lookup form where you can begin a new search.
 - **Select & View** – Opens the selected customer record for viewing, editing, or printing.
 - **New** – Opens the Customer Maintenance screens with blank fields for adding information.

Adding a New Customer Record

If you search for a customer name and it is not found in the customer database, you can create a new record for the customer. The system displays a message as shown in the

[Figure 2-8](#) below if there is no current record.

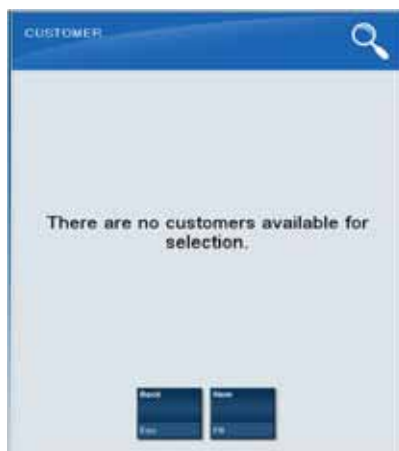




Figure 2-8: Customer Not Found Message Screen

1. Select **New** to display the Customer Maintenance Screen in edit mode. The form consists of ten tabs, each containing a different type of information about the customer.

Note: The information you entered in the Customer Search form automatically populates the appropriate fields on the customer maintenance screen.

2. Enter customer contact information. Your system may be configured to capture and display the following information on the Contact Information tab. Any of the fields may be designated as a required entry (per your store policy)

Figure 2-9: Customer Maintenance Screen

- Any field that requires an entry is marked with a red triangle  in the upper left corner of the field.
- Any field that has a selectable list of options displays a down arrow  on the right side of the field.

Tip: When you enter a valid postal code for the customer, the system automatically enters the city and state information.

Table 2-1: Contact Information Fields

Field Name	Description
First name, middle initial, last name	The system automatically creates an initial cap for the first letter you type here if you don't press the [Shift] key when entering the customer's name.
Company	If you enter a company name here, the Organization Type field becomes active.
Type	Associated with Company entries; for example, Club, Company, School, and so on. This field is only active after a Company name is entered.
Address	Two address lines are provided. This is the customer's primary address.
Apartment #	Optional field.
Postal Code	The system automatically supplies the city and state if it recognizes the Zip/Postal code that you enter.
City	Automatically populated if the system recognizes the Zip/Postal code that you entered first.
State/Province	If you begin typing, the system auto-fills the field with states/provinces defined for your store.
Country	Defaults to the country in which the store is located, but can be changed using the Change Country option.
Phone Numbers	As you enter data in these fields, the associated contact permission check marks become active. Check mark whether or not it is okay to contact the customer by selecting the corresponding yes box.

Table 2-1: Contact Information Fields (continued)

Field Name	Description
Email address	Format this email address correctly so it can be used to contact the customer. If the customer would like to receive receipt copies via email, this must be a valid email address and the Email flag (Email?) must be set to “Yes”.
Anniversary Date	This information can be used to display a message such as “Happy Anniversary” before or after the anniversary.
Birth Date	This information can be used to display a message such as “Happy Birthday John” before or after the customer’s birthday.
Gender	The gender will determine the avatar picture in the contact information tab.
Language	The language code for the customer’s preferred language.
Email Receipts	“Yes” indicates the customer would like to have email receipts automatically selected when purchasing items.

3. Select the **Associations** tab to make additional entries for personal information such as tax exemptions. See [Associations Tab](#).
4. Select the **Addresses** tab to add and manage multiple addresses for the customer. See [Addresses Tab](#).

Note: The non-editable tabs are *Dashboard*, *Purchase History*, *Customer Account*, and *Wish List*. Depending on your store policy, you may be able to create and maintain House Accounts. See the *Oracle Retail Xstore Point-of-Service User Guide* Customer Maintenance chapter to create and modify House Accounts.

The Customer Account tab contains options to Print Balance Receipt and Print Account History, see the *Oracle Retail Xstore Point-of-Service User Guide* Customer Maintenance chapter.

5. To create a comment for the new customer, see [Adding a Comment to a Customer Record](#).
6. After completing all of the data entry for the new customer, select the **Save Changes** option to store the new customer record in the database.
7. Select **Cancel** to return to the Customer Search list.

Associations Tab

Select the **Associations** tab to select a membership if applicable.

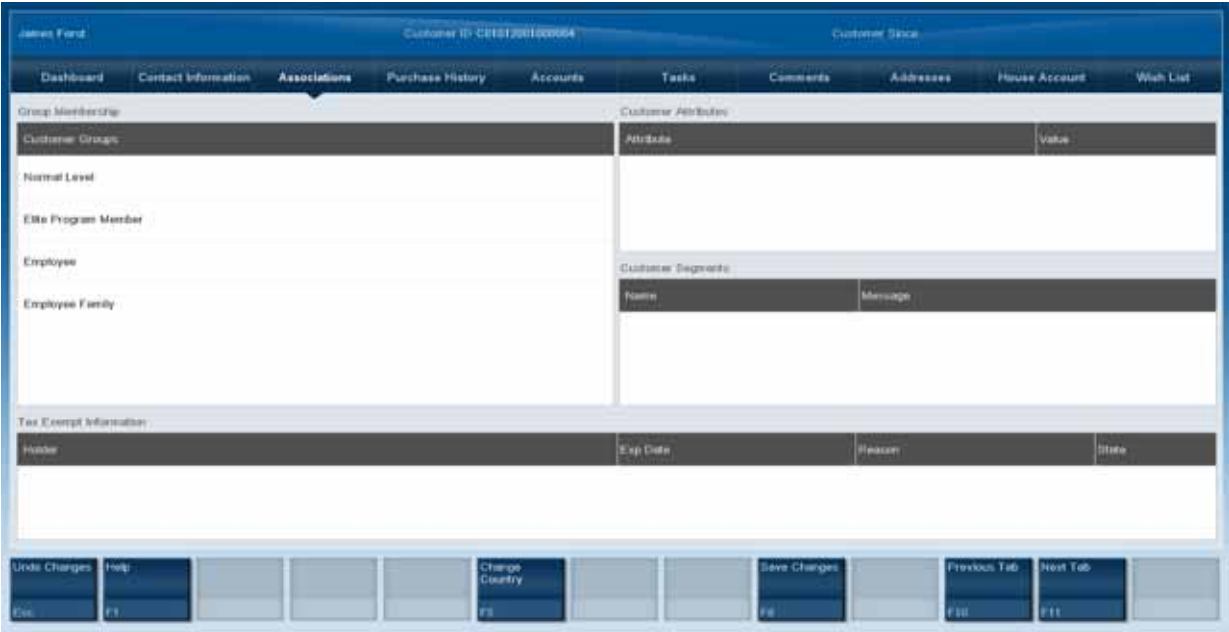


Figure 2-10: New Customer Associations Tab

Table 2-2: Associations Tab Fields


Field Name	Description
Group Membership	Select a membership if applicable. Your store may have badges such as silver  assigned to various group memberships. The badge appears on the header of the Customer Maintenance Screen as well as the Customer Loyalty Banner on various sales screens. A customer may be associated with one or more groups. If groups are not defined, no customer groups are listed in this section.
Customer Attributes [NON-EDITABLE]	Attribute categories are defined by the home office and provide additional information about the customer.
Customer Segments [NON-EDITABLE]	Segments are groupings that share common criteria. This information is provided by Oracle Retail Customer Engagement Cloud Services (formerly MICROS Retail Relate CRM). Identifying a customer with a segment may be helpful in customer analysis and in sales promotions.

Table 2-2: Associations Tab Fields (continued)

Field Name	Description
Tax Exempt Information	If a customer has a tax exemption, that information is displayed in this section. A customer may have one or more exemptions, and they may be updated as required. To add tax exempt information see the <i>Oracle Retail Xstore Point-of-Service User Guide</i> .

Addresses Tab

Select the **Addresses** tab to add and manage multiple addresses for the customer. The Contact Information address will automatically be set as the primary. To change this see the *Oracle Retail Xstore Point-of-Service User Guide* Customer Maintenance chapter.

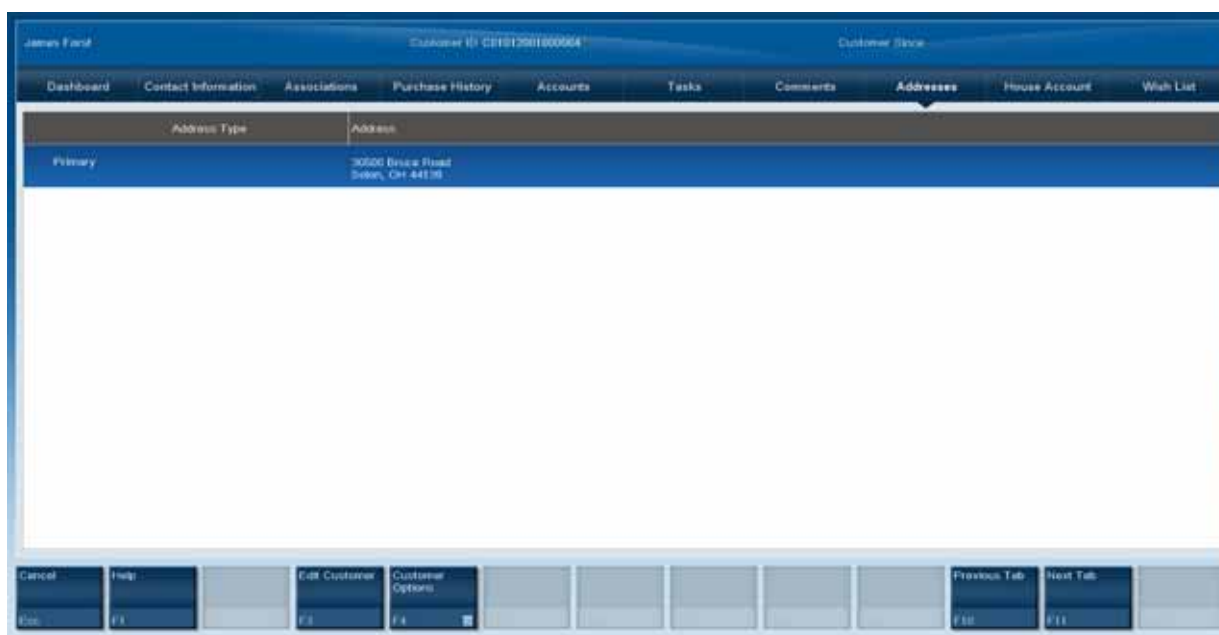


Figure 2-11: New Customer Address Tab

Adding a Comment to a Customer Record

To add a comment to your new customer:

1. Select the **Comments** tab to view or add comments for this customer.
2. Select the **Add Comment** menu button.

Note: If the *Add Comment* button is not available, you may be entering a new customer. Save Changes first and then add the comment.

- 3. Type a comment.

Figure 2-12: Add Comment Form

- 4. Select **Ok**. The comment displays on the **Comments** tab.

Figure 2-13: Comments Tab

Viewing a Customer Record

A customer record always opens in a read-only mode and cannot be edited unless you change to the editing mode. If you only need to see information or confirm that it is correct, just navigate between the tabs on the customer record.

- 1. At the Customer Search form, select a customer name and select the **Select & View** option (see [Accessing Customer Maintenance and Accounts](#)).

Note: The system may display the customer record automatically if only one record matches the search criteria you entered at the Customer Search form. The source for the customer record is also noted near the top of the results list.

The customer record opens in a read-only mode.

The screenshot displays the Oracle Retail Xstore Point-of-Service Manager's Customer Record in Read-Only Mode. The interface is divided into several sections:

- Header:** Displays the user name 'Joe Smith', 'Customer ID', and 'Customer Name'.
- Tabs:** A row of tabs at the top includes Dashboard, Contact Information, Associations, Purchase History, Accounts, Tasks, Comments, Addresses, House Account, and Wish List. The 'Dashboard' tab is currently selected.
- Dashboard Content:**
 - Photo Area:** A placeholder for a customer photo, currently showing a building icon. A 'SOLD' badge is visible in the top right corner of this section.
 - Customer Details:** Fields for 'Loyalty # Not Enrolled', 'Birth Date', 'Last Purchase 11/29/2016', 'Address', 'Email', and 'Phone #'. The 'Loyalty # Not Enrolled' field is highlighted in blue.
 - Transactions Table:** A table titled 'Last 365 Days' showing sales and returns. The table has columns for 'Sales', 'Returns', and 'Net'. The data shows a single transaction with a sales amount of \$15.00 and a net amount of \$15.00.
 - Calendar:** A calendar view at the bottom right showing the last 365 days, with a legend for 'Sales' (blue) and 'Returns' (red).
- Footer:** A row of buttons at the bottom includes 'Cancel', 'Help', 'Edit Customer', 'Customer Options', 'Previous Tab', and 'Next Tab'. The 'Edit Customer' button is highlighted in blue.

Figure 2-14: Customer Record in Read-Only Mode

Note: The photo area is always present. When a customer's image is not present, an avatar takes its place.

2. Choose one of these options:
 - **Back** – Returns to the Customer Search form.
 - **Edit Customer** - Allows you to change information in the customer record.
 - **Customer Options** – Displays a list of customer options. Options include:
 - * Add a new customer record to the customer database
 - * Print the customer record
 - * Enroll the customer in the loyalty program
 - * Maintain the customer's tax exemption information
 - * Create a House Account for the customer

Note: Refer to the *Oracle Retail Xstore Point-of-Service User Guide*, Customer Maintenance chapter - Additional Customer Options for customer options instructions.

3. Navigate between the tabbed sections on the customer record by selecting the **Previous Tab** and **Next Tab** menu options. This section provides an overview of the information available on each tab.
 - * **Dashboard Tab:** This tab shows the customer's loyalty information, and purchase information over the last 365 days.
 - * **Contact Information Tab:** This tab shows the customer name, address, phone and email information, contact preferences, and profile completeness

progress bar. Your store may be configured to display anniversary, birthday, and loyalty expiration messages.

- * **Associations:** Displays information about the customer group, customer attributes, segment, tax exempt record.
- * **Purchase History Tab:** Displays sales history information about the customer.
- * **Customer Account Tab:** Displays information about the customer's accounts, including loyalty, and other transaction-related accounts
- * **Tasks Tab:** Displays customer related tasks and appointments (see also [Reviewing Task Management Information](#)). You can add and edit tasks from this tab but updates to the status must be made from the My Tasks screen. See the *Xstore User Guide* for instructions on how to update status.
- * **Comments Tab:** Displays comments that have been entered about the customer.
- * **Addresses Tab:** Displays the customer's primary address and any other addresses on file.
- * **House Account Tab:** Displays information about the House Account associated with this customer. This tab is only active if the customer has a house account.
- * **Wish List Tab:** If your system is set up to use Oracle Retail Customer Engagement Cloud Services, this tab displays the customer's wish list items. Otherwise, this tab is not active.

Note: Refer to the *Oracle Retail Xstore Point-of-Service User Guide*, Customer Maintenance chapter for information about each tab section and how to modify a customer. The instructions are the same.

Customer List Report

The Customer List Report is available from the Back Office Menu. It is accessed from the Customer Maintenance and Accounts menu as well as from the Reports Menu. The report can be viewed on the screen or printed.

The Customer List Report shows customers who fall within specified data ranges (for example, spends over \$500.00 per year) or who follow a particular pattern of shopping (for example, most purchases are from the children's department).

The selection criteria allow you to include customers in the report based upon customer location, type of merchandise purchased, amount of merchandise purchased or returned, and certain demographic information.

The Customer List Report can be produced at either a summary level or a detail level.

Note: Refer to the *Oracle Retail Xstore Point-of-Service Reports Guide* for more detailed information about this report.



Gift Registry

Overview

The Gift Registry feature is a tool to assist the customer in purchasing gifts for someone registered. Items in a sale transaction can be associated to a registry; additionally, gift registries can be set up and maintained in the system from the Back Office. Gift Registry is available if you are using Oracle Retail Customer Engagement Cloud Services.

You can sell, return and cancel gift registry items in the Register mode of Xstore Point-of-Service. To sell an item off of a gift registry, you must first assign the gift registry to the sale or order. Gift registry sales can be added to special orders as well as Oracle Retail Order Broker Cloud Service orders.

If an item on the registry is returned with the original receipt, the gift registry is automatically updated.

Refer to the *Xstore Point-of-Service User Guide* for more information about the point of sale functions.

To conduct the following, you must log in to the Back Office:

- [Accessing the Gift Registry](#)
- [Modifying a Gift Registry](#)
- [Print Registry](#)

Accessing the Gift Registry

1. From the Back Office Main Menu, select **Customer Maintenance and Accounts** and then press [Enter].
2. Select **Gift Registry** and then press [Enter].



3. You have the following options at the Gift Registry Search prompt:

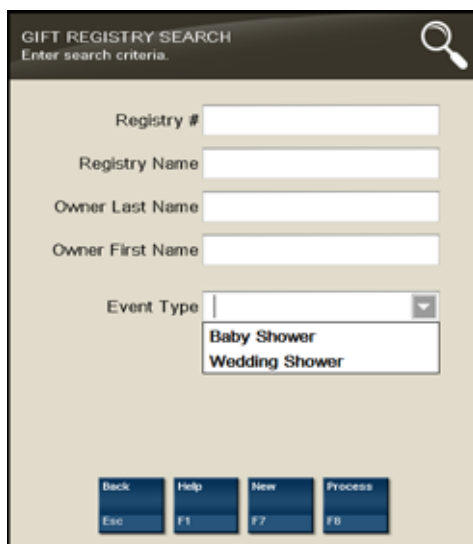


Figure 3-1: Gift Registry Search Prompt

- To create a new registry, select **New**. Skip to [Creating a New Registry](#).
 - To search for a gift registry, enter one or more search criteria and then select **Process**. You can search by: Registry #, Registry Name, Owner First Name, Owner Last Name, Event Type, or scan a registry id with the handheld scanner. Continue with step 4.
4. If Xstore retrieves more than one registry, select the registry you wish to view.



NAME & EVENT	EVENT DATE	REGISTRY #
Jones, Amanda Jones Smith	04/30/2013	82
Jones, Amanda Smith Wedding	07/31/2013	85
Jones, Aaron Jones Allison	05/12/2013	95

Figure 3-2: Multiple Search Results

Note: To create a new registry, select *New*. See [Creating a New Registry](#).

5. Choose **Select & View** to view the Gift Registry options.

ITEM	PRICE	PURCHASED	QTY	QTY DESIRED
TIE WAIST SHIRT DRESS 1005			1	10
BLK.WHITE CAP SLEEVE DRESS 1004	\$69.50	0	0	10
PEASANT TOP JERSEY DRESS 1005	\$79.99	0	0	10

Figure 3-3: Gift Registry Options

You have the following options at this screen:

- Select **Change Quantity Desired** to update the desired item quantity. See [Changing the Quantity](#).
- Select **Delete Item** to remove the item from the gift registry. See [Deleting an Item](#).
- Select **View Details** to review and edit the gift registry information. See [Viewing and Modifying Details](#).
- Select **View Owners** to view and edit registry owner information. See [Viewing and Modifying Owners](#).
- Select **View Attributes** to see additional attribute information such as wedding date, baby's gender, etc. See [Viewing and Modifying Attributes](#).
- Select **View Addresses** to view any addresses associated with the registry. Addresses include before event, after event, and vendor's address. See [Viewing and Modifying Addresses](#).

Creating a New Registry

1. To create a new registry, select **New** from the Gift Registry Search prompt or the search results list. The Customer Search form displays.
2. Enter the search criteria for the person for which you wish to create a gift registry. Select **Process**.

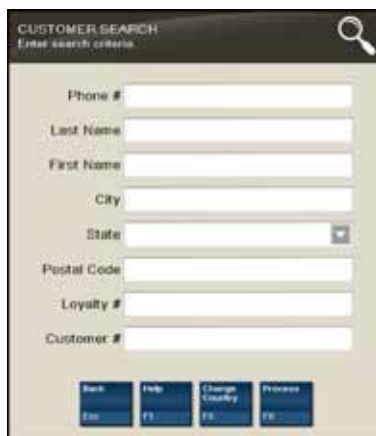
The screenshot shows the 'CUSTOMER SEARCH' form with the subtitle 'Enter search criteria'. It features a search icon in the top right corner. The form contains several input fields: 'Phone #', 'Last Name', 'First Name', 'City', 'State' (a dropdown menu), 'Postal Code', 'Loyalty #', and 'Customer #'. At the bottom, there are four buttons: 'Back', 'Help', 'Change Query', and 'Process'. Below these buttons are four keyboard shortcuts: 'Esc', 'F1', 'F2', and 'F3'.

Figure 3-4: Customer Search Form

3. Select the customer from the retrieved list. If the customer is not listed, create a new customer record by selecting **New**. See the *Xstore POS User Guide* for instructions on Adding a New Customer. Once you've added a new customer, the Registry Details screen displays.
4. Complete the required fields and select **Process**:

The screenshot shows the 'REGISTRY DETAILS' form with the subtitle 'Enter the gift registry information.'. It displays 'Customer # C1973001000006' and 'Customer Name Lisa Regier'. The form includes input fields for 'Registry Name', 'Event Type' (a dropdown menu), 'Event Date', 'Expiration Date', and a large text area for 'Comments'. At the bottom, there are three buttons: 'Back', 'Help', and 'Process'. Below these buttons are three keyboard shortcuts: 'Esc', 'F1', and 'F2'.

Figure 3-5: Registry Details

Table 3-1: Gift Registry Fields

Field	Description
Registry Name	Describe the event.
Event Type	Select an event from the drop-down list.
Event Date	Event date <i>must</i> be equal to or earlier than the expiration date.
Expiration Date	Expiration date <i>must</i> be later than the current business date.
Comments	Optional field.

- The gift registry screen displays. The Registry information can be viewed and modified using the **View Details** menu option.

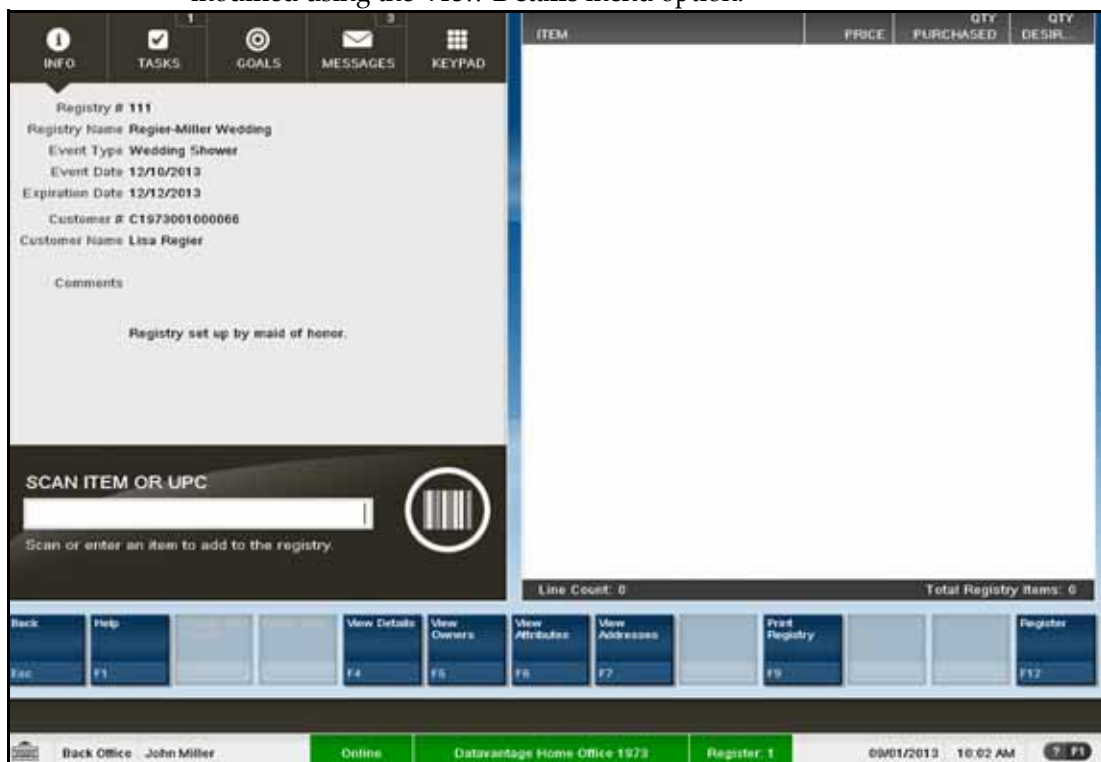


Figure 3-6: New Registry Setup

- To add or modify registry information see [Modifying a Gift Registry](#).

Modifying a Gift Registry

- With a gift registry displayed ([Figure 3-3](#) and [Figure 3-6](#)), add or modify the registry information as needed.

Table 3-2: Add or Modify Gift Registry

To	Refer To
Add an item	Adding Items

Table 3-2: Add or Modify Gift Registry

To	Refer To
Change the quantity	Changing the Quantity
Delete an item	Deleting an Item
View/Modify Details	Viewing and Modifying Details
View/Modify Owners	Viewing and Modifying Owners
View/Modify Attributes	Viewing and Modifying Attributes
View/Modify Addresses	Viewing and Modifying Addresses

Adding Items

1. From the Gift Registry screen, scan or enter the UPC to add items to the gift registry.
2. If prompted, enter the quantity in the **Enter Quantity** field and press **[Enter]**.

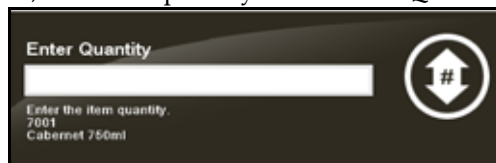


Figure 3-7: Enter Quantity

3. As you add items to the gift registry, the line count and number of items on the registry are updated accordingly.

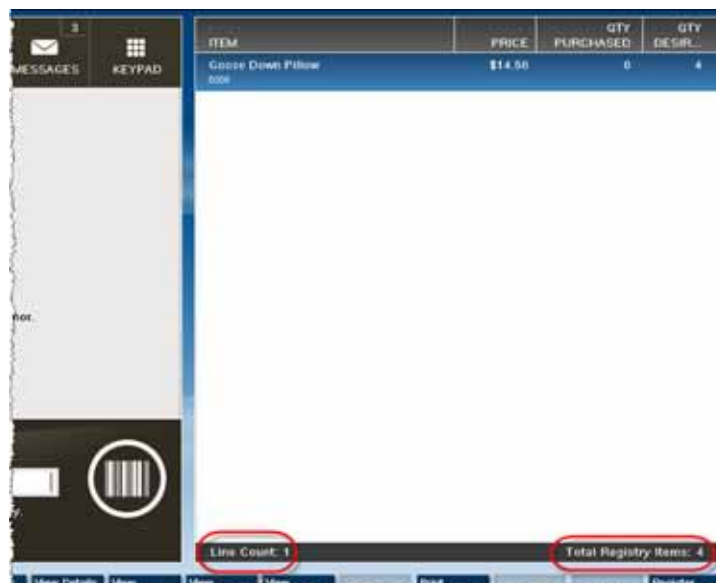


Figure 3-8: View Port - Line Count and Item Quantity

Changing the Quantity

1. From the Gift Registry screen, select the **Change Qty Desired** button menu option.
2. Select the item you wish to modify and press [Enter].
3. Enter the **Quantity** and press [Enter]. The change displays in the View Port.

Figure 3-9: Enter New Quantity

Deleting an Item

1. From the Gift Registry screen, select the **Delete Item** menu button.
2. Select the item you wish to delete and press [Enter]. The item no longer appears in the view port.

Viewing and Modifying Details

The View Details option displays the information that was initially entered when setting up the registry.

1. From the Gift Registry screen, select the **View Details** menu option.
2. Modify the information as needed and select **Process**.

Figure 3-10: View and Modify Registry Details

Viewing and Modifying Owners

1. From the Back Office Gift Registry screen, select the **View Owners** menu option.
2. The Registry Owners list displays. The check mark next to the Customer # indicates the primary owner.



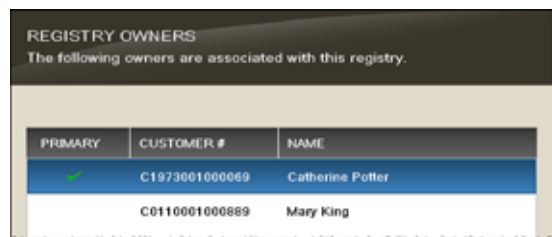
Figure 3-11: Registry Owners List

To modify the primary owner

If the registry has more than one owner, perform the following steps to change the primary owner.

1. From the Registry Owners list, select the owner you wish to change to the primary.
2. Select the **Make Primary** button.
3. When prompted, press [Y] to confirm the change.

The new primary owner is moved to the top of the list and has a green check mark by the name.



To create a new owner

Perform the following steps to create a new owner.

1. From the Registry Owners list, select **New** (see [Figure 3-11](#)).
2. The customer search screen displays. Enter your search criteria for the person you wish to add as an owner. Select **Process**.

Note: If the customer is not listed, create a new customer record by selecting New. See step 3 for more information.

3. If more than one customer matches your search criteria, select the customer from the retrieved list.

4. Verify the address, modify if needed, and select **Save Changes**.

The screenshot shows a web form titled "GIFT REGISTRY OWNER INFORMATION" with the instruction "Enter the gift registry owner information." The form is for "Owner: Margaret King". It contains the following fields:

- Nickname:** Margaret King
- Address:** 4464 Burning Memory Lane
- Zip:** 19020
- State:** PA - Pennsylvania
- City:** Bensalem
- Apt:** (empty)
- Email:** DaveABlackburn@gmail.com
- Phone:** 509-478-9464

 At the bottom, there are four buttons: "Back", "Help", "Change Country", and "Save Changes". Below these buttons are four small icons labeled "Esc", "F1", "F5", and "F8".

Figure 3-12: Gift Registry Owner Information

Important: The address information will be saved in the Customer Maintenance Screen Addresses Tab with the address type of Gift Registry. Any modifications you make to the address will not change the primary customer address information.

5. Repeat steps until all owners are listed.
6. To modify the primary owner, see [To modify the primary owner](#).

To edit registry owner information

1. From the Registry Owners list, select the owner you wish to edit. (See [Figure 3-11](#)).
2. Select **Edit**.
3. At the Gift Registry Owner Information window, make your edits as needed.

This screenshot is identical to Figure 3-12, showing the "GIFT REGISTRY OWNER INFORMATION" form for Margaret King with the same address and contact details.

Figure 3-13: Gift Registry Owner Information

Modifying a Gift Registry

4. Select **Save Changes**.

To delete an owner

1. From the Registry Owners list, select the owner you wish to remove.

Important: You cannot delete a primary owner. Press [Esc] to close the prompt: the primary registry owner cannot be deleted.

Designate a different primary owner prior to deletion. See [To modify the primary owner](#).

2. Select **Delete**.
3. When prompted, press [Y] to confirm the deletion.
4. The Registry owner screen displays without the deleted owner. Select **Back** to return to the gift registry. To modify the primary owner, see [To modify the primary owner](#).

Viewing and Modifying Attributes

The message window of the Gift Registry screen displays only three attributes. To see additional attributes, or to modify an attribute, select **View Attributes**.

The screenshot displays the Gift Registry screen. The left panel shows registry details for Registry # 44, including the name 'ACTUAL WEDDING', event type 'Wedding Shower', event date '08/31/2013', expiration date '11/30/2013', customer ID 'C1736001089184', customer name 'Jennifer Hudson', number of guests expected '25', wedding date '12-15-2013', and theme 'Winter Garden'. A red circle highlights the 'Number of Guests expected 25' and 'Wedding Date 12-15-2013' fields. Below this is a 'SCAN ITEM OR UPC' section with a barcode icon and a prompt to 'Scan or enter an item to add to the registry.' The right panel shows a table with columns: ITEM, PRICE, PURCHASED, QTY, and QTY DESIR. The table is currently empty. At the bottom of the right panel, it shows 'Line Count: 0' and 'Total Registry Items: 0'. The bottom navigation bar includes buttons for Back, Help, View Details, View Owners, View Attributes, View Addresses, Print Registry, and Register. The status bar at the very bottom shows 'Back Office', 'Online', 'Datavantage Home Office 1873', 'Register: 1', and the date/time '08/01/2013 11:42 AM'.

Figure 3-14: Gift Registry Screen - Attributes Area Display

To create a new attribute

1. From the Gift Registry screen, select the **View Attributes** menu button.
2. From the Registry Attributes list, select **New**.



Figure 3-15: Registry Attributes List

3. Select the attribute you wish to add and then select **Ok**.



Figure 3-16: Select Attribute List

4. When prompted, enter the Attribute value and press **[Enter]**. The new attribute will be associated with this gift registry.
5. Select **Back** to return to the Gift Registry screen.

To edit an attribute

1. From the Gift Registry screen, select the **View Attributes** menu button.
2. From the Registry Attributes list ([Figure 3-15](#)), select the attribute you wish to edit.
3. Select **Edit**.

Modifying a Gift Registry

4. Depending on the type of attribute, you may need to add a value to the attribute value focus bar or select from a list of values then press **[Enter]**. The attribute value is updated accordingly.

To delete an attribute

1. From the Gift Registry screen, select the **View Attributes** menu button.
2. From the Registry Attributes list ([Figure 3-15](#)), select the attribute you wish to delete.
3. Select **Delete**. The attribute is removed.

Viewing and Modifying Addresses

1. From the Gift Registry screen, select the **View Addresses** menu option.
2. View address information:
 - If addresses are associated with the gift registry they are displayed.



Figure 3-17: Gift Registry Address List

- If no addresses are associated with the gift registry, this message displays. Press **[Enter]** to close the message prompt or select **New** to add an address for this registry.



Figure 3-18: No Addresses Prompt

To create a new address

1. From the Gift Registry screen, select the **View Addresses** menu option.
2. From the Gift Registry address list ([Figure 3-17](#)) or the No Address on file prompt ([Figure 3-18](#)), select **New**.
3. When prompted, enter the required fields:

Figure 3-19: Address Information Form

4. Select **Save Changes**.

To edit an existing address

1. From the Gift Registry screen, select the **View Addresses** menu option.
2. From the Gift Registry address list ([Figure 3-17](#)), select the address you wish to edit.

Modifying a Gift Registry

3. Select **Edit**.
4. Modify the information and then select **Save Changes**.

To delete an existing address

1. From the Gift Registry screen, select the **View Addresses** menu option.
2. From the Gift Registry address list ([Figure 3-17](#)), select the address you wish to delete.
3. Select **Delete**.
4. When prompted, press [Y] to confirm that you want to delete the address.

Print Registry

1. From the Back Office Gift Registry screen, select **Print Registry**.

The screenshot displays the Gift Registry interface. On the left, a sidebar contains navigation icons for INFO, TASKS, GOALS, MESSAGES, and KEYPAD. Below these, registry details for Registry # 96 are shown, including Registry Name (Jones Allison), Event Type (Wedding Shower), Event Date (05/12/2013), Expiration Date (05/11/2014), Customer # (C0772001000131), and Customer Name (Aaron Jones). A comments section at the bottom of the sidebar notes 'Registry updated August 16, 2013. Venue change.' Below the comments is a 'SCAN ITEM OR UPC' section with a text input field and a barcode icon.

The main area on the right features a table with the following data:

ITEM	PRICE	QTY PURCHASED	QTY DESIR...
TIE WAIST SHIRT DRESS 1003		1	10
BLK WHITE CAP SLEEVE DRESS 1004	\$69.50	0	10
PEASANT TOP JERSEY DRESS 1005	\$79.99	0	10

At the bottom of the main area, it shows 'Line Count: 3' and 'Total Registry Items: 30'.

The bottom of the screen has a menu bar with buttons: Back, Help, Change Qty Desired, Delete Item, View Details, View Owners, View Attributes, View Addresses, Print Registry, and Register. Below this is a status bar showing 'Back Office John Miller', 'Online', 'DataVantage Home Office 1073', 'Register: 1', '05/01/2013 9:29 AM', and a help icon with 'F1'.

Figure 3-20: Gift Registry Menu Button Options


2. With the report displayed, select **Print Report** to print the report.

Gift Registry - King Shower

Event Date: 08/30/2013

Line Count: 2

Total Registry Items: 7



Registry ID: 112

Item ID	Description	Price	Purchased	Desired
1005	PEASANT TOP JERSEY DRESS	\$79.99	0	3
6006	Goose Down Pillow	\$14.50	0	4

Figure 3-21: Gift Registry Report

Note: The bar code on the report allows quick access to assigning a registry to a sale.

Note: See the *Xstore Point-of-Service Reports Guide* more information about reports.

Employee Maintenance

Employee Maintenance Overview

Oracle Retail Xstore Point-of-Service maintains various kinds of information about store associates. Associates who have the proper security privileges may add, view, update, terminate, and void an employee record. The employee maintenance screen is organized into five categories, each one accessible by selecting an on-screen tab. The tabs are named General, Human Resources (HR), Security, Fingerprint, and Comment. The Employee Maintenance Menu also provides additional functions including an Employee Productivity Report, the ability to borrow an employee from another store in the organization, and an employee payroll advance function.

Note: Because each Oracle Retail Xstore Point-of-Service menu is configurable, the button functions and the menu options on your system may appear in a different order or have different text than the examples shown in this manual.

Accessing Back Office Employee Maintenance Functions

1. After logging in to the Back Office (see [Accessing the Back Office](#)), select the **Employee Maintenance and Payroll** option and press [Enter].



Figure 4-1: Back Office Main Menu - Employee Maintenance and Payroll Option

Tip: Access a menu option with a single keystroke. Just press the keyboard number or letter associated with any menu option to use that function.

2. At the Employee Maintenance and Payroll menu, select one of the options and press [Enter].

The following options are available:

- **Employee Maintenance** - Select this option to maintain employee records. Refer to [“Maintaining Employee Information”](#).
- **Time and Attendance** - Select this option to maintain employee timecard and payroll information. Refer to [“Payroll and Timecard Maintenance”](#).
- **Employee Scheduling Maintenance** - Select this option to create and edit employees’ work schedules and manage employees’ time off. Refer to [“Employee Scheduling”](#).
- **Task Maintenance** - Select this option to create and maintain employee tasks. Refer to [“Message Maintenance and Task Management”](#).
- **Message Maintenance** - Select this option to create and maintain employee messages. Refer to [“Message Maintenance and Task Management”](#).

Maintaining Employee Information

1. When the Employee Maintenance menu displays, select the **Employee Maintenance** option and press [Enter].

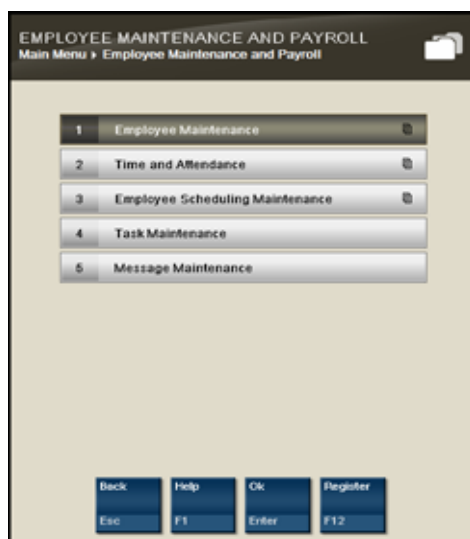


Figure 4-2: Employee Maintenance Menu

Tip: You can also press the number associated with the menu option on the keyboard to access the maintenance function.

Note: The following options are also available here:

- **Employee Borrow** - Select this option to borrow an associate from another store to work in your store for a specific and limited period of time. Refer to [Borrow Employee](#).

- **Employee Productivity Report** - Select this option to run the Employee Productivity Report. Refer to [Employee Productivity Report](#) and the *Oracle Retail Xstore Point-of-Service Reports Guide* for more information.
- **Associate Advance** - Select this option to provide payment in advance of an employee's scheduled payday. Refer to [Associate Advance](#).

Oracle Retail Xstore Point-of-Service displays the Employee Lookup form, prompting for employee information.



Figure 4-3: Employee Lookup Form

2. Enter the criteria you want to use for finding an employee record and select **Process**.

Tip: If you enter an Employee ID, Oracle Retail Xstore Point-of-Service may immediately display that employee's record if the ID exists and if it is unique.

If you enter search criteria that results in more than one record being found or your system is set up to always display a list, you must select the record you want from the list.



Figure 4-4: Employee Lookup Results List

Editing an Employee Record

Choose one of these options:

- **Back** – Returns to the Employee Lookup form.
- **Select & View** – Opens the selected employee record for viewing, editing, or printing.
- **New** – Displays a form for adding a new employee record to the employee database.

Viewing an Employee Record

An employee record always opens in a view-only mode and cannot be edited unless you change to the editing mode. After an employee record displays, you can navigate between the tab sections using the **Previous Tab** and **Next Tab** options to select any of them. Refer to [Employee Maintenance Tabs Overview](#) for screen images and more detail about the information found on each tab.

Note: When a screen or field is grayed out, it cannot be edited until you change to the editing mode. The edit functions are controlled by security and may not be available to all users.

The screenshot shows the 'Employee Record (Read-Only Mode)' interface. At the top, the user 'Vanessa Clark' is logged in, with Employee ID: 0643001000004, Store: 643, and Source: StorePrimary. The interface has five tabs: GENERAL, HR, SECURITY, FINGERPRINT, and COMMENT. The GENERAL tab is selected and displays three main sections: 'Name & Address', 'Personal Information', and 'Emergency Contact Information'. The 'Name & Address' section includes fields for First Name (Vanessa), Middle (Clark), Last (Clark), Suffix (dropdown), Address (12345 Chatham Circle), Postal Code (44007), City (Twinsburg), State (OH), Country (US - UNITED STATES), Email, and Phone (216-333-3333 x.3333). The 'Personal Information' section includes SSN (222-22-2222), Language (English (United States)), Marital Status (Married), Birth Date (01/02/1950), Gender (Female), and Spouse Name. The 'Emergency Contact Information' section includes First Name (Bob) and Phone (222-222-2222 x.222). At the bottom, there is a navigation bar with buttons for Back, Help, Edit Employee, Change Password, New Employee, Password Challenge Questions, Previous Tab, Next Tab, and Register. The status bar at the very bottom shows 'Back Office John Smith', 'Online', 'DataVantage Home Office 643', 'Register: 1', '09/23/2013 1:12 PM', and a help icon with F1.

Figure 4-5: Employee Record (Read-Only Mode) Showing Five Tab Sections

Editing an Employee Record

After viewing an employee record you may decide that some of the information must be changed, or you may want to enter additional information in some fields. You must enter the editing mode to make any changes to the record.

1. With the employee record displayed, select the **Edit Employee** option to go into an editing mode. The fields are no longer grayed out.
2. Use the **Next Tab** and **Previous Tab** menu options to navigate to the tab you want.

3. To make changes to any of the fields, select the field you want to change, and replace the old entry by typing over it with the new information.
 - Any fields that require entries are marked with a red triangle in the upper left corner of the field.
 - Any fields that have lists attached display a down arrow on the right side of the field.

Vanessa Clark [Employee ID: 0101002000003 | Store: 101 | Source: StorePrimary]

GENERAL | **HR** | **SECURITY** | **FINGERPRINT** | **COMMENT**

Name & Address

First Name: Last Name: Suffix:

Address:

Postal Code: City:

State: Country:

Email:

Phone:

Personal Information

SSN:

Language:

Marital Status:

Birth Date:

Gender:

Spouse Name:

Emergency Contact Information

First Name:

Phone:

Navigation: Undo Changes | Help | Save Changes | Previous Tab | Next Tab | Register

Figure 4-6: Employee Record in Edit Mode

4. Save any changes you made before exiting from the Employee Maintenance screen. Select the **Save Changes** option to keep your changes. If you decide not to keep the changes you made, select the **Undo Changes** option.

Note: If you select *Undo Changes* you are prompted to confirm that you want to exit edit mode without saving any changes that you made. When the prompt “Are you sure you want to lose changes?” displays, and you select *Yes*, your changes are discarded.

Changing an Employee’s Password

This option allows you to change a password for an employee. Passwords for new employees are created when a new employee’s record is added to the database. You must have security privileges in the system to change a password.

Note: You must have the employee’s record open to change the password and not be in edit employee mode.

1. Open the employee record for the user whose password you want to change.

Editing an Employee Record

2. Select the **Change Password** option.

Note: You may also change a password from both the Register Login screen and the Back Office Login screen see [Changing Your Password](#).

The screenshot displays the 'Employee Record' for Sally Wolf. The record is organized into tabs: GENERAL, HR, SECURITY, FINGERPRINT, and COMMENT. The GENERAL tab is active, showing fields for Name & Address, Personal Information, and Emergency Contact Information. The Name & Address section includes fields for First Name (Sally), Last Name (Wolf), Address (5556 Ravenna Rd), Postal Code (44087), City (Twinsburg), State (OH), Country (US - UNITED STATES), Email, and Phone (111-111-1111 x.111). The Personal Information section includes fields for SSN, Language (English (United States)), Marital Status (Single), Birth Date (02/02/1980), Gender (Female), and Spouse Name. The Emergency Contact Information section includes fields for First Name (Marge Wolf) and Phone (222-222-2222 x.2222). At the bottom of the screen, a row of buttons is visible: Back, Help, Edit Employee, Change Password (highlighted with a red circle), New Employee, Password Challenge Questions, Previous Tab, Next Tab, and Register. The Change Password button is labeled 'F4'.

Figure 4-7: Change Password Menu Option

3. Oracle Retail Xstore Point-of-Service may prompt to verify your identity. If prompted, enter your own employee ID and password to verify that you have security privileges to change an employee's password. If you enter this information incorrectly, the system displays the message "The password entered was incorrect." Select **Ok** to continue and reenter the information.

4. Oracle Retail Xstore Point-of-Service prompts you to enter a new password for the employee. Type the new password for the employee and retype the same new password on the line below to confirm it.




Figure 4-8: Prompt for New Employee Password and Confirmation

Tip: Passwords may be case sensitive, so notice whether the Caps Lock key is on or off when you enter and confirm the new password.

5. Select **Process** to verify the new password. If the system accepts the password, a confirmation message indicates that the password was changed.

Note: The system may enforce certain rules regarding passwords such as the minimum number of characters required or whether you can reuse an old password. If the new password does not meet the requirements, the system displays a message. If prompted, follow the instructions to correct any errors.

Establish Password Challenge Questions

This configurable function allows your associates to reset their own password after answering several questions. Your store may not have this option available.

To establish password challenge questions:

1. Open the employee record for the user whose challenge questions you want to maintain.

Editing an Employee Record

2. Select the **Password Challenge Questions** menu option.

The screenshot shows the 'Employee Record Maintenance' screen for Sally Wolf. The top navigation bar includes tabs for GENERAL, HR, SECURITY, FINGERPRINT, and COMMENT. The 'GENERAL' tab is active. The form is divided into two main sections: 'Name & Address' and 'Personal Information'. The 'Name & Address' section includes fields for First Name (Sally), Last Name (Wolf), Address (5656 Ravenna Rd), Postal Code (44087), City (Twinsburg), State (OH), Country (US - UNITED STATES), Email, and Phone (111-111-1111 x.1111). The 'Personal Information' section includes fields for SSN, Language (English (United States)), Marital Status (Single), Birth Date (02/02/1980), Gender (Female), and Spouse Name. Below these sections is the 'Emergency Contact Information' section, which includes fields for First Name (Marge Wolf) and Phone (222-222-2222 x.2222). At the bottom of the screen is a row of buttons: Back, Help, Edit Employee, Change Password, New Employee, Password Challenge Questions (highlighted with a red circle), Previous Tab, Next Tab, and Register.

Figure 4-9: Password Challenge Questions Menu Option

3. Select a **Challenge Question** from the drop-down menu and type the answer in the Challenge question answer field.
4. Select **Next Question**.

The screenshot shows the 'PASSWORD CHALLENGE QUESTIONS' screen. It has a title bar with a lock icon and the text 'You must answer 3 password challenge questions'. The main content area is titled 'Question 1 of 3'. It contains a section 'Choose a challenge question' with a drop-down menu showing 'In what city were you born?'. Below this is a text field for 'Challenge question answer' with the value 'SOLON'. At the bottom are three buttons: Back, Help, and Next Question.

Figure 4-10: Password Challenge Questions Maintenance

5. Repeat steps 3-4 until the confirmation prompt displays. Press [Enter].

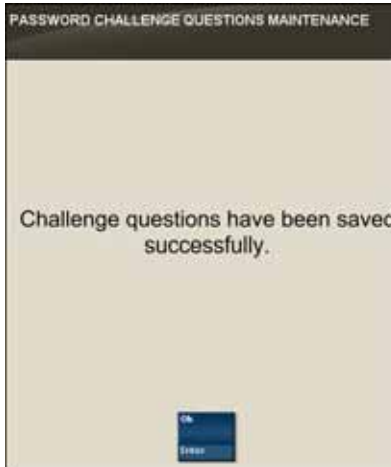


Figure 4-11: Challenge Questions Saved

Note: The number of challenge questions is configured by your store, up to ten.

Setting Up an Employee Fingerprint Record

If you use a biometric device for employee ID verification, use the Fingerprint tab to enroll the employee's fingerprints.

1. With the employee record displayed, select the **Fingerprint** tab. Use the **Previous Tab** and **Next Tab** menu options to navigate from one tab to another.

Note: The first screen that displays depends upon the current view mode:

- If you are in view-only mode, the Fingerprint Enrollment Status screen displays. See [Figure 4-12](#).

You must select **Edit Employee** to enter into edit mode.

- If you are already in edit mode, the Fingerprint Scans screen displays. See [Figure 4-14](#).
-

2. If you are in view-only mode, the Fingerprint Enrollment Status screen displays the employee's current fingerprint enrollment status in the Finger Selected panel of the screen.

Editing an Employee Record

In the following example, the employee has no fingerprint records on file (*currently Enrolled Count=0*).



Figure 4-12: Fingerprint Enrollment Status Screen - View Only Mode

Tip: On the hand image, a green finger represents the finger selected for enrollment. A blue finger indicates the finger has already been enrolled in the system.

3. Select the **Edit Employee** menu option to begin the enrollment process.
4. By default, the system prompts to enroll the right index finger. To choose a different finger to enroll, select the **Select Different Finger** menu option and select a finger from the Fingerprint Enrollment list.



Figure 4-13: Fingerprint Enrollment List

5. In edit mode, begin the fingerprint scan by following the on-screen prompts.

Employee Name: Emp ID: 0438001000074 Store: 438 Source:

General HR Security **Fingerprint** Comment

Fingerprint Scans

Place Right Index Finger on scanner or select "Save Changes" to continue

Finger Selected

Next Finger Suggested

Finger(s) Successfully Enrolled

Place your finger on the biometric device 4 times.
(Center your finger on the device and be sure to place your finger the same way each time.)

Scan #1: Place finger on scanner
Scan #2: Not completed
Scan #3: Not completed
Scan #4: Not completed

Maximum Enrolled Count: 4 Currently Enrolled Count: 0

Undo Changes Help Select Different Finger Clear Fingerprints Save Changes Previous Tab Next Tab Register

Esc F1 F5 F6 F8 F10 F11 F12

Figure 4-14: Fingerprint Scans Screen - Edit Mode

Note: Selecting the Save Changes menu option at the Fingerprint Scans screen ([Figure 4-14](#)) returns to the Fingerprint Enrollment Status screen ([Figure 4-12](#)).

For example, if you change your mind and want to select a different finger for enrollment, select **Save Changes** to return to the Fingerprint Enrollment Status screen where you can select a different finger. See step 3.

- Instruct the employee to place a finger on the biometric device. This process must be repeated 4 times to enroll the finger. An image of the fingerprint is shown in the *Fingerprints Scans* panel during the enrollment process.

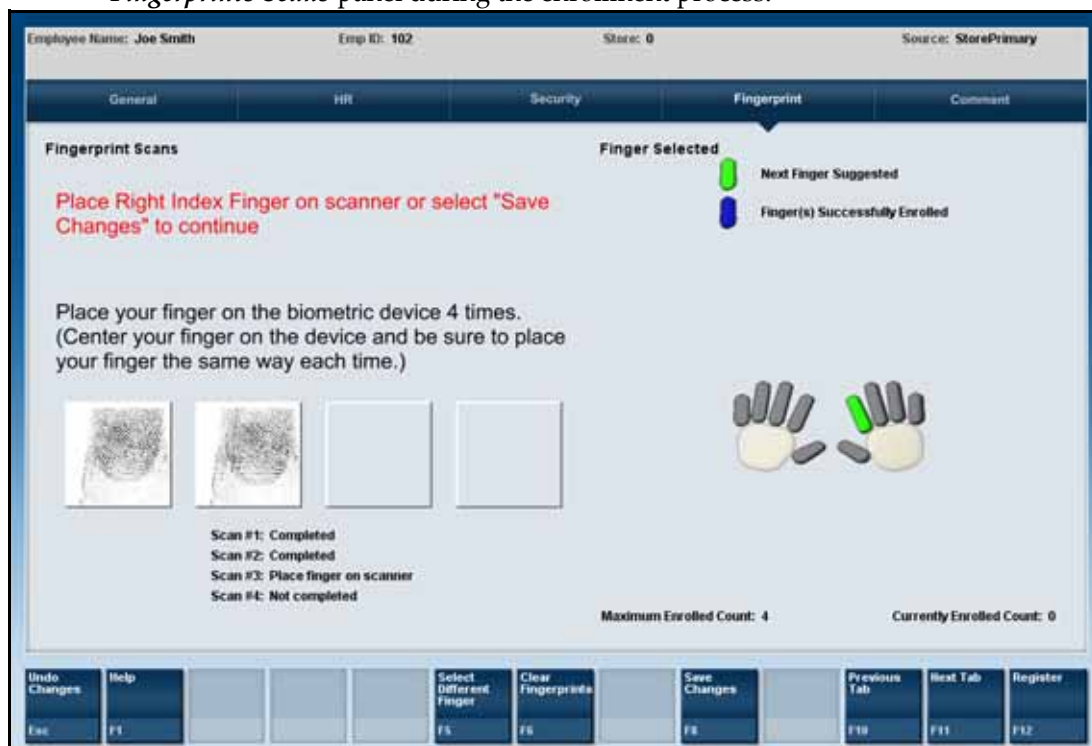


Figure 4-15: Fingerprint Scan In Process - 2 Scans Complete

About this screen:

- Fingerprint Scans** panel - Shows an image of the fingerprint for each scan and the process steps and status.
- Finger Selected** panel - Shows the right index finger is being enrolled (**GREEN**).

- When the scan is complete, the system returns to the Fingerprint Scans screen where the employee can enroll another finger or you can select **Save Changes** to complete the employee fingerprint enrollment process.

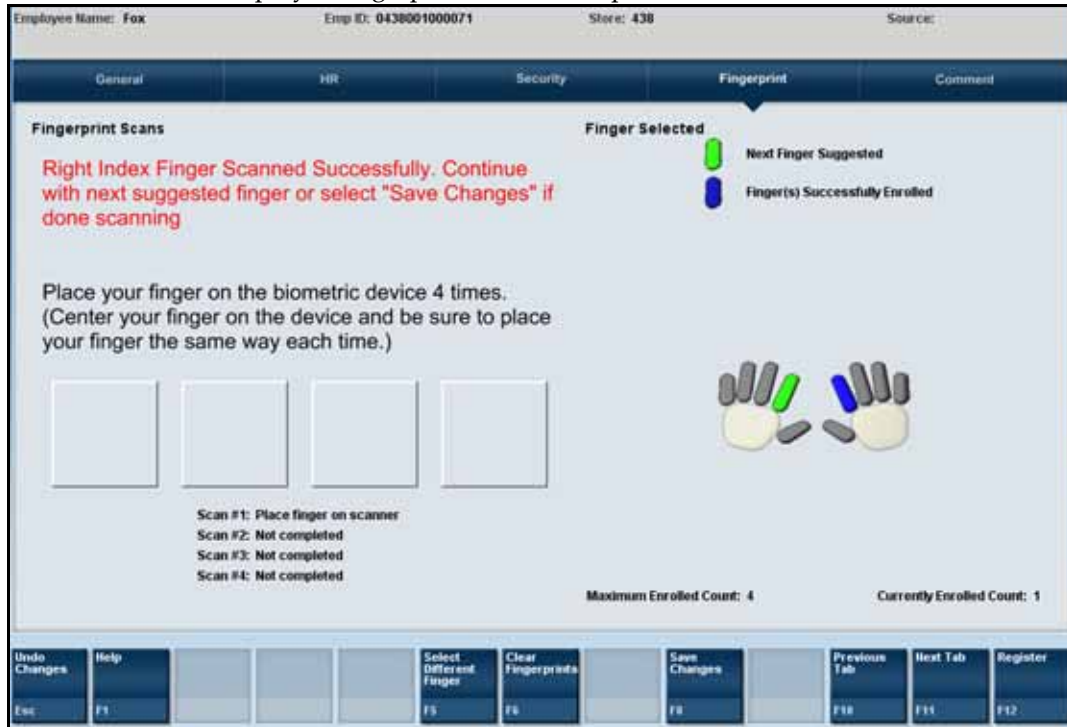


Figure 4-16: Fingerprint Scan Complete

About this screen:

- Fingerprint Scans** panel - Shows the enrollment process steps for the next finger.
- Finger Selected** panel - Shows the right index finger has been enrolled (**BLUE**) and suggests the next finger for enrollment (**GREEN**).

Note: To remove an employee's fingerprint record from the system, select the *Clear Fingerprints* option from the menu. When prompted for confirmation, select **Yes**. This removes the entire fingerprint record (all fingers).

To choose a different finger to enroll, select the *Select Different Finger* menu option and select a finger from the Fingerprint Enrollment list.

Adding a Comment

Oracle Retail Xstore Point-of-Service allows you to add a text comment to an employee's record. The comment can be viewed on the Comment tab window and printed.

Important: If you are creating a new employee record, select **Save Changes** first and then open the **Comment Tab** to create a comment.

- Select the **Comment** tab.
- Select the **Add Comment** option. Oracle Retail Xstore Point-of-Service displays a text form where you can enter a comment.

3. Select **Ok** to save the comment with the employee's record.

Adding a New Employee

Although some employee records may be downloaded from the home office automatically, you may need to create a new employee record at the store level.

1. You must first log in to the Employee Maintenance Menu. Refer to [Accessing Back Office Employee Maintenance Functions](#).
2. Check to see if the employee record already exists by entering the new associate's name in the Employee Lookup form.

Tip: You may search by partial names if needed.



Figure 4-17: Employee Lookup Form

3. Select **Process** to continue.

- If your search for an employee name did not return a valid employee record, the system displays the message shown below. Select the **New** option to create a new employee record.

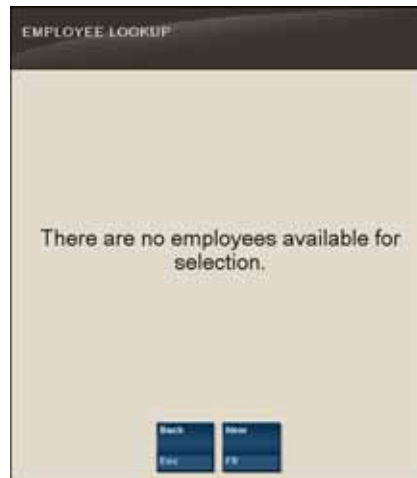


Figure 4-18: No Employee Record Found Message

Note: After you finish adding the new employee and you have saved the new record, you can add an additional new employee record by selecting the *New Employee* option from the Employee Maintenance screen.

- The system prompts you to create a password for the new associate by entering and confirming it in the New Password form.

The screenshot shows a web application interface titled "NEW PASSWORD" with a subtitle "Enter and confirm a new password." and a lock icon in the top right corner. The main content area is a light beige color and contains two text input fields. The first field is labeled "Enter the new password." and the second field is labeled "Confirm the new password." Both fields have a password mask (dots). At the bottom of the screen, there are three blue buttons: "Back" on the left, "Help" in the middle, and "Process" on the right.

Figure 4-19: New Password Form

Note: The system may enforce certain rules regarding passwords such as the minimum number of characters required, or whether you can reuse a previous password.

Editing an Employee Record

6. Select **Process** to continue. Oracle Retail Xstore Point-of-Service displays a blank form with the five tab sections.

Note: Any information you entered in the fields on the Employee Lookup form automatically populates the associated fields on the Employee Maintenance General tab.

7. Enter the new employee's information on the appropriate tabs. For more details about the type of information on each tab, refer to [Employee Maintenance Tabs Overview](#).

Vanessa Clark Employee ID: 0101002000003 Store: 101 Source:

GENERAL HR SECURITY FINGERPRINT COMMENT

Name & Address

First Name: Vanessa Middle: Clark Last: Clark Suffix:
Prefix First Middle Last Suffix

Address: 12345 Chatham Circle

Postal Code: 44087 City: Twinsburg

State: OH Country: US - UNITED STATES

Email:

Phone: 216-333-3333 x.333 Home Other

Personal Information

SSN: 222-22-2222

Language: English (United States)

Marital Status: Married

Birth Date: 01/02/1960

Gender: Female

Spouse Name: Bob

Emergency Contact Information

First Name: Bob

Phone: 222-222-2222 x.222

Undo Changes Help Save Changes Previous Tab Next Tab Register

Figure 4-20: Employee Maintenance General Tab

8. After completing all of the data entry, select **Save Changes** to store the new employee record in the database.

Voiding (Terminating) an Employee Record

The employee **Status** field specifies whether an employee is considered to be actively employed or terminated. The **Status** field is found on the Human Resources (HR) tab of the employee record.

1. Open the record of the employee that you want to terminate.
2. Navigate to the **Human Resources (HR)** tab; the system displays the HR information.

3. Select Edit Employee.

Nancy Clark | Employee ID: 6643661000004 | Store: 643 | Source:

GENERAL	HR	SECURITY	FINGERPRINT	COMMENT
Employee Profile Hire Date: 01/01/2012 Status: Active Active Date: Term. Date: Group: Front Room Department: Position: Type: Job Title: Cashier Overtime Eligible?: Yes Clock In Required?: Yes Last Review: 01/02/2013 Next Review: 01/02/2014				
Time Off Sick Days: 5 Vacation Days: 5 Personal Days: 5 Sick Used: 1 Vacation Used: Personal Used:				
Discount Groups Employee Family				
Pay Status: Hourly Base Pay: 9.00 Extra Withheld:				

Buttons: Back, Help, **Edit Employee** (circled), Change Password, New Employee, Password Challenge Questions, Previous Tab, Next Tab, Register.

Figure 4-21: HR Tab

4. Select the drop-down arrow on the **Status** field to list the available options.
5. Select the **Terminated** option from the list.
6. The **Termination Date** field is now a required entry as indicated by the red triangle in the field. Enter the employee's termination date.

Joe Smith | Employee ID: 102 | Store: 0 | Source: StorePrimary

GENERAL	HR	SECURITY	FINGERPRINT	COMMENT
Employee Profile Hire Date: 01/01/2012 Status: Terminated Active Date: 01/05/2012 Term. Date: ▲ Group: Back Room Department: Position: Default Type: Default Job Title: CASHIER Overtime Eligible?: Yes Clock In Required?: Yes Last Review: 01/01/2013 Next Review: 01/01/2014				
Time Off Sick Days: 5 Vacation Days: 5 Personal Days: 2 Sick Used: 3 Vacation Used: 1 Personal Used:				
Discount Groups Normal Level Elite Program Member Employee Employee Family				
Pay Status: Hourly Base Pay: 9.00 Extra Withheld:				

Buttons: Undo Changes, Help, Save Changes, Previous Tab, Next Tab, Register.

Figure 4-22: HR Tab - Changing Employee Status

Employee Maintenance Tabs Overview

7. Select the **Save Changes** option to complete the termination process. The employee's record is now marked as voided (terminated). The employee's security privileges are also terminated.

Tip: The employee record is still in the system and can be viewed by selecting *Yes* in the *Terminated* field on the Employee Lookup form.



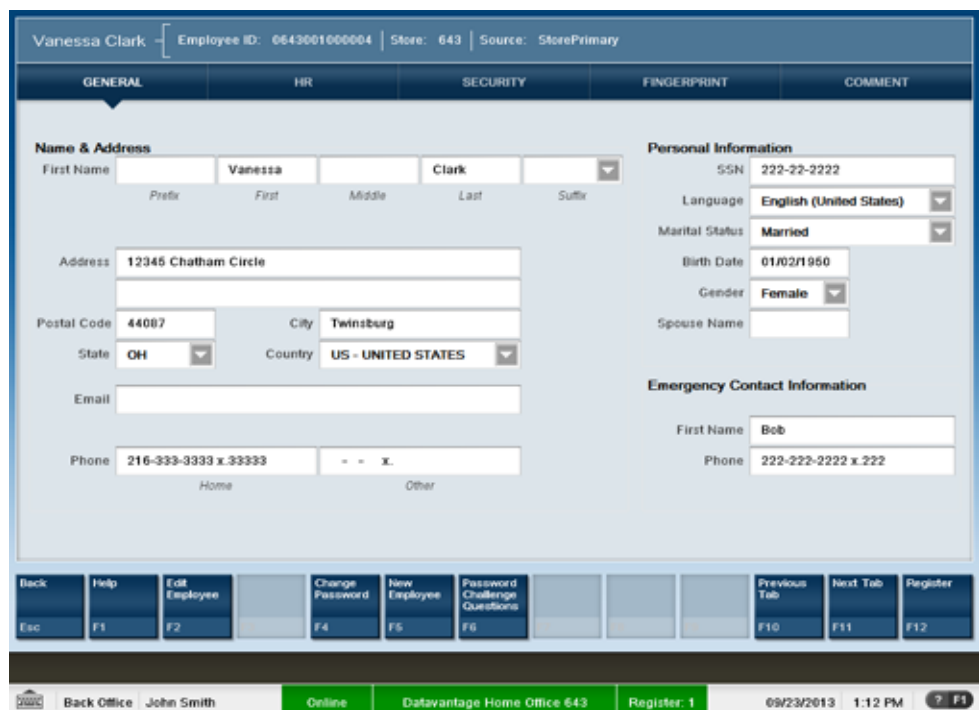
The image shows a screenshot of the 'EMPLOYEE LOOKUP' form. It has a search bar at the top. Below it are input fields for 'Employee ID:', 'Last Name:', and 'First Name:'. At the bottom, there is a 'Terminated?' dropdown menu. The 'Yes' option is highlighted in blue, indicating it is the selected value.

Employee Maintenance Tabs Overview

There are five tabs on the Employee Maintenance window. This section shows the five tabbed sections, gives a brief description, and shows the menu options available for each tab.

Note: Because the fields on the Employee Maintenance screens are configurable, your screens may differ from the screens shown here.

- **GENERAL TAB-** Displays employee name, address, contact and personal information.



The image shows a screenshot of the 'Employee Maintenance' window, specifically the 'GENERAL' tab. At the top, it displays the employee's name 'Vanessa Clark' and some metadata: 'Employee ID: 0643001000004', 'Store: 643', and 'Source: StorePrimary'. Below this is a tabbed interface with five tabs: 'GENERAL', 'HR', 'SECURITY', 'FINGERPRINT', and 'COMMENT'. The 'GENERAL' tab is active. It contains two main sections: 'Name & Address' and 'Personal Information'. The 'Name & Address' section includes fields for 'First Name' (Vanessa), 'Last Name' (Clark), 'Address' (12345 Chatham Circle), 'Postal Code' (44007), 'City' (Twinsburg), 'State' (OH), 'Country' (US - UNITED STATES), 'Email', and 'Phone' (216-333-3333 x.33333). The 'Personal Information' section includes fields for 'SSN' (222-22-2222), 'Language' (English (United States)), 'Marital Status' (Married), 'Birth Date' (01/02/1950), 'Gender' (Female), and 'Spouse Name'. Below these sections is an 'Emergency Contact Information' section with fields for 'First Name' (Bob) and 'Phone' (222-222-2222 x.222). At the bottom of the window is a toolbar with buttons for 'Back', 'Help', 'Edit Employee', 'Change Password', 'New Employee', 'Password Challenge Questions', 'Previous Tab', 'Next Tab', and 'Register'. The status bar at the very bottom shows 'Back Office John Smith', 'Online', 'Datavantage Home Office 643', 'Register: 1', '09/23/2013 1:12 PM', and a help icon.

Figure 4-23: General Tab

General employee information can include any combination of the following fields, any of which can be configured to require an entry:

Employee Name & Address Information	
Name prefix (Mr., Ms., Dr., and so on)	State/Province
First name, Middle name/initial, Last name	Zip/Postal Code (system will populate the city and State based on the entered zip code)
Name suffix (Jr., Sr., III, etc.)	Country (defaults to the country in which the store is located, but can be changed)
Address	Email address
City	Phone Numbers
Employee Status & Personal Information	
Social Security Number	Birth Date
Language (the employee's language preference, French, United States English, etc.)	Gender
Marital Status	Spouse's Name
Emergency Contact Information	
Emergency Contact Name	Emergency Contact Phone Number

- **HUMAN RESOURCES (HR) TAB** - Displays information about hiring date, employee status, and pay status, title, salary, vacation and personal time, and discount group membership.

Vanessa Clark | Employee ID: 0101002000003 | Store: 101 | Source:

GENERAL | **HR** | **SECURITY** | **FINGERPRINT** | **COMMENT**

Employee Profile

Hire Date: 03/20/2013

Status: Active

Active Date:

Term Date:

Group: Closing Staff

Department:

Position:

Type:

Job Title: Sales

Overtime Eligible? Yes

Clock In Required? Yes

Last Review:

Next Review:

Time Off

Sick Days: 5

Vacation Days: 5

Personal Days: 2

Sick Used:

Vacation Used:

Personal Used:

Discount Groups

Normal Level

Elite Program Member

Employee

Employee Family

Pay Status Hourly

Base Pay:

Extra Withheld:

Undo Changes | Help | Save Changes | Previous Tab | Next Tab | Register

Figure 4-24: Human Resources Tab

Employee Maintenance Tabs Overview

Information on the Human Resources Tab is organized into the following sections.:

Employee Hire & Status Information	
Hire Date	Group membership
Status (Active, Inactive, Terminated)	Department assignment
Active Date	Position
Termination Date	Type (used to further define the employee's position within the organization)
Employee Pay Information	
Pay Status (Salary or Hourly)	Clock In Required?
Base Pay (Amount)	Last Review date
Extra Withheld (extra amount withheld from the employee's pay check)	Next Review date
Job Title	
Overtime Eligible?	
Employee Time Off Information	
Sick Days (Allotment)	Sick Used
Vacation Days (Allotment)	Vacation Used
Personal Days (Allotment)	Personal Used
Employee Group Information	
Discount Groups	

- **SECURITY TAB** - Displays information about the groups with which the employee is associated to determine system privileges.

The screenshot shows the 'SECURITY' tab for employee Vanessa Clark. The header bar includes the employee's name and details: Employee ID: 0101002900003, Store: 101, and Source. Below the header are five tabs: GENERAL, HR, SECURITY (selected), FINGERPRINT, and COMMENT.

Security Profile

Training Status: Exempt (dropdown) Login ID: 231 (text field)

Primary Group: Everyone (dropdown) Locked Out?: No (dropdown)

Groups

- Everyone
- Trainee
- Cashier
- Keyholder
- Manager

Store Assignment

STORE ASSIGNMENT	BEGINNING	ENDING	TEMPORARY?
101 - DTV Home Office	03/21/2013		No

At the bottom, there is a navigation bar with buttons: Undo Changes, Help, Save Changes, Previous Tab, Next Tab, and Register. Keyboard shortcuts F1 through F12 are also indicated.

Figure 4-25: Security Tab

Employee Security Permissions & System Access Information	
Training Status (for example, Exempt, Restricted Trainee, Unrestricted Trainee)	Login ID (may be different from the employee ID)
Primary Group (security assignment)	Locked Out? (if Yes, the employee cannot access any area of the system)
Groups (lists the available security groups set up for your store)	Store Assignment (used for borrowed employee functions)

Employee Maintenance Tabs Overview

- **FINGERPRINT TAB** - Provides the ability to create an employee fingerprint data record in addition to the conventional user ID and password data. This tab is only active if you are using a fingerprint device.

The screenshot displays the 'Fingerprint' tab within an employee maintenance application. At the top, a header bar shows 'Employee Name: Joe Smith', 'Emp ID: 102', 'Store: 0', and 'Source: StorePrimary'. Below this is a navigation bar with tabs: 'General', 'HR', 'Security', 'Fingerprint' (selected), and 'Comment'. The main content area is titled 'Fingerprint Scans' and contains a red instruction: 'Select "Edit Employee" to start enrollment process'. To the right, a 'Finger Selected' section shows a green bar for 'Next Finger Suggested' and a blue bar for 'Finger(s) Successfully Enrolled'. Below this is a graphic of two hands with fingers numbered 1 through 10. At the bottom of the main area, it states 'Maximum Enrolled Count: 4' and 'Currently Enrolled Count: 0'. A bottom navigation bar includes buttons for 'Back', 'Help', 'Edit Employee', 'Change Password', 'New Employee', 'Previous Tab', 'Next Tab', and 'Register'. A yellow banner above the bottom bar indicates '18 New Orders'. The footer shows 'Back Office', 'John Hashbrown', 'Online', 'Potomac Mills 438', 'Register: 1', '12/28/2012', '12:41 PM', and a help icon with 'F1'.

Figure 4-26: Fingerprint Tab

Information on the Fingerprint Tab is organized into the following sections.

Fingerprint Scans Panel

- To enroll an employee's fingerprint, you must select the **Edit Employee** menu option and follow the instructions on the screen.

Once in editing mode, the four windows in this section display an image of the scanned fingerprint as the employee performs the enrollment process. The same finger must be scanned 4 times to create the record.

See [Setting Up an Employee Fingerprint Record](#) for more information.

Finger Selected Panel

- This image defines the color-codes for the fingers on the hand images.



- This image shows which finger(s) on each hand are recorded in the system:
 - Blue** indicates this finger is successfully recorded in the system
 - Green** indicates the finger to scan next, but can be changed if you prefer to use a different finger



- A count of the maximum number of fingers that may be enrolled and the number of enrolled fingers are also shown here.

Maximum Enrolled Count: 4

Currently Enrolled Count: 0

Borrow Employee

- **COMMENT TAB** - Displays notes and comments about the associate.

The screenshot displays the 'COMMENT TAB' interface. At the top, there are five tabs: GENERAL, HR, SECURITY, FINGERPRINT, and COMMENT. The COMMENT tab is selected. Below the tabs, the 'Comments' section shows a text area with the following content:

Created On: August 16, 2013 01:27:01 PM
Created By: 100
Kathy will be in charge of the new employee training session on June 30th.

At the bottom of the interface, there is a navigation bar with buttons: Back, Help, Edit Employee, Add Comment, Previous Tab, Next Tab, and Register. Below these buttons are function key labels: Esc, F1, F2, F4, F10, F11, and F12.

Figure 4-27: Comment Tab

The date and time and the ID for the person who created the comment is associated with the text of the comment. The most-recent comment is listed first. An option to add a new comment for the associate's record is available here.

Borrow Employee

This function provides the capability to search the corporate database for an employee. Once the employee record is found, the employee can be assigned to work in a new location by setting up an expiration time limit for this temporary position. This functionality can be used when sharing employees between stores.

1. After logging in to the Back Office, select **Employee Maintenance** and select the **Employee Borrow** option.

The screenshot shows the 'EMPLOYEE MAINTENANCE' menu. The breadcrumb trail at the top reads: Main Menu > Employee Maintenance and Payroll > Employee Maintena... Below this, there is a list of four options:

- 1 Employee Maintenance
- 2 Employee Borrow
- 3 Employee Productivity Report
- 4 Associate Advance

At the bottom of the menu, there is a navigation bar with buttons: Back, Help, OK, and Register. Below these buttons are function key labels: Esc, F1, Enter, and F12.

Figure 4-28: Employee Maintenance Menu, Employee Borrow Option

2. At the Employee Borrow search form, enter your criteria for finding the employee you want to borrow and select **Process**.

The screenshot shows the 'EMPLOYEE BORROW' search form. At the top, it says 'Enter search criteria' next to a magnifying glass icon. There are three input fields: 'Employee ID', 'Last Name', and 'First Name'. At the bottom, there are three buttons: 'Back', 'Help', and 'Process'. Below these buttons are three smaller buttons labeled 'F1', 'F2', and 'F3'.

Figure 4-29: Employee Borrow Search Form

Tip: If you know the employee’s ID, you can enter it in the Employee ID field so that only that employee is listed.

3. If the results include more than one employee, choose the employee you want and select the **Select & Continue** option.

The screenshot shows the 'EMPLOYEE BORROW' screen with the instruction 'Select employee from the list. StorePrimary'. It displays a list of employees with their names and addresses. The first entry is 'Smith, Joe' with address '30500 Bruce Industrial Pkwy, Solon, OH 44139'. Other entries include 'George, Lisa' (two identical entries), 'Leffing, Lucy', 'Bernhardt, Suzanne', and 'Bieber, Justin'. At the bottom, there are two buttons: 'Back' and 'Select & Continue'.

Figure 4-30: List of Employees Available for the Borrow Function

4. After you select one of the employees listed, or if only one employee is found, the **Employee Borrow Details** form displays:



The screenshot shows a software window titled "EMPLOYEE BORROW" with the subtitle "Enter employee borrow details". The form contains the following fields: "Name" with the value "Joe Smith", "Start Date" (empty), "End Date" (empty), and "Temporary" with a dropdown menu showing "Yes". At the bottom of the window, there are six buttons: "Back", "Help", "Continue", "Exit", "F1", and "F8".

Figure 4-31: Employee Borrow Details Form

- a. Enter the **Start Date** and **End Date**.
 - b. Indicate whether the employee is being borrowed temporarily by selecting **Yes** or **No** from the list in the Temporary field.
 5. Select **Continue**.
 6. The system displays a confirmation message when the process for borrowing an employee is complete. Select **Ok** to continue. The system returns to the Main Menu.
- This employee is now available for employee functions in the borrowing store.

Note: Borrowed employees may change their login password at the store where they are temporarily assigned. The password at their home store does not change.

Employee Productivity Report

This Employee Productivity Report shows employees' sales productivity and employees' sales information, including multiple sales, dollar amounts per sale, net sales, returns and markdowns, for selected date and employee ID ranges.

This report allows you to specify an employee and generate the employee's sales results. The results can be viewed on the screen and/or printed.

This report includes the following information:

- **Employee Name and ID**
- **Tot. Trans #** - Total number of transactions rung by the employee.
- **Avg. Items per Sale** - Average number of items per sale per employee.
- **Avg. Amt per Sale** - Average dollar amount per sale per employee.
- **Net Sales Amount** - Net sales amount per employee.
- **Net Return Amount** - Returns dollar amount per employee.
- **Returns % to Total** - Percentage of total returns per employee.
- **Markdowns % to Total** - Percentage of total markdowns per employee.

Refer to the *Oracle Retail Xstore Point-of-Service Reports Guide* for more details about the Employee Productivity Report.

Associate Advance

The Associate Advance function allows a payment to an associate in advance of the associate's scheduled payday. Examples of associate advances include cases of emergency or to pay a new employee in a timely manner.

1. After logging in to the Back Office, select **Employee Maintenance and Payroll** and press [Enter].

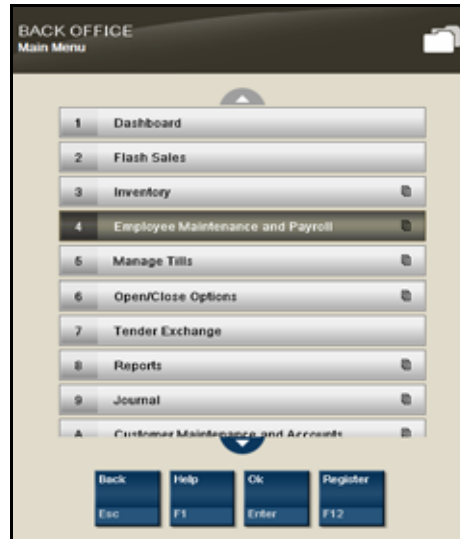


Figure 4-32: Main Menu - Employee Maintenance and Payroll

2. Select **Employee Maintenance** and press [Enter].

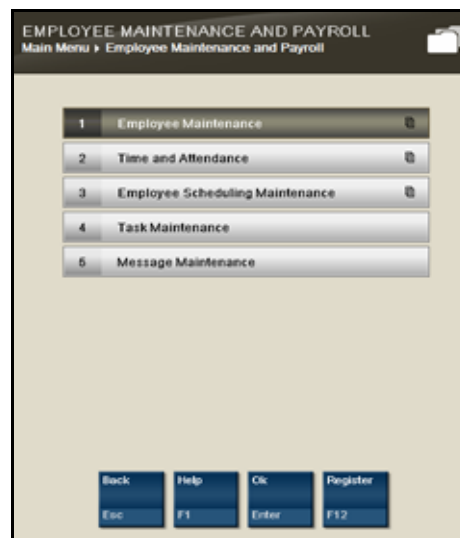


Figure 4-33: Employee Maintenance Option

3. Select **Associate Advance** and press [Enter].



Figure 4-34: Associate Advance Option

4. The system prompts you to enter the lookup criteria. Enter the criteria you want to use for finding an employee's record and select **Process**.

A screenshot of the 'EMPLOYEE LOOKUP' form. At the top, it says 'EMPLOYEE LOOKUP' and 'Enter search criteria'. There are three input fields: Employee ID, Last Name, and First Name. At the bottom, there are three buttons: Back, Help, and Process, each with a corresponding keyboard shortcut (Esc, F1, F8).

Figure 4-35: Employee Lookup Form

- If you enter an Employee ID, Oracle Retail Xstore Point-of-Service may immediately display a prompt for the cash advance amount.
 - If you enter search criteria that results in more than one record being found, or if your system is set up to always show a list, you must select the employee you want from the list.
5. At the prompt, enter the cash advance amount and press [Enter] to continue.

A screenshot of the 'Cash Advance Amount Prompt' screen. It features a text input field labeled 'Amount' with the prompt 'Enter amount.' below it. To the right of the input field is a large dollar sign icon (\$).

Figure 4-36: Cash Advance Amount Prompt

The system records the transaction and returns to the Main Menu.

Oracle Retail Xstore Point-of-Service prints a receipt with the associate's advance information and an employee signature line. Both a store copy and an employee copy are printed.

The receipt is titled 'Xstore' at the top. It contains the following information:

30800 Bruce Industrial Pkwy
 805th, CN 44139
 (442) 439-4414

Times: 14 Date: 1/31/04
 Store: 303 Register: 1
 Cashier: 03010001000002
 Session ID:

Associate Advance

Associate ID	03010001000003
Name	Doris A Jones
Amount	100.00

Associate agrees to the corporate terms for an advance.

 Employee's Signature

At the bottom of the receipt is a barcode.

Figure 4-37: Associate Advance Receipt Example

The cash drawer opens to remove the cash advance.

6. If the system prompts you to close the cash drawer, press **[Enter]** to respond to the prompt.

Employee Scheduling

Overview

Employee Scheduling allows you to perform a variety of scheduling activities:

- Create and maintain employee work shifts
- Schedule and maintain employee time-off events such as vacations and other times when employees may not be available for work
- Assign employees to defined work shifts

Employees can view and print their schedules at the Register Login screen. They may also view a list of other employees who are assigned to work on a specific day. Refer to the *Oracle Retail Xstore Point-of-Service User Guide* for more information.

Work shifts

Work shifts may be created to define a specific set of working hours or days (weekday mornings, weekend evenings, etc.), or with the intent that individuals who belong to a particular group (day managers, night managers, etc.) may be assigned to it. After a shift has been created, an individual employee may be assigned to it. See [Maintaining Employee Shifts](#).

Time Off

Use the Maintain Employee Time Off function to define times when an employee is not available to work. These times can be set up as recurring events that span several days or as single events. See [Maintaining Employee Time-Off Schedules](#).

Reports

The following scheduling reports are available:

- **Employee Performance Report** - This report shows the scheduled hours for an employee or all employees, the hours actually worked, and the difference between scheduled and worked hours. The employee's total sales and average sales for the period are also shown.
- **Employee Schedule Detail** - This report shows the employees who are scheduled for each day in the selected week. Each day of the week is listed, the employees scheduled, their individual start and end times, and the total hours for each day. This report also includes the total scheduled hours for the week.

- **Employee Time Off Summary Report** - This report lists all employees who have time off scheduled for the selected week, and it shows the time-off days, hours (if less than a full day), and the reason for the time-off.

Note: Refer to the *Oracle Retail Xstore Point-of-Service Reports Guide* for detailed information about these reports.

Creating An Employee Schedule

Use this procedure to create an employee schedule for a designated week.

1. After logging in to the Back Office (see [Accessing the Back Office](#)), select **Employee Maintenance and Payroll** and press [Enter].
2. At the Employee Maintenance and Payroll Menu, select **Employee Scheduling Maintenance** and press [Enter].
3. Select the **Employee Schedule** option.



Figure 5-1: Employee Schedule Menu Option

4. Oracle Retail Xstore Point-of-Service prompts for the week to be scheduled. Select the week you want to schedule and press [Enter] to continue.



Figure 5-2: Schedule Weeks List

Note: The current week is selected by default.

- Oracle Retail Xstore Point-of-Service displays the Employee Schedule screen for the selected week. This is the view used to create an employee schedule.

Select the **Edit** option to begin creating a new employee schedule.

Employee Schedule		Sched. Hrs: 168.00 Sched. Amt: 9.00	From: 01/25/2015 To: 01/31/2015					
	TOTAL HOURS	SUN 1/25/15	MON 1/26/15	TUE 1/27/15	WED 1/28/15	THU 1/29/15	FRI 1/30/15	SAT 1/31/15
Brown, Sarah	Working: 20.00 Break: 0.00		9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	
Dubois, Marie	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	
Gagnon, Jean	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	
Johnson, Simon	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	
Sakshi, Shree	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	
Smith, Joe								
Smith, John	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	
Back	Help	Edit	Schedule Dates	Previous Week	Next Week	Print Schedule		Register
Esc	F1	F2	F3	F4	F5	F6		F12

Figure 5-3: Employee Schedule Screen

Oracle Retail Xstore Point-of-Service provides several options for creating a new schedule:

Create New Schedule Options

- Add Manual Shift** - Use this option to create a shift to apply to a specific employee/day on the schedule. See [Adding a Manual Shift](#).
- Add Shift From List** - Use this option to apply a pre-defined shift to a specific employee/day on the schedule. See [Adding a Pre-Defined Shift](#).

Note: To define the shifts, see [Creating a New Shift](#).

- Copy Day Schedule** - Use this option to copy an existing schedule from one day to a day (or days) in this new schedule. See [Copying a Day Schedule](#).
- Copy Week Schedule** - Use this option to copy an existing weekly schedule from one week to this new weekly schedule. See [Copying a Week Schedule](#).

Note:**Scheduling Exceptions...**

- If you schedule a shift for an employee with approved time off for the period, Oracle Retail Xstore Point-of-Service displays a prompt alerting you to the conflict.
- Select the *Add to Schedule* option to schedule the employee and override the time-off event.

<OR>

- Select the *Remove From Schedule* option to remove the conflicted shift(s) from the schedule.

You cannot edit records for any date that precedes the current date.

Note:

- You can assign multiple shifts to the same employee, on the same day. This is useful if you employ many part-time employees.
 - If desired, you can schedule multiple shorter shifts during the day for just one employee. For example a three-hour INVENTORY/STOCK shift in the morning and a two-hour CASHIER shift in the afternoon.
 - See [Figure 5-6](#) for an example of an employee (Frank, Fern) with 2 shifts in a single day.
-

Adding a Manual Shift

Use this option to create a new shift for an employee on the schedule.
...continued from step 5.

1. Select the employee and the day you want to schedule. Use the arrow keys to navigate the scheduling screen grid. The highlighted area indicates the selected cell in the grid.

Note: Touch-screen users, tap the desired cell to select the employee and the day you want to schedule.

Figure 5-4: Selecting the Cell to Schedule - Edit Menu

- Tip:** Make sure you have a valid shift selected, not a cell in the Total Hours column.

-
- EMPLOYEE SCHEDULING**
Employee Schedule Data
- Enter a start time and end time, and select a work code for:
Smith, Joe
Monday, January 26, 2015
- Shift Start Time: 05:00 PM
- Shift End Time: 09:00 PM
- Work Code: [Dropdown Menu]
- Number of Non-Working Hrs: 0
- Time entry instruction:
For 09:15 AM enter 0915 or 0
For 09:15 PM enter 0915P or 0
- Work Code List:
General Sales
Commission Sales
Break for Lunch
Inventory/Stock (Selected)
Administrative/Back office
Product Demonstration
Event Commission
Holiday Sales
- Buttons: Back, Help, OK, Esc, F1, F8

- **Shift Start Time** - Enter the starting time for this shift.
- **Shift End Time** - Enter the ending time for this shift.
- **Work Code** - Select a work code for this shift.
- **Number of Non-Working Hours** - Enter the hours and/or minutes that are counted as non-working hours, such as meal breaks.

- 1 Oracle Retail Xstore Point-of-Service totals the scheduled hours for the week and calculates the scheduled budget amount (if it is configured for your store) as you build the schedule. The total scheduled hours and scheduled dollar amount is shown in the top panel of the screen. It is updated automatically each time you add or remove a shift.
- 2 Oracle Retail Xstore Point-of-Service displays the Weekly Summary Scheduling screen that shows the shift you created for the employee on the scheduled day. Information on this screen includes the starting and ending times, the work code, break times, and the amount of working time.

Employee Schedule

Sched. Hrs: 163.88

From: 6/12/2015

Sched. Amt: 8.89

To: 6/13/2015

1

	TOTAL HOURS	SUN 1/25/15	MON 1/26/15	TUE 1/27/15	WED 1/28/15	THU 1/29/15	FRI 1/30/15	SAT 1/31/15
Brown, Sarah	Working: 20.00 Break: 0.00		9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	
Dubois, Marie	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	
Gagnon, Jean	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	
Johnson, Simon	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	
Sakthi, Shree	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	
Smith, Joe	Working: 3.00 Break: 0.00		5:00 PM 8:00 PM INVENTORY					
Smith, John	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	

Back

Help

Add Manual Shift

Add Shift From List

Change Shift

Delete Shift

Copy Day Schedule

Copy Week Schedule

Save Changes

Register

Esc

F1

F2

F3

F4

F5

F6

F7

F8

F12

Figure 5-6: Weekly Summary Scheduling Screen, Employees Scheduled Example

4. Continue scheduling all employees for the week as needed and select the **Save Changes** option to save your schedule.

Note: Depending on your system's configuration, Oracle Retail Xstore Point-of-Service may provide a warning if you schedule an employee who has a conflict with restrictions defined by your store's policy. For example, there may be a maximum number of scheduled hours that cannot be exceeded.

Adding a Pre-Defined Shift

Use this option to apply an existing shift type to the schedule for a selected employee/day.

...continued from step 5.

Note: To create these pre-defined shifts, refer to [Creating a New Shift](#).

1. Select the employee and the day you want to schedule. Use the arrow keys to navigate the scheduling screen grid. The highlighted area indicates the selected cell in the grid.

Note: Touch-screen users, tap the desired cell to select the employee and the day you want to schedule.

Employee Schedule								
		Sched. Hrs: 160.00	From: 8/1/2015					
		Sched. Amt: 0.00	To: 8/31/2015					
	TOTAL HOURS	SUN 1/25/15	MON 1/26/15	TUE 1/27/15	WED 1/28/15	THU 1/29/15	FRI 1/30/15	SAT 1/31/15
Brown, Sarah	Working: 20.00 Break: 0.00		9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	
Dubois, Marie	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	
Gagnon, Jean	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	
Johnson, Simon	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	
Sakthi, Shree	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	
Smith, Joe	Working: 3.00 Break: 0.00		5:00 PM 8:00 PM INVENTORY					
Smith, John	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	
Back	Help	Add Manual Shift	Add Shift From List	Change Shift	Delete Shift	Copy Day Schedule	Copy Week Schedule	Save Changes
Esc	F1	F2	F3	F4	F5	F6	F7	F8
								Register
								F12

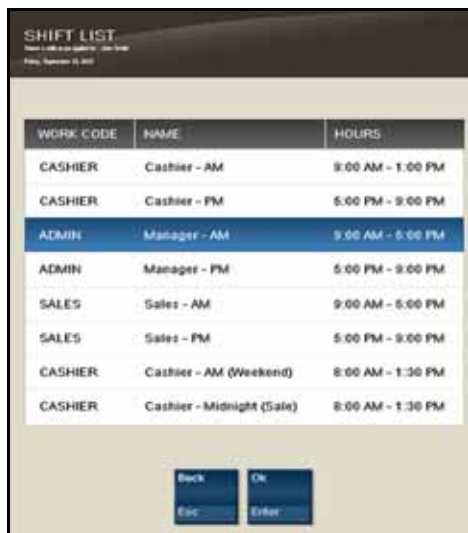
Figure 5-7: Selecting the Cell for a Defined Shift

2. On the Edit Menu, select the **Add Shift From List** option.

Tip: Make sure you have a valid shift selected, not a cell in the *Total Hours* column.

Creating An Employee Schedule

- Oracle Retail Xstore Point-of-Service displays the list of pre-defined shifts. Select a shift from the list that you want to apply to the selected employee and day, then select **Ok** to continue.



WORK CODE	NAME	HOURS
CASHIER	Cashier - AM	9:00 AM - 1:00 PM
CASHIER	Cashier - PM	5:00 PM - 9:00 PM
ADMIN	Manager - AM	9:00 AM - 5:00 PM
ADMIN	Manager - PM	5:00 PM - 9:00 PM
SALES	Sales - AM	9:00 AM - 5:00 PM
SALES	Sales - PM	5:00 PM - 9:00 PM
CASHIER	Cashier - AM (Weekend)	8:00 AM - 1:30 PM
CASHIER	Cashier - Midnight (Sale)	8:00 AM - 1:30 PM

Figure 5-8: List of Pre-Defined Shifts

Oracle Retail Xstore Point-of-Service displays the Weekly Summary Scheduling screen showing the shift you applied to the employee/day. Information shown here includes the pre-defined starting and ending times, the work code, the time allotted for breaks, and the amount of working time. Oracle Retail Xstore Point-of-Service also totals the scheduled hours for the week as you build the schedule and the scheduled budgeted dollar amount (if configured for your store).

Employee Schedule

Sched. Hrs: 171.00

From: 8/25/2015

Sched. Amt: 0.00

To: 8/31/2015

	TOTAL HOURS	SUN 1/25/15	MON 1/26/15	TUE 1/27/15	WED 1/28/15	THU 1/29/15	FRI 1/30/15	SAT 1/31/15
Brown, Sarah	Working: 20.00 Break: 0.00		9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	
Dubois, Marie	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	
Gagnon, Jean	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	
Johnson, Simon	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	
Sakthi, Shree	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	
Smith, Joe	Working: 11.00 Break: 0.00		5:00 PM 9:00 PM INVENTORY	9:00 AM 5:00 PM ADMIN				
Smith, John	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	

Back

Help

Add Manual Shift

Add Shift From List

Change Shift

Delete Shift

Copy Day Schedule

Copy Week Schedule

Save Changes

Register

Esc

F1

F2

F3

F4

F5

F6

F7

F8

F12

Figure 5-9: Pre-defined Shift Added

- Continue scheduling all employees for the week, and select the **Save Changes** option to save your schedule.

Copying a Day Schedule

Use this option if your daily schedules are consistent within the week you are currently scheduling. For example, if your Monday through Wednesday staffing needs are similar, use this option to simply set up one day's schedule (Monday) and copy it to the other days (Tuesday and Wednesday) in the current week.

Note: This option copies the schedule that *every employee* has on the selected day and duplicates it to the additional days that are selected. Therefore, any employee's cell may be selected, as long as it is in the correct day from which the schedule is copied.

For example, Bob works sales from 9:00 a.m. to noon on Monday, and Mary works inventory from 1:00 p.m. to 5:00 p.m. on Monday. If the **Copy Day Schedule** duplicates the Monday schedule to Tuesday and Wednesday, then Bob works from 9:00 a.m. to noon on Monday, Tuesday and Wednesday. Mary works inventory from 1:00 p.m. to 5:00 p.m. on Monday, Tuesday and Wednesday.

...continued from step 5.

1. Select the day you want to copy the schedule from. Use the arrow keys to navigate among the days on the scheduling screen grid. The highlighted area indicates the selected cell and day in the grid. In [Figure 5-10](#), the **Monday** schedule is selected.

Note: Touch-screen users, tap the desired cell to select the day you want to copy the schedule from.

Employee Schedule		Sched. Hrs: 171.00	From: 01/25/2015					
		Sched. Amt: 0.00	To: 01/31/2015					
	TOTAL HOURS	SUN 1/25/15	MON 1/26/15	TUE 1/27/15	WED 1/28/15	THU 1/29/15	FRI 1/30/15	SAT 1/31/15
Brown, Sarah	Working: 20.00 Break: 0.00		9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	
Dubois, Marie	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	
Gagnon, Jean	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	
Johnson, Simon	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	
Sakthi, Shree	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	
Smith, Joe	Working: 11.00 Break: 0.00		5:00 PM 8:00 PM INVENTORY	9:00 AM 5:00 PM ADMIN				
Smith, John	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	
Back	Help	Add Manual Shift	Add Shift From List	Change Shift	Delete Shift	Copy Day Schedule	Copy Week Schedule	Save Changes
Esc	F1	F2	F3	F4	F5	F6	F7	F8
								Register
								F12

Figure 5-10: Copying the Monday Schedule

2. Select the **Copy Day Schedule** option from the Edit menu.

Creating An Employee Schedule

- Oracle Retail Xstore Point-of-Service prompts for the day (or days) you want to copy the selected day schedule to. In this example, select the day or days you want to copy Monday's schedule to and press **[Enter]**.



COPY DAY SCHEDULE
Select the days of the week to populate from the Monday schedule

Tuesday
Wednesday
Thursday
Friday
Saturday

Back Ok
Esc Enter

Figure 5-11: Copy Day Schedule Form

Tip: To select multiple days, use the [Spacebar] to select each day. In this example, Monday's schedule is copied to Tuesday, Wednesday, Thursday, and Saturday.

Oracle Retail Xstore Point-of-Service copies the schedule to each day you selected. Oracle Retail Xstore Point-of-Service totals the scheduled hours for the week as you build the schedule and the scheduled budgeted amount (if configured for your store).

Employee Schedule		Sched. Hrs: 177.00 Sched. Amt: 0.00	From: 01/25/2015 To: 01/31/2015					
	TOTAL HOURS	SUN 1/25/15	MON 1/26/15	TUE 1/27/15	WED 1/28/15	THU 1/29/15	FRI 1/30/15	SAT 1/31/15
Brown, Sarah	Working: 20.00 Break: 0.00		9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	
Dubois, Marie	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	
Gagnon, Jean	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	
Johnson, Simon	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	
Sakthi, Shree	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	
Smith, Joe	Working: 17.00 Break: 0.00		5:00 PM 8:00 PM INVENTORY	9:00 AM 5:00 PM ADMIN		5:00 PM 8:00 PM INVENTORY	5:00 PM 8:00 PM INVENTORY	
Smith, John	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	
Back	Help	Add Manual Shift	Add Shift From List	Change Shift	Delete Shift	Copy Day Schedule	Copy Week Schedule	Save Changes
Esc	F1	F2	F3	F4	F5	F6	F7	F8
								Register F12

Figure 5-12: Copied Day Schedule

- Continue scheduling all employees for the week as needed. Select **Save Changes** on the Edit Menu to save your schedule.

Note: If configured, Oracle Retail Xstore Point-of-Service warns of an attempt to schedule an employee when it conflicts with your store's hourly constraints or other restrictions.

Copying a Week Schedule

Use this option if your weekly schedules are relatively consistent from week to week. For example, if your weekly summer staffing needs are similar, use this option to set up one week's schedule and copy it from week to week. Once the existing schedule is copied to the week you are scheduling, you can easily make adjustments to the schedule as needed.

- At the Employee Scheduling Maintenance Menu select **Employee Schedule**.
- At the **Schedule Weeks** form, select the week that you want to schedule and press **[Enter]**.
- At the Weekly Summary screen, select the **Edit** option.
- Select the **Copy Week Schedule** option.

The screenshot displays the 'Employee Schedule' interface. At the top, it shows 'Sched. Hrs: 0' and 'Sched. Amt: 9.99'. Below this, a date range is set from 'From: 02/01/2015' to 'To: 02/07/2015'. The main area is a grid with columns for 'TOTAL HOURS', 'SUN 2/1/15', 'MON 2/2/15', 'TUE 2/3/15', 'WED 2/4/15', 'THU 2/5/15', 'FRI 2/6/15', and 'SAT 2/7/15'. The rows list employees: Brown, Sarah; Dubois, Marie; Gagnon, Jean; Johnson, Simon; Sakshi, Shree; Smith, Joe; and Smith, John. At the bottom, there is a menu bar with buttons: Back, Help, Add Manual Shift, Add Shift From List, Change Shift, Delete Shift, Copy Day Schedule, Copy Week Schedule (highlighted with a red circle), Save Changes, and Register. Below these buttons are function key labels: Esc, F1, F2, F3, F4, F5, F6, F7, F8, and F12.

Figure 5-13: Copy Week Schedule Option

Creating An Employee Schedule

- Oracle Retail Xstore Point-of-Service displays a list of weeks that have been scheduled previously. Use the up and down arrow keys to select a week from the list and press **[Enter]** to continue.

COPY WEEK SCHEDULE
Select the date of the schedule you want to copy.

01/25/2015	---	01/31/2015
01/18/2015	---	01/24/2015
01/11/2015	---	01/17/2015
01/04/2015	---	01/10/2015
12/28/2014	---	01/03/2015
12/21/2014	---	12/27/2014

Back OK
Esc Enter

Figure 5-14: Copy Week Schedule

Oracle Retail Xstore Point-of-Service copies the schedule from the displayed week to the selected week. Oracle Retail Xstore Point-of-Service totals the scheduled hours for the week as you build the schedule and the scheduled budgeted amount (if that is configured for your store).

Employee Schedule

Sched. Hrs: 177.00

From: 02/01/2015

Sched. Amt: 0.00

To: 02/07/2015

	TOTAL HOURS	SUN 2/1/15	MON 2/2/15	TUE 2/3/15	WED 2/4/15	THU 2/5/15	FRI 2/6/15	SAT 2/7/15				
Brown, Sarah	Working: 20.00 Break: 0.00		9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER					
Dubois, Marie	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER					
Gagnon, Jean	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES					
Johnson, Simon	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES					
Sakthi, Shree	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN					
Smith, Joe	Working: 17.00 Break: 0.00		5:00 PM 8:00 PM INVENTORY	9:00 AM 5:00 PM ADMIN		5:00 PM 8:00 PM INVENTORY	5:00 PM 8:00 PM INVENTORY					
Smith, John	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN					
Back	Help	Add Manual Shift	Add Shift From List	Change Shift	Delete Shift	Copy Day Schedule	Copy Week Schedule	Save Changes				Register
Esc	F1	F2	F3	F4	F5	F6	F7	F8				F12

Figure 5-15: Copied Week Schedule

- Continue scheduling all employees for the week and make any edits as needed. Select the **Save Changes** option to save your schedule. Refer to [Editing a Schedule](#) for more information about changing schedule information.

Editing a Schedule

Use this function to make changes to an existing employee schedule for a designated week.

Note: Schedule records from previous days cannot be edited.

1. At the Back Office Main Menu, select **Employee Maintenance and Payroll** and press [Enter].
2. At the Employee Maintenance and Payroll Menu, select **Employee Scheduling Maintenance** and press [Enter].
3. At the Employee Scheduling Maintenance Menu, select **Employee Schedule** and press [Enter].



4. Oracle Retail Xstore Point-of-Service prompts for a schedule week. Use the up and down arrow keys to select the week that you want to edit and press [Enter] to continue.



Figure 5-16: Schedule Weeks List

Note: The current week is selected by default. You cannot edit a record from a date that is earlier than the current date.

- Oracle Retail Xstore Point-of-Service displays the Employee Schedule screen for the selected week. This is the view used to edit the existing employee schedule. Select the **Edit** option to begin editing this employee schedule.

Note: You can select the **Print Schedule** option to print the displayed schedule on the report printer.

9/8/13 - 9/14/13	
Sun 9/8/13 -	
Mon 9/9/13 9:00 AM - 5:00 PM	Commission Sales Id: 1000::SALES
Mon 9/9/13 9:00 AM - 5:00 PM	Administrative/Back office Id: 1000::ADMIN
Mon 9/9/13 9:00 AM - 4:00 PM	Product Demonstration Id: 1000::DEMO
Tue 9/10/13 9:00 AM - 5:00 PM	Commission Sales Id: 1000::SALES
Tue 9/10/13 9:00 AM - 5:00 PM	Administrative/Back office Id: 1000::ADMIN
Tue 9/10/13 9:00 AM - 1:00 PM	General Sales Id: 1000::CASHIER
Wed 9/11/13 9:00 AM - 5:00 PM	Commission Sales Id: 1000::SALES
Wed 9/11/13 9:00 AM - 5:00 PM	Administrative/Back office Id: 1000::ADMIN
Wed 9/11/13 9:00 AM - 1:00 PM	General Sales Id: 1000::CASHIER
Thu 9/12/13 9:00 AM - 5:00 PM	Commission Sales Id: 1000::SALES
Thu 9/12/13 9:00 AM - 5:00 PM	Administrative/Back office Id: 1000::ADMIN
Thu 9/12/13 9:00 AM - 1:00 PM	General Sales Id: 1000::CASHIER

- Xstore provides several options for editing an existing schedule.

Employee Schedule [Sched. Hrs: 177.00 From: 9/1/2015 Sched. Amt: 0.00 To: 9/13/2015]								
	TOTAL HOURS	SUN 1/25/15	MON 1/26/15	TUE 1/27/15	WED 1/28/15	THU 1/29/15	FRI 1/30/15	SAT 1/31/15
Brown, Sarah	Working: 20.00 Break: 0.00		9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	
Dubois, Marie	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	
Gagnon, Jean	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	
Johnson, Simon	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	
Sakthi, Shree	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	
Smith, Joe	Working: 17.00 Break: 0.00		5:00 PM 8:00 PM INVENTORY	9:00 AM 5:00 PM ADMIN		5:00 PM 8:00 PM INVENTORY	5:00 PM 8:00 PM INVENTORY	
Smith, John	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	
<div> <div>Back</div> <div>Help</div> <div>Add Manual Shift</div> <div>Add Shift From List</div> <div>Change Shift</div> <div>Delete Shift</div> <div>Copy Day Schedule</div> <div>Copy Week Schedule</div> <div>Save Changes</div> <div></div> <div></div> <div></div> <div>Register</div> </div>								
<div> <div>Esc</div> <div>F1</div> <div>F2</div> <div>F3</div> <div>F4</div> <div>F5</div> <div>F6</div> <div>F7</div> <div>F8</div> <div></div> <div></div> <div></div> <div>F12</div> </div>								

Figure 5-17: Weekly Summary Scheduling Screen - Edit Mode

Edit Existing Schedule Menu Options

- Change Shift** - Use this option to edit an existing shift on the schedule. See [Changing a Shift](#).
- Delete Shift** - Use this option to remove a shift from the schedule. See [Deleting a Shift](#).
- You can also add shifts to the schedule as needed. Refer to [Adding a Manual Shift](#), [Adding a Pre-Defined Shift](#), [Copying a Day Schedule](#), and [Copying a Week Schedule](#) for more information.

Changing a Shift

Use this option to edit an existing shift for an employee on the schedule.

1. In edit mode, select the shift you want to change. Use the arrow keys to navigate the scheduling screen grid. The highlighted area indicates the selected shift in the grid.

Note: Touch-screen users, tap the desired cell to select the shift you want to change.

Employee Schedule										Sched. Hrs: 177.00	From: 01/25/2015
										Sched. Amt: 8.00	To: 01/31/2015
	TOTAL HOURS	SUN 1/25/15	MON 1/26/15	TUE 1/27/15	WED 1/28/15	THU 1/29/15	FRI 1/30/15	SAT 1/31/15			
Brown, Sarah	Working: 20.00 Break: 0.00		9:30 AM 1:30 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER				
Dubois, Marie	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER				
Gagnon, Jean	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES				
Johnson, Simon	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES	5:00 PM 9:00 PM SALES				
Sakshi, Shree	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN	9:00 AM 5:00 PM ADMIN				
Smith, Joe	Working: 17.00 Break: 0.00		5:00 PM 8:00 PM INVENTORY	9:00 AM 5:00 PM ADMIN		5:00 PM 8:00 PM INVENTORY	5:00 PM 8:00 PM INVENTORY				
Smith, John	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN	5:00 PM 9:00 PM ADMIN				
Back	Help	Add Manual Shift	Add Shift From List	Change Shift	Delete Shift	Copy Day Schedule	Copy Week Schedule	Save Changes	Register		
Esc	F1	F2	F3	F4	F5	F6	F7	F8	F12		

Figure 5-18: Selected Cell Containing the Shift to be Changed

2. Select the **Change Shift** option.
3. Oracle Retail Xstore Point-of-Service displays the Employee Scheduling Data form that shows the current schedule information for the selected shift. Change the information as required:

EMPLOYEE SCHEDULING
Employee Schedule Data

Enter a start time and end time, and select a work code for:
Brown, Sarah
Monday, January 26, 2015

Shift Start Time: 09:30 AM

Shift End Time: 01:30 PM

Work Code: General Retail

Number of Non-Working Hrs: 0 Hours 0 Mins

Time entry instructions:
For 00:10 AM enter 0010 or 0010A
For 00:10 PM enter 0010P or 2110

Buttons: Back, Help, OK, Esc, F1, F2

Figure 5-19: Employee Scheduling Data Form

- **Shift Start Time** - Enter the starting time for this shift.

Editing a Schedule

- **Shift End Time** - Enter the ending time for this shift.
- **Work Code** - Select a work code for this shift.
- **Number of Non-Working Hours** - Enter the hours and/or minutes that are counted as non-working hours, such as meal breaks.

4. Select **Ok** to continue.

Oracle Retail Xstore Point-of-Service displays the Weekly Summary Scheduling screen showing the shift you changed for the employee/day. Information shown here includes the starting and ending times, the work code, the time allotted for breaks, and the amount of working time. Oracle Retail Xstore Point-of-Service also totals the scheduled hours for the week as you build the schedule and the scheduled budget amount (if configured for your store).

Employee Schedule				
		Sched. Hrs: 177.88	From: 01/25/2015	
		Sched. Amt: 9.88	To: 01/31/2015	
	TOTAL HOURS	SUN 1/25/15	MON 1/26/15	TUE 1/27/15
Brown, Sarah	Working: 20.00 Break: 0.00		9:00 AM 1:00 PM CASHIER	9:00 AM 1:00 PM CASHIER
Dubois, Marie	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER
Gagnon, Jean	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES

Figure 5-20: Schedule before Shift Change

Employee Schedule				
		Sched. Hrs: 188.88	From: 01/25/2015	
		Sched. Amt: 9.88	To: 01/31/2015	
	TOTAL HOURS	SUN 1/25/15	MON 1/26/15	TUE 1/27/15
Brown, Sarah	Working: 23.00 Break: 0.00		9:00 AM 4:00 PM CASHIER	9:00 AM 1:00 PM CASHIER
Dubois, Marie	Working: 20.00 Break: 0.00		5:00 PM 9:00 PM CASHIER	5:00 PM 9:00 PM CASHIER
Gagnon, Jean	Working: 40.00 Break: 0.00		9:00 AM 5:00 PM SALES	9:00 AM 5:00 PM SALES

Figure 5-21: Schedule after shift change

5. Make additional schedule changes as needed and select the **Save Changes** option to save the edited schedule.

Note: If configured, Oracle Retail Xstore Point-of-Service warns you if an employee's schedule conflicts with hourly constraints or other restrictions as determined by your store.

Deleting a Shift

Use this option to remove a shift from the schedule for a selected employee/day.

1. Select the shift you want to remove from the schedule. Use the arrow keys to navigate the scheduling screen grid. The highlighted area indicates the selected shift in the grid.

Note: Touch-screen users, tap the desired cell to select the shift you want to remove.

2. Select the **Delete Shift** option. Oracle Retail Xstore Point-of-Service displays a prompt to verify that the selected shift is the one you want to delete.

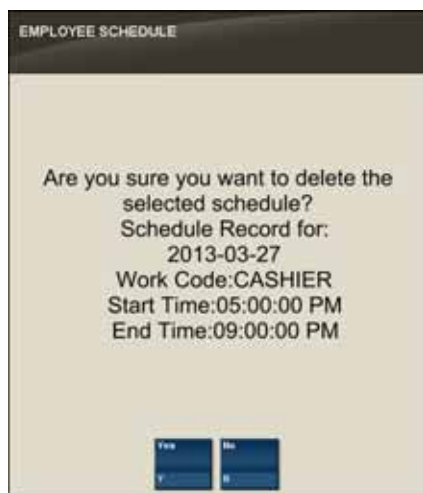


Figure 5-22: Delete Shift Verification Prompt

3. Press [Y] for Yes to delete the shift from the schedule.
Oracle Retail Xstore Point-of-Service displays the Weekly Summary Scheduling screen, removing the shift you deleted for the employee/day. Oracle Retail Xstore Point-of-Service also recalculates the scheduled hours for the week and the scheduled budget amount (if configured for your store) as you edit the schedule.
4. Continue making any changes to the schedule as needed and select the **Save Changes** option to save the edited schedule.

Maintaining Employee Time-Off Schedules

To create and edit time-off events, Oracle Retail Xstore Point-of-Service prompts you for information such as the type of time-off period (whole day, half day, partial day), whether the time-off period spans multiple days or a single day, and the dates and times of the time-off period. This information is shown during the employee scheduling process, alerting you to scheduling exceptions if you try to schedule an employee with previously-approved time off for the time period you are scheduling.

Adding Time-Off Periods

Use this function to add employees' time-off requests to the schedule.

1. From the Back Office Employee Scheduling Maintenance menu, select the **Maintain Employee Time Off** option and press [Enter].



2. Oracle Retail Xstore Point-of-Service prompts you to select a schedule week. Select the week for the time-off event and press [Enter] to continue.

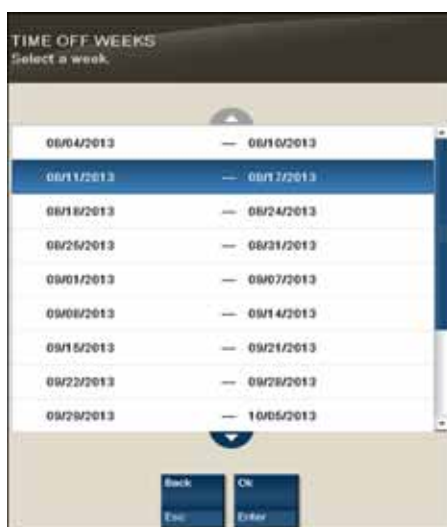


Figure 5-23: Schedule Weeks List

Note: The current week is selected by default.

3. Oracle Retail Xstore Point-of-Service displays the Employee Time Off Scheduling screen showing any previously scheduled time-off events for this week. Select the **Add Time Off** option to create a new time-off event for an employee.

EMPLOYEE	DATE	TIME	REASON
----------	------	------	--------

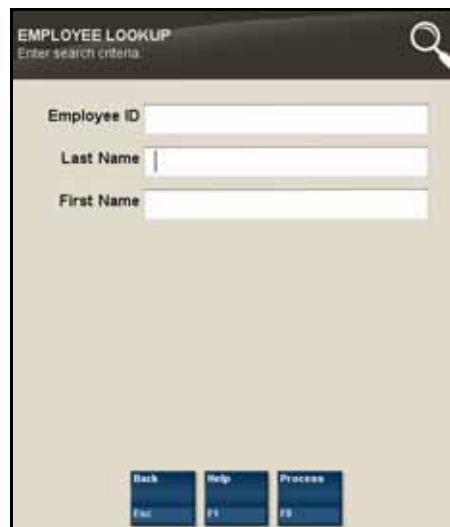
Navigation Bar:

- Back (Esc)
- Help (F1)
- Change Week (F2) 3
- Print Schedule (F4)
- Add Time Off (F5)
- Edit Time Off (F6)
- Remove Time Off (F7)
- Previous Week (F10) 1
- Next Week (F11) 2
- Register (F12)

Figure 5-24: Employee Time Off Scheduling Screen

- Tip:**
1. Select *Previous Week* to view time-off from the week before the week that is displayed.
 2. Select the *Next Week* option to view time-off for the week after the week that is displayed.
 3. To view any other time-off schedule, select the *Change Week* option to select a specific schedule date from the list of weeks.

4. Oracle Retail Xstore Point-of-Service prompts for the employee's information. Enter the employee's information and select **Process** to continue.



The screenshot shows the 'EMPLOYEE LOOKUP' screen. At the top, it says 'Enter search criteria.' with a magnifying glass icon. Below this are three input fields: 'Employee ID', 'Last Name', and 'First Name'. At the bottom, there are three buttons: 'Back' (with 'Esc' below it), 'Help' (with 'F1' below it), and 'Process' (with 'F8' below it).

Figure 5-25: Employee Search Form

5. Oracle Retail Xstore Point-of-Service displays a list of employees who match the search criteria. Select an employee from the list and choose **Select & Continue**.



The screenshot shows the 'EMPLOYEE LOOKUP' screen with the instruction 'Select employee from the list. StorePrimary'. It displays a list of five employees:

Wolf, Sally 123 Bridgeway Twinsburg, OH 44087
Smith, John 30000 Bruce Industrial Pkwy Solon, OH 44138
Sakthi, Shree 30000 Bruce Industrial Pkwy Solon, OH 44138
Smith, Joe 2523 Bridge Lane Twinsburg, OH 44087

The fourth entry, 'Smith, Joe', is highlighted with a blue background. At the bottom, there are two buttons: 'Back' (with 'Esc' below it) and 'Select & Continue' (with 'Enter' below it).

Figure 5-26: List of Matching Employees

6. After the employee has been selected, Oracle Retail Xstore Point-of-Service prompts for the type of time-off event information. Select the time-off type to continue:

Figure 5-27: Time-off Event Type Prompt

- Select the **Full Day** option if the employee has requested time off for the entire day or days.
 - Select the **Half Day** option if the employee has requested half of the day off, such as morning or afternoon.
 - Select the **Partial Day** option if the employee has requested part of the day, such as 2 hours off.
7. Oracle Retail Xstore Point-of-Service prompts for the time-off event date. Enter the starting time-off date and select **Save Changes** to continue.

Figure 5-28: Time Off Date Prompt

- **FULL DAY** - If you chose the full day option, Oracle Retail Xstore Point-of-Service prompts for the number of days for this time-off event. Enter the number

of full days the employee has requested off and select **Save Changes** to continue. Go to step 8.


The screenshot shows a screen titled "SCHEDULING TIME OFF" with the subtitle "Scheduling Time Off". Below the title, it says "Enter the number of days off including the start date". There is a text input field labeled "Number of Days". At the bottom of the screen, there are three buttons: "Back" (F6), "Help" (F1), and "Save Changes" (F5).

Figure 5-29: Number of Days Prompt

- **HALF DAY** - If you chose the half day option, Oracle Retail Xstore Point-of-Service prompts for the part of day. Select whether the time off is morning (AM) or afternoon (PM). Go to step 8.

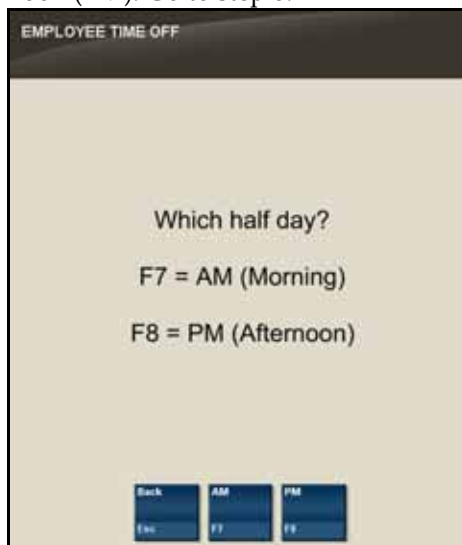
The screenshot shows a screen titled "EMPLOYEE TIME OFF". The main prompt is "Which half day?". Below this, it lists "F7 = AM (Morning)" and "F8 = PM (Afternoon)". At the bottom of the screen, there are three buttons: "Back" (F6), "AM" (F7), and "PM" (F8).

Figure 5-30: Half Day Time-Off Prompt

Note: The number of hours allotted for the half-day time-off option is determined by your store's policy.

- **PARTIAL DAY** - If you chose the partial day option, Oracle Retail Xstore Point-of-Service prompts for the start and end times. Enter the information as required and select **Save Changes**. Go to step [8](#).

Figure 5-31: Partial Time-Off Prompt

8. Oracle Retail Xstore Point-of-Service prompts for the time-off reason. Select a reason for the time-off event from the list and press **[Enter]** to continue.

Figure 5-32: List of Time-Off Reasons

Maintaining Employee Time-Off Schedules

Oracle Retail Xstore Point-of-Service adds the employee's time-off event to the Employee Time Off Scheduling screen for the selected week.



The screenshot shows the 'EMPLOYEE TIME OFF SCHEDULING' window. At the top, there are date pickers for '01/01/2013' and '01/07/2013'. Below this is a table with the following data:

EMPLOYEE	DATE	TIME	REASON
Smith, Joe	1/5/13 - 1/5/13	8:00 AM - 2:00 PM	Medical

Below the table is a large empty white area. At the bottom, there is a row of buttons: Back, Help, Change Week, Print Schedule, Add Time Off, Edit Time Off, Remove Time Off, Previous Week, Next Week, and Register. Each button has a corresponding function key (F1-F12) below it.

Figure 5-33: Employee Time Off Scheduling Screen

Time Off Exception

If the employee has already been scheduled to work on that day (or days), the system prompts you that there is a time-off exception.

- Select the **Add to Schedule** option to schedule the employee's time off as requested.
- Select the **Back** to cancel the request.



The screenshot shows a 'TIME OFF EXCEPTION' dialog box. The text inside reads: 'John Smith has already been scheduled from Wednesday, January 28, 2015 05:00:00 PM through Wednesday, January 28, 2015 09:00:00 PM. Are you sure you want to continue?'. At the bottom, there are two buttons: 'Back' and 'Add to Schedule'.

Removing an Employee Time-Off Period

Use this function when an employee wants to cancel a previously-scheduled time-off. This function removes the time-off event from the schedule.

1. From the Back Office Employee Scheduling Maintenance Menu, select the **Maintain Employee Time Off** menu option and press **[Enter]**.



Figure 5-34: Maintain Employee Time Off Menu Option

2. Oracle Retail Xstore Point-of-Service prompts for a schedule week. Select the week for the time-off event and press **[Enter]** to continue.

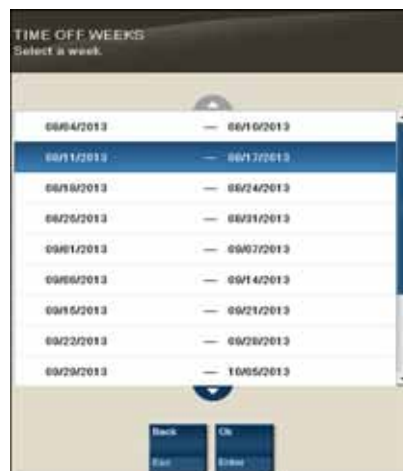


Figure 5-35: Schedule Weeks List

Note: The current week is selected by default.

Maintaining Employee Time-Off Schedules

Oracle Retail Xstore Point-of-Service displays the Employee Time Off Scheduling screen showing the previously scheduled time-off events. Select the employee time-off event you want to remove from the schedule, and select the **Remove Time Off** option.



Figure 5-36: Employee Time Off Scheduling Screen

Tip: Select the *Previous Week* and the *Next Week* options to view the time-off schedule for the week before, or after, the current week you are viewing. To view any other time-off schedule, select the *Change Week* option to select a specific schedule date from the list of weeks displayed.

3. Oracle Retail Xstore Point-of-Service prompts you to confirm the time-off event to be removed from the schedule. Press [Y] for **Yes** to remove the selected employee time-off event. Oracle Retail Xstore Point-of-Service removes the selected time-off event from the schedule.



Editing an Employee Time-Off Period

Use this option to change an employee's previously scheduled time-off request. You can change the type of time off (full day, half day, or part of day), change the time-off date, the number of days for the time-off period, the time-off hour duration, and the time-off reason.

1. From the Back Office Employee Scheduling Maintenance Menu, select the **Maintain Employee Time Off** menu option and press **[Enter]**.



Figure 5-37: Maintain Employee Time-Off Menu Option

Oracle Retail Xstore Point-of-Service prompts for a schedule week. Select the week for the time-off event and press **[Enter]** to continue.

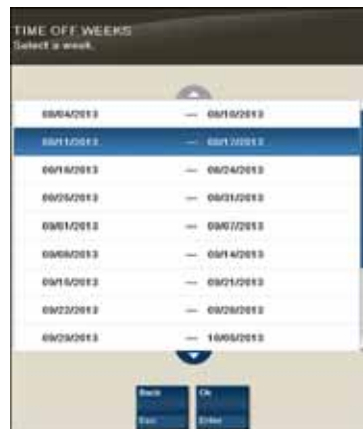


Figure 5-38: Schedule Weeks List

Note: The current week is selected by default.

Editing an Employee Time-Off Period

- Oracle Retail Xstore Point-of-Service displays the Employee Time Off Scheduling screen showing the previously scheduled time-off events. Select the employee time-off event you want to change and select the **Edit Time Off** option.

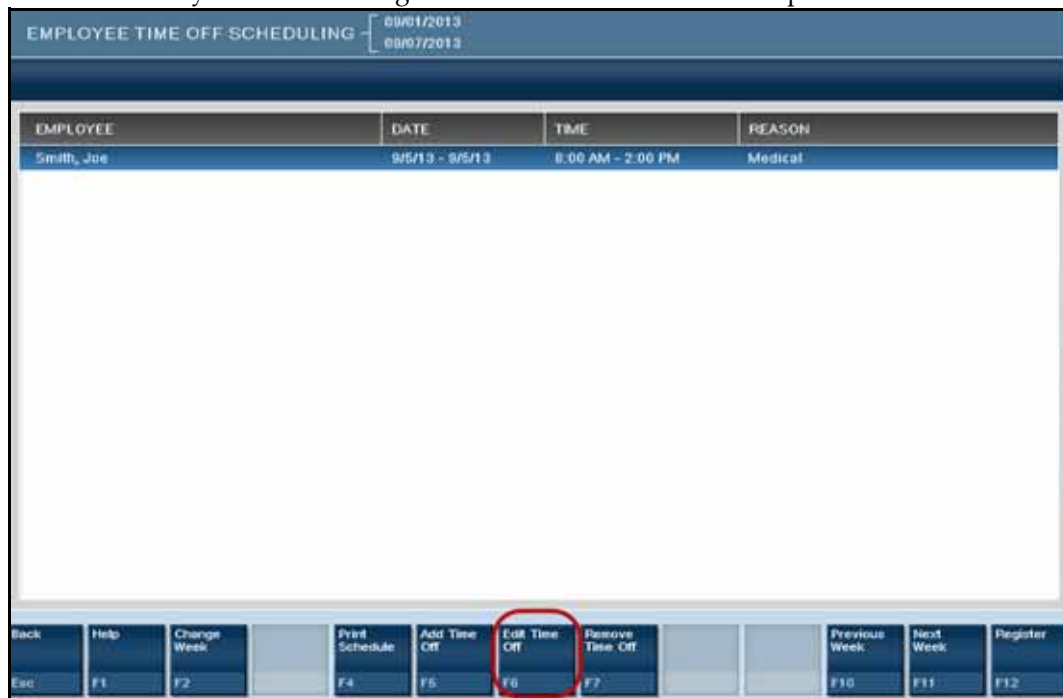


Figure 5-39: Employee Time Off Scheduling Screen

Tip: Select the *Previous Week* and the *Next Week* options to view the time-off schedule for the week before, or after, the current week you are viewing. To view any other time-off schedule, select the **Change Week** option to select a specific schedule date from the list of weeks displayed.

- Oracle Retail Xstore Point-of-Service prompts for the type of time off (full day, half day or partial day), the time off date, and other information as required. Refer to [Adding Time-Off Periods](#) for detailed information about the time-off prompts.
Enter/select the time-off information as required. Oracle Retail Xstore Point-of-Service replaces the employee's original time-off event on the schedule with the updated request.

Printing the Time-Off Schedule

You can print the Employee Time-off Summary Report from both the Employee Time Off Scheduling screen and from the Back Office Employee Scheduling Maintenance menu.

Employee Time Off Summary Report			
Schedule Date Range: 06/05/2011 - 06/11/2011			
Employee Name/ID	Date	Time	Reason
Fields, Mary (01100001000012)	06/07/2011 - 06/07/2011	Full Day	T03 - Personal Time Off
Myers, Mary (01100001000010)	06/09/2011 - 06/09/2011	02:00 PM - 03:30 PM	T03 - Personal Time Off
Newby, Nellie (01010001000002)	06/10/2011 - 06/11/2011	Full Day	T03 - Personal Time Off

Figure 5-40: Employee Time Off Summary Report

- Printing the schedule from the Employee Time Off Scheduling screen (**Print Schedule** button) prints the current schedule shown on the screen.
- Printing the schedule from the Back Office Employee Scheduling Maintenance menu prompts you to select a week to be printed.

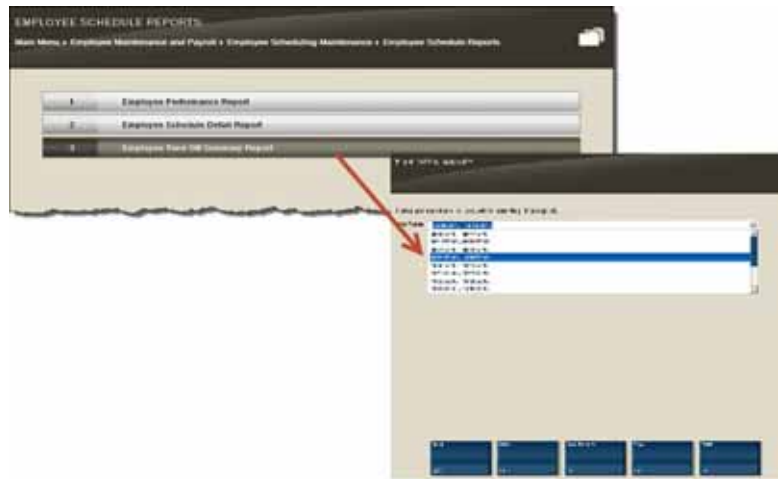


Figure 5-41: Back Office Employee Scheduling Maintenance Menu

Note: Refer to the *Oracle Retail Xstore Point-of-Service Reports Guide* for detailed information about running reports

Maintaining Employee Shifts

To make employee scheduling easier, you can create and edit pre-defined shifts that may be applied during the employee scheduling function.

Creating a New Shift

Use this procedure to create a new shift to be used during employee scheduling.

1. From the Back Office Employee Scheduling Maintenance Menu, select the **Shift Maintenance** menu option and press **[Enter]**.



Figure 5-42: Shift Maintenance Menu Option

2. Oracle Retail Xstore Point-of-Service prompts for the shift information. Select the **New** option to create a new shift type.

A screenshot of a software form titled "SHIFT MAINTENANCE". Below the title is a prompt: "Enter shift search criteria". The form has three input fields: "Shift Name", "Shift Desc", and "Work Code" (which has a dropdown arrow). At the bottom, there are four buttons: Back (Esc), Help (F1), Process (F8), and New (F9). A magnifying glass icon is in the top right corner.

Figure 5-43: Shift Criteria Prompt

- Oracle Retail Xstore Point-of-Service prompts for the shift detail information. Enter the information for the new shift:

The screenshot shows a web-based form titled "SHIFT MAINTENANCE" with the subtitle "Enter shift details". The form contains the following fields and controls:

- Shift Name:** A text input field.
- Shift Desc:** A text input field.
- Start Time:** A time selection field.
- End Time:** A time selection field.
- Number of Non-Working Hrs:** Two input fields labeled "Hours" and "Mins".
- Work Code:** A dropdown menu.
- Buttons:** At the bottom, there are four buttons: "Back", "Help", "Save Changes", and "Delete Shift". Each button has a corresponding keyboard shortcut below it: "Esc" for Back, "F1" for Help, "F8" for Save Changes, and "F9" for Delete Shift.

Figure 5-44: Shift Detail Prompt

- **Shift Name** - Enter a name for this shift. This is the label that is shown in the list of pre-defined shifts.
 - **Shift Description** - Enter a short description for this shift.
 - **Start Time** - Enter the starting time for this shift. If you enter the time as military time, it is converted to a.m. or p.m. For example: 16:00 is converted to 04:00 PM.
 - **End Time** - Enter the ending time for this shift. If you enter the time as military time, it is converted to a.m. or p.m. For example: 16:00 is converted to 04:00 PM.
 - **Number of Non-Working Hours** - Enter the hours and minutes that are counted as non-working hours, such as meal breaks.
 - **Work Code** - Select a work code for this shift.
- Select the **Save Changes** option to create the new shift.

Note: During employee scheduling, this new shift is available as an option in the pre-defined list of shifts. See [Adding a Pre-Defined Shift](#) for detailed information about using the **Add Shift From List** schedule option.

Editing an Existing Shift

Use this procedure to change the information for a pre-defined shift.

1. From the Back Office Employee Scheduling Maintenance Menu, select the **Shift Maintenance** option and press [Enter].



Figure 5-45: Shift Maintenance Option

2. Oracle Retail Xstore Point-of-Service prompts for the shift information. Enter the required information and select the **Process** option to continue. If you do not enter any information, Xstore displays a list of all shifts.

3. If more than one pre-defined shift matches the search criteria you entered, Oracle Retail Xstore Point-of-Service displays a list of shifts. Select the shift you want to change from the list and press [Enter] to continue.

WORK CODE	NAME	HOURS
CASHER	Cashier - AM	8:00 AM - 1:00 PM
CASHER	Cashier - PM	5:00 PM - 9:00 PM
ADMIN	Manager - AM	9:00 AM - 5:00 PM
ADMIN	Manager - PM	5:00 PM - 9:00 PM
SALES	Sales - AM	9:00 AM - 5:00 PM
SALES	Sales - PM	5:00 PM - 9:00 PM
CASHER	Cashier - AM (Weekend)	8:00 AM - 1:30 PM
CASHER	Cashier - Midnight (Sale)	8:00 AM - 1:30 PM

- 4. Oracle Retail Xstore Point-of-Service displays the shift's detail information.

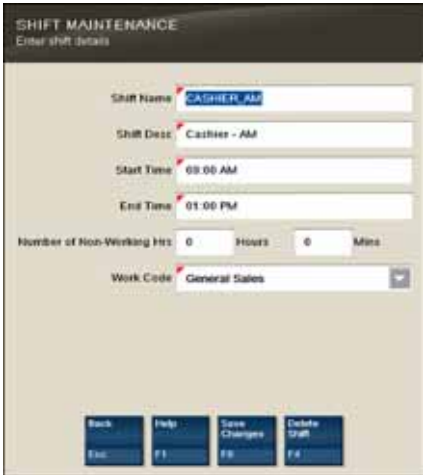


Figure 5-46: Shift Detail Example

Note: To delete the shift entirely, select the *Delete Shift* option here. The deleted shift will no longer be available as an option when setting up employee schedules.

- 5. Change the shift information as needed and select the **Save Changes** option to continue.

Schedule Reports

Note: Refer to the Oracle Retail Xstore Point of Service Reports Guide for detailed information about creating these reports.

Schedule reports are available from the Schedule Reports menu.

- 1. At the Back Office Main menu, select **Employee Maintenance and Payroll** and press [Enter].
- 2. At the Employee Maintenance and Payroll menu, select **Employee Scheduling Maintenance** and press [Enter].
- 3. At the Employee Scheduling Maintenance menu, select **Employee Schedule Reports**.



4. Select a report from the Schedule Reports list.



Figure 5-47: Schedule Reports List

Employee Time Off Summary Report

The Employee Time Off Summary Report provides a listing of employees who have scheduled time off during the weekly period selected for the report. For every employee selected, the report shows the date, amount of time off, and the reason for the time off.

Employee Time Off Summary Report			
Schedule Date Range: 04/23/2006 - 04/29/2006			
Employee Name/ID	Date	Time	Reason
Adams, Edna (03010001000002)	04/24/2006 - 04/26/2006	Full Day	VACATION
Chasticleer, Cindy (03010001000004)	04/23/2006 - 04/23/2006	Full Day	PERSONAL
Fields, Mary (03010001000005)	04/25/2006 - 04/25/2006	10:00 AM - 02:00 PM	UNAVAILABLE

See [Printing the Time-Off Schedule](#) for more information.

Employee Performance Report Overview

This report shows employee performance information within a selected date range for a specified work code (or all codes), for an individual employee, or for all employees.

This report includes the following employee information:

- Total scheduled hours for an employee or all employees
- The hours actually worked by the employee
- The difference between the scheduled hours and the hours worked
- The employee's total sales amount for the period
- The number of sales for the period
- The average dollar amount per sale

- The average number of sales per hours worked

Employee Performance Report							
Date Range: 04/01/2006 - 04/30/2006			Work Code: ALL			Employee: ALL	
Employee Name/ID	Total Hours Scheduled	Actual Hours Worked	Difference	Total Sales	# of Sales	Average Sale	Average Per Hour
Adams, Edna 03010001000002	42.00	42.00	0	\$469.70	16	\$29.36	\$0.00
Ashcroft, Amanda 03010001000003	36.00	36.00	0	\$29.36	6	\$4.89	\$0.00

Figure 5-48: Employee Performance Report

Schedule Detail Report Overview

This report shows employees scheduled for each day in a selected week. It contains the following information:

- Date
- Employee name
- Work Code
- The individual start and end times and hours scheduled for sales and non-sales (work code)
- Total hours for each employee per day
- A report total for the schedule week is shown on the last page of the report

Employee Schedule Detail Report					
Schedule Date Range: 06/05/2011 - 06/11/2011					
Date	Employee	Work Code	Start Time	End Time	Hours
06/06/2011	Fields, Mary 011000010000012	CASHIER	09:00:AM	04:30:PM	7.50
	Finley, Greg 011000010000015	CASHIER	07:00:AM	03:30:PM	8.50
	Frank, Fern 011000010000017	INVENTORY	09:00:AM	11:30:AM	2.50
	Frank, Fern 011000010000017	CASHIER	11:30:AM	04:30:PM	3.00
	French, Pierre 011000010000011	CASHIER	03:00:PM	10:00:PM	7.00

Figure 5-49: Employee Schedule Detail Report

Message Maintenance and Task Management

Overview

Messages can be viewed from both the Register Login screen and the Back Office Login screen. You may also be able to view messages from the transaction screens depending on your store configuration.

Task Management is a feature that encompasses tasks assigned to associates in a store for completion as well as tasks that are customer-focused such as appointments. Tasks have workflows associated with them so at any time a manager can easily see the current status of the task. This section also includes instructions on how to use the Black Book feature to view your associate's primary customers.

Creating and Maintaining Messages

Messages are for information purposes only, and require no action by the employee. Messages may be downloaded from the corporate office, and messages can also be created and maintained at the store level using the Back Office Message Maintenance menu option.

Messages can be store-based or register-based, and provide the ability for both the corporate office and the store managers to share information with all employees. See [Creating and Maintaining Messages](#).

Messages can be maintained at the corporate office or using the Back Office functions. Only store-created messages can be edited at the store level. Messages from the corporate office cannot be changed or deleted.

Creating and Maintaining Messages

Perform the following steps to create and maintain messages:

1. At the Back Office Main Menu, select the **Employee Maintenance and Payroll** menu option and press **[Enter]**.



Figure 6-1: Main Menu - Employee Maintenance and Payroll

2. At the Employee Maintenance and Payroll menu, select the **Message Maintenance** menu option and press **[Enter]**.



Figure 6-2: Employee Maintenance and Payroll Menu

- The Employee Messages search form displays. You have the following options on the search form:

Figure 6-3: Employee Messages Search Form

- To create a new message, select **New Message**. See [Creating a New Message](#).
- To find an existing message:
 - Enter the search criteria in the search fields provided and select **Process**.

Search fields include:

- * **Start Date:** The date the message is to be displayed.
- * **End Date:** The date the message is to be removed from the message list.
- * **Priority:** The message importance: High, Medium, Low.

<OR>

- Leave all the search fields blank and select **Process** to return a list of all active, store-level messages.

See [Editing a Message](#) and [Deleting a Message](#).

Creating a New Message

Messages can be displayed on all registers, or only a specific register. However, all employees have the ability to see the messages. Messages cannot be directed to specific employees or employee groups. Any messages created are automatically flagged as **Store Created**.

- At the Employee Messages search form ([Figure 6-3](#)), select **New Message**.

Note: You can also create a new message by selecting the *New Message* option from the Employee Messages list. See [Figure 6-6](#).

2. Enter data as required to create a new message:

The screenshot shows a software interface titled "EMPLOYEE MESSAGES" with a subtitle "Message Maintenance". The form contains the following fields and controls:

- Store Created:** Yes
- Start Date:** 08/30/2013
- End Date:** 09/30/2013
- Priority:** Medium (with a dropdown arrow)
- Register Specific:** No (with a dropdown arrow)
- Register #:** (empty text field)
- Message URL:** (empty text field)
- Message:** Sign up now for the annual associate appreciation picnic.

At the bottom of the form, there are five buttons: Back, Help, Edit Message, Delete Message, and New Message. Below these buttons are five keyboard shortcuts: Esc, F1, F2, F4, and F7.

Figure 6-4: Employee Messages - New Message Form

- **Start Date:** The date the message is to be displayed.
- **End Date:** The date the message is to be removed from the message list.
- **Priority:** The message importance: High, Medium, Low.
- **Register Specific/Register #:**
 - * **Register Specific:** Yes or No - If **No**, the message is displayed on all registers. If **Yes**, the message is only displayed on a specific register.
 - * **Register #** - If Register Specific is set to **Yes**, this is the register on which the message are displayed.
- **Message URL:** If applicable, enter a URL address. The URL will appear as an attachment to the message. See [Figure 6-5](#) below.
- **Message:** The message text.

- Select **Save Changes** to create the new message.

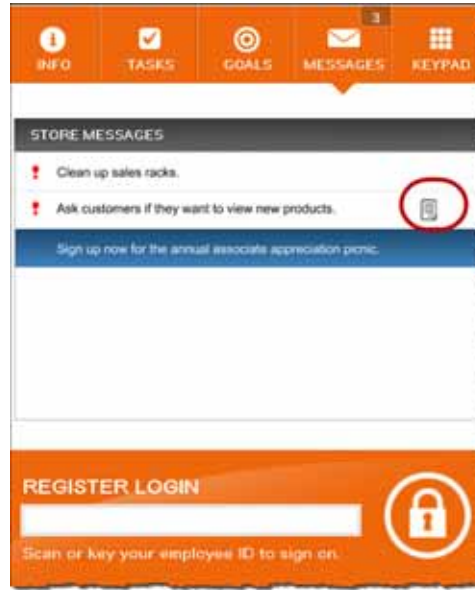


Figure 6-5: Register Store Message with URL attachment

Editing a Message

Only messages created at the store level can be edited or deleted. For this reason, any messages downloaded from the corporate office are not displayed in the list of messages returned from a message search.

Note: To find and display the list of store-created messages, refer to [step 3](#).

1. At the Employee Messages list, use the up and down arrow keys to select and highlight a message, then press **[Enter]** to display the Employee Messages maintenance form.

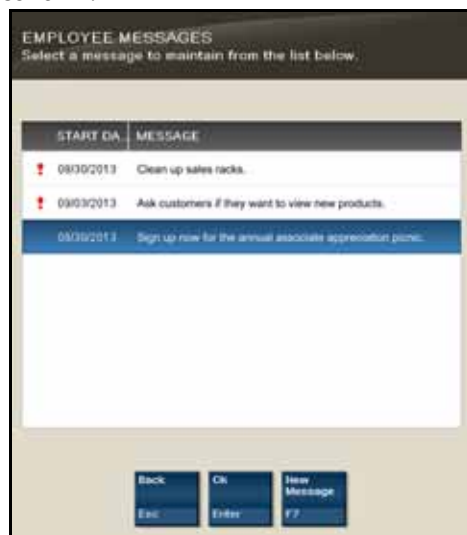


Figure 6-6: Employee Messages List

- At the Employee Messages maintenance form, select **Edit Message** to make the fields active and available for editing.



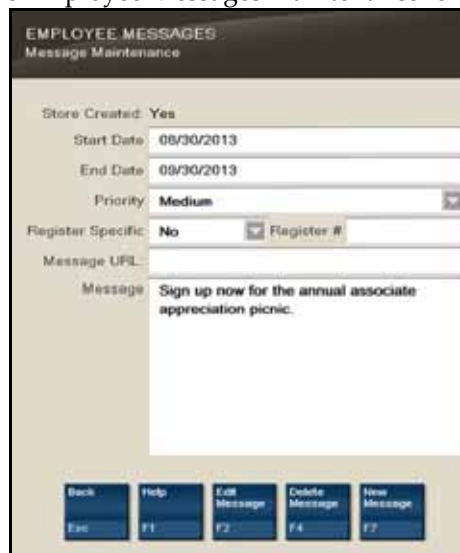
The screenshot shows the 'EMPLOYEE MESSAGES: Message Maintenance' form in a menu view. The form contains the following fields and controls:

- Store Created: Yes
- Start Date: 08/30/2013
- End Date: 09/30/2013
- Priority: Medium (dropdown menu)
- Register Specific: No (dropdown menu) with a 'Register #' field
- Message URL: (empty text field)
- Message: Sign up now for the annual associate appreciation picnic.

At the bottom, there are five buttons: Back (F1), Help (F2), Edit Message (F3), Delete Message (F4), and New Message (F5).

Figure 6-7: Employee Messages Menu Options

- At the active Employee Messages maintenance form, make your changes as needed:



This screenshot is identical to the one in Figure 6-7, showing the 'EMPLOYEE MESSAGES: Message Maintenance' form in an active view. It displays the same fields and controls as described in the previous figure.

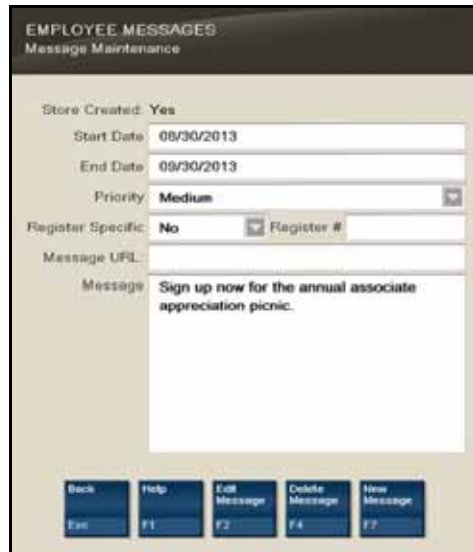
Figure 6-8: Employee Messages Maintenance Form - Active View

- **Start Date:** The date the message is to be displayed.
 - **End Date:** The date the message is to be removed from the message list.
 - **Priority:** The message importance: High, Medium, Low.
 - **Register Specific/Register #:**
 - * **Register Specific:** Yes or No - If **No**, the message is displayed on all registers. If **Yes**, the message is only displayed on a specific register.
 - * **Register #:** The register on which the message is displayed. This only applies if Register Specific is set to **Yes**.
 - **Message:** The message text.
- After making your changes, select **Save Changes** to apply your edits to the message.

Deleting a Message

Only messages created at the store level can be deleted.

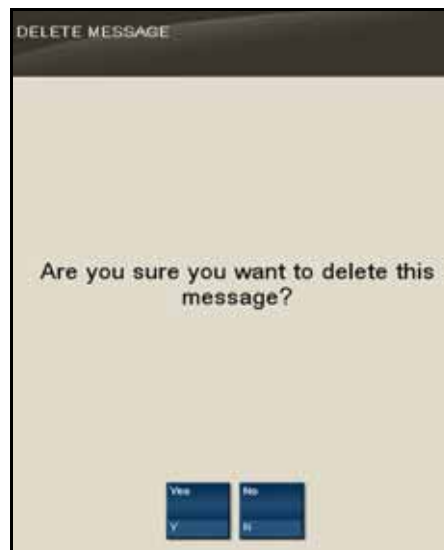
1. At the Employee Messages list ([Figure 6-6](#)), use the up and down arrow keys to select and highlight a message, then press **[Enter]** to display the Employee Messages maintenance form.



The screenshot shows the 'EMPLOYEE MESSAGES: Message Maintenance' form. It includes fields for 'Store Created: Yes', 'Start Date' (08/30/2013), 'End Date' (09/30/2013), 'Priority' (Medium), 'Register Specific' (No), and 'Register #' (empty). The 'Message UPL' field is empty, and the 'Message' field contains the text 'Sign up now for the annual associate appreciation picnic.' At the bottom, there are five buttons: 'Back' (F1), 'Help' (F2), 'Edit Message' (F3), 'Delete Message' (F4), and 'New Message' (F5).

Figure 6-9: Employee Messages Maintenance Form

2. At the Employee Messages maintenance form, select **Delete Message** to delete the message.
3. At the Delete Message confirmation prompt, select **Yes** to remove the message. If you do not want to delete the message, select **No** to return to the Employee Messages search form.



The screenshot shows the 'DELETE MESSAGE' confirmation prompt. It asks 'Are you sure you want to delete this message?' and has two buttons at the bottom: 'Yes' (Y) and 'No' (N).

Figure 6-10: Delete Message Confirmation Prompt

Reviewing Task Management Information

Use the My Task screen to review all tasks assigned to associates (see [Viewing Task Progress](#)). Use the Black Book to view primary customer's assigned to your associates (see [Viewing Black Book Customers](#)).

Viewing Task Progress

1. From the Back Office select **Associate Tasks --> My Tasks**.
2. Use the filter bar to search by **Associate, Activity, Status, Start Date, or End Date**. To filter:
 - a. Select a Heading or Date field from the filter bar:

Task List		Associate Shree Sakthi		Activity APPOINTMENT		Status Open	Start Date 6/3/2015	End Date 6/22/2015
P	DATE	START TIME	DURATION	ACTIVITY	DESCRIPTION	CUSTOMER	STATUS	ASSOCIATE
1	6/3/2015	10:00 AM	1 hour	APPOINTMENT	Dress Fitting	Lee Smith	Open	Shree Sakthi
	6/3/27/2015	9:00 AM	1 hour	APPOINTMENT	Alterations	Leslie R Brown	Open	Shree Sakthi

Figure 6-11: Filter Bar

- Note:** You can also use the following menu options to filter:
- Associate List Filter
 - Activity List Filter
 - Status List Filter

- b. If you selected:
 - * **Associate** - select a value and then select **Ok**.



Figure 6-12: Associate List Filtering

- * **Activity** - select a value and then select **Ok**.



Figure 6-13: Activity Filtering

- * **Status**- select a value and then select **Ok**.

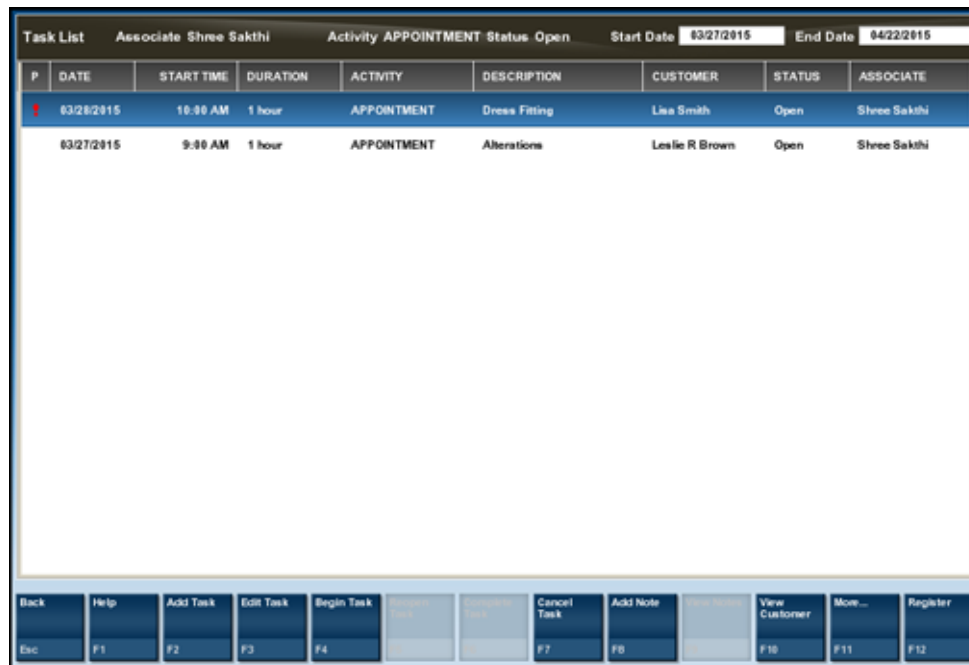


Figure 6-14: Status Filtering

- * **Start Date** - override the default value.
- * **End Date** - override the default value.

Reviewing Task Management Information

Oracle Retail Xstore Point of Service displays tasks that meet your filter values.



P	DATE	START TIME	DURATION	ACTIVITY	DESCRIPTION	CUSTOMER	STATUS	ASSOCIATE
	03/26/2015	10:00 AM	1 hour	APPOINTMENT	Dress Fitting	Lisa Smith	Open	Shree Sakthi
	03/27/2015	9:00 AM	1 hour	APPOINTMENT	Alterations	Leslie R Brown	Open	Shree Sakthi

Figure 6-15: Filtering Results

Table 6-1: Task List Fields

Field	Description
Priority (P)	The Importance of the task (High (🔴), Medium (none), or Low (🔵).
Date	The date the task should be started.
Start Time	The time the task should begin.
Duration	The length of time for the task.
Activity	Type of task.
Description	Detailed description the task.
Customer	The customer assigned to the task. Note: Select View Customer to view the Tasks tab of the Customer Maintenance screen which displays all tasks assigned to the customer. See description in the <i>Xstore Point-of-Service User Guide</i> for more information.

Table 6-1: Task List Fields

Field	Description
Status	Indicates the progress of the task: Open - The appointment is open, but not started. In Progress - The appointment has been started, but not completed. Cancelled - The appointment has been cancelled and cannot be reopened or edited. Closed - The appointment has been completed and cannot be reopened or edited.
Associate	The employee or employee group responsible for completing the task.

Note: The *Xstore Point-of-Service User Guide* for editing tasks and adding comments.

Viewing Black Book Customers

[Oracle Retail Customer Engagement Cloud Services only]

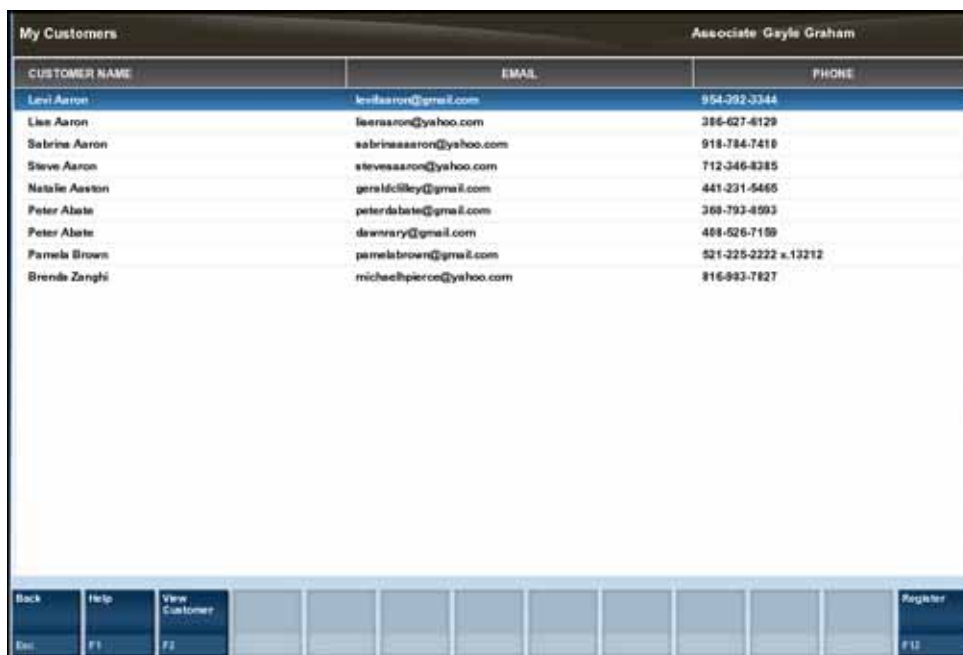
1. From the Back Office select **Associate Tasks** --> **Black Book**. The Associate filter prompt displays.
2. Select an associate and press [Enter].



Figure 6-16: Associate List Filtering

Reviewing Task Management Information

Xstore displays the primary customer's assigned to the associate you selected.



My Customers			Associate: Gayle Graham		
CUSTOMER NAME	EMAIL	PHONE			
Levi Aaron	leviaaron@gmail.com	954-392-3344			
Lisa Aaron	leeraaron@yahoo.com	386-627-6129			
Sabrina Aaron	sabrinasaron@yahoo.com	918-784-7418			
Steve Aaron	steveaaron@yahoo.com	712-346-8385			
Natalie Aarson	geraldciley@gmail.com	441-231-5465			
Peter Alate	peteralate@gmail.com	360-793-8593			
Peter Alate	dawnary@gmail.com	408-526-7159			
Pamela Brown	pamelabrown@gmail.com	521-225-2222 x.13212			
Brenda Zanghi	michaeltpierce@yahoo.com	816-993-7627			

Back Help View Customer Register

Figure 6-17: Black Book Screen

Table 6-2: Black Book Fields

Field	Description
Customer Name	The primary customer's name.
Email	The primary customer's email address.
Phone	The primary customer's phone number.

- To view the customer information select **View Customer**. The Customer Maintenance screen displays the purchase history. Select **Back** to return to the Black Book screen.

Note: Refer to step 3 (Purchase History Tab) as well as the *Xstore Point-of-Service User Guide* Customer Maintenance chapter.

Payroll and Timecard Maintenance

Overview

Payroll Maintenance refers to the system functions that allow you to view, analyze, edit, and post weekly payroll information to the home office. Payroll information includes the daily hours—by work assignment—for each employee for a given week, including overtime hours. This payroll information for each week is derived from the timecard shift data.

Timecard Maintenance refers to system functions that allow you to view and edit timecard entries created through the clock-in/clock-out process. You may also create new timecard entries and void existing ones, whether they were created automatically or manually. For example, use Timecard Maintenance to modify an employee's timecard when the employee fails to clock-in or clock-out properly. Timecard entries also directly translate into payroll data, assuming the payroll data is not modified later.

Note: Refer to [Employee Scheduling](#) for information about scheduling and maintaining employee time-off events such as vacations and other times when employees may not be available for work, creating and maintaining employee work shifts and assigning employees to defined work shifts.

Accessing Back Office Payroll & Timecard Maintenance Functions

Associates with the proper security permissions may access Payroll Maintenance and Timecard Maintenance from the Back Office Employee Maintenance and Payroll Menu. Use these functions to maintain the timecard entries that were created through the clock-in/clock-out process and the payroll entries that were derived from the timecard entries.

In addition to the employee payroll and timecard maintenance functions, a Posted Timecard Report and a Payroll Report are also available.

1. Select the **Back Office** option.

- After logging in to the Back Office (see [Accessing the Back Office](#)), select the **Employee Maintenance and Payroll** option from the Main Menu.

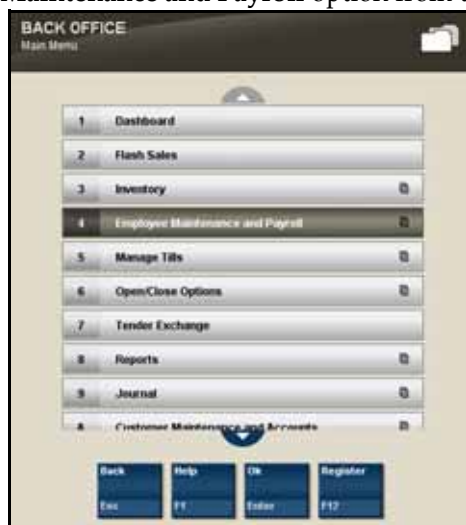


Figure 7-1: Employee Maintenance and Payroll Option

- Select the **Time and Attendance** option from the Employee Maintenance and Payroll menu.



Figure 7-2: Time and Attendance Option

Note: Because each Oracle Retail Xstore Point-of-Service menu is configurable, the button functions and the menu options on your system may appear in a different order or have different text than the examples shown in this manual.

4. Select one of the options from the **Time and Attendance** Menu.



Figure 7-3: Time and Attendance Menu Options

The following options are available:

- **Payroll & Timecard Maintenance** - Select this option to maintain employee payroll records. Refer to [Payroll and Timecard Maintenance](#).
- **Payroll Summary Report** - Select this option to run the Payroll Report. Refer to [Payroll Summary Report](#).
- **Payroll Detail By Employee Report** - Select this option to run the Payroll Detail By Employee Report. Refer to [Payroll Detail By Employee Report](#).
- **Posted Timecard Report** - Select this option to run the Posted Timecard Report. Refer to [Posted Timecard Report](#).
- **Open Timecard Report** - Select this option to run the Open Timecard Report. Refer to [Open Timecard Report](#).
- **Regenerate Payroll File** - Select this option to recreate the payroll file.

Payroll and Timecard Maintenance

Use the Payroll and Timecard Maintenance menu option to maintain Payroll and Timecard information.

Note: The payroll categories are configurable, so the categories available on your system may differ from the examples shown here. The starting work day of the week display is also configurable. Your first day of the week may be different from the day shown in the example.

1. At the Time and Attendance Menu, select the **Payroll and Timecard Maintenance** option. Oracle Retail Xstore Point of Service prompts for the payroll week you want to manage. Select a payroll date from the list and select **Ok** to continue.

Figure 7-4: Payroll Week List

2. Oracle Retail Xstore Point of Service displays the Employee Lookup form, prompting for employee information. Enter the criteria you want to use for finding the employee payroll record you want to review and select **Process**:

Figure 7-5: Employee Lookup Form

- If you enter an employee ID and Oracle Retail Xstore Point of Service finds it, the name is displayed in a list. Press **[Enter]** to continue.
- If your search criteria produces more than one record, you must select the record you want from the list and press **[Enter]**.

When you have located and selected the employee, Oracle Retail Xstore Point of Service displays the Payroll Maintenance record for the employee. The record includes the following tabs:

- [Payroll Maintenance Tab](#)
- [Payroll Comments Tab](#)
- [Timecard Maintenance Tab](#)
- [Timecard Comment Tab](#)

Payroll Maintenance Tab

Use the Payroll Maintenance tab to verify and enter payroll hours for a selected payroll period. All payroll records should be reviewed manually and saved before the payroll finish date. This includes hours automatically fed to payroll from the timecard clock in/clock out records. Posted payroll information is uploaded to the home office at closing.

You must find and display an employee payroll record for a specific payroll week so that you may view it or change it.

	SUN 1/25/15	MON 1/26/15	TUE 1/27/15	WED 1/28/15	THU 1/29/15	FRI 1/30/15	SAT 1/31/15	TOTAL HOUR
Hours Worked	0.00	8.00	4.00	9.00	9.00	3.00	0.00	33.00
Overtime Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Double Overtime	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Vacation Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sick Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Personal Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Holiday Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Bereavement Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total	0	8	4	9	9	3	0	33

Figure 7-6: Payroll Maintenance Screen

The Payroll Maintenance tab shows the following information:

- **Employee information:** Employee ID, name, and department.
- **The days of the week and the date for each day;** for example, Sunday through Saturday.
- **Regular Hours Worked** - These hours are determined from the timecard records and cannot be changed here. Refer to [Editing a Timecard Record](#) for more information on changing timecard records.
- **Overtime Hours** - These hours are calculated automatically by the system, based on the overtime rules established by the home office. These hours cannot be changed here. Refer to [Editing a Timecard Record](#) for more information on changing timecard records.

- **Double Overtime Hours** - These hours are calculated automatically by the system based on the overtime rules established by the home office. These hours cannot be changed here. Refer to [Editing a Timecard Record](#) for more information on changing timecard records.
- **Non-Working Hours Categories** - These types of payroll hours can be edited in Payroll Maintenance using the Edit Non-Working Hours option. Examples of non-working hours include:
 - * Vacation Hours
 - * Sick Hours
 - * Personal Hours
 - * Other Hours
 - * Holiday Hours
 - * Bereavement Hours
 - * Jury Hours
 - * Funeral Hours
- **Total Hours** - The total working hours for each category by day and by week.
- **Totals** - The total hours by day and by week.

Note: Refer to [Editing a Payroll Record](#) for information about editing non-working hours.

The following options are available from the Payroll Maintenance screen:

- Select **Employee List** to see a list of active employees for the payroll week you are viewing.
- Select **Edit Non-Working** to edit the hours for the non-working categories. Non-working categories include Vacation Hours, Sick Hours, Personal Hours, and Other Hours as determined by your store policy. Hours that are calculated from the timecard records cannot be edited through Payroll Maintenance. See [Editing a Payroll Record](#).
- Select **Review Payroll** after you have reviewed the employee's payroll record. This function adds a timestamp to the record along with your ID and the payroll record is now ready for posting to the home office.
- Select **Post Employee** to post the employee's record to the home office.
- Select **Post Payroll** to post all employees' records to the home office.
- Select **Previous Employee** to move backward or **Next Employee** to move forward and view additional employee payroll records for the payroll week.
- Use the **Previous Tab** and **Next Tab** options to navigate between the tabs on this screen:
 - * Use the **Timecard Maintenance** tab to review or edit the timecard records that correspond to this payroll record. Refer to [Timecard Maintenance Tab](#) for more information about editing timecard records.
 - * Use the **Payroll Comment** tab to view and/or add a comment.
- Select **Register** to go to the register screens.

Editing a Payroll Record

Note: Only non-working hours such as sick time, vacation time, personal time, etc. can be edited from Payroll Maintenance. To edit working hours (derived from the timecard records), use Timecard Maintenance.

1. To make a change to a non-working-hour payroll record select the **Edit Non-Working** option from the Payroll Maintenance screen ([Figure 7-6](#)).
2. Select a non-working hour payroll record and make the change by typing the number of hours in the selected field:

PAYROLL MAINTENANCE		Store
PAYROLL MAINTENANCE		
Employee ID: 100		
	SUN 12/30/12	12
Hours Worked	19.00	
Overtime Hours	0.00	
Double Overtime	0.00	
Vacation Hours	0.00	
Sick Hours	0.00	
Personal Hours	0.00	
Other Hours	5.00	
Holiday Hours	0.00	
Bereavement Hours	0.00	
Jury	0.00	

Figure 7-7: Payroll Maintenance Screen, Edit Non-Working Hours

- You can use up to 2 decimal places when entering hours; for example, 2.75 for 2 hours and 45 minutes.
 - You cannot enter more than 24 hours or less than 15 minutes (.25 hours) in a day.
 - Depending upon your store policy, you may have additional time restrictions.
3. Select the **Save** option to save the edited payroll record. Oracle Retail Xstore Point of Service updates the hours for the payroll record.

Reviewing a Payroll Record

After you have verified the information for an employee's payroll record, you can mark this record as reviewed.

1. At the Payroll Maintenance screen, select the **Review Payroll** option to add a timestamp to the currently displayed employee record.
2. Press **[Enter]** to close the prompt: the payroll has been reviewed. The Payroll Maintenance screen displays.

Oracle Retail Xstore Point of Service marks the record as reviewed. This information

is displayed in the information panel at the top of the Payroll Maintenance screen as shown below.



Figure 7-8: Payroll Reviewed Timestamp

3. Continue reviewing additional employee records as needed by selecting the **Previous Employee** and **Next Employee** options. When all records have been reviewed, the payroll records are ready for posting to the home office.

Posting the Employee's Payroll Record

After you have verified the information for an employee's payroll record and marked the record as reviewed, you can post the record to the home office.

Tip: You also have the option to post all employee payroll records at once. Refer to [Posting all Employee Payroll Records at One Time](#) for procedural information.

1. To post the employee's payroll record to the home office, select the **Post Employee** option.
2. Oracle Retail Xstore Point of Service prompts to confirm the selection. Select **Yes** to post the employee's payroll record and Oracle Retail Xstore Point of Service displays a message notifying you that the employee's payroll record has been posted.

Note: If you have not marked this employee payroll record as reviewed before choosing to post the record, Oracle Retail Xstore Point of Service displays a message asking if you want to post the record anyway.

Select **Yes** to post the record or select **No** to return to the Payroll Maintenance screen where you can review the payroll record.



Figure 7-9: Post Employee Payroll Record Confirmation Prompt

3. Press **[Enter]** to close the prompt: payroll has been posted. The Payroll Maintenance screen displays.

Oracle Retail Xstore Point of Service marks the employee's payroll record as posted. This information is displayed in the information panel at the top of the Payroll Maintenance screen as shown below.

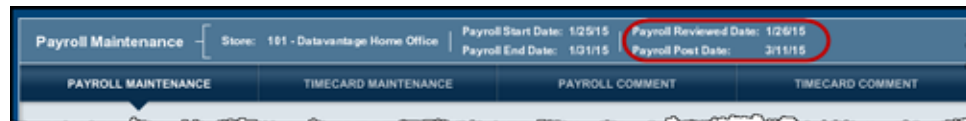


Figure 7-10: Payroll Posted Timestamp

- Continue reviewing and posting additional employee records as needed by selecting the **Previous Employee** and **Next Employee** options.

If the system identifies a payroll exception error (as determined by your store's policy) when you post an employee's payroll record, you are notified that a payroll exception exists.

- If any payroll errors are found, select an employee from the list and press [Enter] to return to the employee's payroll record where you can review the record and make changes as required.



Figure 7-11: Payroll Errors at Posting

Note: To edit an employee's regular hours, you must use the *Timecard Maintenance* tab.

Posting all Employee Payroll Records at One Time

You can also post all employee payroll records at the same time rather than individually.

- To post the entire payroll to the home office, select the **Post Payroll** option.

Note: If the system identifies a payroll exception error (as determined by your store policy) when you post payroll records, you are notified that a payroll exception exists. See [Figure 7-11](#)

Oracle Retail Xstore Point of Service prompts to confirm the selection.



Figure 7-12: Post Payroll Confirmation Prompt

2. Select **Yes** to post the payroll to the home office.
3. If any records have not been marked as reviewed, Oracle Retail Xstore Point of Service displays a list of employee payroll records that require review.
 - To review a record, select the name on the list and then select **Ok** to display the Payroll Maintenance screen where you can review the record.<OR>
 - To post payroll to the home office without reviewing the records, select the **Continue Post Payroll** option.



Figure 7-13: List of Non-reviewed Employee Payroll Records

When payroll has been posted, Oracle Retail Xstore Point of Service displays a message indicating that the records have been posted and marks all records with a timestamp for the posted date.



Figure 7-14: Payroll Posted Message

Viewing and Editing Posted Payroll Records

Once payroll records have been posted, you can view the information at the Payroll Maintenance screen and edit information if you have the proper security permissions.

1. When you select an option to edit timecard and/or payroll information for a posted payroll record, Oracle Retail Xstore Point of Service displays a message informing you that payroll has been posted. Any changes you make to a posted record must be re-posted to the home office manually.

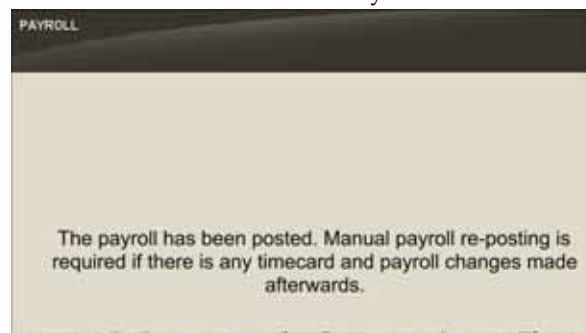


Figure 7-15: Payroll Posted, Edit Message

2. Press [Enter] to acknowledge this message and make your edits as required.

Payroll Posting Day

On the day payroll must be posted to the home office, Oracle Retail Xstore Point of Service may display a message indicating that payroll records are due. This message displays when you exit the Payroll Maintenance function without posting the payroll

records. Select **Yes** to continue maintaining the payroll records or **No** to exit Payroll Maintenance.



Figure 7-16: Payroll Posting Day Prompt

Payroll Comments Tab

To view payroll record comments, use the **Previous Tab** and **Next Tab** options to navigate between the tabs on this screen and select the **Payroll Comment** tab.

Oracle Retail Xstore Point of Service displays any comments associated with this payroll record. In addition to the text, the date the comment was added and the ID of the person who created the comment are also included.

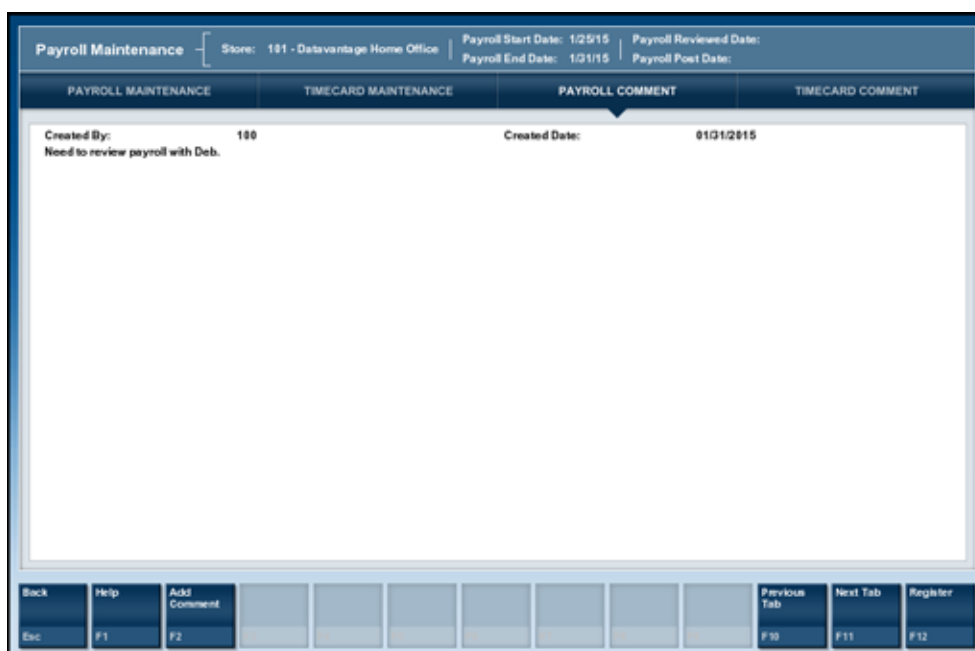


Figure 7-17: Payroll Comments

Adding Comments

An option to add a new comment to this payroll record is also available. You can add additional comments to a record, or add comments to a record that has no current comments associated with it.

1. To add a comment to the payroll record, select the **Add Comment** option ([Figure 7-17](#) above). Oracle Retail Xstore Point of Service displays the Add Comment form.

2. Type a comment and select **Ok** to add the comment to the employee's payroll record.

Figure 7-18: Add Comment Prompt

Timecard Maintenance Tab

The Timecard Maintenance tab shows the following information:

Employee ID:	Employee Name: Smith, John							Department:
	SUN 1/25/15	MON 1/26/15	TUE 1/27/15	WED 1/28/15	THU 1/29/15	FRI 1/30/15	SAT 1/31/15	
		CASHIER 8:00 AM 12:00 PM	ADMIN 5:00 PM 9:00 PM	ADMIN 8:00 AM 12:00 PM	ADMIN 8:00 AM 12:00 PM	ADMIN 1:00 PM 4:00 PM		
		LUNCH_BREAK 12:00 PM 1:00 PM		LUNCH_BREAK 12:00 PM 1:00 PM	LUNCH_BREAK 12:00 PM 1:00 PM			
		ADMIN 1:00 PM 4:00 PM		ADMIN 1:00 PM 5:00 PM	ADMIN 1:00 PM 5:00 PM			

Scheduled	Actual
0	0
4	8
4	4
9	9
9	9
4	3
0	0


Total Hours: 33

Figure 7-19: TimeCard Maintenance Tab

- The days of the week and the date for each day; for example, Sunday through Saturday.

Note: The week day order is configurable, so your beginning day of the week may differ from the first day shown here.

- The work code and the times the employee clocked in and out for each work code.

- If the employee uses multiple work codes while clocking in during the day, multiple entries display. For example, in [Figure 7-19](#), on Monday, the employee worked on the selling floor (Cashier) and then worked in the Back Office (Admin).
- An icon  associated with a timeclock record indicates that it has been entered or modified through Timecard Maintenance and it is not the original clock-in or clock-out record, or that the record has an exception to a timecard rule. Select the record and the **View History** option for details about this modified record.
- The hours scheduled for each day. Available if the scheduling option is used.
- The actual hours worked each day.
- The total number of hours worked for the week.

The following menu options are available from the Timecard Maintenance screen:

- **Payroll Dates** - Select this option to view the list of payroll dates. Select a new date from the list to view the selected employee's timecard record for the new payroll week.
- **Employee List** - Select this option to view a list of active employees for the payroll week you are viewing.
- **Edit Timecard** - Select this option to edit the timecard record.
- **View History** - Select this option to view the details about a specific timeclock record.
- **Previous Employee/Next Employee** - Select these options to move backward/forward to view additional employee timecard records for the payroll week.
- **Exception List** - Select this option to view a list of employee records that have exceptions for this payroll week. Exception rules are set up by the home office.
- Use the **Previous Tab** and the **Next Tab** menu options to navigate between the Timecard Maint tab and the Timecard Comment tab.
- **Timecard Comment Tab**- Select this tab to view and/or add a comment.

Editing a Timecard Record

1. To change a timecard record, select the record that you want to change on the Timecard Maintenance screen and select the **Edit Timecard** option.

Payroll Maintenance — Store: 101 - DataVantage Home Office | Payroll Start Date: 1/25/15 | Payroll Reviewed Date: 1/25/15
Payroll End Date: 1/31/15 | Payroll Post Date:

TIMECARD MAINTENANCE

Employee ID: 100 | Employee Name: Smith, John | Department:

SUN	MON	TUE	WED	THU	FRI	SAT
1/25/15	1/26/15	1/27/15	1/28/15	1/29/15	1/30/15	1/31/15
	CASHIER 8:00 AM 12:00 PM	ADMIN 5:00 PM 9:00 PM	ADMIN 8:00 AM 12:00 PM	ADMIN 8:00 AM 12:00 PM	ADMIN 1:00 PM 4:00 PM	
	LUNCH_BREAK 12:00 PM 1:00 PM		LUNCH_BREAK 12:00 PM 1:00 PM	LUNCH_BREAK 12:00 PM 1:00 PM		
	ADMIN 1:00 PM 4:00 PM		ADMIN 1:00 PM 5:00 PM	ADMIN 1:00 PM 5:00 PM		

Scheduled: 0 4 4 9 9 4 0
Actual: 0 8 4 9 9 3 0
Total Hours: 33

Back Help Payroll Dates Employee List **Edit Timecard** View History Previous Employee Next Employee Exception List Previous Tab Next Tab Register

Figure 7-20: Timecard Maintenance Screen

2. The following editing options are available:
 - **Add Timecard record** - Use this option to add a timecard record for the selected day. Refer to [Adding a Timecard Record](#).
 - **Change Timecard record** - Use this option to change a timecard record for the selected day. Refer to [Changing a Timecard Record](#).
 - **Delete Timecard record** - Use this option to remove a timecard record for the selected day. Refer to [Deleting a Timecard Record](#).

Adding a Timecard Record

1. Select **Edit Timecard**.
2. Select the day to be edited and select **Add Timecard**.

3. Oracle Retail Xstore Point of Service displays the Timecard Maintenance form. You must select a work code and enter the start time and end time for the timecard record.



The screenshot shows the 'TIMECARD MAINTENANCE' form with the subtitle 'Timecard Data'. It contains the following fields and controls:

- Timecard Record for:** A text field containing '91070910'.
- Work Code:** A dropdown menu showing 'General Sales'.
- Check In Time:** A text field containing '09:00 AM'.
- Check Out Time:** A text field containing '09:00 AM'.
- Time entry instruction:** A section with two lines of text: 'For 09:10 AM enter 0910 or 0910A' and 'For 09:10 PM enter 0910P or 2110'.
- Buttons:** At the bottom, there are four buttons: 'Back' (top left), 'Help' (top right), 'Save Changes' (bottom right), and 'Exit' (bottom left).

Figure 7-21: Timecard Maintenance Form

4. Select the **Save Changes** option to create the new timecard record.
5. Depending upon your store policy, you may be prompted to enter a comment about the change to the timecard record. Type a comment and press **[Enter]** to continue.



The screenshot shows the 'ADD COMMENT' form with the subtitle 'Enter a comment for the timecard record.' It contains the following elements:

- Text Area:** A large, empty text area for entering a comment.
- Buttons:** At the bottom, there are two buttons: 'Back' (left) and 'OK' (right).

Figure 7-22: Timecard Comment Form

The system prints receipts for your records and the record is added to the selected day.

Timecard Acceptance Form

Timecard Entry:

Authorizing Manager ID:1

Employee ID:03010001000002

Employee Name:

Edna Adams

Timecard Date: XX/XX/XX

Work Code: SALES

Clock In: 08:00 AM

Clock Out: 03:00 PM

Comments:

Forgot to clock in and out.


X

Employee's Signature

X

Manager's Signature

Figure 7-23: Edit Timecard Record Receipt Example - Forgot To Clock In And Out

On the Timecard Maintenance screen, this record is preceded by an icon  indicating that it has been modified and is not an original clock in/clock out record.

The system recalculates the actual hours worked for the day, the total hours worked for the week, and updates the timecard record accordingly.

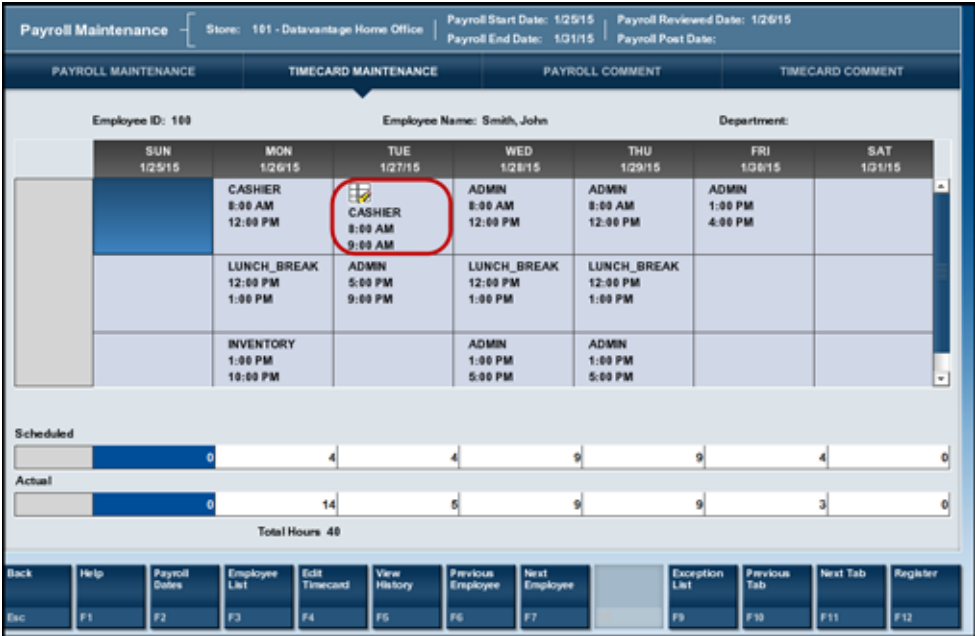


Figure 7-24: Timecard Maintenance Screen - Timecard Record Added

Changing a Timecard Record

1. Select **Edit Timecard**.
2. Select the day to be edited and select **Change Timecard**.

Note: If no timecard exists for the day you are editing, select *Add Timecard*.

Oracle Retail Xstore Point of Service displays the Timecard Maintenance form where you can change the work code and start time and end times for the timecard record. The data on the form defaults to the current record information for the selected day.

The screenshot shows the 'TIMECARD MAINTENANCE' form with the title 'Timecard Data'. It includes fields for 'Timecard Record for:' (01/21/2015), 'Work Code' (a dropdown menu currently open showing various sales and administrative codes), 'Clock In Time:', 'Clock Out Time:', and 'Time entry instructions:'. At the bottom, there are buttons for 'Back', 'Help', 'Save Changes', 'Exit', 'F1', and 'F8'.

Figure 7-25: Timecard Maintenance Form - Timecard Record Inset

3. Make the changes as needed and then select the **Save Changes** option to replace the current timecard record with the edited timecard record.
4. Depending upon your store policy, you may be prompted to enter a comment about the change to the timecard record. Type a comment and press [**Enter**] to continue.

The screenshot shows the 'ADD COMMENT' form with the prompt 'Enter a comment for the timecard record.' and a large text input area. At the bottom, there are buttons for 'Back', 'Ok', 'Exit', and 'Enter'.

Figure 7-26: Timecard Comment Form

The system prints receipts for your records and the edited record is updated for the selected day.

Ticket: 2152 Date: 12/12/10
Store: 110 Register: 1

Timecard Acceptance Form

Timecard Entry:
Authorizing Manager ID: 100
Employee ID: 01100001000012
Employee Name:
Mary Fields


Timecard Date: 12/16/10
Work Code: CASHIER
Clock In: 4:38 PM
Clock Out: 9:30 PM

Comments:
Forgot to clock out at end of shift.

X _____
Employee's Signature

X _____
Manager's Signature

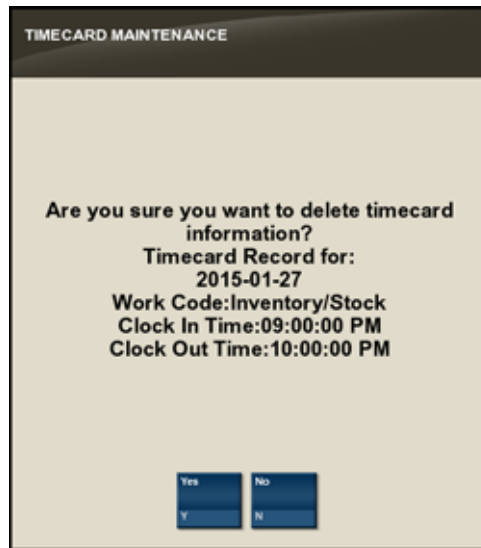
Figure 7-27: Edit Timecard Record Receipt Example - Forgot to Clock Out

This record is preceded by an icon  indicating that it has been modified and is not an original clock in/clock out record. The system recalculates the actual hours worked for the day and the total hours worked for the week, and updates the timecard record accordingly.

Deleting a Timecard Record

1. Select **Edit Timecard**.
2. Select the day to be edited and select **Delete Timecard**.

- Oracle Retail Xstore Point of Service prompts to confirm that you want to delete the selected record. Select **Yes** to delete the record.

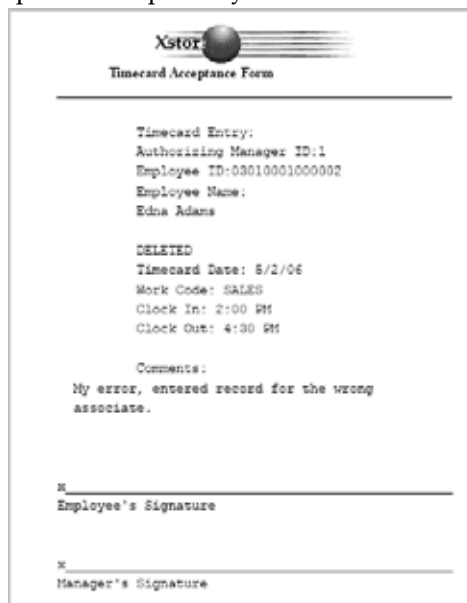


A screenshot of a confirmation dialog box titled "TIMECARD MAINTENANCE". The text inside asks, "Are you sure you want to delete timecard information?" and provides details for the record to be deleted: "Timecard Record for: 2015-01-27", "Work Code: Inventory/Stock", "Clock In Time: 09:00:00 PM", and "Clock Out Time: 10:00:00 PM". At the bottom, there are two buttons labeled "Yes" and "No", with corresponding letters "Y" and "N" below them.

Figure 7-28: Delete Timecard Record Confirmation Prompt

- Depending upon your store policy, you may be prompted to enter a comment for this change to the timecard record. If prompted, type a comment and select **Ok** to continue.

The system prints receipts for your records.



A screenshot of a receipt titled "Xstore Timecard Acceptance Form". The receipt contains the following information: "Timecard Entry:", "Authorizing Manager ID: 1", "Employee ID: 00010001000002", "Employee Name: Edna Adams", "DELETED", "Timecard Date: 5/2/06", "Work Code: SALES", "Clock In: 2:00 PM", "Clock Out: 4:30 PM", "Comments: My error, entered record for the wrong associate.", and two signature lines labeled "Employee's Signature" and "Manager's Signature".

Figure 7-29: Delete Timecard Record Receipt Example

The record for the selected date is deleted as indicated on the Timecard Maintenance screen.

Payroll Maintenance — Store: 101 - Datavantage Home Office | Payroll Start Date: 1/25/15 | Payroll Reviewed Date: 1/31/15 | Payroll End Date: 1/31/15 | Payroll Post Date:

PAYROLL MAINTENANCE | **TIMECARD MAINTENANCE** | PAYROLL COMMENT | TIMECARD COMMENT

Employee ID: 100 | Employee Name: Smith, John | Department:

SUN 1/25/15	MON 1/26/15	TUE 1/27/15	WED 1/28/15	THU 1/29/15	FRI 1/30/15	SAT 1/31/15
	CASHIER 8:00 AM 12:00 PM	ADMIN 5:00 PM 9:00 PM	ADMIN 8:00 AM 12:00 PM	ADMIN 8:00 AM 12:00 PM	ADMIN 1:00 PM 4:00 PM	
	LUNCH_BREAK 12:00 PM 1:00 PM	Deleted INVENTORY 9:00 PM 10:00 PM	LUNCH_BREAK 12:00 PM 1:00 PM	LUNCH_BREAK 12:00 PM 1:00 PM		
	ADMIN 1:00 PM 4:00 PM		ADMIN 1:00 PM 5:00 PM	ADMIN 1:00 PM 5:00 PM		

Scheduled: 0 4 4 9 9 4 0

Actual: 0 8 4 9 9 3 0

Total Hours: 33

Back Help Payroll Dates Employee List Edit Timecard View History Previous Employee Next Employee Exception List Previous Tab Next Tab Register

Esc F1 F2 F3 F4 F5 F6 F7 F9 F10 F11 F12

Figure 7-30: Timecard Maintenance Screen, Timecard Record Deleted Example

This record shows DELETED indicating that it has been removed. The system recalculates the actual hours worked for the day and the total hours worked for the week, and updates the timecard record accordingly.

Viewing Timecard Exception Records

Exception criteria are set up by the home office. For example, an exception may include employees who worked more than 14 hours per day or employees who worked less than 1 hour per day. Other exceptions include mismatched clock in/clock out records.

1. At the Timecard Maintenance Screen, select the **Exception List** option.

- Oracle Retail Xstore Point of Service displays a list of employees with exceptions for the current payroll date. Select a name from the list and select **Ok** to view the timecard record with the exception.



Figure 7-31: List of Employees with Timecard Exceptions

- Oracle Retail Xstore Point of Service displays the Timecard Maintenance tab for the selected employee:

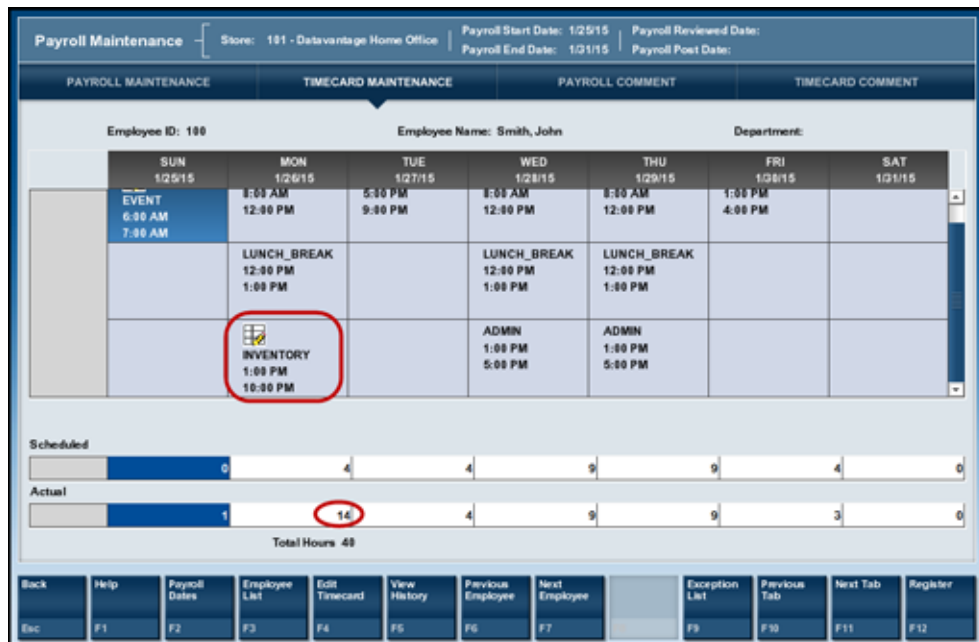


Figure 7-32: Timecard Maintenance Screen, Timecard Record Exception

- To view the details about the exception, select the record and then select the **View History** option. Refer to [Posted Timecard Report](#) for more information.
- To edit the exception record, select the record and then select the **Edit Timecard** option. Refer to [Editing a Timecard Record](#) for more information.

Viewing Timecard Record History

The timecard record history shows a list of all the activities for a specific record. This information includes the clock in and clock out times, the work codes, and any edits that pertain to the record.

1. To view the timecard record history, select the timecard record and then select the **View History** option at the Timecard Maintenance screen.

Oracle Retail Xstore Point of Service displays the history for the selected timecard record.



Figure 7-33: Timecard Record History

2. Press [Esc] to return to the Timecard Maintenance screen.

Timecard Comment Tab

To view timecard record comments, use the **Previous Tab** and **Next Tab** options to navigate to the Timecard Comment tab at the Timecard Maintenance screen.

Oracle Retail Xstore Point of Service displays the comments associated with the current timecard record. In addition to the text of the comment, the comment's date and time of entry, and the ID of the person who created the comment are also shown.

The screenshot shows the 'Payroll Maintenance' screen with a header bar containing 'Store: 101 - Datavantage Home Office', 'Payroll Start Date: 1/25/15', 'Payroll End Date: 1/31/15', 'Payroll Reviewed Date: 1/26/15', and 'Payroll Post Date: 3/11/15'. Below the header is a tabbed interface with four tabs: 'PAYROLL MAINTENANCE', 'TIMECARD MAINTENANCE', 'PAYROLL COMMENT', and 'TIMECARD COMMENT'. The 'TIMECARD COMMENT' tab is selected. The main area displays a list of comments for a specific timecard record. The first comment is: 'Business Date: 01/25/2015', 'Created On: 01/26/2015 01:57:42 PM', 'Created By: 100', and the text 'Sarah was sick'. The second comment is: 'Business Date: 01/27/2015', 'Created On: 03/10/2015 03:01:59 PM', 'Created By: 100', and the text 'decided not to work so late.' At the bottom of the screen is a navigation bar with buttons: 'Back', 'Help', 'Add Comment', 'Previous Tab', 'Next Tab', and 'Exit'. The 'Add Comment' button is highlighted.

Figure 7-34: Timecard Record Comments

Adding Comments

An option to add a new comment to this timecard record is also available at the **Timecard Comment** tab. You can add additional comments to a record, or add comments to a record that has no current comments associated with it.

1. To add a comment to the timecard record, use the **Previous Tab** and **Next Tab** options to navigate to the **Timecard Comment** tab.
2. Select the **Add Comment** option (Figure 7-34 above).
3. Oracle Retail Xstore Point of Service displays the Add Comment form. Type a comment and press **[Enter]** to add the comment to the timecard record.

The screenshot shows the 'ADD COMMENT' form. The title bar says 'ADD COMMENT' and the subtitle says 'Enter a comment for the timecard record.' The main area is a large text input field. At the bottom of the form are two buttons: 'Back' and 'Enter'.

Figure 7-35: Add Comment Form

Posted Timecard Report

This report shows a day-by-day breakdown of employee time-card records when payroll is posted. For each employee, the report includes the total hours for each day and for the week. If this report is printed, it includes signature lines for the employee and manager.

This report includes the following information:

- Date
- Time In
- Time Out
- Category
- Hours
- Day Total
- Week Total

Refer to the *Oracle Retail Xstore Point of Service Reports Guide* for details about this report.

Open Timecard Report

The Open TimeCard Report provides a listing of employees who have time cards with **Clock-In** times but who have not yet clocked out from work. The report lists the employee name and ID, the clock-in time and the work code selected at clock-in time. This report includes the following information:

- Employee ID
- Name
- Clock-In Time
- Register
- Work Code

Refer to the *Oracle Retail Xstore Point of Service Reports Guide* for details about this report.

Payroll Summary Report

The Payroll Summary Report shows all of the hours displayed on the Payroll Maintenance screen for all active employees for a pay period.

This report includes the following information:

- **Employee Name/ID**
- **Date/Weekday**
- **Reg Hours** - The regular hours worked, excluding overtime hours.
- **Over Time Hours** - The overtime hours worked.
- **Double Time Hours** - Overtime hours worked at a double pay rate.
- **Non-Working Hours** - Non-working categories include Vacation Hours, Sick Hours, Personal Hours, and Other Hours as determined by your store policy.
- **Total Hours** - The total hours worked for each employee and category.

Payroll Detail By Employee Report

- **Report Total Hours** - The sum of all hours for all employees on the report.

Note: Refer to the Oracle Retail Xstore Point of Service Reports Guide for details about this report.

Payroll Summary Report					
Date Range: 03/03/2013 - 03/09/2013					
{100} Brown, John					
Date	Regular	Overtime	DoubleTime	Non-Working	Total
March 6, 2013 (Wednesday)	24	0	0	0	24
Total	24	0	0	0	24
{101} Sakthi, Shree					
Date	Regular	Overtime	DoubleTime	Non-Working	Total
March 6, 2013 (Wednesday)	24	0	0	0	24
Total	24	0	0	0	24
REPORT TOTAL:	48	0	0	0	48

Figure 7-36: Payroll Summary Report

Payroll Detail By Employee Report

The Payroll Detail By Employee Report shows a detailed breakdown for each employee's payroll record by day and payroll category. This report includes the following information:

- Payroll Period
- Regular Hours
- Overtime Hours
- Double-time Hours
- Vacation Hours
- Personal Hours
- Sick Hours
- Funeral Hours
- Other Hours
- Total Hours

The report also includes lines where employees may sign and date the printed report to indicate they reviewed the payroll information.

Note: Refer to the *Oracle Retail Xstore Point of Service Reports Guide* for details about this report.

Payroll Detail By Employee Report									
Date Range: 01/01/2013 - 03/08/2013						(100) Brown, John			
Payroll Period:	Regular Hours	OverTime Hours	DoubleTime Hours	Vacation Hours	Personal Hours	Sick Hours	Funeral Hours	Other Hours	Total Hours
January 1, 2013 (Tuesday)	16	0	0	0	0	0	0	0	16
February 3, 2013 (Sunday)	16.5	0	0	0	0	0	0	0	16.5
February 3, 2013 (Sunday)	0	0	0	0	0	0	0	3	3
February 6, 2013 (Wednesday)	7	0	0	0	0	0	0	0	7
February 6, 2013 (Wednesday)	0	0	0	0	0	1	0	0	1
March 6, 2013 (Wednesday)	24	0	0	0	0	0	0	0	24
EMPLOYEE STORE	63.5	0	0	0	0	1	0	3	67.5

Date: _____

Employee Signature: _____

Figure 7-37: Payroll Detail By Employee Report

Register Open and Close

Overview

Open the register to ring sales. Close the register to reconcile the cash drawer and to lock the register from further sales.

Note: Due to the numerous system configuration options available, menu options are not identified by a function key number (F2, F3, and so on). Instead, the name on the button is used throughout this guide.

Accessing the Back Office Register Open/Close Functions

1. After logging into the Back Office (see [Accessing the Back Office](#)), select the **Open/Close Options** menu option and press [Enter].

Tip: You can also press the number/letter associated with the menu option on the keyboard to access the open and close functions.

2. Select an option from the Open/Close Options menu and press [Enter].



Figure 8-1: Open/Close Options Menu

Tip: The Register Close and Store Close menu options toggle between open and close. In [Figure 8-1](#) above, note that the register menu option is “Register Close”. This indicates that the register is opened. The “Store Close” option tells you that the store is currently open.

- To close the register, select the **Register Close** option. See [Closing the Register](#).
- To open the register, select the **Register Open** option. See [Opening the Register](#).
- To print a till summary receipt, select the **Print Till Summary Receipt** option. See [Print Till Summary Receipt](#).

Closing the Register

The register close process can be performed by store managers or associates who have the proper security privileges. A register close can be completed any time during the day.

This process is highly configurable and your process may be different than the instructions below. Every effort has been made to include notes or examples of additional steps that may be configured for your store.

The procedures described in this section assume that till accountability is not being used (this is a configurable option). For more information on till accountability and its requirements see the chapter, [Till Management](#).

The register closing process depends upon whether your system is configured for standard opening and closing, or 24/7 trading:

- [Standard](#) close process.
- [24/7](#) trading close process.
- [Cash Drawer](#) close process.

Standard

Note: The open/close instructions below include the counting of tills to show all steps to close the register. Refer to the Till Options chapter in the *Oracle Retail Point-of-Service User Guide* for more information.

1. From the register to be closed, select the **Back Office** option on the menu. Follow any prompts to log in to the Back Office as required.
2. At the Back Office Main Menu, use the up and down arrow keys to select **Open/Close Options** and press [Enter], or press the number associated with the menu option on the keyboard.



Figure 8-2: Back Office Main Menu

3. Oracle Retail Xstore Point-of-Service displays the Open/Close Options menu. Select the **Register Close** option and press [Enter], or press the number associated with the menu option on the keyboard.



Important: Note that the Register option toggles between open and close. If the option is “Register Close”, the register is currently open. If the option is “Register Open”, the register is currently closed.

4. Oracle Retail Xstore Point-of-Service displays a confirmation prompt: Do you want to close this register? Press [Y] to close the register.

Note: Pressing [N] at the Register Close confirmation prompt cancels the register close process and returns you to the Open/Close Options menu.

Closing the Register

5. The cash drawer opens and Oracle Retail Xstore Point-of-Service displays the Close Count Summary screen. Each count group (tender type) is counted individually. Specific groups require additional information as determined by the home office. Select the tender type to be counted and then select the Count Selected option to display the tender group's count screen.

COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVER/SHORT
Credit Card	\$0.00	\$0.00	\$0.00
Issue Store Credit	\$0.00	\$0.00	\$0.00
Store Credit	\$0.00	\$0.00	\$0.00
US Traveler Check	\$0.00	\$0.00	\$0.00
XPAY GIFT CARD	\$0.00	\$0.00	\$0.00
Cash	\$0.00	\$100.00	(\$100.00)
Australian Cash	\$0.00	\$100.00	(\$100.00)
Canada Cash	\$0.00	\$100.00	(\$100.00)
Euro Cash	\$0.00	\$100.00	(\$100.00)
Gift Certificate	\$0.00	\$0.00	\$0.00

Figure 8-3: Close Count Summary Screen

Note: Depending upon the configuration of your system and your store policy, the over/short amounts as shown above may not be displayed.

6. Enter each value as required in the focus bar and press [Enter]. The tender type you select and your system's configuration determine the type of count you must perform. The following table shows Xstore base examples.

Table 8-1: Tender Count Screen Xstore Base Examples




Tender Count	Example
Credit Card <i>(Totals Count)</i>	<p>The focus bar prompts to enter the Count and then the Amount.</p> 
Cash <i>(Denomination Count)</i>	<p>The focus bar prompts to enter the Count for each denomination. In the example below, the Fifty dollar denomination is being counted. Once [Enter] is pressed, the system highlights the next denomination in the count. The amount is calculated based on the quantity entered and displays a running total at the bottom of the screen.</p> 

Table 8-1: Tender Count Screen Xstore Base Examples

Tender Count	Example
Check <i>(Totals Count)</i>	<p>The focus bar prompts to enter the Serial # and then the Amount. The system calculates the amount based on the quantity entered and displays a running total at the bottom of the screen.</p> 

Note: A Totals Count prompts for a total number of the tender type and the total amount.

A Denomination Count requires that you specify the number of items (Count) and the value of each item in the tender group (Amount) that you selected.

Tip: The type of count is labeled on the upper left portion of the count screen view port. The tender type is identified in the upper right portion of the count screen view port.

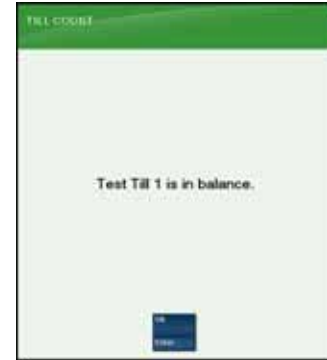
7. Select **Next Group** to display the next count screen.

Tip: Select **Prior Group** to go back to the previous count screen.

8. Repeat steps 6-7 until all tenders are counted. Select Summary to return to the Count Summary screen.
9. Review the amounts. If the totals are correct, select the **Counting Complete** button.

Tip: Check the Over/Short column to see if your till is balanced with the system values for each tender type. To modify counts see [Editing Tender Group Counts](#).

10. If the till is in balance, a confirmation message displays. Press **[Enter]** to continue the register close.



11. If any tenders are out of balance—your counts do not match the system expected amounts—Xstore displays a list of tenders that are out of balance.

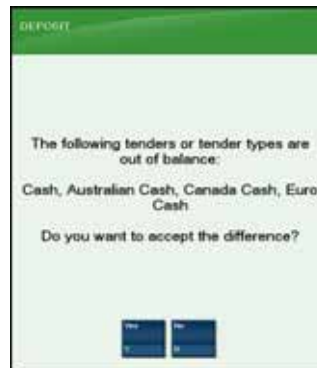
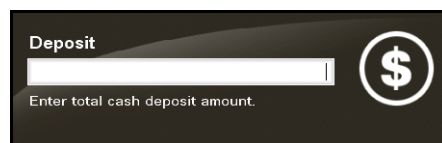


Figure 8-4: Tenders Out of Balance Prompt

- * Select **Yes** to accept your counted amounts. If prompted, select a reason for the count discrepancy and/or type a comment about the discrepancy.
<OR>
 - * Select **No** to recount any tenders as needed. Oracle Retail Xstore Point-of-Service re-displays the Close Count screen where you can make your changes as needed. See [Editing Tender Group Counts](#).
12. Depending upon your system's configuration, you may be prompted with the suggested deposit amount.
- Select **Accept Deposit** to confirm the amount to be deposited and go to step 13.
 - Select **Change Deposit** to enter an amount to be deposited:
 - 1) You are prompted to enter the amount to be deposited.



- 2) Enter the amount and press [Enter] to continue the register close.

Tip: You can select the **Deposit Calculator** option to display a denomination count screen that can be used as a calculator—showing a running total at the bottom of the screen as you count the cash amount to be deposited.

13. The system may be configured to print a **Closed Count** receipt and a **Register Closed** receipt.

Close the cash drawer and the system closes the register.

Editing Tender Group Counts

If a tender group is out of balance, you can recount an individual tender group and edit the original count you entered into the system.

1. At the Count Summary screen ([Figure 8-3](#)), select the tender group that must be recounted and select the **Count Selected** option to display the tender group count screen.

2. Recount the tender and enter the new count values. Most tenders allow you to override the denomination count by selecting the row and then adding values into the focus bar prompts. When you press [Enter] the count value changes. For checks, however, you must select the **Remove Count** button to delete the row and then re-enter the **Serial #** and **Amount**.



3. Select the **Summary** option to view the changes and return to the Tender Group Summary screen.
4. Repeat steps 1-3 for each tender group that is not balanced. When you have completed editing the tender groups, select the **Counting Complete** option. If there are tender groups that are still out of balance, a screen displays prompting whether you want to recount the tenders or accept the count and continue with the register close process.
5. Depending upon your system's configuration, you may be prompted with the suggested deposit amount. See step 11 to complete the register close process.

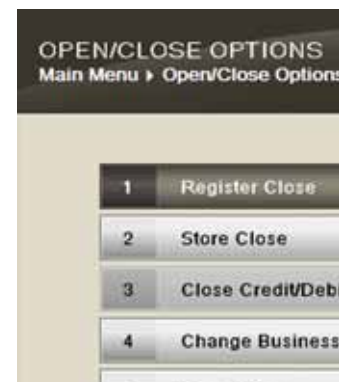
24/7

1. From the register to be closed, select the **Back Office** option on the menu. Follow any prompts to log in to the Back Office as required.
2. At the Back Office Main Menu, use the up and down arrow keys to select **Open/Close Options** and press [Enter], or press the number associated with the menu option on the keyboard.



Figure 8-5: Back Office Main Menu

3. Oracle Retail Xstore Point-of-Service displays the Open/Close Options menu. Select the **Register Close** option and press [Enter], or press the number associated with the menu option on the keyboard.



Important: Note that the Register option toggles between open and close. If the option is “Register Close”, the register is currently open. If the option is “Register Open”, the register is currently closed.

4. Oracle Retail Xstore Point-of-Service displays a confirmation prompt: Do you want to close this register? Press [Y] to close the register.

Note: Pressing [N] at the Register Close confirmation prompt cancels the register close process and returns you to the Open/Close Options menu.

The cash drawer opens.

5. Depending upon the configuration of your system, you may be prompted to either remove all non-cash tenders from the till, or remove the till. Follow the instructions on the screen, then click **OK** to continue.

6. The system may be configured to print a **Closed Count** receipt and a **Register Closed** receipt.

Close the cash drawer and the system closes the register.

Note: Till reconciliation is done separately from the close process. See the Reconcile a Till section in the *Oracle Retail Point-of-Service User Guide* for more information.

7. After the register close is complete, you may be prompted whether to re-open the register.
 - Click **No** to keep the register closed.
 - Click **Yes** to re-open the register. See step 7 in [24/7](#) for more information.

Cash Drawer

If your system is configured to use networked cash drawers, closing the register is done by closing the cash drawer.

You must remove the till before closing the cash drawer. See [Removing a Cash Drawer Till](#) for more information.

To close the cash drawer:

1. In the Back Office menu, select **Open/Close Options**.



Figure 8-6: Open/Close Options Menu

2. Select **Cash Drawer Close**.

A list of open cash drawers displays.
3. Select the drawer to close.
4. Select **OK**.

A confirmation prompt opens.
5. Select **Yes**.
6. The physical cash drawer opens and Oracle Retail Xstore Point-of-Service displays the Close Count Summary screen. Each count group (tender type) is counted individually. Specific groups require additional information as determined by the

home office. Select the tender type to be counted and then select the Count Selected option to display the tender group's count screen.

COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVERSHORT
Credit Card	\$0.00	\$0.00	\$0.00
Issue Store Credit	\$0.00	\$0.00	\$0.00
Store Credit	\$0.00	\$0.00	\$0.00
US Traveler Check	\$0.00	\$0.00	\$0.00
XPAY GIFT CARD	\$0.00	\$0.00	\$0.00
Cash	\$0.00	\$100.00	(\$100.00)
Australian Cash	\$0.00	\$100.00	(\$100.00)
Canada Cash	\$0.00	\$100.00	(\$100.00)
Euro Cash	\$0.00	\$100.00	(\$100.00)
Gift Certificate	\$0.00	\$0.00	\$0.00

Figure 8-7: Close Count Summary Screen

Note: Depending upon the configuration of your system and your store policy, the over/short amounts as shown above may not be displayed.

Closing the Register

- Enter each value as required in the focus bar and press **[Enter]**. The tender type you select and your system's configuration determine the type of count you must perform. The following table shows Xstore base examples.

Table 8-2: Tender Count Screen Xstore Base Examples


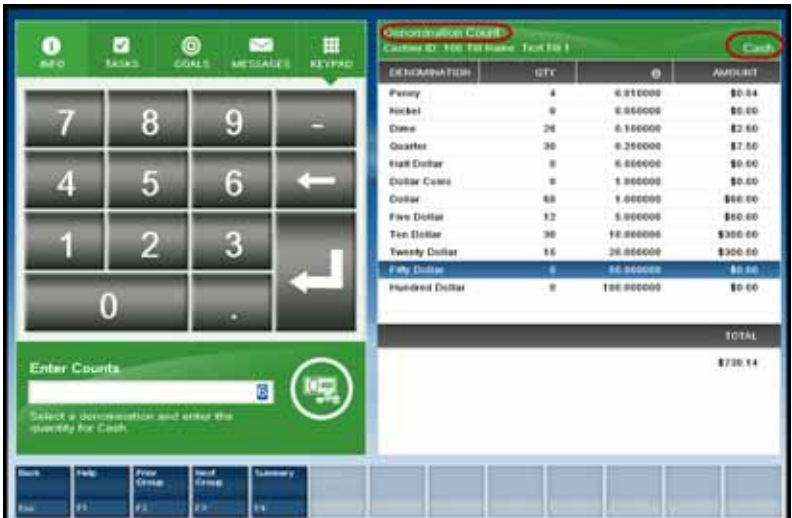

Tender Count	Example
Credit Card <i>(Totals Count)</i>	<p>The focus bar prompts to enter the Count and then the Amount.</p> 
Cash <i>(Denomination Count)</i>	<p>The focus bar prompts to enter the Count for each denomination. In the example below, the Fifty dollar denomination is being counted. Once [Enter] is pressed, the system highlights the next denomination in the count. The amount is calculated based on the quantity entered and displays a running total at the bottom of the screen.</p> 

Table 8-2: Tender Count Screen Xstore Base Examples

Tender Count	Example
Check <i>(Totals Count)</i>	<p>The focus bar prompts to enter the Serial # and then the Amount. The system calculates the amount based on the quantity entered and displays a running total at the bottom of the screen.</p> 

Note: A Totals Count prompts for a total number of the tender type and the total amount.

A Denomination Count requires that you specify the number of items (Count) and the value of each item in the tender group (Amount) that you selected.

Tip: The type of count is labeled on the upper left portion of the count screen view port. The tender type is identified in the upper right portion of the count screen view port.

8. Select **Next Group** to display the next count screen.

Tip: Select *Prior Group* to go back to the previous count screen.

9. Repeat steps 6-7 until all tenders are counted. Select Summary to return to the Count Summary screen.
10. Review the amounts. If the totals are correct, select the **Counting Complete** button.

Tip: Check the Over/Short column to see if your till is balanced with the system values for each tender type. To modify counts see [Editing Tender Group Counts](#).

11. If the till is in balance, a confirmation message displays. Press **[Enter]** to continue the cash drawer close.



12. If any tenders are out of balance—your counts do not match the system expected amounts—Xstore displays a list of tenders that are out of balance.

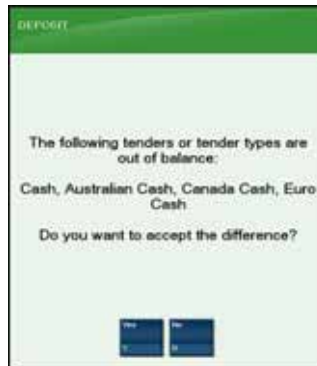
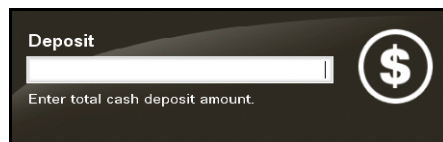


Figure 8-8: Tenders Out of Balance Prompt

- * Select **Yes** to accept your counted amounts. If prompted, select a reason for the count discrepancy and/or type a comment about the discrepancy.
<OR>
 - * Select **No** to recount any tenders as needed. Oracle Retail Xstore Point-of-Service re-displays the Close Count screen where you can make your changes as needed. See [Editing Tender Group Counts](#).
13. Depending upon your system's configuration, you may be prompted with the suggested deposit amount.
 - Select **Accept Deposit** to confirm the amount to be deposited and go to step 13.
 - Select **Change Deposit** to enter an amount to be deposited:
 - 1) You are prompted to enter the amount to be deposited.



2) Enter the amount and press [Enter] to continue the cash drawer close.

Tip: You can select the **Deposit Calculator** option to display a denomination count screen that can be used as a calculator—showing a running total at the bottom of the screen as you count the cash amount to be deposited.

14. The system may be configured to print a **Closed Count** receipt and a **Cash Drawer Closed** receipt.

End Count Deposit Receipt Sample

Count Type: END COUNT	
Till ID: T111	
Tender	
Check	
Declared Amount	80.00
System Total	80.00
Difference	0.00
Cash	
Declared Amount	742.07
System Total	742.07
Difference	0.00
US Traveler's Check	
Declared Amount	0.00
System Total	0.00
Difference	0.00
Total Declared Amount	792.07
Local Currency	
Till Opening Amount	
Total Cash Amount	742.07
Total Cash Deposit	442.07
Cash Remained In Till	300.00
Total Cash Pickup	
	28.00
Aruban Guilder	
Exchange Rate	
	1.77
Foreign Amount	0.00
Converted Amount	0.00

Close Receipt Sample

Date: 3/22/06	
Store: 001	Register: 1
Cashier: 1	

Register Closed	

Close the physical cash drawer to complete the close process.

Forcing a Register to Close

This register is now closed as indicated by the Register indicator color change (from green to red).



Figure 8-9: Back Office View, Register Closed

Note: If configured, you can still access functions that do not require a till such as Clock In and Clock Out, Item Lookup, and View Timecard even though the register is closed for sale transactions.

Forcing a Register to Close

If register equipment fails for any reason and a register cannot be closed using the normal procedure, the **Force Close** option may be used. By forcing a register to close, despite equipment failure, the store closing procedure may then be started.

1. At the Back Office Main Menu, select **Open/Close Options** press [Enter].
2. Select **Force Close** press [Enter].

Oracle Retail Xstore Point-of-Service displays a list of any open registers (if no registers are still open, Oracle Retail Xstore Point-of-Service displays a message).

3. Select the register that you want to close from the list. Use the up and down arrow keys to go to the register you want to close, and press [Spacebar] to select it. Press [Enter] to continue.

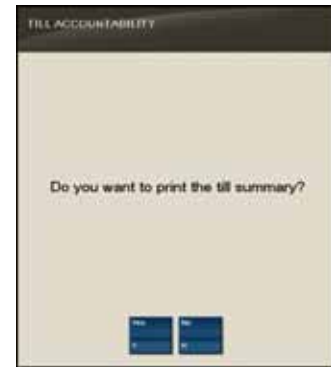
Oracle Retail Xstore Point-of-Service displays a message indicating that the register has been forced to close.

Print Till Summary Receipt

This option allows you to print a summary recorded during the last till count.

1. At the Back Office Main Menu, select **Open/Close Options** press [Enter].
2. Select **Print Till Summary Receipt**.

- When prompted, select **Yes** to print the receipt. The system prints the till summary for the register to a receipt printer. The receipt includes a breakdown of the various tenders (quantity and amount), a configurable list of various transactions that occurred at the register (/paid out, returns, refunds, discounts, account setups, etc., and the quantity and amount for each), and taxes.



Opening the Register

Opening the register is a process that can be quickly completed by managers or associates who have the proper security privileges. The process is highly configurable and your process may be different from the instructions below. Every effort has been made to include notes or examples of additional steps that may be configured for your store.

The register open process depends upon whether your register is configured for a standard open and close process, or if it is configured for 24/7 processing.

- [Standard](#) open process.
- [24/7](#) trading open process.

Standard

- After logging on at the Back Office (see [Accessing the Back Office](#)), select the **Open/Close Options** from the Main Menu and then press **[Enter]**.

Note: Touch-screen users tap the register status bar to open the register. The focus bar prompts for your employee ID and password. Enter the information when prompted. Proceed to step 3.



2. Select the **Register Open** option and press [Enter], or press the number associated with the menu option on the keyboard.



Figure 8-10: Open/Close Options Menu

Note: The Register menu option toggles between open and close. If the available menu option is “Register Close”, the register is currently open. If the available menu option is “Register Open”, the register is currently closed.

3. Oracle Retail Xstore Point-of-Service prompts: Do you want to open this register? Press [Y] to open this register.

Depending upon the configuration of your system, you may be prompted to perform an opening count. Refer to [To Perform a Begin Count](#) for procedural information.

If your register has more than one cash drawer, you are prompted to select the drawer from a list of available cash drawers and attach the till before performing an opening count. Refer to [“Till Management”](#) for more information.

If you are not prompted to count the till, the register is opened at this time.

To Perform a Begin Count

1. After confirming that you want to open the register, the Count Summary screen displays, select the tender type to be counted and then select the Count Selected button to display the tender group's count screen.

COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVERSHORT
Cash	\$0.00	\$100.00	(\$100.00)
Australian Cash	\$0.00	\$100.00	(\$100.00)
Canada Cash	\$0.00	\$100.00	(\$100.00)
Euro Cash	\$0.00	\$100.00	(\$100.00)

Figure 8-11: Begin Count Summary Screen

2. Enter each value as required in the focus bar and press [Enter]. Xstore will highlight the next denomination in the list.

Note: Depending upon the configuration of your system, you may be prompted to enter the total opening amount rather than prompted to count by denomination. See [Tender Count Screen Xstore Base Examples](#)

DENOMINATION	QTY	ID	AMOUNT
Penny	36	0.010000	\$0.36
Nickel	10	0.050000	\$0.50
Dime	0	0.100000	\$0.00
Quarter	0	0.250000	\$0.00
Half Dollar	0	0.500000	\$0.00
Dollar Coins	0	1.000000	\$0.00
Dollar	0	1.000000	\$0.00
Five Dollar	0	5.000000	\$0.00
Ten Dollar	0	10.000000	\$0.00
Twenty Dollar	0	20.000000	\$0.00
Fifty Dollar	0	50.000000	\$0.00
Hundred Dollar	0	100.000000	\$0.00
TOTAL			\$0.00

Figure 8-12: Denomination Count - Cash

3. Select Next Group until all tenders are counted.

Tip: Select *Prior Group* to go back to the previous count screen.

4. Repeat steps 2-3 until all tenders are counted and then select **Summary** to return to the Count Summary screen.
5. Review the amounts. If the totals are correct, select the **Counting Complete** button.

Tip: Check the Over/Short column to see if your till is balanced with the system values for each tender type.

6. If the starting cash amount matches, the system prompts to confirm the amount for all cash currencies you entered and opens the register after you acknowledge the system amount.:

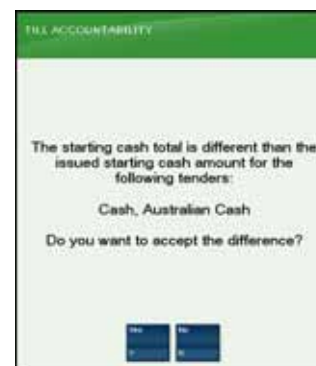


Figure 8-13: Verify Begin Count Prompt

- Select **Yes** if the amount is correct.
- Select **No** to recount the starting amount.

If configured, the system prints a Begin Count receipt showing the amount of starting cash in the till and signature lines for the cashier and manager to sign confirming this open amount.

7. If the currency amounts do not match, the system displays a prompt to either recount the till or to accept the difference.:



- Press **[Y]** to accept the amount you counted and continue opening the register. You are prompted to enter/select the reason for the discrepancy between the counted amount and the expected amount. You may be required to enter a comment and then press **[Enter]**.

<OR>

- Press [N] to recount the till.

If you counted the till from the Back Office, select the Register option to display the register screen. The register is now open and a till has been counted and attached to the current register. The system may print a receipt indicating the register number that is open and the cashier ID who is at the register.

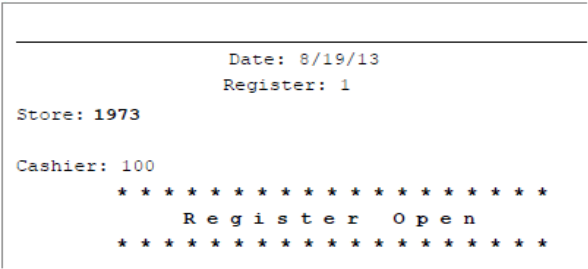


Figure 8-14: Register Open Receipt

24/7

1. When you attempt to log in to the system, Oracle Retail Xstore Point-of-Service determines the status of the register and store. If the register status is closed, a Register Closed message displays if configured to do so. Press [Esc] to close the message.



The red register indicator on the status bar also shows that the register is closed.

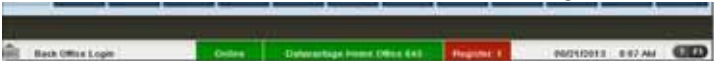


Figure 8-15: Status Bar - Register Closed

Tip: If you are using a touch-screen, tap the red register status bar to open the register. The focus bar prompts for your employee ID and password. Enter the information when prompted. Proceed to step 7.



Opening the Register

2. Select the **Back Office** option on the Register menu to open the register from the Back Office Main Menu.

Note: Access to the back office functions is controlled by security levels. You must have the correct security privileges to access the Back Office.

3. Oracle Retail Xstore Point-of-Service prompts for your employee ID to log in to the back office. Enter your employee ID and then press **[Enter]**.



Note: If your system is set up to use a Biometric Fingerprint device, an Employee ID Login prompt displays. Use the device to scan your fingerprint rather than entering your user ID and password.

Note: Scanned and keyed entry is also supported at this prompt.



4. Oracle Retail Xstore Point-of-Service prompts for your employee password to complete the login process. Enter your employee password and then press **[Enter]**.
5. At the Back Office Main Menu, select the **Open/Close Options** option and press **[Enter]**, or press the number associated with the menu option on the keyboard to display the Open/Close Options menu.



Figure 8-16: Back Office Main Menu

6. At the Open/Close Options menu, select the **Register Open** option and press [Enter], or press the number associated with the menu option on the keyboard.



Figure 8-17: Open/Close Options Menu

Note: The Register menu option toggles between open and close. If the available menu option is “Register Close”, the register is currently open. If the available menu option is “Register Open”, the register is currently closed.

7. Xstore prompts: Do you want to open this register? press [Y] to confirm that you want to open this register.

Note: The following prompts are optional depending on your configuration:

- If your register has more than one cash drawer, you are prompted to select the drawer from a list of available cash drawers.
- The system may be configured to print a Register Open receipt.



An insert till notification window opens.



Figure 8-18: Insert Till

- Click **OK** to open the till.
The till opens and you are returned to the Back Office Main Menu.
- Click **Change Float** to change the float amount:
 - 1) Click to select the reason for the change to the float amount.
 - 2) Click **OK**.
 - 3) Enter additional comments, if necessary.
 - 4) Click **OK**.
 - 5) Click to select the currency to change.
 - 6) Click **OK**.
 - 7) Enter the new amount in the **Change Float Amount** field.



Figure 8-19: Change Float Amount

- 8) Press the **[Enter]** button.
- 9) Click **Yes** to confirm the new amount.
Return to the Insert Till screen.
- 10) If necessary, click **Change Float** to repeat steps 1-9 for a different currency.
The till opens and you are returned to the Back Office Main Menu.

Cash Drawer Open

If your system is configured to use networked cash drawers, opening the register is done by opening the cash drawer. Any register's back office can be used to open the

networked cash drawers. If there are no available networked cash drawers to open the **Cash Drawer Open** button is disabled.

To open the cash drawer:

1. In the Back Office menu, select **Open/Close Options**.



Figure 8-20: Open/Close Options Menu

2. Select **Cash Drawer Open**.
A list of available networked cash drawers opens.
3. Select the drawer to open.
4. Select **OK**.
A confirmation prompt opens.
5. Select **Yes**.
A list of tills opens.
6. Select the till to use.
7. Select **OK**.

8. The Count Summary screen displays, select the tender type to be counted and then select the Count Selected button to display the tender group's count screen.

Count Summary
Cashier ID: 100 Till Name: Test Till 1

Balance Summary Over/Short

COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVER/SHORT
Cash	\$0.00	\$100.00	(\$100.00)
Australian Cash	\$0.00	\$100.00	(\$100.00)
Canada Cash	\$0.00	\$100.00	(\$100.00)
Euro Cash	\$0.00	\$100.00	(\$100.00)

Back Help Count Selected Done Counting

Esc F1 F2 F3

Begin Count John Smith Online Datavantage Home Office 643 Register 1 03/31/2014 10:02 AM ? F1

Figure 8-21: Begin Count Summary Screen

9. Enter each value as required in the focus bar of the count screen and press **[Enter]**. Xstore will highlight the next denomination in the list.

Note: Depending upon the configuration of your system, you may be prompted to enter the *total* opening amount rather than prompted to count by denomination. See [Tender Count Screen Xstore Base Examples](#).

DENOMINATION	QTY	AMOUNT	CASH
Penny	36	\$ 0.360000	\$0.36
Nickel	15	\$ 0.500000	\$0.50
Dime	2	\$ 0.200000	\$0.20
Quarter	0	\$ 0.250000	\$0.00
Half Dollar	0	\$ 0.500000	\$0.00
Dollar Coins	0	\$ 1.000000	\$0.00
Dollar	0	\$ 1.000000	\$0.00
Five Dollar	0	\$ 5.000000	\$0.00
Ten Dollar	0	\$ 10.000000	\$0.00
Twenty Dollar	0	\$ 20.000000	\$0.00
Fifty Dollar	0	\$ 50.000000	\$0.00
Hundred Dollar	0	\$ 100.000000	\$0.00
TOTAL			\$0.00

Figure 8-22: Denomination Count - Cash

10. Select Next Group to display the next count screen.

Tip: Select *Prior Group* to go back to the previous count screen.

11. Repeat steps 9-10 until all tenders are counted and then select Summary to return to the Count Summary screen.
12. Review the amounts. If the totals are correct, select the **Counting Complete** button.

Tip: Check the Over/Short column to see if your till is balanced with the system values for each tender type. To modify counts see [Editing Tender Group Counts](#).

13. If the starting cash amount matches, the system prompts to confirm the amount for all cash currencies you entered and opens the cash drawer after you acknowledge the system amount.

Figure 8-23: Verify Begin Count Prompt

If configured, the system prints a Begin Count receipt showing the amount of starting cash in the till and signature lines for the cashier and manager to sign confirming this open amount.

14. If the currency amounts do not match, the system displays a prompt to either recount the till or to accept the difference:



Figure 8-24: Starting Cash Difference Prompt

- * Press [Y] to accept the amount you counted and continue opening the cash drawer. You are prompted to enter/select the reason for the discrepancy between the counted amount and the expected amount. You may be required to enter a comment and then press [Enter].
- <OR>
- * Press [N] to recount the till.
15. Open the till to associate with the Cash Drawer. See Open a Till- Cash Drawer in the *Oracle Retail Point-of-Service User Guide* for more information.
 16. If you counted the till from the Back Office, select the **Register** option to display the register screen. The register is now open and a till has been counted and attached to the current register. The system may print a receipt indicating the register number that is open and the cashier ID who is at the register.

Store Open/Close

Overview

Store Close

The store is closed to lock out certain business transaction functionality. The store close process clears daily data, accepts downloads from the home office, and prepares your store to open for a new business day. The store close is divided into multiple, individual processes. Oracle Retail Xstore Point of Service guides you through each step in the process.

Store Open

The store open process opens the store for the new business day. The store is opened to allow business transactions in the system. The store open process begins when an associate signs on for the first time after a store close is finished. Oracle Retail Xstore Point of Service guides you through each step in the process.

Closing the Store

Prerequisites: To begin the store close, all of the tills and registers must be closed for the business date and all associates should be signed off, except for the closing associate and the till open for that register. The store bank must be counted and reconciled.

The store close function is highly configurable and your process may be different from the instructions below. Every effort has been made to include notes or examples of additional steps that may be configured for your store.

Note: If your store has a lead register where the database is hosted, the lead register must be the last register closed. If you attempt to close the lead register before all other registers are closed, the system prompts you to close the other registers before closing the lead register.

1. After logging into the Back Office, (see [Accessing the Back Office](#), select the **Open/Close Options** menu option and press [Enter].



Figure 9-1: Back Office Main Menu

Note: Store Open and Store Close activities are controlled by user security. An employee must have the proper security privileges to open and close the store.

Tip: You can also press the number associated with the menu option on the keyboard to access the open and close functions.

- At the Open/Close Options Menu, select the **Store Close** option and select **Ok**.



Figure 9-2: Open/Close Options Menu

Tip: The Register Close and Store Close menu options toggle between open and close. In [Figure 9-2](#) above, note that the register menu option is “Register Open”. This indicates that all registers are closed and you can begin closing the store. The “Store Close” option tells you that the store is currently open.

- The system prompts: Do you want to close this store? Select **Yes** to begin the store close process.
- Oracle Retail Xstore Point of Service verifies that all registers are closed. If any registers are still open, the system displays a list of open registers and prompts you to close each register before the store close process can continue.

Refer to [Chapter , “Register Open and Close”](#), for more information about closing the register.

- Oracle Retail Xstore Point of Service searches for and lists any transactions created on the current business date that were suspended and not subsequently resumed and completed or cancelled. If any suspended transactions are found, the system displays a list showing the suspended transactions.

You have the following options:

- * Press **[Enter]** (Continue) to automatically cancel all listed transactions and continue with the store close process (step 6. below).

<OR>

- * Press **[Esc]** (Back) to cancel the store close process and reconcile the suspended transactions per your store policy.

In addition, the system may also list any pending orders that require attention. The associate performing the store close can either cancel the store close process, or allow

Oracle Retail Xstore Point of Service to continue with the store close. The pending orders retain the same status and are not changed in any way by this notification prompt.

6. If prompted, select the bank or institution for the bank deposit and press **[Enter]**.
7. Depending upon the configuration of your system, you may be prompted to enter a message that displays when the store is opened for the next business day. If prompted, type a message and press **[Enter]**.

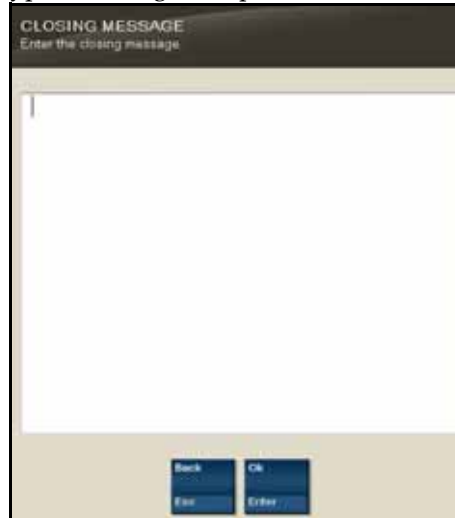


Figure 9-3: Closing Message Prompt

8. Depending upon your system's configuration, you may be prompted to respond to a store closing question. If prompted, select an answer to the question and press **[Enter]**.



Figure 9-4: Store Closing Question Prompt

9. Depending upon your system's configuration, you may be prompted with other messages concerning the status of various functions within the store. For example, you may be notified that a cycle count for inventory is due or that items are ready to be received.

Acknowledge these messages by pressing **[Enter]** to continue with the store close process.

10. If configured, you may be prompted to count the amount to be deposited in the store bank (safe) at the Store Bank Deposit Count screen. If prompted, count the tenders for deposit and select the **Done Counting** option when you are finished. Follow instructions for a [Till Audit](#).

If there is a difference between your count and the amount that the system expected, a message displays. You may return to the Count Summary screen and make changes, or accept the difference.

When the counting is complete, a Confirm Bank Deposit prompt displays. Select yes, the system prints deposit receipts for your records.

11. If prompted, press **[Enter]** to begin the nightly close process. Some events that occur during a nightly close are configurable. For example, certain reports may be generated at every closing.

From this point on, no user intervention is required and the store closing process begins. The Message indicator on the status bar may display information about the process as it is occurring.

Note: Depending upon your store policy, you may have access to some Back Office functions while the store is closed.

The system prints receipts as required by your system configuration and store policy.

Store Bank Deposit Receipt Sample

Count Type: BANK DEPOSIT	
Till ID: STORERANK	
Tender	
Check	
Declared Amount	\$0.00
System Total	\$0.00
Difference	0.00
Cash	
Declared Amount	767.07
System Total	767.07
Difference	0.00
US Traveler's Check	
Declared Amount	0.00
System Total	0.00
Difference	0.00
Total Declared Amount	817.07
Local Currency	
Total Cash Amount	767.07
Total Cash Deposit	167.07
Cash Remained In Till	600.00
Total Cash Pickup	25.00
Aruban Guilder	
Exchange Rate	1.77
Foreign Amount	0.00
Converted Amount	0.00

Deposit Receipt Sample

30500 Bruce Industrial Hwy Solon, OH 44139 440-498-4414	
Ticket: 34	Date: 3/22/06
Store: 301	Register: 1
Cashier: 1	
Session ID:	
Total Cash Deposit	167.07
Aruban Guilder	0.00
Canadian Cash	0.00
Canadian Traveler's Check	0.00
Check	\$0.00
Yen	0.00
Mexican Peso	0.00
Mexican Traveler's Check	0.00
US Traveler's Check	0.00
Total Deposit Amount	217.07

Figure 9-5: Deposit Receipt

Store Closed Receipt

Yen	
Exchange Rate	117.28
Foreign Amount	0.00
Converted Amount	0.00
Mexican Peso	
Exchange Rate	10.74
Foreign Amount	0.00
Converted Amount	0.00
Mexican Traveler's Check	
Exchange Rate	10.74
Foreign Amount	0.00
Converted Amount	0.00
Employee's Signature	

Manager's Signature	

Date: 4/18/06
Store: 301 Register: 1
Cashier: 1

Store Closed

Figure 9-7: Store Closed Receipt

Figure 9-6: Store Bank Deposit Receipt

The closed store status is indicated by the color change in the store status area of the screen.



Figure 9-8: Back Office View - Store Closed Status

Opening the Store

The store open process is performed on only one register. The store open procedure signals that the store is open to all registers. Once the store is open, sales cannot be rung until the register is opened and a till is counted for the register.

During the store open process, the system may also list any pending orders that require attention. Once the store is open, the associate can take any action as needed on the orders.

1. At the Back Office Login screen, log in with your user name and password.

Note:

Touch-screen users tap the store status bar to open the store. The focus bar prompts for your employee ID and password. Enter the information when prompted. Proceed to step 4.



Opening the Store

2. The Back Office Main Menu displays. Select the **Open/Close Options** menu option and press **[Enter]**.



Figure 9-9: Back Office Main Menu

3. At the Open/Close Options menu, select the **Store Open** option and select **Ok**.



Figure 9-10: Open/Close Options Menu

Tip: The Register Open and Store Open menu options toggle between open and close. The Store Open menu option indicates that this store is currently closed. The Register Open menu option indicates that this register is also closed.

4. The system prompts: Do you want to open this store? Select **Yes** to continue with the store open process.
5. If prompted to confirm the business date, verify the default date shown is correct (today's date) and press **[Enter]**.



Figure 9-11: Business Date Prompt

Tip: If this date is incorrect, enter the new business date at the prompt. Oracle Retail Xstore Point of Service prompts you to confirm the date you entered. This function is controlled by security.

6. Oracle Retail Xstore Point of Service displays a prompt showing the date the store has been opened for. Press **[Enter]** for **Ok** to continue the store open process.
7. Depending upon the configuration of your system, you may be prompted with other messages concerning the status of various functions within the store. If prompted, acknowledge these messages to continue with the store open process.

For example, you may be notified that a cycle count for inventory is due or that items are ready to be received.
8. A message that was entered during the store close may be displayed. If displayed, press **[Enter]** to acknowledge this message and continue with the store open process.
9. If prompted, enter the starting cash amount for the store bank. Refer to [Open the Store Bank](#) for more information about opening the store bank.
10. The system may print a store open receipt for your records.

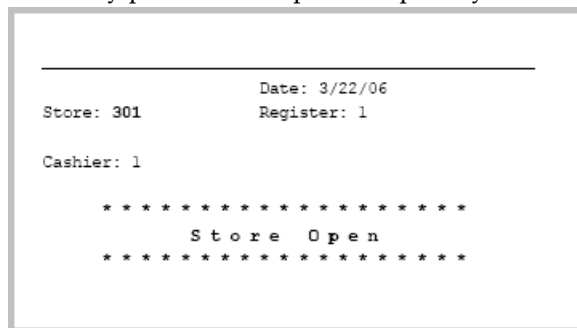


Figure 9-12: Store Open Receipt

Tip: Note that the store status indicator has changed to green indicating the store is now open. However, the Register status indicator is red indicating that this register is still closed.



11. The system prompts: Do you want to open this register? Select **Yes** to open the register. Refer to [Register Open and Close](#) for more information about opening the register.

The store and register are opened for the new business day.

Note: If you select **No** at the Open Register prompt, the system returns to the Open/Close Options menu.

Once the store is open, sales cannot be rung until the register is opened and a till is counted for the register.

Calling the Update Service

Note: This process is controlled by user security and is only available for authorized users.

The Check for Updates process allows Oracle Retail Xstore Point of Service to request the download manifest on demand. This option provides the ability to bypass the scheduler normally run during the store close, and to initiate the download manifest when called.

1. Select the **Back Office** option and log in with your user name and password.
2. The Back Office Main Menu displays. Select the **Check for Updates** menu option and press [**Enter**].



Figure 9-13: Check for Updates Menu Option

3. The system prompts: Xstore has requested updates. Press [**Enter**] to confirm.

Note: Some system updates may not take immediate effect in Oracle Retail Xstore Point of Service.

Manually Refresh Promotions

Typically a promotion is updated with new information during a register restart. Use this process to update new promotions that are cached without having to restart that register, such as in the middle of the day.

Note: Applies to registers only and you would need to perform this action on each register to update its cache for promotions.

To refresh the promotion cache for a register:

1. In the Back Office menu, select **Open/Close Options**.
2. Select **Refresh Promotions**.
3. Oracle Retail Xstore Point of Service displays a confirmation prompt: Are you sure you want to refresh promotions? This may take several minutes.
4. Press [**Y**] to continue. A progress bar is displayed until the update is complete.

Note: Pressing [**N**] at the Refresh Promotions confirmation prompt cancels the refresh process and returns you to the Open/Close Options menu.

5. When the update is complete, a prompt is displayed: "Promotions have been refreshed as of (*time and day*)."

Till Management

Overview

There are two types of till management: Register Accountability and Till Accountability. Register Accountability is the default system mode and is used unless the system is configured to use Till Accountability.

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

Alternatively, the till can be assigned to networked cash drawers.

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

Till Accountability: A till is assigned to a *specific* cashier. The assigned till can be attached to any register the cashier may work on during the day. The cashier must count the assigned till and then attach the till to a cash drawer/register before ringing transactions. The system can be configured to allow the cashier to enter a total amount counted, or to count by denomination. For denomination counts, the cashier counts and enters each denomination separately and each count is saved into the system.

At the end of the cashier's shift, the cashier must count and return the assigned till to the cash management office for reconciliation. This process transfers responsibility for the assigned till back to the cash manager.

Till Accountability also allows Dual Cash Drawer functionality, in which one register can use two separate cash drawers. This allows two cashiers to share a single POS register while keeping their tills separate.

Note: Refer to the *Oracle Retail Xstore Point-of-Service User Guide* for detailed information about counting tills.

Till Accountability Process

The till accountability process follows a sequence of steps that require till counts whenever the till is moved or given to another person. These steps provide additional checks and balances each time the status of any till changes.

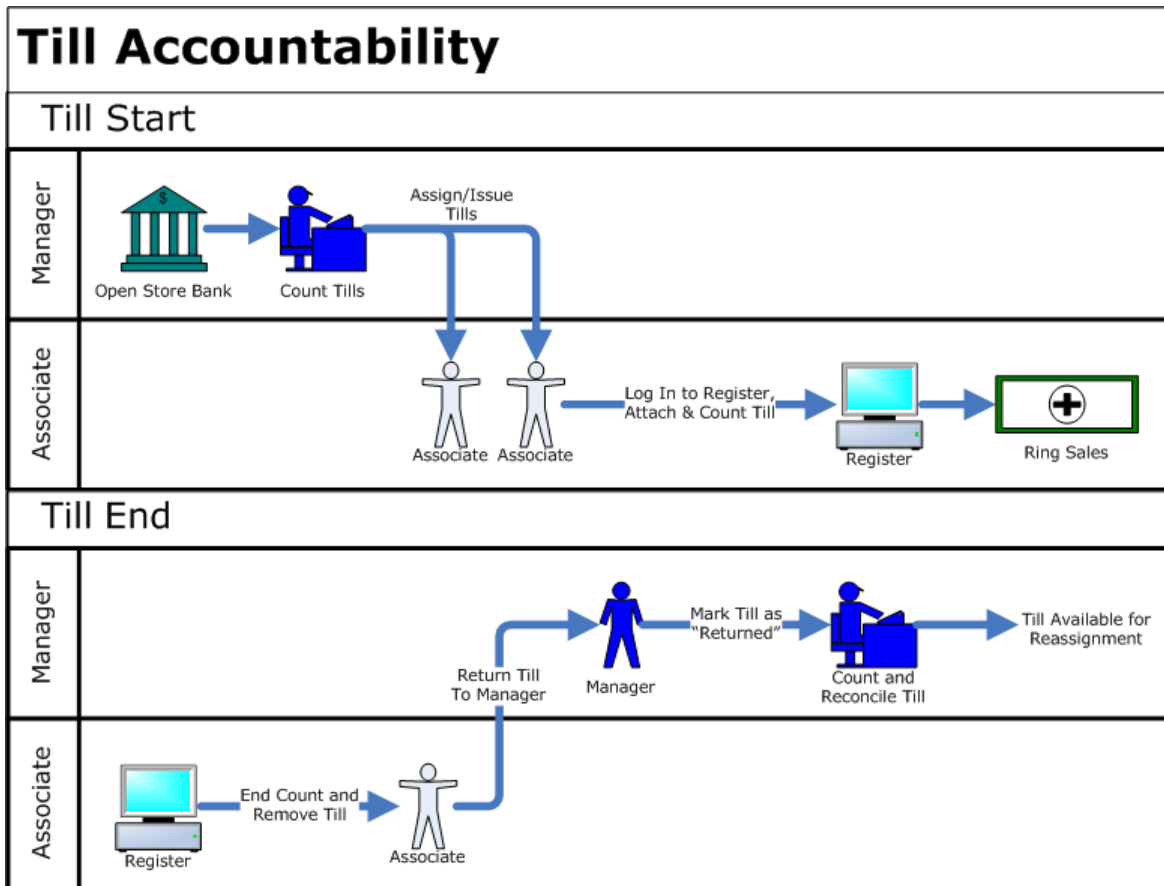


Figure 10-1: Till Accountability Process Flow

Till Start

1. Manager opens and counts the store bank (safe).
2. Manager assigns/issues tills to associates and confirms the starting cash amount in each till.
3. Associate picks up the assigned till and goes to a register.
4. Associate logs in to a register.
5. Associate is prompted to attach the till to the register. If multiple cash drawers are available, the associate is prompted to select a cash drawer.
6. Associate attaches the till to the cash drawer in the register.
7. Associate counts the beginning amount of cash in the till.
8. Associate is ready to ring sales.

Till End

1. Associate can either end count the till at the register (Count Till) or remove the till to count it in the Back Office (Remove Till). The counting process is the same in either location.
2. Associate counts the till.
3. Associate removes the till and returns the till to the manager.
4. Manager marks the till as Returned in the system. The manager has now accepted responsibility for the till.
5. Manager performs the reconciliation count on the returned till.
6. The till is now available and can be issued to another employee, starting the process over again.

Accessing Back Office Till Management Functions

Associates with the proper security permissions may access Till Management from the Back Office Main Menu. The Back Office Manage Tills menu offers till management functions such as assigning and reconciling tills, till audit functions, changing the float amount, and making bank deposits.

1. After logging in to the Back Office (see [Accessing the Back Office](#)), select the Manage Tills option from the Main Menu and press [Enter] for **Ok**.

Depending on the configuration of your system, the **Manage Tills** option may also be available from the employee login screen and the Register screen.



Figure 10-2: Back Office Main Menu

Tip: You can also type the number associated with the menu option to access the function.

- At the Manage Tills menu, select one of the menu options and press [Enter] for Ok.



Figure 10-3: Manage Tills Menu

The Manage Tills menu has the following options:

- Till Options** - Select this option for all functions that apply to a till in use by the register. This submenu contains the following functions:
 - Post Void** - Select this option to perform a post void transaction. See [Post Voiding Transactions](#) for more information.
 - No Sale** - Select this option to perform a no sale transaction to open the cash drawer.

Note: Refer to the *Oracle Retail Xstore Point-of-Service User Guide* for a step-by-step procedure describing the no sale transaction.

- Paid In** - Select this option to perform a paid in transaction. This option requires an attached till. See [Performing Paid In/Paid Out Transactions](#).
- Paid Out** - Select this option to perform a paid out transaction. This option requires an attached till. See [Performing Paid In/Paid Out Transactions](#).
- Foreign Currency Maint.** - Select this option to update the exchange rate between the local currency and foreign currencies that are acceptable tenders. See [Foreign Currency Maintenance](#).
- Tender Exchange** - Select this option to perform a tender exchange transaction, which allows you to exchange one form of tender for another. For example, accept a customer's check for some amount and give them the same amount as cash.

Note: Refer to the *Oracle Retail Xstore Point-of-Service User Guide* for a step-by-step procedure describing the tender exchange process.

- Change Float** - Select this option to change the amount of cash that remains in each till after the end count is performed. See [Changing the Float Amount](#).
- Till Maintenance** - Select this option for all manager-level till functions, including the opening, issuing, attaching, removing, and closing of a till. Some options may also be available to non-managers, depending on your store policy. This submenu contains the following functions:

Register Accountability Mode Options

- **Cash Pickup** - Select this option to perform a cash pickup transaction. See [Cash Pickup](#).
- **Cash Transfer** - Select this option to transfer cash to a till. See [Cash Transfer](#).
- **Till Audit** - Select this option to perform a till audit (a count performed on an active till).

Note: Till audit does not adjust the till counts; it is used only to count the till while it is attached to a register. See [Till Audit](#).

- **Mid-day Deposit** - Select this option to perform a mid-day deposit transaction, which allows a manager to place funds into a store bank (safe) during the course of a working session. See [Mid-Day Deposit](#).
- **Store Bank Audit** - Select this option to perform an audit count of the store bank (store safe). See [Auditing the Store Bank](#).
- **Store Bank Cash Deposit** - Select this option to make a cash deposit into the store bank. See [Store Bank Cash Deposit](#).
- **Bank Deposit** - Select this option to remove money from the store bank so that it can be deposited into a bank. See [Preparing the Bank Deposit](#).
- **Attach Cash Drawer Till** - Only used when networked cash drawers are configured. See [Attaching a Cash Drawer Till](#).
- **Remove Cash Drawer Till** - Only used when networked cash drawers are configured. See [Removing a Cash Drawer Till](#).
- **Reconcile Cash Drawer** - Only used when networked cash drawers and 24/7 trading is configured. See [Reconciling a Networked Cash Drawer Till](#).

Till Accountability Mode Only Options

When using till accountability, the following options are available, in addition to the options listed above for register accountability.

- **Issue/Return Till (Till Accountability Mode Only)** - Select this option to assign a till to a cashier and to enter the starting cash amount, or return an issued till. See [Issue a Till \(Till Accountability Mode Only\)](#).
- **Count Till (Till Accountability Mode Only)** - Select this option to perform a begin count or close count on a till. If a begin count was not performed on the till, this option starts a begin count. If a begin count was performed on the till, this option starts a close count.
 - * See [To Perform a Begin Count](#) for a description of the begin count procedure.
 - * See [Closing the Register](#) for a description of the close count procedure.
- **Attach Other Till (Till Accountability Mode Only)** - Select this option to attach a till to the register. This option can attach a till that is assigned to you or to another associate. See [Attaching a Till \(Till Accountability Mode Only\)](#).
- **Remove Till (Till Accountability Mode Only)** - Select this option to remove a till that is assigned to you and attached to the register. See [Remove a Till \(Till Accountability Mode Only\)](#).
- **Remove Other Till (Till Accountability Mode Only)** - Select this option to remove any employee's till that is attached to the register. See [Remove a Till \(Till Accountability Mode Only\)](#).

Issue a Till (Till Accountability Mode Only)

- **End Count Other Till (Till Accountability Mode Only)** - Select this option to end count a till assigned to any employee. See [End Count Other Till \(Till Accountability Mode Only\)](#).
- **Reconcile Till (Till Accountability Mode Only)** - Select this option to count a returned till and compare your counts with the cashier's counts. See [Reconciling a Till \(Till Accountability Mode Only\)](#).
- **Store Bank Maintenance** - Select this option for all functions related to the store bank. This submenu contains the following functions:
 - **Open Store Bank (Till Accountability Mode Only)** - Select this option to open the store bank. See [Open the Store Bank](#).
 - **Reconcile Store Bank (Till Accountability Mode Only)** - Select this option to reconcile the store bank. See [Reconcile the Store Bank](#).

Issue a Till (Till Accountability Mode Only)

Associates can only be assigned to one till at a time.

Important: Prerequisites: No tills can be issued until the store bank is open. See [Open the Store Bank](#) for more information.

1. From the Manage Tills Menu, select the **Till Maintenance** option and press [Enter] for **Ok**.
2. From the Till Maintenance menu, select the **Issue/Return Till** option and press [Enter] for **Ok**.



Figure 10-4: Till Maintenance Menu - Issue/Return Till Option

3. The system displays the Till Details screen, showing the current status of the tills. Select the **Issue Till** option from the menu.

TILL DETAILS

The details of each till are shown. Select an option from the menu below.

TILL ID	ISSUED	EMPLOYEE ID	EMPLOYEE NAME	ATTACHED	CASH DRA	REGIST	COUNT STA
TestTill1	×			×			
TestTill2	×			×			
TestTill3	×			×			
TestTill4	×			×			
TestTill5	×			×			
TestTill6	×			×			

Back

Help

Issue Till

Return Till

Register

Esc

F1

F2

F3

F12

Figure 10-5: Till Details Screen

Issue a Till (Till Accountability Mode Only)

About this screen - [Figure 10-5](#)

- A red X (✗) in the Issued column indicates that the till has been returned to the cash office and is available for assignment.
- A green check mark (✓) in the Issued column indicates that the till has already been issued to an associate and is not available.

Note: All the tills listed in this example are available for assignment.

4. The system displays a list of available tills. Select a till from the list and press [Enter] for **Ok**.



5. An Employee Lookup prompt opens. Enter the search criteria (Employee ID, First Name and/or Last Name) for the employee to be assigned to the till and select **Process**.

The screenshot shows a screen titled "EMPLOYEE LOOKUP" with the instruction "Enter search criteria". Below this are three input fields: "Employee ID", "Last Name", and "First Name". At the bottom of the screen, there are three buttons: "Back", "Help", and "Process".

Figure 10-6: Employee Lookup Prompt

6. The system displays a list of employees matching the entered search criteria. Select the employee's name that is being issued the till and press **[Enter]** to continue.



Figure 10-7: Employee Selection List

7. Oracle Retail Xstore Point-of-Service prompts for the amount of starting cash in the till, and may show the default starting cash amount set up for this till. Accept the default cash amount or enter the starting cash amount and press **[Enter]**.

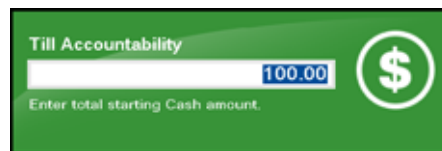


Figure 10-8: Starting Cash Prompt

Note: If your store allows foreign cash to be given as change, additional prompts may display in the focus bar for each denomination. Continue to enter the amount and press **[Enter]** for each prompt until the confirmation prompt displays.

Issue a Till (Till Accountability Mode Only)

- The system displays a message confirming that the till is now issued to a specific employee. Press [Enter] for **Ok** to close the confirmation prompt. A receipt is also printed for your records.

Ticket: 500683 Date: 6/25/XX
Store: 301 Register: 1
Cashier: 100

Issued Till ID: Till2
Cashier ID: 100

Starting Amount: 350.00

Employee's Signature

x

Manager's Signature

x

Figure 10-9: Till Assigned Receipt

- Oracle Retail Xstore Point-of-Service assigns the till to the cashier and returns to the Till Details screen. The till is now listed as Issued.

TILL DETAILS

The details of each till are shown. Select an option from the menu below.

TILL ID	ISSUED	EMPLOYEE ID	EMPLOYEE NAME	ATTACHED	CASH DRA...	REGIST...	COUNT STA...
TestTill1	✓	100	John Smith	✗			UNCOUNTED
TestTill2	✗			✗			
TestTill3	✗			✗			
TestTill4	✗			✗			
TestTill5	✗			✗			
TestTill6	✗			✗			

Back Help Issue Till Return Till Esc F1 F2 F3 Register F12

Figure 10-10: Till Details - Issued Till

About this screen - [Figure 10-10](#)

- A green check mark (✓) in the Issued column indicates that the till has been issued to the employee.
- A red X (✗) in the Attached column indicates that the till has not yet been attached to a cash drawer and register.

Oracle Retail Xstore Point-of-Service generates a new session ID to identify the session that was started by assigning a till to a cashier.

Note: A cashiering session begins when the till is withdrawn from the cash management office and assigned to a cashier. The session ends when the till is reconciled.

The till is now assigned to a specific cashier. When the cashier logs in to the register, Oracle Retail Xstore Point-of-Service prompts the cashier to verify the starting amount in the till and to attach the till to the register before ringing sales..

Note: Refer to the *Oracle Retail Xstore Point-of-Service User Guide* for more information about using till accountability at the cash register.

Attaching a Till (Till Accountability Mode Only)

Attach Other Till Option

After a till has been issued to a cashier, the till must be attached to a register for it to be used for transactions.

Normally, an associate has the ability to attach a till assigned to them after logging in to the system where the till is located. However, if a manager is attaching another employee's till to a register, this must be done through the **Attach Other Till** option.

1. From the Manage Tills menu, select the **Till Maintenance** option and press **[Enter]** for **Ok**.
2. From the Till Maintenance menu, select the **Attach Other Till** option and press **[Enter]** for **Ok**.
3. The system displays a list of tills available to be attached. Select a till from the list and press **[Enter]** for **Ok**.



4. If your system is configured to allow two (2) tills on the register and both cash drawers are still

Remove a Till (Till Accountability Mode Only)

available, the system prompts for the cash drawer to use for the till. Select the cash drawer to be used, then press [Enter] for **Ok**.



Figure 10-11: Cash Drawer

5. Perform the Begin Count on the till.

See [To Perform a Begin Count](#) for the Begin Count procedure.

At the confirmation prompt, select **Ok**.



Remove a Till (Till Accountability Mode Only)

Oracle Retail Xstore Point-of-Service gives managers and associates the option to remove their own till from a register or remove a till assigned to someone else, depending on the option chosen in the Manage Tills menu.

To remove a till, do the following:

1. From the Manage Till menu, select the **Till Maintenance** option, then press [Enter] for **Ok**.
2. From the Till Maintenance menu, select **Remove Till** or **Remove Other Till** option, then press [Enter] for **Ok**.
 - If you selected **Remove Other Till**, continue with step 3.

3. If you selected **Remove Other Till**, Oracle Retail Xstore Point-of-Service displays a list of tills attached to the register. Select the till you are removing, then press **[Enter]** for **Ok**. Skip to step 5.

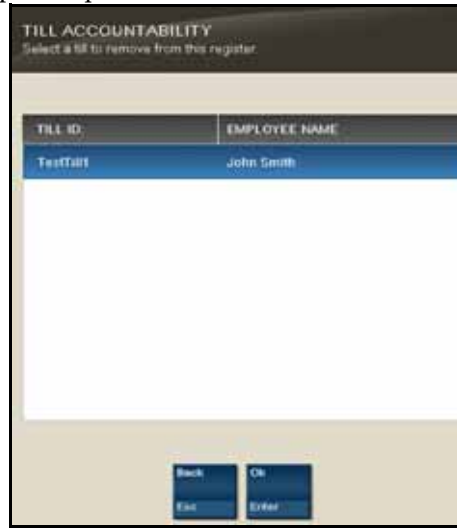


Figure 10-12: Till to Remove Selection List

4. The system prompts whether to remove the till from the register.
 - Press **[Y]** or select **Yes** to remove the till.
 - Press **[N]** or select **No** to keep the till attached to the register and return to the Manage Tills menu.
5. Oracle Retail Xstore Point-of-Service displays a message confirming that the till has been removed from the register. Press **[Enter]** for **Ok** to close the prompt.
 - A receipt prints for the till removal and Oracle Retail Xstore Point-of-Service returns to the Till Maintenance menu.

End Count Other Till (Till Accountability Mode Only)

To end count a till assigned to any employee, do the following:

1. From the Manage Tills menu, select the **Till Maintenance** option, then press **[Enter]**.
2. From the Till Maintenance menu, select the **End Count Other Till** option, then press **[Enter]** for **Ok**.

Return a Till (Till Accountability Mode Only)

3. The system prompts you to select the till that is being end counted. Select the till, then press **[Enter]** for **Ok**.

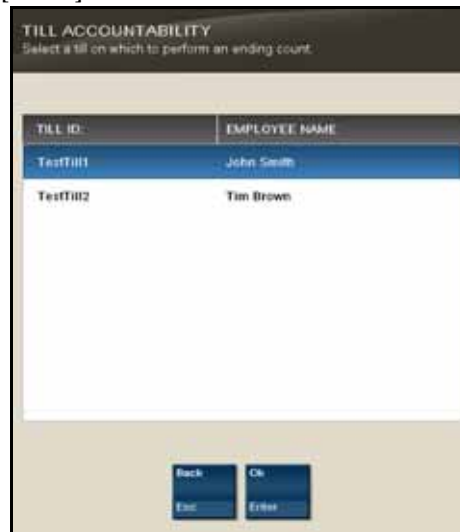


Figure 10-13: Till Selection for End Count

4. Continue the end count process as with a normal closing count.
See [Closing the Register](#) for a description of the closing count procedure.

Return a Till (Till Accountability Mode Only)

Before a till can be reconciled, the till must be marked as Returned. This indicates that the till has been transferred from the control of the associate/cashier to the manager.

Prerequisites: The following steps must be completed before you can return a till.

- 1) The till must be end counted
<AND>

- 2) The till must be removed

See [End Count Other Till \(Till Accountability Mode Only\)](#) and [Remove a Till \(Till Accountability Mode Only\)](#).

1. From the Manage Tills Menu, select the **Till Maintenance** option and press **[Enter]** for **Ok**.
2. From the Till Maintenance menu, select the **Issue/Return Till** option and press **[Enter]** for **Ok**.



3. The system displays the Till Details screen, showing the current status of the tills.

Select the **Return Till** menu option.

TILL ID	ISSUED	EMPLOYEE ID	EMPLOYEE NAME	ATTACHED	CASH DPA	REGIST	COUNT STA
TestTill1	3 ✓	100	John Smith	2 ✗			1 ENDCOUNT
TestTill2	✓	101	Steve Sakita	✗			UNCOUNTED
TestTill3	✗			✗			
TestTill4	✗			✗			
TestTill5	✗			✗			
TestTill6	✗			✗			

Figure 10-14: Return Till

Table 10-1: About this screen - [Figure 10-14](#)

Component #	Description
1. Count Status	A Count Status of ENDCOUNT indicates that the till has been end counted by the associate.
2. Attached	A red ✗ in the Attached column indicates that the till has been removed from the register.
3. Issued	A green check mark (✓) in the Issued column indicates that the till has not yet been returned to the manager.

- The system displays a list of tills that can be returned. Select the till from the list and press [Enter] for Ok.

TILL ID	EMPLOYEE NAME
TestTill1	John Smith

Return a Till (Till Accountability Mode Only)

- Oracle Retail Xstore Point-of-Service displays a message confirming that the till has been returned. Press **[Enter]** for **Ok** to acknowledge the message.



Figure 10-15: Till Accountability Returned Till

- The system returns to the Till Details screen, with A red **✗** next to the Till showing it as **Returned**. Select the **Back** option to return to the Back Office.

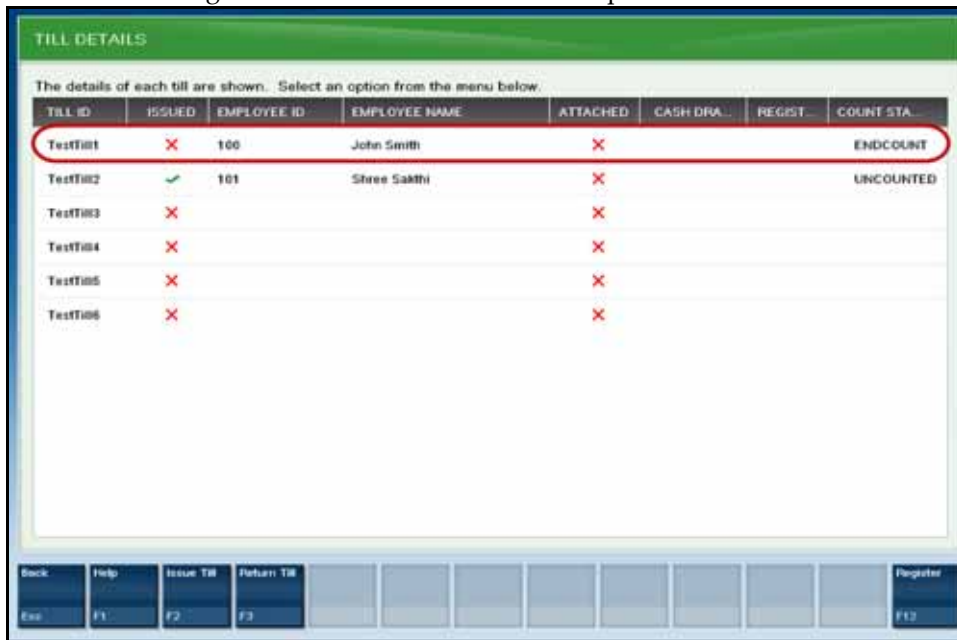


Figure 10-16: Till Details - Returned Till

About this screen - [Figure 10-16](#)

A red **✗** in the Issued column indicates that the till is Returned. The till can now be reconciled.

Reconciling a Till (Till Accountability Mode Only)

The final check of a till is performed at till reconciliation, when the till is counted and checked against the amount the cashier counted for the till. Following till reconciliation, the till is closed.

Important: **Prerequisites:** The following steps must be completed before you can reconcile a till:

- 1) The till must have an ENDCOUNT status. **Activity:** The associate has performed a close count on the till.
- 2) The till has been removed from the register. **Activity:** The associate has performed the Remove Till function at the register.
- 3) The till has been returned, indicating the till has been transferred from the control of the associate to the cash manager. **Activity:** The cash manager has marked the till as returned using the Issue/Return function.

See also: [End Count Other Till \(Till Accountability Mode Only\)](#), [Remove a Till \(Till Accountability Mode Only\)](#), and [Return a Till \(Till Accountability Mode Only\)](#).

7. From the Manage Tills menu, select the **Till Maintenance** option and press [Enter] for **Ok**.
8. From the Till Maintenance menu, select the **Reconcile Till** option and press [Enter] for **Ok**.

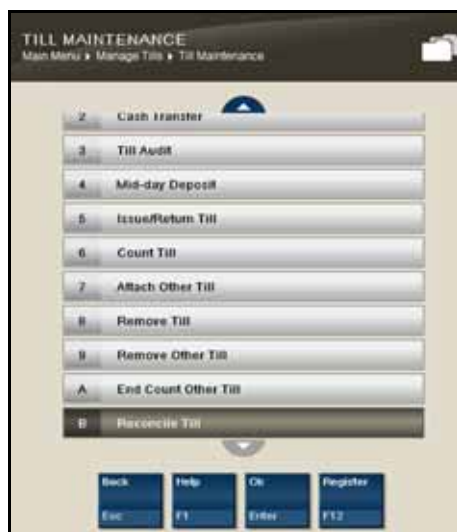


Figure 10-17: Till Maintenance Menu - Reconcile Till Option

Reconciling a Till (Till Accountability Mode Only)

9. Select a till to reconcile from the list of tills and press [Enter] for Ok.



Figure 10-18: List of Tills for Reconciliation

10. At the Count Summary screen, select the tender type you want to count and then select the **Count Selected** option.

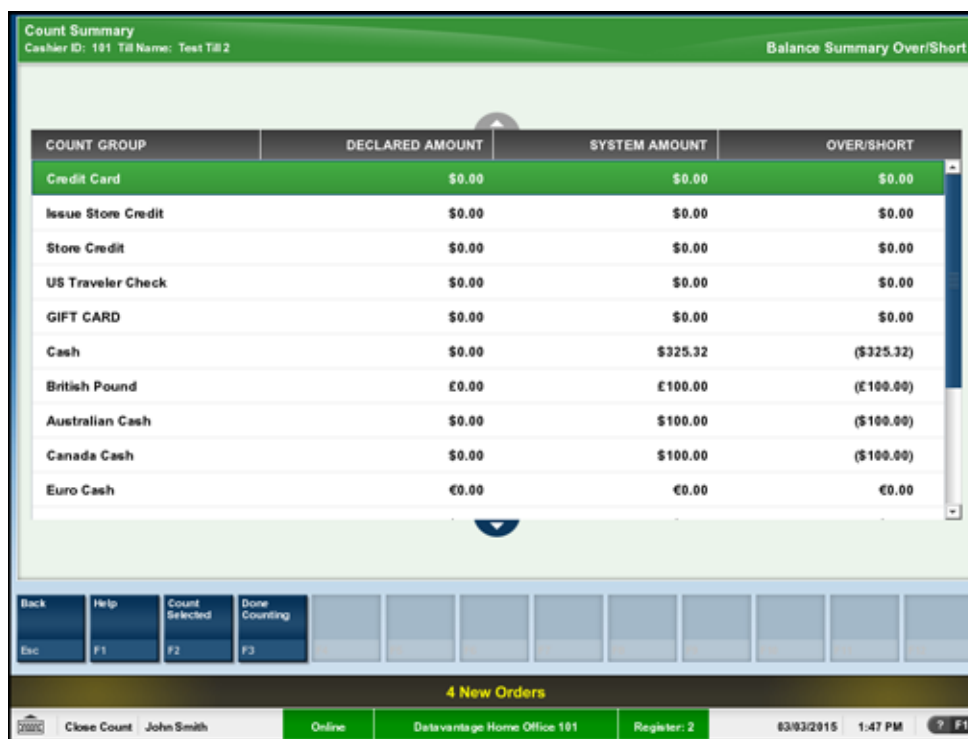


Figure 10-19: Reconcile Count Screen

Note: Depending upon the configuration of your system, the over/short amounts as shown above may not be displayed.

Select the **View Over/Short Reasons** button to review comments regarding the end count.

11. Enter each value as required in the focus bar and press [Enter]. The tender type you select and your system's configuration determine the type of count you must

perform. For examples of count screens, see [Tender Count Screen Xstore Base Examples](#).

12. After you complete the count for the selected group, select the **Next Group** option, and repeat this step for additional groups that you want to count.
13. After you count all groups that you want to audit, select the **Summary** option to return to the Count Summary screen.
14. The system records the information, prints a reconcile receipt for your records, and returns to the Till Management menu.

Xstore	
6579 Cochran Rd Suite A Solon, OH 44139 888-888-1212	
Ticket: 255	Date: 8/24/11
Store: 303	Register: 1
Cashier: 1	
Session ID:	
Count Type: RECONCILE	
Till ID: 3000Bank	
Tender:	
Store Credit	
Declared Amount	0.00
System Total	0.00
Difference	0.00
Private Label Credit Card	
Declared Amount	0.00
System Total	0.00
Difference	0.00
Merchandise Credit Card	
Declared Amount	0.00
System Total	0.00
Difference	0.00
US Traveler Check	
Declared Amount	0.00
System Total	0.00
Difference	0.00
Credit Card	
Declared Amount	100.37
System Total	100.37
Difference	0.00

Figure 10-20: Reconcile Receipt Sample

Note: Deposits from the reconciled till are made to the store bank (safe).

Open the Store Bank

Note: This function may be part of the store open process.

To open the store bank, do the following:

1. From the Manage Tills menu, select the **Store Bank Maintenance** option, then press [Enter] for Ok.
2. From the Store Bank Maintenance menu, select the **Open Store Bank** option, then press [Enter] for Ok.

Open the Store Bank

- At the Count Summary screen, select the tender type you want to count and then select the **Count Selected** option.

COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVER/SHORT
Cash	\$0.00	\$500.00	(\$500.00)
British Pound	£0.00	£200.00	(£200.00)
Australian Cash	\$0.00	\$200.00	(\$200.00)
Canada Cash	\$0.00	\$200.00	(\$200.00)

Back Help Count Selected Done Counting

4 New Orders

Store Bank Open - John Smith Online Data Advantage Home Office 181 Register 2 6/30/2015 4:16 PM F1

- Enter each value as required in the focus bar and press **[Enter]**. The tender type you select and your system's configuration determine the type of count you must perform. For examples of count screens, see [Tender Count Screen Xstore Base Examples](#).
- After you complete the count for the selected group, select the **Next Group** option, and repeat this step for additional groups that you want to count.
- After you count all groups that you want to audit, select the Summary option to return to the **Count Summary** screen.
- When all denomination quantities have been entered, select the **Done Counting** option.
 - If the opening amount in the store bank does not equal the amount that was in the store bank at the prior store bank close, the system prompts whether to accept or reject the discrepancy.
 - Select **Yes** to accept the discrepancy. You may be prompted to enter a comment and then press **[Ok]**.

- * Select **No** to reject the discrepancy and return to the denomination counts.

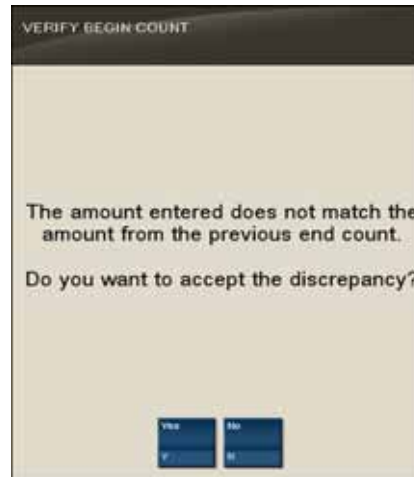


Figure 10-21: Store Bank Discrepancy Prompt

- If the opening amount in the store bank equals the amount that was in the store bank at the prior store bank close, the system displays a message confirming that the store bank is in balance. Acknowledge the message to continue.
8. Oracle Retail Xstore Point-of-Service opens the store bank, prints a receipt for the opening of the store bank with the denomination count, and returns to the Main Menu.

Auditing the Store Bank

The store bank audit function is used to count the tenders in your store bank (store safe). This audit function provides the capability to select a tender type, record its total current value, and compare that value with the system-recorded amount for the same tender. The system calculates and displays any difference (over/short) between the expected amount and the actual amount.

Note: An audit does not change the expected amount in the store bank.

1. From the Manage Tills Menu, select the **Store Bank Maintenance** option and press [Enter] for Ok.

- From the Store Bank Maintenance menu, select the **Store Bank Audit** option and press [Enter] for Ok.



Figure 10-22: Manage Tills Menu - Store Bank Audit Option

Tip: You can also type the number associated with the menu option to access the function.

- At the Count Summary screen, select the tender type you want to count and then select the **Count Selected** option.

COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVER/SHORT
US Traveler Check	\$0.00	\$0.00	\$0.00
Cash	\$0.00	\$500.00	(\$500.00)
British Pound	£0.00	£150.00	(£150.00)
Australian Cash	\$0.00	\$100.00	(\$100.00)
Canada Cash	\$0.00	\$100.00	(\$100.00)
Euro Cash	€0.00	€0.00	€0.00
Check	\$0.00	\$0.00	\$0.00
Miscellaneous	\$0.00	\$0.00	\$0.00

4 New Orders

Store Bank Audit | John Smith | Online | Datevantage Home Office 101 | Register: 2 | 03/03/2015 2:07 PM | F1

Figure 10-23: Store Bank Audit Screen

Note: Depending upon the configuration of your system, the over/short amounts as shown above may not be displayed.

4. Enter each value as required in the focus bar and press **[Enter]**. The tender type you select and your system's configuration determine the type of count you must perform. For examples of count screens, see [Tender Count Screen Xstore Base Examples](#).
5. After you complete the count for the selected group, select the **Next Group** option, and repeat this step for additional groups that you want to count.
6. After you count all groups that you want to audit, select the Summary option to return to the **Count Summary** screen.
7. When you have counted all the tenders in the store bank, select the **Done Counting** option to complete the audit and return to the Main Menu.

Reconcile the Store Bank

Note: Before you can close the store bank, all tills must be reconciled. See [Reconciling a Till \(Till Accountability Mode Only\)](#).

To close the store bank, the store bank must also be reconciled. In Oracle Retail Xstore Point-of-Service, the store bank is automatically closed once it is reconciled. To reconcile and close the store bank, do the following:

1. From the Manage Tills menu, select the **Store Bank Maintenance** option, then press **[Enter]** for **Ok**.
2. From the Store Bank Maintenance menu, select the **Reconcile Store Bank** option, then press **[Enter]** for **Ok**.
3. The Reconcile Store Bank screen opens. Select each count group and count the tenders in the store bank.

Note: Depending upon the configuration of your system, the over/short amounts may not be displayed.

4. When you have counted all the tenders in the store bank, select the **Done Counting** option to complete the reconciliation and return to the Manage Tills Menu.
5. Oracle Retail Xstore Point-of-Service prints a receipt for the store bank reconciliation and closes the store bank. The system returns to the Main Menu.

Preparing the Bank Deposit

1. From the Manage Tills Menu, select the **Store Bank Maintenance** option and press **[Enter]** for **Ok**.

2. From the Store Bank Maintenance menu select, the **Bank Deposit** option and press [Enter] for Ok.



Figure 10-24: Store Bank Maintenance Menu - Bank Deposit Option

Tip: You can also type the number associated with the menu option to access the function.

3. Depending upon your store policy, you may be prompted to select the bank where the money should be deposited. If prompted, select a bank from the list and press [Enter] for Ok.

- At the Count Summary screen, select the tender type you want to count and then select the **Count Selected** option.

The screenshot shows the 'Count Summary' screen with the following data:

COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVER:SHORT
US Traveler Check	\$0.00	\$0.00	\$0.00
Cash	\$0.00	\$500.00	(\$500.00)
British Pound	£0.00	£150.00	(£150.00)
Australian Cash	\$0.00	\$100.00	(\$100.00)
Canada Cash	\$0.00	\$100.00	(\$100.00)
Euro Cash	€0.00	€0.00	€0.00
Check	\$0.00	\$0.00	\$0.00
Miscellaneous	\$0.00	\$0.00	\$0.00

Below the table, there are buttons for 'Back', 'Help', 'Count Selected', and 'Done Counting'. At the bottom, a status bar shows '4 New Orders' and system information: 'Bank Deposit Count - John Smith', 'Online', 'Date/Time: Home Office 181', 'Register: 2', '63/632815', '2:12 PM', and 'F3'.

Figure 10-25: Bank Deposit Count Screen

Note: Depending upon the configuration of your system, the over/short amounts as shown above may not be displayed.

- Enter each value as required in the focus bar and press **[Enter]**. The tender type you select and your system's configuration determine the type of count you must perform. For examples of count screens, see [Tender Count Screen Xstore Base Examples](#).
- After you complete the count for the selected group, select the **Next Group** option, and repeat this step for additional groups that you want to count.
- After you count all groups that you want to audit, select the Summary option to return to the **Count Summary** screen.
- Select the **Done Counting** option when you have finished counting.
- The system displays a confirmation prompt showing the bank deposit tenders and amounts you counted. Select **Yes** to accept the bank deposit amounts as shown or select **No** to return to the Count Summary screen to make any adjustments as needed.

Store Bank Cash Deposit

When the bank deposit count is complete, the system prints a deposit slip showing all tenders to be deposited and returns to the Store Bank Maintenance menu.

Bank Deposit Receipt Sample - Detail



A sample of a detailed bank deposit receipt from Xstore. The receipt includes store information (6573 Cochran Rd, Suite A, Solon, OH 44139, 330-666-1212), transaction details (Ticket: 255, Date: 9/24/05, Store: 301, Register: 1, Cashier: 1, Session ID), and count type (RECONCILE, Till ID: StoreBank). It lists various tenders with their declared amounts, system totals, and differences.

Tender	
Store Credit	
Declared Amount	0.00
System Total	0.00
Difference	0.00
Foreign Label Credit Card	
Declared Amount	0.00
System Total	0.00
Difference	0.00
Merchandise Credit Card	
Declared Amount	0.00
System Total	0.00
Difference	0.00
US Traveler Check	
Declared Amount	0.00
System Total	0.00
Difference	0.00
Credit Card	
Declared Amount	188.97
System Total	188.97
Difference	0.00

Figure 10-26: Bank Deposit Receipt - Detail

Bank Deposit Receipt Sample - Summary



A sample of a summary bank deposit receipt from Xstore. It includes the same store and transaction information as the detail receipt. It summarizes the total cash deposit and the total deposit amount.

Ticket: 255	Date: 9/24/05
Store: 301	Register: 1
Cashier: 1	
Session ID:	
Total Cash Deposit	0.00
US Traveler Check	0.00
Canada Cash	0.00
Canadian Traveler Check	0.00
Currency	0.00
Euro Cash	0.00
Check	411.54
Total Deposit Amount	411.54

Figure 10-27: Bank Deposit Receipt - Summary

Store Bank Cash Deposit

Note: Once the Store Bank has been reconciled, you cannot make cash deposits into it.

During the day, there may be times when you must deposit cash into the store bank. Use this procedure when a cash deposit is to be made into the store bank.

1. From the Manage Tills menu, select the **Store Bank Maintenance** option, then press [Enter] for **Ok**.
2. From the Store Bank Maintenance menu, select the **Store Bank Cash Deposit** option, then press [Enter] for **Ok**.

3. If your store is configured for foreign cash currency tenders to be given as change, select the type of currency you are depositing and press **[Enter]**.



Figure 10-28: Store Bank Cash Deposit List

4. The system prompts for the cash amount you are depositing into the store bank. Enter the amount, then press **[Enter]**.

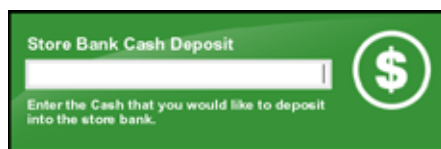


Figure 10-29: Store Bank Cash Deposit Amount Prompt

5. Oracle Retail Xstore Point-of-Service prints a receipt for the deposit and returns to the Store Bank Maintenance menu.

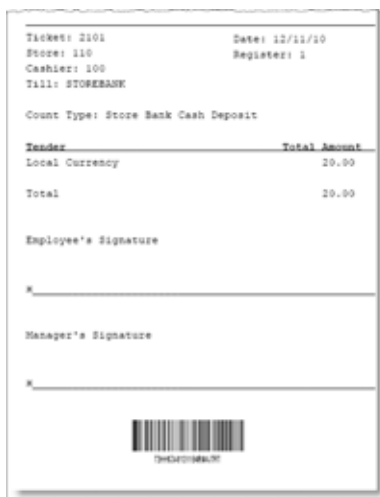


Figure 10-30: Store Bank Cash Deposit Receipt

Attaching a Cash Drawer Till

Use this procedure to attach a till into the networked cash drawers in order to track money in the cash drawer.

1. From the Manage Tills menu, select the **Till Maintenance** option and press [Enter] for **Ok**.
2. From the Till Maintenance menu, select the **Attach Cash Drawer Till** option and press [Enter] for **Ok**.
3. The system displays a list of tills available to be attached.



Figure 10-31: Select Cash Drawer Till to Attach

Select a till from the list and press [Enter] for **Ok**.

4. Scan the cash drawer. The cash drawer ID is verified to determine it is in the correct state.
If the scanned drawer is not in the correct state, an error message is displayed. "Cash drawer is currently unavailable." Press [Enter] for **Ok**.

If the scanned cash drawer barcode does not match to the selected cash drawer, an error message is displayed "The scanned cash drawer does not match the selected cash drawer." Press [Enter] for **Ok**

5. Confirm you want to attach the till to the cash drawer: "Are you sure you want to attach till to cash drawer <cash drawer id and name>?" Select [Yes] on this prompt, to continue.

The cash drawer is opened and the till is attached to the cash drawer.

A confirmation message is displayed: "Till <insert till name> has been attached to cash drawer <Cash Drawer ID and name>."

Press [Enter] for **Ok** and close the drawer. You are returned to the Xstore Home screen.

6. Repeat this procedure for further cash drawers.

Removing a Cash Drawer Till

Oracle Retail Xstore Point-of-Service gives managers and associates the option to remove their own till from a register or remove a till assigned to someone else, depending on the option chosen in the Manage Tills menu. The ability to combine the cash drawer close and reconcile processes together is configurable.

To remove a till from a networked enabled cash drawer, do the following:

1. From the Manage Till menu, select the **Till Maintenance** option, then press **[Enter]** for **Ok**.
2. From the Till Maintenance menu, select **Remove Cash Drawer Till** then press **[Enter]** for **Ok**.
3. Oracle Retail Xstore Point-of-Service displays a list of tills attached to the cash drawer.



Figure 10-32: Select Cash Drawer Till to Remove

Select the till you are removing, then press **[Enter]** for **Ok**.

4. Scan the cash drawer. The cash drawer ID is verified to determine it is in the correct state.

If the scanned drawer is not in the correct state, an error message is displayed. "Cash drawer is currently unavailable." Press **[Enter]** for **Ok**.

If the scanned cash drawer barcode doesn't match to the selected cash drawer, an error message is displayed "The scanned cash drawer does not match the selected cash drawer." Press **[Enter]** for **Ok**.

5. Confirm you want to remove the till from the cash drawer: "Are you sure you want to remove till from cash drawer <cash drawer id and name>?" Select **[Yes]** on this prompt, to continue.

The cash drawer is opened and the till is removed from the cash drawer.

A confirmation message is displayed: "Till <insert till name> has been removed from cash drawer <Cash Drawer ID and name>."

Press **[Enter]** for **Ok** and close the drawer. You are returned to the Xstore Home screen.

6. Repeat this procedure for further cash drawers.

Reconciling a Networked Cash Drawer Till

This procedure allows you to reconcile the transactions associated to a cash drawer. It does not reconcile the register. You need to close the cash drawer first (at any time) and then reconcile the cash drawer (at any time). The cash drawer does not have to be closed before the End of Day Process. This is particularly applicable for 24/7 trading to minimize downtime.

1. From the Manage Tills menu, select the **Till Maintenance** option and press [Enter] for **Ok**.
2. From the Till Maintenance menu, select the **Reconcile Cash Drawer** option and press [Enter] for **Ok**.

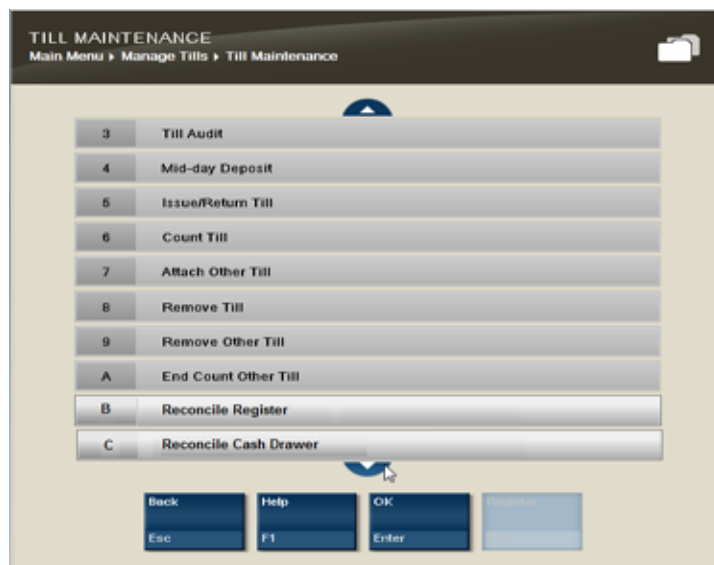


Figure 10-33: Till Maintenance - Reconcile Cash Drawer

The ability to combine the Cash Drawer Close and Reconciliation Processes is configurable (for register accountability in a normal store environment). Therefore, if configured, the reconciliation process would begin directly after the Cash Drawer Close flow. In 24/7 trading the cash drawer and reconciliation processes is separate.

3. Any register's back office can be used to reconcile networked cash drawers.

The Networked Cash Drawer Reconciliation button is always available. If you attempt to access it and no cash drawers are available to reconcile, an error message "All closed cash drawers have been reconciled." is displayed.

4. Select the cash drawer to reconcile from a list of cash drawers available to reconcile.



Figure 10-34: Cash Drawer Selection

Once a cash drawer has been reconciled, it is no longer displayed on the list of available cash drawers to reconcile.

The cash drawers do not have to be reconciled in a specific order.

The cash drawers' name, description and Session ID are listed.

5. Select the Cash Drawer and press the **Select OK** button.

The system prompts you with the question: "Do you want to reconcile the following cash drawer? <Insert Cash Drawer Device Name>".



Figure 10-35: Confirm Cash Drawer Reconciliation

Select **[Yes]** on this prompt, to continue.

6. The existing Xstore reconcile flow is followed for the limited tenders accepted on the networked cash drawer. Any transaction from any register completed on the cash drawer and has the selected networked cash drawer's ID saved with the transaction should be reconciled at this time.

The cash drawer has been reconciled and the user is returned to the Xstore Home screen.

Performing Paid In/Paid Out Transactions

A **Paid In** transaction allows you to move funds into a till from non-sale sources such as returned check charges, found money, and change from a Paid Out transaction.

A **Paid Out** transaction moves funds out of a till for non-refund purposes such as business expenses and office supply purchases.

Store policy controls the list of valid reasons that you can select for performing a Paid In or Paid Out transaction. In addition, store policy controls whether or not receipts are produced by these two transactions.

The Paid In and Paid Out transactions may also be available on the Till Options Menu at the register.

Note: A till must be attached to the register to perform Paid In/Paid Out transactions. If a till is not attached and one of those options is selected, a message is displayed indicating that a till must be attached for the transaction to be performed.

Note: In an only networked cash drawer environment you are required to scan the cash drawer barcode to link it to the transaction before the drawer pops.

Note: In a mixed network/local cash drawer environment, select whether to use a network cash drawer.

Paid In Transaction

1. From the Manage Tills Menu, select the **Till Options** option, then press **[Enter]** for **Ok**.
2. From the Till Options menu, select the **Paid In** option and press **[Enter]** for **Ok**.



Figure 10-36: Manage Tills Menu, Paid In 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.

3. The system prompts you to enter a paid out receipt barcode. If you are now placing funds back into the till from a previous paid out transaction and you have the receipt, scan or enter the barcode and press [Enter]. Otherwise, just press [Enter] to bypass this prompt.



Figure 10-37: Paid Out Receipt Barcode Prompt

4. Select a reason for this Paid In transaction and press [Enter] for Ok.



Figure 10-38: List of Paid In Reasons

Note: There may be additional prompts for information (such as a comment) depending upon the specific reason code that you select.

5. At the Amount prompt, enter the cash amount you are adding to the till and press [Enter].



Figure 10-39: Enter Amount Prompt

- Note:** Note the reference to the original paid out transaction number shown in this example. This information associates the original paid out transaction with the current paid in transaction for accounting purposes.

3. Select a reason for this Paid Out transaction and press [Enter] for Ok.

The screenshot shows a green header bar with the text "PAID OUT" and "Select a reason for performing a paid out." Below this is a list of reasons: "Stocks", "Contractor Services", "Store Incentives", "Postage", and "Delivery". At the bottom, there are two buttons: "Back" and "Ok".

Figure 10-41: List of Paid Out Reasons

Note: There may be additional prompts for information (such as a comment) depending upon the specific reason code that you select.

4. At the Amount prompt, enter the cash amount you are removing from the till and press [Enter].

The screenshot shows a green background with the word "Amount" at the top. Below it is a white input field with a dollar sign icon to its right. The text "Enter amount." is displayed below the input field.

Figure 10-42: Enter Amount Prompt

5. Oracle Retail Xstore Point-of-Service prompts you to close the cash drawer (if configured to do so), prints a receipt, and returns to the Main Menu.

The screenshot shows a receipt with the following information:
 4375 Cochran Rd
 Suite A
 Solon, OH 44139
 330-886-1222
 Ticket: 12 Date: 9/24/08
 Pos#: 001 Register: 1
 Cashier: 1
 Reason: 20
 PAID OUT
 Till ID:Till1
 Code: TrTransRC-1
 Supplier
 Comments:
 Need to purchase printer paper.
 Paid Out Amount: 19.00
 Employee's Signature
 Payee's Signature
 A barcode is at the bottom.

Figure 10-43: Paid Out Receipt Sample

Cash Pickup

A Cash Pickup moves cash from the till to the store bank.

Note: This procedure may differ from the cash pickup transaction performed by a cashier. See the Oracle Retail Xstore Point-of-Service User Guide for more information about this transaction type.

To perform a Cash Pickup:

1. From the Manage Tills menu, select the **Till Maintenance** option, then press [Enter] for **Ok**.
2. From the Till Maintenance menu, select the **Cash Pickup** option, then press [Enter] for **Ok**.
3. If your store is configured for foreign cash currency tenders to be given as change, select the type of tender from the list.



Figure 10-44: Cash Pickup Currency List

4. If the register has more than one cash drawer, you are prompted to select a till for the pickup. Select the till and press [Enter] for **Ok**.

Note: In an only networked cash drawer environment you are required to scan the cash drawer barcode to link it to the transaction before the drawer pops.

Note: In a mixed network/local cash drawer environment, select whether to use a network cash drawer.

5. You are prompted to enter the amount of the pickup. Enter the amount and press [Enter].



Figure 10-45: Cash Pickup Amount

6. A receipt prints for the Cash Pickup. Oracle Retail Xstore Point-of-Service returns to the Main Menu.

Cash Transfer

A Cash Transfer moves cash from the store bank to a till. To perform a Cash Transfer, do the following:

1. From the Manage Tills menu, select the **Till Maintenance** option and then press **[Enter]** for Ok.
2. From the Till Maintenance menu, select the **Cash Transfer** option and then press **[Enter]** for Ok.

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

Note: In an only networked cash drawer environment you are required to scan the cash drawer barcode to link it to the transaction before the drawer pops.

Note: In a mixed network/local cash drawer environment, select whether to use a network cash drawer.

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

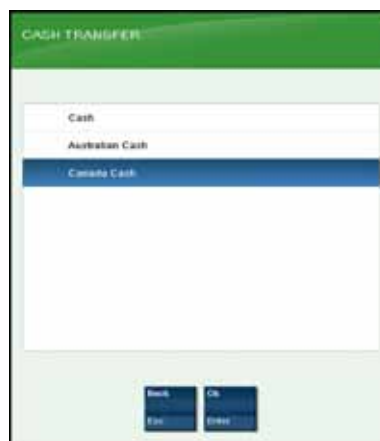


Figure 10-46: Cash Transfer Currency List

4. You are prompted to enter the amount of the Cash Transfer. Enter the amount, then press **[Enter]**.

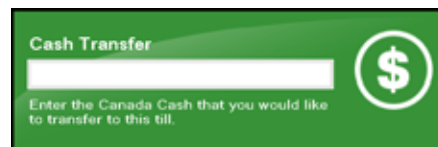


Figure 10-47: Cash Transfer Amount Prompt

5. A receipt prints for the Cash Transfer and Oracle Retail Xstore Point-of-Service returns to the Main Menu.

Till Audit

Till Audit provides the capability to select a tender type, record its total current value, and see if that value balances with the amount that the system shows for the same

tender. The system calculates and displays any difference (over/short) between the two amounts.

A Till Audit may be performed any time after the Beginning Count and before the Ending Count. The till does not need to be removed after the audit is completed.

1. From the **Manage Tills** menu, select the **Till Maintenance** option and press [Enter] for **Ok**.
2. From the Till Maintenance menu, select the **Till Audit** 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.

Note: In an only networked cash drawer environment you are required to scan the cash drawer barcode to link it to the transaction before the drawer pops.

Note: In a mixed network/local cash drawer environment, select whether to use a network cash drawer.

3. At the Count Summary screen, select the tender type you want to count and select the **Count Selected** option. Use the up and down arrow keys to scroll through the list if necessary.

COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVER/SHORT
Credit Card	\$0.00	\$0.00	\$0.00
Issue Store Credit	\$0.00	\$0.00	\$0.00
Store Credit	\$0.00	\$0.00	\$0.00
US Traveler Check	\$0.00	\$0.00	\$0.00
GIFT CARD	\$0.00	\$0.00	\$0.00
Cash	\$0.00	\$197.20	(\$197.20)
British Pound	£0.00	£197.97	(£197.97)
Australian Cash	\$0.00	\$0.00	\$0.00
Canada Cash	\$0.00	\$300.00	(\$300.00)
Euro Cash	€0.00	€0.00	€0.00

Figure 10-48: Audit Count - Count Summary Screen

4. Enter each value as required in the focus bar and press [Enter]. The tender type you select and your system's configuration determine the type of count you must perform. For examples of count screens, see [Tender Count Screen Xstore Base Examples](#).
5. After you complete the count for the selected group, select the **Next Group** option, and repeat this step for additional groups that you want to count.

- After you count all groups that you want to audit, select the **Summary** option to return to the Count Summary screen. Check the Over/Short column to see if your till is now balanced with the system values for each tender type.

COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVER/SHORT
Credit Card	\$0.00	\$0.00	\$0.00
Issue Store Credit	\$0.00	\$0.00	\$0.00
Store Credit	\$0.00	\$0.00	\$0.00
US Traveler Check	\$0.00	\$0.00	\$0.00
GIFT CARD	\$0.00	\$0.00	\$0.00
Cash	\$197.20	\$197.20	\$0.00
British Pound	£197.07	£197.07	£0.00
Australian Cash	\$0.00	\$0.00	\$0.00
Canada Cash	\$300.00	\$300.00	\$0.00
Euro Cash	€0.00	€0.00	€0.00

4 New Orders

Audit Count: John Smith Online Delavante Home Office 181 Register: 1 8/6/2015 3:32 PM ? F1

Figure 10-49: Count Summary Screen - Audit Complete

- Select the **Done Counting** option when you complete your audit of the till.
- The system prints a Till Audit receipt for your records.

Session ID:	
Count Type:	TILL AUDIT
Till ID:	Till1
Tender	
Check	
Declared Amount	0.00
System Total	0.00
Difference	0.00
Cash	
Declared Amount	400.00
System Total	410.43
Difference	(10.43)
US Traveler's Check	
Declared Amount	0.00
System Total	0.00
Difference	0.00
Total Declared Amount:	400.00
Local Currency	
Till Opening Amount:	
Total Cash Amount	400.00
Total Cash Deposit	0.00
Cash Remained In Till	400.00
Total Cash Pickup:	400.00
Arabic Oulder	
Exchange Rate	1.77
Foreign Amount	0.00
Converted Amount	0.00

Figure 10-50: Till Audit Receipt Sample (section only)

- Close the cash drawer. The system returns to the Till Options menu.

Mid-Day Deposit

Mid-Day Deposit allows you to place funds from a register into the store bank (safe) during the course of a working session. This activity is not necessarily restricted to a specific time, and may be used as often as necessary.

1. From the **Manage Tills Menu**, select **Manage Tills** to display the Manage Tills menu.
2. Select **Till Maintenance** from the Manage Tills menu.
3. At the Till Maintenance menu, select the **Mid-Day Deposit** option. The system opens the cash drawer when you select this 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.

Note: In an only networked cash drawer environment you are required to scan the cash drawer barcode to link it to the transaction before the drawer pops.

Note: In a mixed network/local cash drawer environment, select whether to use a network cash drawer.

4. The Count Summary screen displays a list of tender groups that may be removed from the till and deposited in the store bank. Select the tender type you want to count and select the **Count Selected** option.

COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVER/SHORT
US Traveler Check	\$0.00	\$0.00	\$0.00
Cash	\$0.00	\$426.11	(\$426.11)
British Pound	£0.00	£0.00	£0.00
Australian Cash	\$0.00	\$0.00	\$0.00
Canada Cash	\$0.00	\$0.00	\$0.00
Euro Cash	€0.00	€0.00	€0.00
Check	\$0.00	\$0.00	\$0.00
Miscellaneous	\$0.00	\$0.00	\$0.00

Figure 10-51: Count Summary Screen - Mid Day Count

5. Enter each value as required in the focus bar and press **[Enter]**. The tender type you select and your system's configuration determine the type of count you must perform. For examples of count screens, see [Tender Count Screen Xstore Base Examples](#).

6. If additional funds are to be placed into the store bank, select the **Next Group** option to display the input screen for the next tender type.
 - a. Enter the count and amount values for the next tender group that you selected.

Tip: You may select *Prior Group* to return to the previous tender group in the list.

- b. Select the **Summary** option to return to the list of all tender groups.
7. At the Count Summary screen, select the **Done Counting** option.

COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVER/SHORT
US Traveler Check	\$0.00	\$0.00	\$0.00
Cash	\$426.11	\$426.11	\$0.00
British Pound	£0.00	£0.00	£0.00
Australian Cash	\$0.00	\$0.00	\$0.00
Canada Cash	\$0.00	\$0.00	\$0.00
Euro Cash	€0.00	€0.00	€0.00
Check	\$0.00	\$0.00	\$0.00
Miscellaneous	\$0.00	\$0.00	\$0.00

Figure 10-52: Mid-day Count Summary Screen - Done Counting

Note: The difference between the Declared Amount (your count) and the System Amount is the amount remaining in the till.

Post Voiding Transactions

8. The system prints a receipt for the Mid-Day deposit.

Count Type: MID COUNT	
Till ID: T111	
Transac	
Check	
Declared Amount	0.00
System Total	0.00
Difference	0.00
Cash	
Declared Amount	1800.00
System Total	2129.63
Difference	(628.63)
US Traveler's Check	
Declared Amount	0.00
System Total	0.00
Difference	0.00
Total Declared Amount	1800.00
Local Currency	
Till Opening Amount	
Total Cash Amount	1800.00
Total Cash Deposit	0.00
Cash Remained In Till	1800.00
Total Cash Pickup	880.00
Arden Gilder	
Exchange Rate	1.77
Foreign Amount	0.00
Converted Amount	0.00
Canadian Cash	
Exchange Rate	1.19
Foreign Amount	0.00

Figure 10-53: Mid-Day Deposit Receipt Sample

9. Close the cash drawer. The system returns to the Main Menu.

Post Voiding Transactions

Performing a Post Void transaction changes the status of a sales transaction to Void. Only transactions for the current business date can be post voided.

All records in the system are reset, almost as if they had never occurred during the original transaction, and the transaction record is retained in a voided state.

Certain kinds of sale transactions may involve extended transactions — activities related to the transaction that occur outside of 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, a prompt to continue or discontinue the post void process displays.

The types of transactions that may be post voided are determined by the home office.

If you scan or enter a barcode for a transaction type that cannot be post voided (such as a timecard transaction), the system displays a message indicating that the transaction type cannot be post voided. Press [Enter] for **Ok** to acknowledge the message and the system returns to the Manage Tills menu.

You can post void transactions from the register (see the Oracle Retail Xstore Point-of-Service User Guide), from the



Electric Journal (see [Post Voiding a Transaction](#)), or from the Manage Tills menu:

1. At the **Manage Tills** menu, select **Till Options**, then press [Enter] for **Ok**.
2. From the Till Options menu, select the **Post Void** option, then press [Enter] for **Ok**.



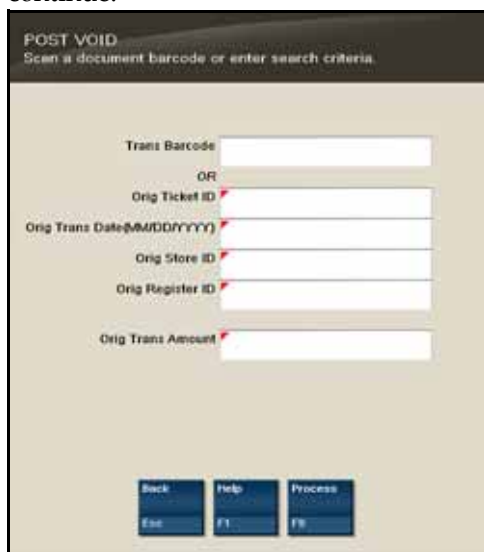
Figure 10-54: Till Options Menu, Post Void Option

Note: A till must be attached to the register to perform a transaction void. If a till is not attached, this option may be grayed out on the menu (Register Accountability mode), or a message may be displayed if the **Post Void** menu option is selected (Till Accountability mode). If the register has more than one cash drawer, you may be prompted to select the till to be used for this process.

Note: In an only networked cash drawer environment you are required to scan the cash drawer barcode to link it to the transaction before the drawer pops.

Note: In a mixed network/local cash drawer environment, select whether to use a network cash drawer.

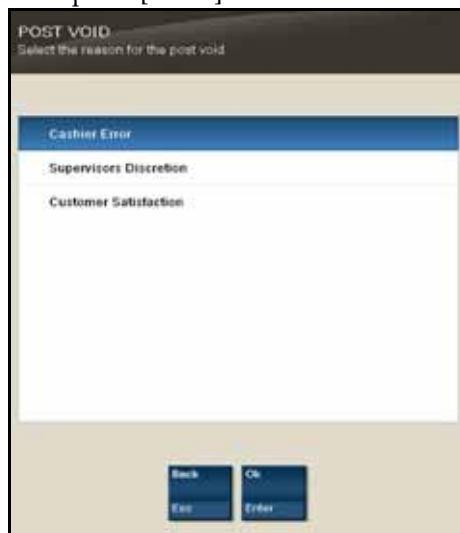
- At the Post Void prompt, scan or enter the transaction information and select **Process** to continue.



The screenshot shows a screen titled "POST VOID" with the instruction "Scan a document barcode or enter search criteria." Below this, there are several input fields: "Trans Barcode", "OR", "Orig Ticket ID", "Orig Trans Date(MM/DD/YYYY)", "Orig Store ID", "Orig Register ID", and "Orig Trans Amount". At the bottom, there are three buttons: "Back", "Help", and "Process".

Figure 10-55: Post Void Prompt

- Oracle Retail Xstore Point-of-Service prompts: Are you sure you want to post void the selected transaction? Select **Yes** to continue with the post void transaction.
- The system prompts for the reason you are performing the post void. Select a reason from the list and press **[Enter]** for **Ok**.



The screenshot shows a screen titled "POST VOID" with the instruction "Select the reason for the post void." Below this, there is a list of reasons: "Cashier Error", "Supervisors Discretion", and "Customer Satisfaction". At the bottom, there are two buttons: "Back" and "Ok".

Figure 10-56: Post Void Reasons

- The system may prompt for a comment about the post void. If prompted, type a comment and press **[Enter]** for **Ok** to continue.

- Oracle Retail Xstore Point-of-Service post voids the transaction, prints receipts, and returns to the Main Menu.

Ticket: 11		Date: 8/24/08	
Store: 001		Register: 1	
Cashier: 1			
DEFAULT SYSTEM USER			
VOID TRANSACTION			
Code: MGR_DISCRETION			
Manager's Discretion			
Item	Qty	Price	Amount
Wary Dress Leather Loafers			
1004	1	99.00	99.00
Subtotal			99.00
Tax 3.00%			3.94
Total			104.94
Cash			106.00
Change			
Cash			(0.06)
Original Trans ID: 10			
Original Cashier ID: 1			
Original Register ID: 1			
** VOID ** VOID ** VOID **			

Figure 10-57: Post Void Receipt Sample

Changing the Float Amount

The Float is the total value of cash counted and removed from the till, but not included in the bank deposit. This cash remains in circulation to be used the next time the till is opened. This option can be used whenever you need to change the amount withheld from the bank deposit, and can be adjusted per till. For example, you may want to change the float amount during the December holiday shopping season to plan for increased sale activity.

- At the Manage Tills menu, select **Till Options**, then press [Enter] for **Ok**.
- At the Till Options menu, select the **Change Float** option, then press [Enter] for **Ok**.



Figure 10-58: Till Options Menu - Change Float

- The system prompts for the reason you are changing the float amount. Select a reason from the list and press [Enter] for **Ok** to continue.
- Depending upon the reason you selected, you may be prompted for additional information/comments. If prompted, enter the information as required and press [Enter] for **Ok**.

Changing the Float Amount

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



6. The system displays a list of tills. Use the up and down arrow keys to select the till(s) you want to change (press the **[Spacebar]** to select multiple tills). After you select all of the tills you want to change, press **[Enter]** for **Ok**.



Figure 10-59: Till List - Two Tills Are Selected

7. The system prompts for the new float amount for the selected tills. Enter the new float amount for the tills in the list and press [Enter].

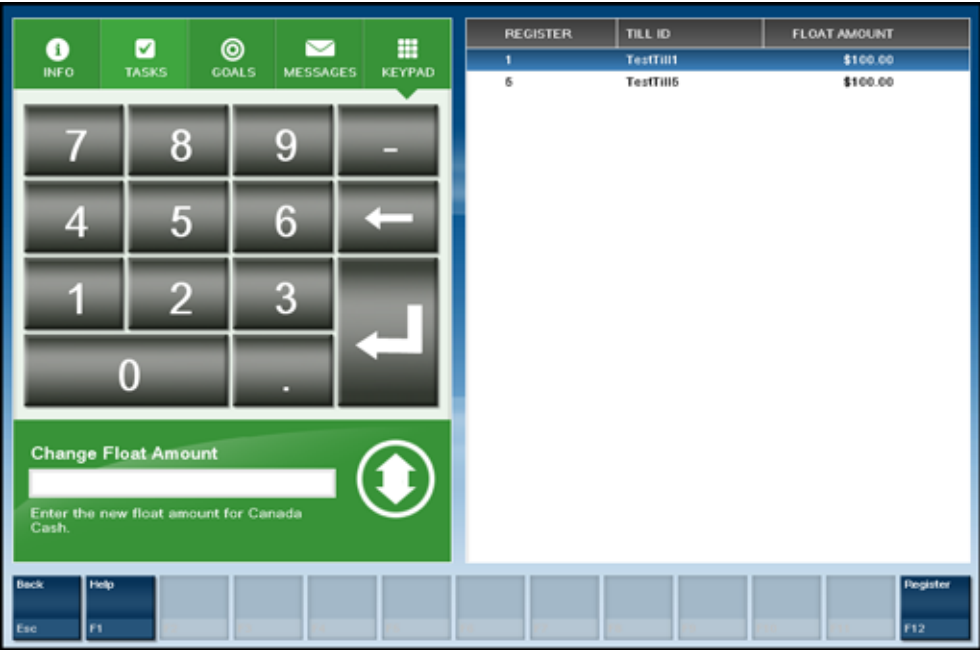


Figure 10-60: New Float Amount Prompt

8. The system prompts to confirm the new float amount for the selected tills. Press [Y] for **Yes** to accept the new float amount. The system updates the float amount to the new value for the selected tills and returns to the Main Menu.



Figure 10-61: Confirm New Float Amount Prompt

Foreign Currency Maintenance

You can edit the currency exchange rate for the foreign currencies that are accepted as tenders for sale transactions, if your store policy allows it. Some currency rates fluctuate frequently, so you can edit the exchange rate as often as necessary.

Note: Your system's configuration may make Foreign Currency Maintenance available from the Register Till Options menu as well as from the Back Office Manage Tills menu.

Foreign Currency Maintenance

1. At the Manage Tills menu, select the **Till Options** option, then press [Enter] for **Ok**.
2. From the Till Options menu, select the **Foreign Currency Maint.** option, then press [Enter] for **Ok**.
3. If the system prompts for a security login, enter your employee ID and password and select **Process**.
4. Oracle Retail Xstore Point-of-Service displays a list of currencies. Select the currency whose exchange rate you are changing, then press [Enter] for **Ok**.



5. The system displays the current information for the currency you selected. Enter the new exchange rate and a comment, then select **Save New Rate**.

The screenshot shows the 'CURRENCY EXCHANGE' screen with the prompt 'Enter the new exchange rate'. It displays the following information:

Base Currency: USD Cash
Target Currency: EUR Euro Cash
Current Exchange Rate: 0.85
New Exchange Rate: 0.85
Comments:
Update requested by J. Tellman

At the bottom of the screen, there are buttons for 'Cancel', 'Help', 'Save New Rate', 'Esc', 'F1', and 'Enter'.

Figure 10-62: New Exchange Rate

6. Oracle Retail Xstore Point-of-Service prompts whether to change the exchange rate. Select **Yes** to continue.

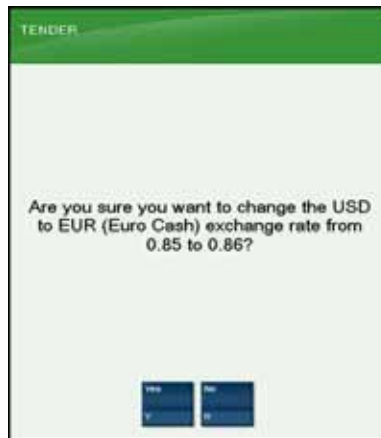


Figure 10-63: Confirmation Prompt

7. The new currency exchange rate is now effective and the system prints a receipt with the new exchange rate. Oracle Retail Xstore Point-of-Service returns to the Main Menu.

Note:

About exchange rate calculations in currency conversions:

- The exchange rate with the base currency ID of the local currency ID is the value that is used to calculate a converted currency amount. The exchange rate is stored as a factor of the local exchange rate.
 - The conversion is calculated by multiplying the local currency by the exchange rate.
-
-

Flash Sales Reports

Overview

The Flash Sales Reports include four different reports, each of which may be displayed on the screen or printed:

- Flash Sales Summary Report
- Flash Sales By Department
- Flash Sales By Hour
- Flash Sales By Employee

The Flash Sales reports provide an instant snapshot of sales at the moment that you select one of the reports. Three of the four reports display data in a column format and also in graphic format as bar charts and pie charts. The exception is the Flash Sales By Employee Report, which does not include graphs.

Each of the reports provides a criteria selection screen where you may set the parameters that are used to select the data included in the report.

All of the reports may be viewed online and printed immediately, or saved so that they may be viewed later. Saved reports may be preserved with the original selection parameters or with the original data.

All of the Flash Sales reports are also accessible from the Back Office **Reports Menu**.

Note: Refer to the *Oracle Retail Xstore Point of Service Reports Guide* for details about the Flash Sales Reports.

Flash Sales Summary Report

The Flash Sales Summary Report provides current sales results for the entire store. It includes looks at sales results from two perspectives:

Sales - The count of transactions and the dollar amount of the transactions in the following categories: gross sales, net sales, returns, discounts and total tax.

Tenders - The count of transactions and the dollar amount for each tender type that was used, such as cash, various credit cards, store credit, gift certificates, etc.

The last page of the Flash Sales Summary report includes a pie chart of the tenders used and a bar chart of the sales results.

Flash Sales By Department Report

The Flash Sales By Department Report provides current sales results for the entire store for each department. It includes the department name and number, count of transactions in each department and the dollar amount of the sales per department.

The last page of the Flash Sales By Department Report includes a vertical bar graph showing dollar values per department.

Flash Sales By Hour Report

The Flash Sales By Hour Report provides current sales results for the entire store in hourly increments. It includes an hour by hour breakdown of sales and shows the transaction count per hour, item count per hour and net sales per hour.

The last page of the Flash Sales By Hour Report includes a horizontal bar graph showing sales dollars, item count, and transaction count per hour.

Flash Sales By Employee Report

The Flash Sales By Employee Report provides up-to-the-moment sales results on a specified date for every employee. It includes the employee name and ID, number of transactions and the total dollar value of those transactions.

Electronic Journal

Overview

The electronic journal is an electronically-captured record of all transactions. The search capabilities allow you to quickly locate any transaction and to view the detailed information on the receipt associated with a specific transaction. You may also print gift receipts, reprint receipts, tax free invoices and post void transactions from the Electronic Journal if you have the proper security permissions. A Journal Report showing detailed transaction information is also available.

Accessing Back Office Journal Functions

Employees with the proper security permissions may access the Electronic Journal from the Back Office Menu. The Journal menu provides options to view the Electronic Journal and to run the Journal Report.

1. After logging in to the Back Office (see [Accessing the Back Office](#)), select the **Journal** option from the Main Menu and press **[Enter]**.



Figure 12-1: Back Office Main Menu - Journal Option

Tip: You can also press the number or letter on the keyboard associated with a menu option to access the Journal functions. Touch-screen users can tap to select from the list.

- At the Journal menu, select one of the options and press **[Enter]**.



Figure 12-2: Journal Menu

The Journal menu has the following options:

- Electronic Journal** - Select this option to view the Electronic Journal records.
- Journal Report** - Select this option to run the Journal report. Refer to [Journal Report](#) for more information.

Viewing the Electronic Journal

- At the Journal menu, select the **Electronic Journal** option and press **[Enter]**.



Figure 12-3: Journal Menu - Electronic Journal Option

- The system displays the Transaction Search form. Enter your search criteria and select **Process**.

Note: Depending on your store's configuration, a *Check Account Number* search field displays as well as a *Read Check from MICR* button.



The screenshot shows a 'TRANSACTION SEARCH' form with the instruction 'Enter search criteria.' Below this, there are several input fields arranged in two columns. The left column contains fields for 'Register #', 'Ticket #', 'Date/Time', 'Cashier ID', 'Customer # or Last Name', 'Trans. Type', 'Tender', and 'Credit Card #'. The right column contains corresponding 'Start' and 'End' fields for 'Register #', 'Ticket #', 'Date/Time', and 'Cashier ID'. The 'Date/Time' section is expanded, showing 'Start Date' (01/26/2015), 'End Date' (01/26/2015), 'Start Time' (12:00:00 AM), and 'End Time' (11:59:59 PM). At the bottom of the form, there are three buttons: 'Back', 'Help', and 'Process', each with a corresponding function key (F6, F7, F8) below it.

Figure 12-4: Transaction Search Form

The following search parameters are available:

- **Register Number** - Enter the identifier for a specific register, a range of registers, or leave these fields blank to view information for all registers.
- **Ticket Number** - Enter a transaction identifier for a specific transaction, a range of transactions, or leave these fields blank to view information for all transactions.
- **Date/Time** - Enter a start date and time, an end date and time, or accept the default for today.
- **Cashier ID** - Enter the identifier for a specific associate, a range of associates, or leave these fields blank to view information for all associates.
- **Customer** - Enter a customer name or number to view information about a specific customer.
- **Transaction Type** - Select a transaction type from the list or select ALL to view all transaction types. Transaction types include options such as TIME CLOCK, NO SALE, RETAIL SALE, POST VOID, etc.
- **Tender** - Select a tender type from the list or select ALL to view all tender types. Tender types include options such as Store Credit, Cash, Check, etc.
- **Credit Card #** - Enter the credit card number used for a transaction.

Oracle Retail Xstore Point of Service displays the Electronic Journal screen.

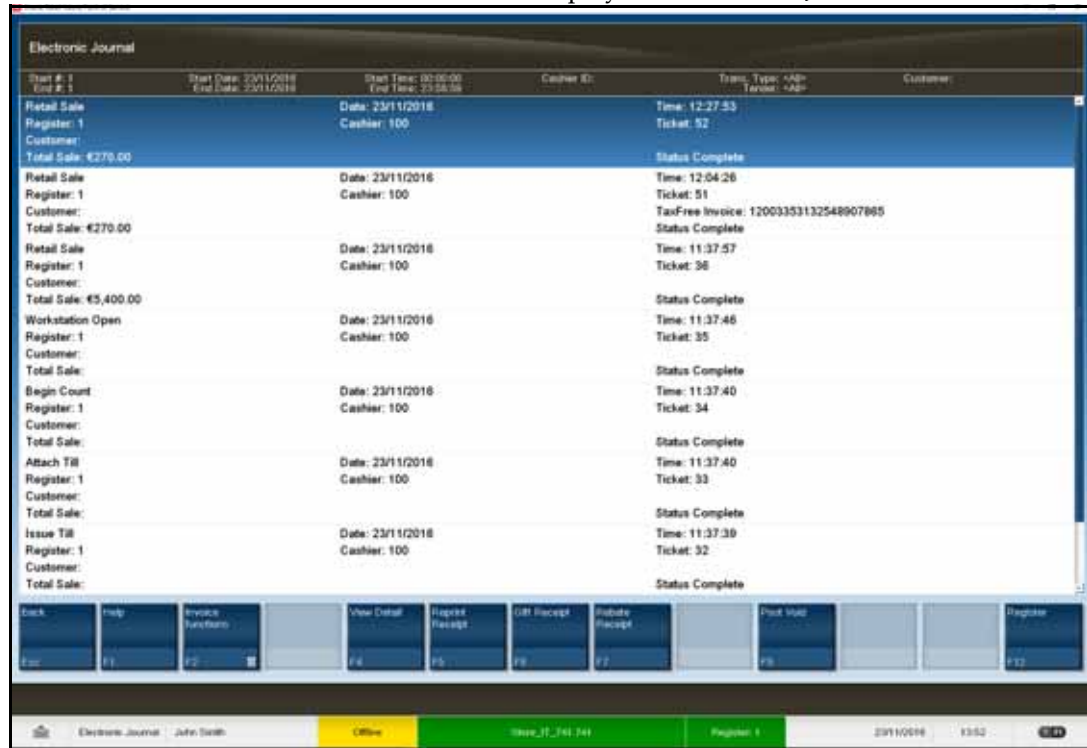


Figure 12-5: Electronic Journal Screen

The following options are available at this screen:

- **Invoice Functions** - Select this option to issue or reprint a tax free invoice. Refer to [Issuing a Tax Free Invoice from the Electronic Journal](#) and [Reprinting a Tax Free Invoice from the Electronic Journal](#) for more information.
- **View Detail** - Select this option to view additional information about the selected transaction. Refer to [Viewing Transaction Detail](#) for more information.
- **Reprint Receipt** - Select this option to reprint a receipt for the selected transaction. The receipt is clearly labeled as a reprint. Refer to [Reprinting a Receipt](#) for more information.
- **Gift Receipt** - Select this option to print a gift receipt for the selected transaction. Refer to [Printing a Gift Receipt](#) for more information.
- **Rebate Receipt** - Select this option to print a Rebate Authorization receipt. Refer to [Printing a Rebate Receipt](#) for more information.
- **Post Void** - Select this option to post void the selected transaction. Refer to [Post Voiding a Transaction](#) for more information.

Viewing Transaction Detail

Note: The detail information shown is specific to each transaction type. For example a Time Clock journal includes the Employee number and name, Clock In or Clock Out, and the time. A Post Void Journal includes the Original Transaction Location ID, Register ID, and Business Date.

With the transaction record selected, select the **View Detail** option.

Oracle Retail Xstore Point of Service displays the Electronic Journal transaction detail screen for the selected record.

RETAIL SALE		Ticket #: 103896	Register ID: 1
		Business Date: 03/07/2013	Cashier ID: 100
DETAIL			
Customer Name: Nancy Smith		Begin Date/Time: 03/19/2013 07:58:57 AM	Associates:
Customer ID: C1736001089327		End Date/Time: 03/19/2013 08:00:15 AM	Total: (\$118.00)
Return 1002	1	COTTON JERSEY TIERED DRESS	(\$118.00)
Refund	Cash		(\$118.00)
Subtotal			(\$118.00)
Fees			\$0.00
Tax			\$0.00
Total			(\$118.00)
Sold Items: 0			CHANGE DUE \$0.00

Figure 12-6: Electronic Journal Transaction Detail Screen - Sale Transaction Type

The detail information for a RETAIL SALE transaction, (sale, return, send sale, special order, layaway, order, etc.) includes the following data:

- **Item Detail:** Quantity, item ID, description, discounts, price, and the extended price for each item
- **Tender Detail:** Tender types and amount of each type
- **Totals:** Subtotal, fees, tax, and totals as shown on the original receipt

Note: Some transaction types, such as Assign Till transaction type and Workstation Open transaction type, do not show any detailed information.

Reprinting a Receipt

This function may also be available from the Register Login screen.

1. With the transaction record selected, select the **Reprint Receipt** option.
2. Oracle Retail Xstore Point of Service prompts to confirm: Do you want to reprint the receipts associated with the transaction? Select **Yes** to reprint the receipts.

Reprinting a Receipt

The printed receipts are clearly identified as reprints.

```
Ticket: 48      Date: 3/22/06
Store: 301      Register: 1

Salesperson:
1 (System USER)

Cashier: 1
Customer: Penny Pearly

*****REPRINT - REPRINT - REPRINT - REPRINT*****

Item      Qty      Price      Amount
BLK DRESS W/SCALLIE HECK
1002                      1    $9.98    $9.98

Subtotal          $9.98
Tax 5.00%          2.00

Total          62.98

Cash          62.00

Change
Cash          (0.02)
SOLD ITEM COUNT = 1

*****REPRINT - REPRINT - REPRINT - REPRINT*****
```

Figure 12-7: Reprint Receipt Example

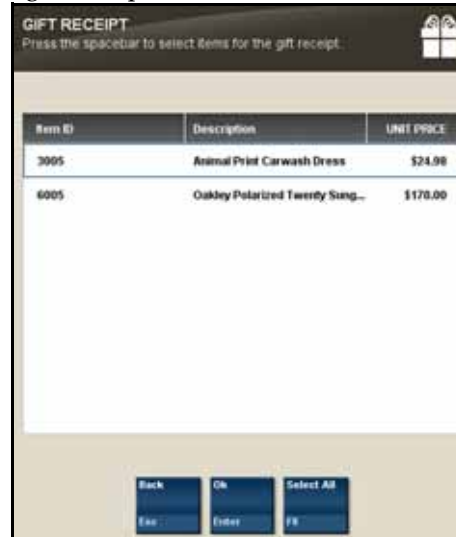
Note: If reprints of the receipts are not permitted for the transaction type you selected, Oracle Retail Xstore Point of Service displays a message indicating that reprints are not allowed. You must acknowledge the message to return to the Electronic Journal screen.

Printing a Gift Receipt

This function may also be available at the Register Login screen.

1. With the transaction record selected, select the **Gift Receipt** option.

Oracle Retail Xstore Point of Service displays a list of items in the transaction that are eligible for a gift receipt.



Item ID	Description	UNIT PRICE
3005	Animal Print Carwash Dress	\$24.98
6005	Oakley Polarized Twenty Sung...	\$170.00

Figure 12-8: List of Items Eligible for a Gift Receipt

2. Use the up and down arrow keys to select an item and then press the [Spacebar] to mark it for a gift receipt. You may use the **Select All** option to print gift receipts for all of the listed items.

Note: If there are multiple items that have been labeled as requiring a gift receipt, you may be prompted whether or not the items should be grouped on separate gift receipts. For example, 2 items on one receipt, and 3 items on another receipt.

See [Multiple Gift Items - Grouping Items for Gift Receipts](#).

3. Press [Enter] to continue. Oracle Retail Xstore Point of Service prints the gift receipt(s) for the selected item(s).



Figure 12-9: Gift Receipt Example

Multiple Gift Items - Grouping Items for Gift Receipts

The items that you issued a gift receipt for are now labeled with the Gift icon.

RETAIL SALE Ticket #: 499 Register ID: 1
Business Date: 08/21/2013 Cashier ID: 100

DETAIL COMMENTS

Customer Name: Greyly Campbell Begin Date/Time: 08/21/2013 12:39:18 PM Associates: 100
Customer ID: C0999002 End Date/Time: 08/21/2013 12:39:55 PM Total: \$31.05

Sale	1	Purple Envelope Dress	\$28.75
10% Off Any non-Price Overridden from Dept. 25005			(\$3.20)
Tender	Cash		\$31.05

Subtotal \$28.75
Fees \$0.00
Tax \$2.30
Total \$31.05
CHANGE DUE \$0.00

Sold Items: 1

Back Help Refuse Receipt Reprint Receipt Gift Receipt Post Void Previous Tab Next Tab Register
Esc. F1 F2 F3 F4 F5 F6 F10 F11 F12

Electronic Journal Online Datavantage Home Office 643 Register: 1 08/21/2013 12:41 PM ? F1

Figure 12-10: Electronic Journal - Transaction Detail

Note: If gift receipts are not permitted for the transaction type you selected, Oracle Retail Xstore Point of Service prompts with a message indicating that gift receipts are not allowed. You must press [Enter] to acknowledge the message to return to the Electronic Journal screen.

Multiple Gift Items - Grouping Items for Gift Receipts

...continued from step 2.

If prompted whether or not you want to group the gift receipt items, you have the following options:

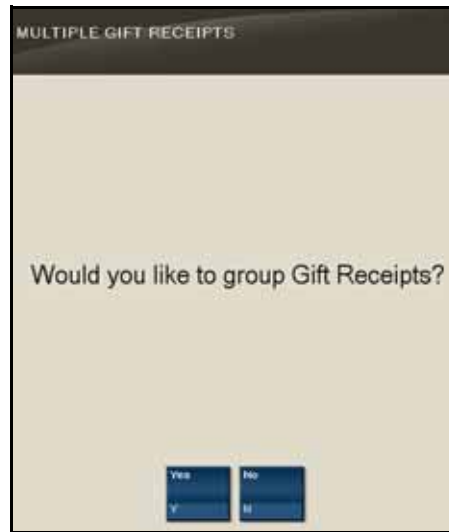


Figure 12-11: Multiple Gift Items - Group Receipts Prompt

- To group the items, select **Yes**, and continue with [To Group Gift Items](#) below.
- If you do not want to group the items, select **No** and continue with [To Continue without Grouping Gift Items](#).

To Group Gift Items

After selecting **Yes** at the Multiple Gift Receipts prompt ([Figure 12-11](#)), the system displays the list of items requiring gift receipts. Press the [**Spacebar**] to highlight and select the gift items for the first gift receipt, then select one of the following options:

Finish and Print Option

- Select **Finish and Print** to print a gift receipt with the grouped items you selected.
 - If there are at least two or more gift items still available after setting up the grouping, you are prompted whether or not you want to print a separate gift receipt for each remaining gift item:
 - * When prompted, select **Yes** to print a separate gift receipt for each remaining gift item.
 - <OR>
 - * Select **No** to print the remaining gift items on a single gift receipt.
- If only one gift item is still available after setting up the grouping, the system automatically prints that gift item on a separate gift receipt.

Add Grouping Option

- Select **Add Grouping** to create multiple grouped gift receipts, beginning with the first group of gift items you selected.
 - The system then displays the gift item list again showing only the items that are still available for grouping. Select the next gift receipt items.
 - You can continue grouping the items using the **Add Grouping** option as long as there are at least 2 remaining items in the list.

- When only 1 item remains in the list, the **Add Grouping** option no longer is available. Select **Finish and Print** to create a gift receipt for the remaining gift item.

To Continue without Grouping Gift Items

1. After selecting **No** at the Multiple Gift Receipts prompt ([Figure 12-11](#)), the system prompts whether or not you want to print a separate gift receipt for each gift item.

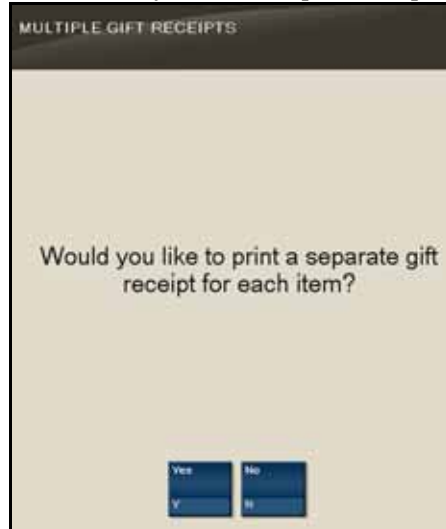


Figure 12-12: Multiple Gift Receipts - Print Separate Receipts Prompt

2. Select one the following options:
 - Select **Yes** to print one gift receipt per gift item.
 - Select **No** to print a single gift receipt with all gift items.

Printing a Rebate Receipt

Rebate receipts may be offered to customers so they can retain the original receipt for a purchase, and use this Rebate Authorization receipt to mail in as proof of purchase.

With the transaction record selected, select the **Rebate Receipt** option. Oracle Retail Xstore Point of Service prints the rebate authorization receipt if an item is eligible for a rebate.



Figure 12-13: Rebate Authorization Receipt

Post Voiding a Transaction

Important: Only transactions for the current date can be post voided. If you try to post void a transaction from a previous day, the system displays a message and you are not permitted to post void the transaction.

This function may also be available at the Register Login screen.

1. With the transaction record selected, select the **Post Void** option.

Post Voiding a Transaction

- Oracle Retail Xstore Point of Service prompts to confirm that you want to post void this transaction. Select **Yes** to post void the transaction.

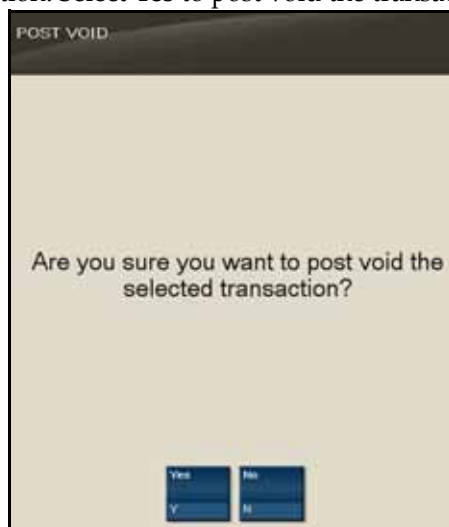


Figure 12-14: Confirm Post Void

- Oracle Retail Xstore Point of Service prompts for the reason you are post voiding this transaction, if required by your store policy. Select a reason from the list and press **[Enter]**.



Figure 12-15: Post Void Reasons

- Oracle Retail Xstore Point of Service may prompt for a comment for this post void transaction. If prompted, type a comment and press **[Enter]**.

Oracle Retail Xstore Point of Service post voids the transaction and prints a post void receipt. The printed receipts are clearly identified as voided.

```

30600 Bruce Industrial Pkwy
Solon, OH 44139
440-498-4416

Ticket: 49      Date: 3/22/06
Store: 301      Register: 1
Cashier: 1

Penny Bailey
VOID TRANSACTION
Code:DISCOUNT_NOT_GIVEN
Discount Not Given

Item      Qty      Price      Amount
H&M COATS W/SCALLOP NECK
1002
1          1      $9.98      $9.98

Subtotal          $9.98
Tax 5.00%         5.00

Total          $14.98

Cash          $14.98

Change
Cash          ($3.02)

Original Tran ID:49
Original Cashier ID:1
Original Register ID:1
**VOID**VOID**VOID**

```

Figure 12-16: Post Void Receipt Example

Journal Report

The Journal Report shows detailed transaction information exactly as it was rung. Data can be displayed for an individual employee or for all employees, or for transaction codes, transaction line codes, and tender codes. Transactions are sorted by date, register number, and transaction number.

This report includes the following information:

- Transaction Type
- Register ID
- Business Date
- Total
- Cashier
- Transaction ID
- Customer Name
- Status

Item section: Commissioned Emp ID, Item ID, Description, Quantity, Unit Price, and Ext Price

Tender section: Taxable Amount, Non Taxable Amount, Sales Tax, Total, and Tender Type

Note: Refer to the *Oracle Retail Xstore Point of Service Reports Guide* for details about this report.

Journal Report						
Date Range: 01/01/2013 - 04/01/2013		Register: ALL		Associates: ALL		
Trans Type: ALL		Customer ALL		Transactions: ALL		
Trans Type: Retail Sale		Register: 1		BusinessDate: 04/01/2013		
Total: 122.55		Cashier: 100		TransId: 57		
Customer Forst, James				Status: COMPLETE		
Comm. Assoc: 101,101,101						
Item	Item ID	Description	Qty	Unit Price	Ext Price	
	6008	Birkenstock Sheridan	1	99.99	99.99	
	7002	Ranch Snack	1	0.99	0.99	
	330203	Green L Tee Shirt	1	12.50	12.50	
Tender						
Tender Type				Amount		
Taxable Amount:				113.48		
Non Taxable Amount:				0.00		
Sales Tax:				9.07		
Total:				122.55		
Tender		Cash	122.55			

Figure 12-18: Journal Report Example

Order Broker Maintenance

Overview

An Oracle Retail Order Broker Cloud Service (formerly Locate) transaction allows a store to sell an item that is not in stock and to direct another location to fulfill and ship the customer's order to a specified location. The menu options described here allow you to manage these orders.

After Order Broker is configured for your store, use the Order options to maintain the order. A store can only see orders initiated in the store and orders downloaded to the store for sourcing or pick up.

Note: Refer to the chapter Order Broker Transactions in the *Oracle Retail Xstore Point-of-Service User Guide* for more information about Order setup.

If your store has been assigned as the source to fulfill an Order Broker order, you need, to ship the items to the customer. If the Order Broker order was created in your store, you can use these options to track the progress of the order as it is processed.

Use the **Order Status Report** to view detailed information about orders based on user-selected criteria. This report includes details about the Order Broker order themselves (ORDER section), the purchasing customer information (CUSTOMER section), as well as details about the items that are on the order (ITEMS section).

Note: Refer to the *Oracle Retail Xstore Point-of-Service Reports Guide* for details about this report.

Use the **Unfulfillable Items Report** and **Order Status Report** to track orders and follow up with customers.

Note: Refer to the *Oracle Retail Xstore Point-of-Service Reports Guide* for details about these reports.

Order Status

Note: To view status information about new orders you must have a touch-screen or a mouse. The additional information, as shown below, is view-only.

Oracle Retail Xstore Point-of-Service periodically checks for orders to be fulfilled. If there are orders to be fulfilled by this location, you will see a message in the message bar indicating the number of new orders pending fulfillment by this store.

6 New Orders

Figure 13-1: Message Bar, showing 6 New Orders

Click/select the message bar to view the New Order Statistics window:

- **Total New Orders** - The total number of new orders based on the order line statuses of Accepted, Polled, or Reserved. See [Order and Item Status Values](#). The following statistics are subsets of Total New Orders:
- **Ship Orders** - The number of orders waiting to be shipped from this store.
- **Customer Pick Up Orders** - The number of orders to be picked up in this store.
- **Items Awaiting Pick** - The number of items that must be set aside for the orders.
- **Average Order Age** - The average age of the orders awaiting fulfillment, in days and hours, or minutes.
- **Oldest Order Age** - The age of the oldest order awaiting fulfillment, in days and hours, or minutes.
- **Unfulfillable Orders** - The number of orders that cannot be filled. When an order is rejected and cannot be filled at another location, the status becomes unfulfillable.



The following table describes order and item status values:

Table 13-1: Order and Item Status Values

Order Status Value	Item Status Value
Open - If one of the items is in the following status: New Order, Polled, Accepted, or In Transit. Note: It is possible for an open order to be under review and unable to be processed during this time.	New - Indicates the item has been added to the order.
Ready for Pick Up - All items are in Reserved or Received status (can also include cancelled item).	Polled - Indicates the source/fulfilling location got the item request.

Table 13-1: Order and Item Status Values

Order Status Value	Item Status Value
Ready to Ship - This is applicable only for customer delivery or delayed pickup (aka pickup from this store). All items must be Reserved. Can also include cancelled items.	Accepted - Indicates the source location has confirmed it can satisfy the order request.
Complete - The order has been completed.	Reserved - Indicates the item has been put aside for the customer at the source/fulfilling location.
Cancelled - All items are cancelled.	
Unfulfillable – All items are unfulfillable or a mix of unfulfillable and cancelled. Unfulfillable items are those that have been rejected either manually by the receiving store or automatically by the Order Broker.	In Transit - Indicates the item has been shipped to another location for pickup.
	Received - Indicates the item has been received in the store.
	Fulfilled - Indicates the item has been picked up/delivered.
	Cancelled - Indicates the item has been cancelled.
	Rejected - Indicates the source location has rejected the order and the item is sourced from another location.
	Unfulfillable -Indicates the item has been rejected and an alternative location could not be determined.

Fulfilling an Order

1. To fulfill an order, select the **Customer Maintenance and Accounts** option from the Back Office Main Menu.
2. Select the **Order Options** option from the Customer Maintenance and Accounts menu.



Figure 13-2: Customer Maintenance and Accounts Menu

3. At the Order Options menu, select the **Order Worklist** option, then press [Enter] to display a list of orders to be fulfilled by this store.



Figure 13-3: Order Options Menu - Order Worklist Option

Note: The orders shown in the Order Worklist are the orders that require action: either fulfillment, or rejection if you cannot fulfill the request.

Depending on your store configuration (set in SystemConfig.xml), delivery orders may be listed before customer pickup orders.

4. Select an order from the Order Worklist and then select one of the following:

Table 13-2: Order Worklist Options

Option	Description
View	View additional information (see View Order).
Accept Order	Accept the order and go to the Accept Order step. See Accept and Reserve Order
Accept All	Accept all orders.
Print Pick List	Prints a single pick list for all accepted orders

Important: The Action column may indicate “Under Review.” When the order is under review, you cannot accept or reject items. The customer can, however, cancel the order.

If you select Accept All a prompt displays indicating orders under review will not be changed. If you select Accept Order a prompt displays indicating the order is under review.



ORDER	CUSTOMER	DATE	ACTION ?
Pickup	894628-7881	105 days 8 hrs	
0430001002112	John Edson	05/10/2013	Pick/Reserve
Pickup	872-403-3432	103 days 5 hrs	
1730002001429	Chester Jones	05/10/2013	Accept/Reject
Pickup	886-787-8888	86 days 22 hrs	
0112001000118	Adrienne Ward	05/20/2013	Accept/Reject
Pickup		84 days 22 hrs	
0112001000120	Adrienne Ward	05/20/2013	Pick/Reserve
Pickup		84 days 22 hrs	
0430001002213	Alexa Account	06/10/2013	Accept/Reject
Pickup	215-321-2132	84 days 6 hrs	
0430001002272	Alexa Account	07/26/2013	Accept/Reject
Pickup	215-321-2132	25 days 22 hrs	
0430001002276	Paul Munchin	08/12/2013	Accept/Reject
Pickup		8 days 23 hrs	
0112001000120	Nancy Smith	08/21/2013	Accept/Reject
Pickup	857-472-8465	5 days 9 hrs	

Buttons: Back, View, Accept Order, Accept All, Print Pick List

Figure 13-4: Order Worklist

Note: Orders that are still pending beyond a specified age threshold are shown in red text in the list. In the example shown above, any orders that have been pending for 4 days or more are flagged.

View Order

View Order displays the Order maintenance screen.

The screenshot displays the 'PICKUP ORDER' screen for a customer named Nancy D Smith with Order # 8112081889128. The screen is divided into several sections: 'ORDER INFO' (Order Date: 8/21/13 2:57 PM, Order Origin: 112 Solon Linux Lab, Under Review: No), 'CUSTOMER INFO' (Sold To: Nancy D Smith, 1070 HARTER STREET, DAYTON, OH 45402; Company: fox@micro-retail.com; Email: 937-672-8463), and 'ORDER TOTALS' (Subtotal: \$158.58, Freight: \$0.00, Tax: \$1.88, Total: \$162.38, Balance Due: \$137.14). Below these is a table with columns: ITEM STATUS, SOURCE LOCATION, ORDER DESTINATION, ITEM, QTY, and EXT PRICE. The table shows one item: 'Picked' at '181 Datasantage Home Office' with a quantity of 1 and an extended price of \$158.58. The item is 'Oakley Polarized Twenty Sungl...'. At the bottom, there are buttons for 'Back', 'Help', 'Accept Order', 'Reject Order', 'Check Inventory', and 'Register'. A status bar at the bottom indicates '31 New Orders' and 'Back Office: John Smith'.

Figure 13-5: Order Maintenance Screen

The following information is displayed on this screen:

Table 13-3: Order Maintenance Screen Components

Component	Description
1. Static Area	<p>Contains the type of order, Customer Name, order number, age information, and reference number. The order number is the number provided by the system that requested/originated the order. The reference number is an optional value that identifies the order. It is the order ID appended with last order line sequence number. The status displays on the far right. See Table 13-1 for status definitions. Order Type values include the following:</p> <ul style="list-style-type: none"> • <i>Transfer Pickup Order</i> (Pickup This Store) • <i>Pickup Order</i> (Pickup Other Store) • <i>Delivery Order</i> (Customer Delivery)

Table 13-3: Order Maintenance Screen Components

Component	Description
2. Order Information	<ul style="list-style-type: none"> • Order Date - The date and time the order was created. • Order Origin - The location in which the order was created. • Under Review - Yes or No. • Comments - Any notes associated with the order.
3. Customer Information	<ul style="list-style-type: none"> • Sold To - The purchasing customer's name and address information. • Company - The purchasing customer's company, if applicable. • Email - The purchasing customer's email address. • Phone - The purchasing customer's telephone number(s).
4. Order Totals	<ul style="list-style-type: none"> • Subtotal - The order subtotal (the shipping fee amount is not included in the subtotal). • Freight - The freight cost associated with the order. • Tax - The tax on the order. • Total - The total for the order (the shipping fee amount is included in the total). • Balance due - The amount due for the order.
5. Item Information	<ul style="list-style-type: none"> • Status - The item status. See Order and Item Status Values. • Source Location - The location name and ID that sourced the order request. • Order Destination - The delivery method and delivery address, or pickup location for the order. • Item - The item identifier and description. • Qty - The item quantity. • Ext Price - The item's extended price (the item quantity x the item unit price - discounts).

Select an option from the menu to process the order: [Check Inventory](#), [Accept and Reserve Order](#), or [Reject Order](#)

Check Inventory

1. To verify you have enough stock on hand to fulfill an order, select the **Check Inventory** menu option. The Order Inventory Levels form shows the item quantity ordered and the current quantity on hand.
2. Press [Enter] to close the form.

ITEM ID	DESCRIPTION	QTY ORDER...	QTY ON HAND
6885	Oakley Polarized Twenty Sunglasses	1	1,888

Figure 13-6: Order Inventory Levels Form

Accept and Reserve Order

To Accept an order:

1. At the Order Maintenance screen, select the **Accept Order** menu option.
2. At the confirmation prompt, select **Yes** to accept the order.

Oracle Retail Xstore Point-of-Service automatically prints a pick slip.



XSTORE™

Office
30500 Bruce Industrial Pkwy
Solon, OH 44139
440-498-4414

Ticket: 30239 Date: 8/21/18
Store: 101 Register: 1
Cashier: 100

Customer:
Nancy D Smith

Pickup

Order #
0112001000128


0112001000128

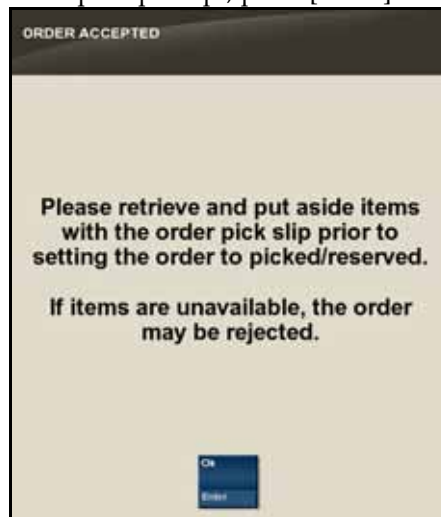
Item	Qty	Price	Amount
Jakley Polarized Twenty Sunglasses	1		
3005	1		150.50

Balance Due: 137.14

Pick Slip

Figure 13-7: Pick Slip

- At the Order Accepted prompt, press **[Enter]** to continue.



ORDER ACCEPTED

Please retrieve and put aside items
with the order pick slip prior to
setting the order to picked/reserved.

If items are unavailable, the order
may be rejected.




Figure 13-8: Order Accepted Prompt

- Once you have retrieved the items for the order, select the **Pick/Reserve Order** menu option. If you cannot fulfill the order for some reason, you can reject the order at this point. See [Reject Order](#) for more information about rejecting an order.

PICKUP ORDER [Nancy D Smith | Order #: 9112001000128] **OPEN**

AGE: 9 day(s), 9 hr(s), 53 min(s) REFERENCE #

ORDER INFO	CUSTOMER INFO	ORDER TOTALS
Order Date: 8/21/13 2:07 PM Order Origin: 112 Solon Linux Lab Under Review: No Comments:	Sold To: Nancy D Smith 1070 HARTER STREET DAYTON, OH 45402 Company: Email: flos@micros-retail.com Phone: 937-672-8463	Subtotal: \$150.50 Freight: \$0.00 Tax: \$1.88 Total: \$152.38 Balance Due: \$137.14

ITEM STATUS	SOURCE LOCATION	ORDER DESTINATION	ITEM	QTY	EXT PRICE
Accepted	181 Datevantage Home Office	Pickup: 181 Datevantage Home Office 30500 Bruce Industrial Pkwy Solon, OH 44139	6885 Oakley Polarized Twenty Sungl...	1	\$150.50

Back Help Reject Order Pick/Reserve Order Check Inventory Register

Esc F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12

Figure 13-9: Order Maintenance Screen - Pick/Reserve Order - Delivery Order Example

Note: The Pick/Reserve Order menu option is only available after you accept the order.

If the Under Review field indicates yes, the Accept Order, Reject Order and Pick/Reserve Order buttons are grayed out.

- Select **Yes** to reserve the order.
- Oracle Retail Xstore Point-of-Service displays a prompt confirming the items for the order have been reserved and provides additional instructions needed to fulfill the order. The message displayed here varies with the order type. Press **[Enter]** to close the prompt.

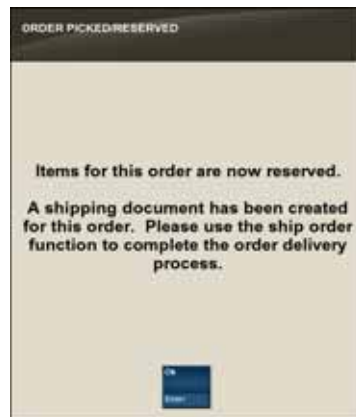


Figure 13-10: For Delivery Prompt

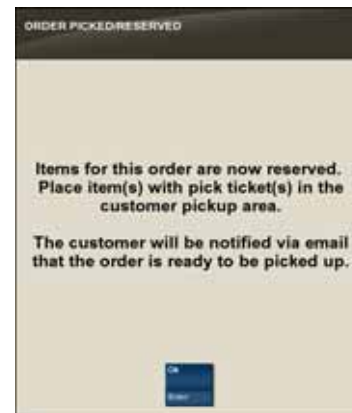


Figure 13-11: For Pickup Prompt

Notes:

- For Delivery type orders, use the Ship Order function to complete the order delivery process. See [Shipping an Order](#).
- For other Order types, the status for each item is updated to Reserved, and the Order status is updated to **Ready for Pickup**.

ITEM STATUS	SOURCE LOCATION	ORDER DESTINATION	ITEM	QTY	EXT PRICE
Reserved	181	Pickup	MSB	1	\$106.56

Figure 13-12: Reserved Ready for Pickup

Un-reserve Order

To un-reserve an order:

1. Since the order has been accepted it will no longer appear in the Order Worklist. From the Back Office main menu, select **Customer Maintenance and Accounts --> Order Options --> Order Maintenance**.
2. Enter the search criteria and select **Process**.

The screenshot shows the 'ORDER SEARCH' screen with the instruction 'Enter criteria to search for an order.' Below this are several input fields: 'Order #', 'Last Name', 'First Name', 'Primary Phone' (with a separator icon), 'Date', and 'Status' (with a dropdown arrow). At the bottom are three buttons: 'Back', 'Help', and 'Process'. Below these buttons are keyboard shortcuts: 'Esc', 'F1', and 'F8'.

Figure 13-13: Order Search

3. If more than one order is returned, select the order you wish to modify and press **[Enter]**.

The screenshot shows the 'ORDER SEARCH Results' screen with the instruction 'Select an order.' Below this is a table with three columns: 'ORDER #', 'ORDER TYPE', and 'STATUS'. The table contains three rows of data. The first two rows are for 'Nancy Smith' with 'Complete' status. The third row is for 'Nancy Smith' with 'Open' status and is highlighted in blue. Below the table are two buttons: 'Back' and 'On'. Below these buttons are keyboard shortcuts: 'Esc' and 'Enter'.

ORDER #	ORDER TYPE	STATUS
8181801000970 Nancy Smith	Pickup 338-338-3333	Complete 8/31/2013
8181801000971 Nancy Smith	Pickup 338-338-3333	Complete 8/31/2013
8112501000128 Nancy Smith	Pickup 937-672-8463	Open 8/31/2013

Figure 13-14: Order Search Results

4. Select Un-reserve Order.

PICKUP ORDER — Nancy D Smith | Order #: 811288188128 **READY FOR PICKUP**

AGE: 8 day(s), 8 hr(s), 55 min(s) REFERENCE #

ORDER INFO	CUSTOMER INFO	ORDER TOTALS
Order Date: 8/21/13 2:07 PM	Sold To: Nancy D Smith	Subtotal: \$158.50
Order Origin: 112 Solon Linux Lab	1070 HARTER STREET	Freight: \$0.00
Under Review: No	DAYTON, OH 45402	Tax: \$1.88
Comments:	Company:	Total: \$162.38
	Email: Box@micros-retail.com	Balance Due: \$137.14
	Phone: 937-672-4463	

ITEM STATUS	SOURCE LOCATION	ORDER DESTINATION	ITEM	QTY	EXT PRICE
Reserved	181 Office	Pickup: 181 Office 30500 Industrial Pkwy Solon, OH 44128	0885 Oakley Polarized Twenty Sungl...	1	\$158.50

Back Help Reject Order Un-reserve Order Check Inventory Register

Esc F1 F3 F5 F6 F7 F8 F9 F10 F11 F12

Figure 13-15: Un-reserve Order Menu Option

The order status changes to **Open** and the Item Status changes to **Accepted**.

Reject Order

When you reject an order it changes the order status to open sends it back to the Order Broker where another source/fulfillment location is determined.

1. At the Order Maintenance screen, select the **Reject Order** menu option.
2. At the Reject Order confirmation prompt, select **Yes** to reject the order.

REJECT ORDER

Are you sure you want to reject this order?

Yes No

Figure 13-16: Reject Order Confirmation Prompt

- If prompted, select a reject reason code.



Figure 13-17: Reason Code Prompt

Note:

This order is sent back to the Order Broker where another source/fulfillment location is determined. If a source location is not found, the order status becomes *unfulfillable*. It may take a few minutes for the status to change from Open to Unfulfillable. If the order is unfulfillable, you will want to cancel it and refund the customer. Orders are cancelled through the Register, see the *Oracle Retail Xstore Point-of-Service User Guide*.

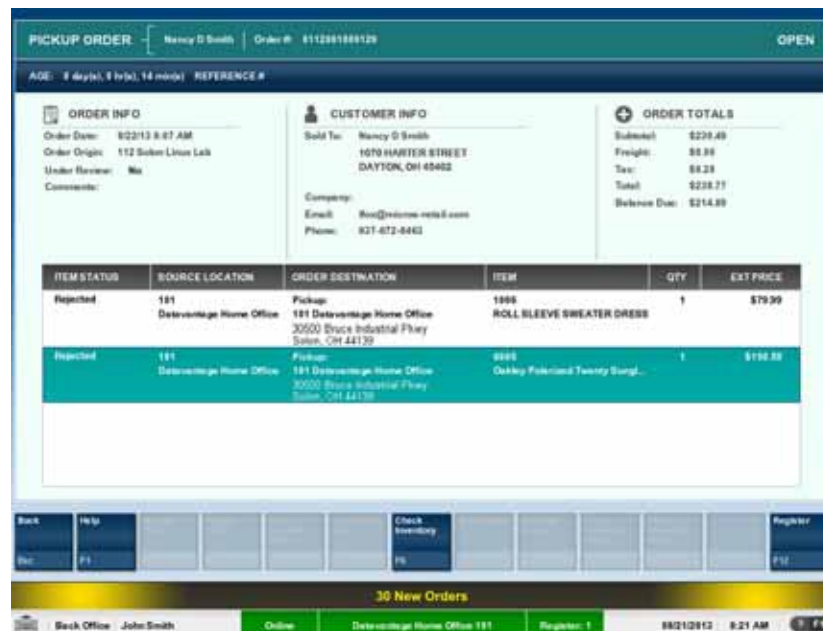


Figure 13-18: Rejected Order - Unfulfillable Example

Shipping an Order

For Delivery type orders, select the **Ship Order** menu option to ship the items. Oracle Retail Xstore Point-of-Service creates the Shipping Document for this order. This option is only available at the order sourcing location when the status of the items on the order is **Reserved**.

1. At the Order Maintenance screen, select the **Ship Order** menu option.

The screenshot shows the 'TRANSFER PICKUP ORDER' screen with the 'READY TO SHIP' status. The screen is divided into several sections: ORDER INFO, CUSTOMER INFO, ORDER TOTALS, and a table of items. The 'Reserved' status in the table is circled in red. At the bottom, the 'Ship Order' button is also circled in red.

ITEM STATUS	SOURCE LOCATION	ORDER DESTINATION	ITEM	QTY	EXT PRICE
Reserved	Alt Delaware Home Office	Pickup 191 Delaware Home Office 3800 Strawn Industrial Plaza Tulsa, OH 44129 US	8488 Canon G7000 Multi-Color	1	\$67.99

Figure 13-19: Order Maintenance Screen - Ship Order Menu Option

2. When prompted, select **Yes** to confirm you want to ship the order.
3. When prompted, select **Yes** to print a shipping label.
4. If prompted, enter the total weight for the shipment and select **Process**.
5. When prompted whether to accept the shipping method chosen when the order was set up, perform one of the following steps:

The screenshot shows a 'SHIPPING LABEL' screen with a large text prompt: 'Continue with originally selected shipping method of 'USPS Priority Mail''. At the bottom, there are two buttons: 'OK' and 'Change Shipping Method'.

Figure 13-20: Shipping Label - Original Shipping Method Prompt

- To *accept* the shipping method selected during order setup, press [Enter] and go to step 6.

Shipping an Order

- To *change* the shipping method selected during order setup, select **Override Shipping Method**, select a shipping method from the list and press [Enter].

Note: The *Override Shipping Method* option is controlled by security. You are prompted for Manager override if you do not have the required level of security to perform this function as indicated by the Security Override icon shown here.



- Print the shipping label. If the shipping carrier's label cannot be printed for any reason, you can print a label manually by following the prompts for label location selection and printing.
- If prompted, enter the tracking number for the shipment and select **Process**.
- If prompted, to print a packing slip for the shipment, select **Yes** to print the packing slip.

Oracle Retail Xstore Point-of-Service returns to the Order maintenance screen. The status for each item is updated to either In Transit if the order is being shipped to another store or Fulfilled if the order is being shipped directly to the customer.

TRANSFER PICKUP ORDER — Garnett Hobbes | Order #: 0101001001256 OPEN

AGE: 20 day(s), 23 hr(s), 14 min(s) REFERENCE #

ORDER INFO		CUSTOMER INFO		ORDER TOTALS	
Order Date:	3/21/14 2:24 PM	Sold To:	Garnett Hobbes	Subtotal:	\$67.99
Order Origin:	101 DataVantage Home...		3439 VIRGINIA RD 102-C	Freight:	\$0.00
Under Review:	No		WOODMERE, OH 44122	Tax:	\$0.85
Comments:		Company:	US	Total:	\$68.84
		Email:		Balance Due:	\$53.84
		Phone:	216-777-9311		

ITEM STATUS	SOURCE LOCATION	ORDER DESTINATION	ITEM	QTY	EXT PRICE
In Transit via USPS Parcel Post Tracking #: 232323	438 DataVantage Home Office	Pickup: 101 DataVantage Home Office 30500 Bruce Industrial Pkwy Solon, OH 44139 US	6000 Career Dress MoleSkin	1	\$67.99

Back Help Cancel Order Cancel Order Place Order Cancel Order Cancel Order Check Inventory Ship Order Ship Order Ship Order Ship Order Ship Order Register

Esc F1 Esc Esc Esc Esc Esc Esc Esc Esc Esc Esc Esc F12

Figure 13-21: Updated Item and Order Status - In Transit

Maintaining/Viewing an Order

If an Order Broker order was created in your store, you can use the following steps to track the progress of the order as it is processed.

1. To maintain/view an order, select the **Customer Maintenance and Accounts** option from the Back Office Main Menu.
2. Select the **Order Options** option from the Customer Maintenance and Accounts menu, then select the **Order Maintenance** option from the Order Options menu. See [Figure 13-3](#).
3. At the Order Search form, enter the search criteria needed to find an order:

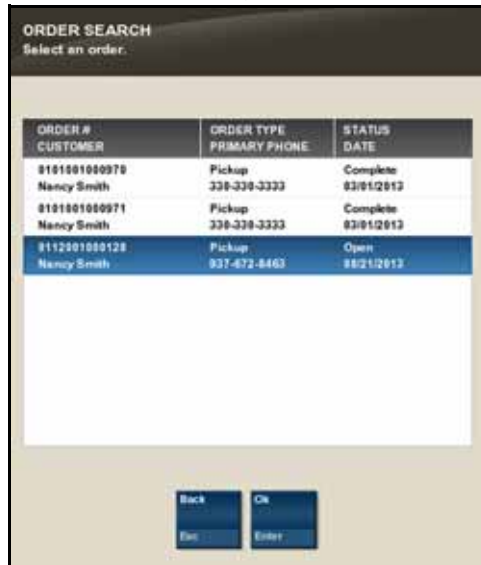
Tip: To find all pending orders for fulfillment, select the *Open* Order Status value as the search criterion.

- **Order ID** - The order identifier number.
- **Last Name** - The customer's last name.
- **First Name** - The customer's first name.
- **Phone** - The customer's phone number.
- **Order Date** - The date the order was set up.
- **Order Status** - See [Order and Item Status Values](#).



Figure 13-22: Order Search Form

4. At the Order Search results list, select an order and press [Enter].



The screenshot shows a handheld device screen with the title "ORDER SEARCH" and the instruction "Select an order." Below this is a table with three columns: ORDER #, ORDER TYPE, and STATUS. The table contains three rows of data. The first two rows are for "Complete" orders, and the third row is for an "Open" order, which is highlighted in blue. At the bottom of the screen are four buttons: "Back", "Ok", "Esc", and "Enter".

ORDER #	ORDER TYPE	STATUS
0101001000970 Nancy Smith	Pickup 330-330-3333	Complete 03/01/2013
0101001000971 Nancy Smith	Pickup 330-330-3333	Complete 03/01/2013
0112001000120 Nancy Smith	Pickup 937-672-8463	Open 03/21/2013

Figure 13-23: Order Search Results List

The system displays the Order maintenance screen. See [Order Maintenance Screen](#) for details.

Allocating an Item

If you do not use the Oracle Retail Xstore Point-of-Service Back Office receiving module to receive items, select the **Allocate Items** menu option at the Order maintenance screen to automatically mark the item as received and ready for pickup. This allocation process performs all the Order Broker updates, local status updates, and customer e-mailing rules typically performed by the Oracle Retail Xstore Point-of-Service receiving module, and moves ON_HAND inventory to the ORDER bucket for allocation purposes.

The **Allocate Items** menu option is only be available when the following conditions are true:

- Your system is not set up to auto-generate receiving documents
 - The order type is either Transfer Pickup or Web Pickup
 - This is the store where the order is to be picked up
 - The items on the order have a status of In Transit
1. To allocate items, select the **Allocate Items** menu option at the Order maintenance screen.
 2. When prompted, select **Yes** to confirm you want to receive the item(s). The system updates the item status to Received and the order status is updated to Ready for Pick Up.

Balance Inquiry

Overview

The system creates accounts to track the activities that are related to various customer-related transactions. The status of an account may change from time to time as different events occur that affect the account. An individual customer may have several different kinds of accounts open at the same time. The **Balance Inquiry** process is associated with customer accounts and is used to check the amount remaining on a customer's store credit voucher, gift card, or gift certificate.

Important: Other customer account types such as Work Orders, Special Orders, Layaways, and Orders are documented in separate chapters in this book.

House Account information can be found in [Customer Maintenance](#).

About Store Credit and Gift Certificate Balance Inquiry

When a balance inquiry for a store credit or gift certificate is performed, Oracle Retail Xstore Point of Service first determines which currency the store credit or gift certificate is in. If this currency is different than your store's local currency, then the foreign tender amount of the store credit or gift certificate is automatically converted to the local tender and amount using the current exchange rate on file. This localization is shown on the screen and on the receipt, if printed.

Balance Information

The Balance Inquiry function allows you to see the current balance on various types of accounts that a customer may have. The types of inquiries available depend upon the types of accounts that are offered by a store. For example, balance inquiries may be performed for:

- Gift Cards
- Gift Certificates
- Store Credit accounts
- Loyalty accounts
- Gift Receipts

1. After logging in to the Back Office (see [Accessing the Back Office](#)), select the **Balance Inquiry** option to view the inquiry functions available in your store.



Figure 14-1: Back Office Main Menu

2. Select the type of inquiry you want to perform by selecting the appropriate option from the Balance Inquiry menu.



Figure 14-2: Balance Inquiry Menu

3. Oracle Retail Xstore Point of Service prompts for a card or account number. The information required here varies with the type of balance inquiry you are performing. Enter the information or scan it from a card and press [Enter] to continue.



Figure 14-3: Store Credit Account Number Prompt

- Please wait while the system queries the centralized database for the balance information.

Note: The system displays a message if the account is closed or cannot be located.

If a deal or discount was applied to the gift item at the time of purchase, you cannot use Balance Inquiry to look up the price. No item price barcode is printed on the receipt.

- Oracle Retail Xstore Point of Service retrieves the account balance information and displays the information on the screen.



Figure 14-4: Available Account Balance

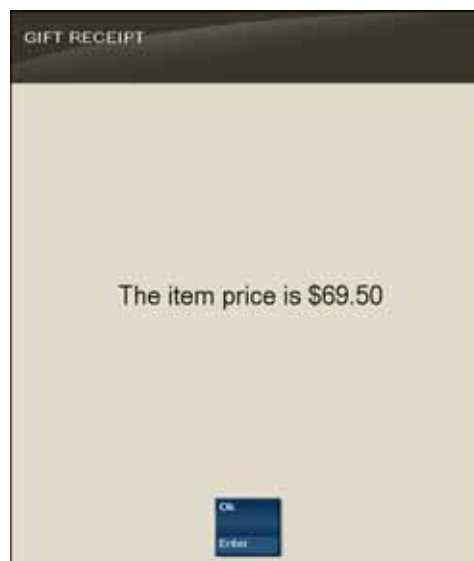


Figure 14-5: Item Price From Gift Receipt

- Press [Y] to print a receipt for this balance information.
- Press [N] if you do not need a printed receipt for this balance information.
- If the option to print a receipt is not available, press [Enter] to close the prompt.

Balance Information

If you chose to print a receipt, the information shown on the receipt includes the date of this inquiry, the card or account information (masked), and the available balance on the card or account.

Store Credit Example

BALANCE INQUIRY
Date: 6/6/11
Account Number: *****0030
Remaining Balance: 106.31

Loyalty Card Example

BALANCE INQUIRY
Date: 6/12/11
Card # *****1678
Program Name: XST Loyalty
Program Level: XST Loyalty 1
Loyalty Pts.: 2328
Awards: 79.02

Figure 14-6: Sample Balance Inquiry Receipts

Layaway Maintenance

Overview

Layaways are similar to special orders and work orders because they are persistent sales. Generally, this indicates that the sale transaction in which the layaway is created is not the end of the transaction's life-cycle. Persistent sales can have an arbitrary number of transactions in their life-cycles, but non-persistent sales consist of a single transaction (and a possible void of that transaction).

The operational rules for layaways may also differ from those for non-persistent sales or even other types of persistent sales. For example, a layaway does not require the customer to pay for the items in full when purchased. Also, layaway items may not be reflected in the store's sales figures until the customer takes the item into possession (at pickup).

After a layaway account has been created, the account information is available from the Back Office. Use the Back Office Layaway Maintenance functions to track, update, and maintain layaway accounts.

Note: Refer to the *Oracle Retail Xstore Point-of-Service User Guide* for information about setting up layaway accounts.

Layaway Reports

The following reports are available from the *Reports* menu to help maintain layaway accounts:

- Layaway Aging Summary Report
- Layaway Aging Detail Report
- Layaway Account Activity Summary Report
- Layaway Account Activity Detail Report

The Layaway Aging reports show layaway accounts based on a specified aging period. Select the *Summary* report option to print a condensed version of the Layaway Aging Report and select the *Detail* report option to print an itemized version of the Layaway Aging Report.

The Layaway Account Activity reports show layaway accounts based on status such as Inactive, Overdue, Delinquent, etc. Select the *Summary* report option to print a

Accessing Back Office Layaway Maintenance

condensed version of the Layaway Account Activity Report and select the *Detail* report option to print an itemized version of the Layaway Account Activity Report.

Note: Refer to the Oracle Retail Xstore Point-of-Service Reports Guide for more information about setting up and running these reports.

Accessing Back Office Layaway Maintenance

1. Select the **Back Office** option.
2. After logging in to the Back Office, select the **Customer Maintenance and Accounts** option from the Back Office Main Menu.



Figure 15-1: Back Office Main Menu

Tip: You can also press the number or letter associated with the menu option on the keyboard to access the function.

3. Select the **Layaway Maintenance** option and **Ok**.



Figure 15-2: Customer Maintenance and Accounts Menu

Tip: You can also press the number associated with the menu option on the keyboard to access the function.

4. Oracle Retail Xstore Point of Service displays the Layaway Search form, prompting for search criteria. Enter the criteria you want to use for finding a layaway record and select **Process**:

Figure 15-3: Layaway Search Form

- If you enter a specific layaway ID and Oracle Retail Xstore Point of Service finds it, Oracle Retail Xstore Point of Service displays the layaway record in a list. Press **[Enter]** to continue and the record is displayed.

- If you enter search criteria that results in more than one record being found, or your system is set up to display the accounts list, you must select the record you want from the list and then press **[Enter]**.



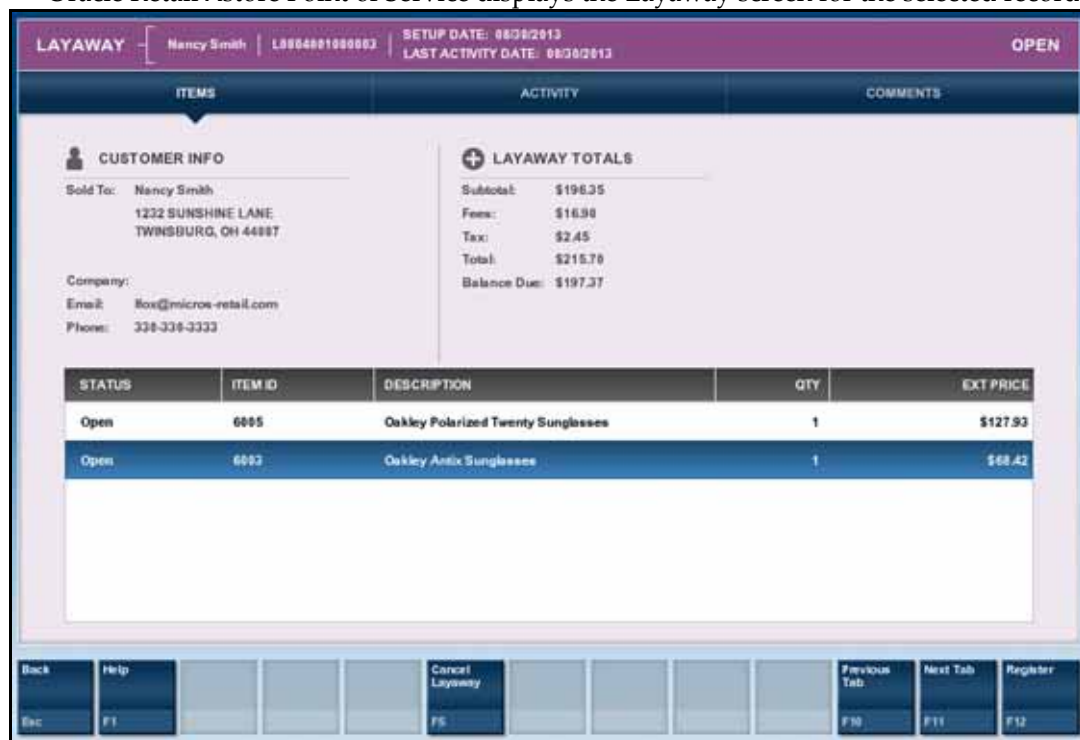
LAYAWAY SEARCH
Select one of the following layaway accounts.

NAME ACCOUNT ID	SETUP DATE STATUS	BALANCE
Smith, Betty L8864801000004	08/08/2013 Open	\$176.25
Smith, Nancy L8864801000003	08/08/2013 Open	\$197.37

Buttons: Back, Select & Continue, Esc, Enter

Figure 15-4: Layaway Search Results List

Oracle Retail Xstore Point of Service displays the Layaway screen for the selected record.



LAYAWAY — Nancy Smith | L8864801000003 | SETUP DATE: 08/08/2013 | LAST ACTIVITY DATE: 08/08/2013 | **OPEN**

ITEMS	ACTIVITY	COMMENTS
-------	----------	----------

CUSTOMER INFO

Sold To: Nancy Smith
1232 SUNSHINE LANE
TWINSBURG, OH 44087

Company:
Email: Box@micro-retail.com
Phone: 330-330-3333

LAYAWAY TOTALS

Subtotal: \$196.35
Fees: \$16.98
Tax: \$2.45
Total: \$215.78
Balance Due: \$197.37

STATUS	ITEM ID	DESCRIPTION	QTY	EXT PRICE
Open	6005	Oakley Polarized Twenty Sunglasses	1	\$127.93
Open	6003	Oakley Antix Sunglasses	1	\$68.42

Buttons: Back, Help, Cancel Layaway, Previous Tab, Next Tab, Register, Esc, F1, F5, F10, F11, F12

Figure 15-5: Layaway Screen

Static Information Area

The upper panel on the screen shows the summary information for the Layaway account, including its status and customer contact information. This panel is always displayed when viewing any of the tabs on this screen.

Customer Information

The customer information area displays:

- **Sold To** - The purchasing customer's name and address information.
- **Company** - The purchasing customer's company, if applicable.
- **Email** - The purchasing customer's email address.
- **Phone** - The purchasing customer's telephone number(s).

Order Totals

The order totals information displays:

- **Subtotal** - The Layaway subtotal (the shipping fee amount is not included in the subtotal).
- **Fees** - Additional cost associated with the Layaway.
- **Tax** - The tax on the Layaway.
- **Total** - The total for the Layaway (the shipping fee amount is included in the total).
- **Balance due** - The amount due for the Layaway.

Layaway Tab Information

Detailed Layaway information is presented on three tabs; *Items*, *Activity*, and *Comments*. You can navigate between the tab sections by using the **Previous Tab** and **Next Tab** menu options. Each tab contains specific information about the customer's Layaway account.

- **Items Tab**: Shows the item information for the Layaway account.
- **Layaway Activity Tab**: Shows the activity information for the Layaway account.
- **Layaway Comments Tab**: Shows any comments associated with the Layaway account.

Items Tab Information

LAYAWAY | Nancy Smith | L8964881000003 | SETUP DATE: 08/08/2013 | LAST ACTIVITY DATE: 08/30/2013 | **OPEN**

ITEMS		ACTIVITY	COMMENTS	
CUSTOMER INFO Sold To: Nancy Smith 1232 SUNSHINE LANE TWINSBURG, OH 44088 Company: Email: box@micros-retail.com Phone: 330-330-3333		LAYAWAY TOTALS Subtotal: \$198.35 Fees: \$16.98 Tax: \$2.45 Total: \$215.78 Balance Due: \$197.37		
STATUS	ITEM ID	DESCRIPTION	QTY	EXT PRICE
Open	6005	Oakley Polarized Twenty Sunglasses	1	\$127.93
Open	6003	Oakley Antix Sunglasses	1	\$68.42

Back Help Cancel Layaway Previous Tab Next Tab Register
Esc F1 F5 F10 F11 F12

Figure 15-6: Items Tab

- **Status:** The status of the item (Open, Picked Up, Cancelled).
- **Item ID:** The item identifier.
- **Item Description:** The item description.
- **Quantity:** The item quantity.
- **Ext. Price:** The extended price for the item (price x quantity).

Comments Tab Information

CREATED TIME	CREATED BY	COMMENT
March 22, 2013	100	Customer has requested alterations and price list.

Figure 15-8: Comments Tab

- **Created Time:** The date this comment was added to this layaway account record.
- **Comment Created By:** The identifier for the employee who created the comment.
- **Comment:** The text that was entered.

Note: Use the *Add Comment* option to add a comment to the layaway account record.

To Cancel a Layaway Account

The option to cancel a layaway account is available on all three tabs (Item, Activity, and Comments) while you are viewing the account you want to cancel.

1. Search for the layaway account that you want to cancel. Refer to step 4.
2. When Oracle Retail Xstore Point of Service displays the account, select the **Cancel Layaway** option.

3. Oracle Retail Xstore Point of Service displays a message asking if the customer is present during the cancellation of the layaway account. Select **Yes** or **No**.



Figure 15-9: Prompt to Check for Presence of Customer During Cancellation

Customer not present

- If you select **No**, indicating the customer is not present:
 - a. The system displays a prompt asking if you are sure you want to cancel the layaway account. Select **Yes** (responding **No** returns to the Layaway screen).
 - b. The system displays a prompt indicating that the balance amount due to the customer will be transferred to an escrow account. Press [Enter] to respond to the prompt and continue.

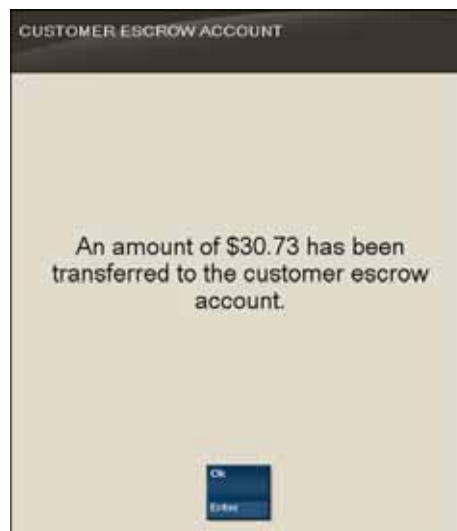


Figure 15-10: Balance Transferred To Escrow Account

- c. The system returns to the Layaway Search form. You may select **Back** to return to the Customer Maintenance and Accounts Menu and perform other functions (see [Layaway Search Form](#)).

To Cancel a Layaway Account

Customer is present

- If you select **Yes**, indicating the customer is present, Oracle Retail Xstore Point of Service displays the following prompt. Press [Enter] and continue with the procedure "[Cancel Layaway - When the Customer Is Present](#)" below.

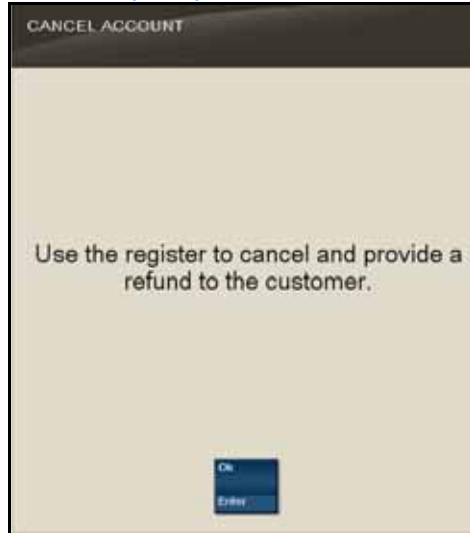


Figure 15-11: Prompt if Customer Is Present

Cancel Layaway - When the Customer Is Present

1. Select the **Register** option from the menu.

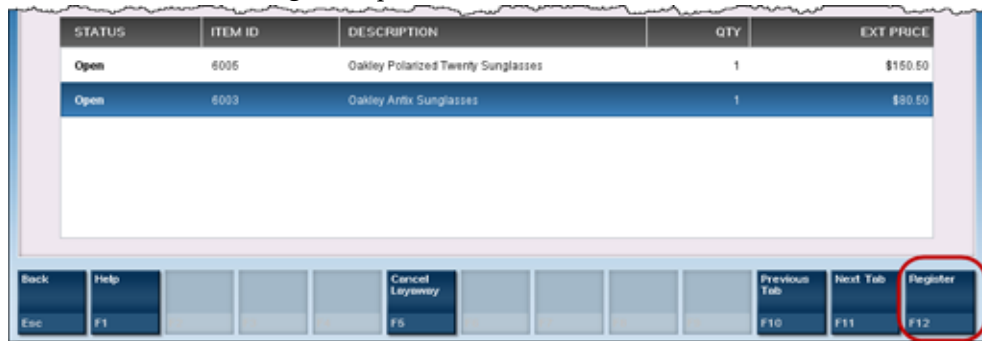


Figure 15-12: Register Option

2. At the Register Pre-Sale screen, assign an associate to the transaction, if your system's configuration requires an associate, and press [Enter].
3. The Customer Lookup form displays. Enter search criteria in the form for the customer whose layaway account must be canceled and select **Process**.
4. Select the correct customer from the list and choose **Select & Continue**.
5. The Register Sale screen displays and the customer who owns the layaway account is associated with it. Select the **Extended Transaction** option from the menu.
6. Select **Layaway** from the Extended Transaction menu.

7. Xstore displays a list of Layaway accounts for the selected customer. Select the Layaway account to be canceled and press **[Enter]** to continue.

LAYAWAY SEARCH
Select one of the following layaway accounts.

NAME ACCOUNT ID	SETUP DATE STATUS	BALANCE
Smith, Nancy L0643001000004	09/18/2013 Open	\$231.55
Smith, Nancy L0643001000003	09/18/2013 Open	\$422.32

Buttons: Back (Esc), Select & Continue (Enter), Make Payment (F6), Set Up New (F9)

Figure 15-13: List of Customer's Layaway Accounts

8. Select the **Cancel Layaway** option.

Nancy Smith

Account ID: L0643001000004
Layaway Status: OPEN
SETUP DATE: 09/18/13
Customer #: C0643001000006
Customer Name: Nancy Smith
Address: 5234 Sunny Lane, Twinsburg, OH 44067
Phone: 330-503-3861 330-503-8888
Account Total: \$267.28
Payment Total: \$28.73
Balance Due: \$231.55
Open Items: 2

Layaway
Select one of the following items options.

TRANS #	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Open 001	1	Gulkey Polarized Twenty ...		\$150.00
		\$14.00 CR Any Item 6001-6005 (\$10.00)		
Open 002	1	Gulkey Arflex Sunglasses		\$50.00
		\$14.00 CR Any Item 6001-6005 (\$10.00)		
Open 003	1	Layaway Setup Fee		\$23.00
Open 004	1	Layaway Deposit		\$15.73

ITEMS: 0 TAX: \$0.00 FEES: \$0.00 SUBTOTAL: \$0.00
Amount: Daily Wtd **AMOUNT DUE \$0.00**

Buttons: Back (Esc), Help (F1), End Layaway (F2), Make Payment (F6), Layaway Details (F4), End Account (F8), Set Up New (F9), **Cancel Layaway (F10)**, More (F12)

Footer: Layaway - John Smith | Status: Datacartage Home Office 845 | Register: 1 | 09/18/2013 1:44 PM | P: F1

Figure 15-14: Layaway Screen

Note: See the *Oracle Retail Xstore Point-of-Service User Guide* for further instructions on cancelling the layaway.

Work Order Maintenance

Work Order Overview

A Work Order is a request to take some action (perform a task) on an item. The item may be on the current sale transaction at the register, or it may be a previously-purchased item.

Work Order tasks may be organized into logically related categories. For example, some tasks may be related to jewelry, while others are related to automotive parts. Vendors who perform the work must be defined and associated with a store location because it's possible that a vendor may offer service only within a restricted geographic area.

After a Work Order has been created, the information in the Work Order account is accessible from the Back Office. Use the Back Office Work Order Maintenance functions to track, update, and maintain Work Order accounts.

Note: Refer to the *Oracle Retail Xstore Point-of-Service User Guide* for information about setting up Work Orders.

Accessing Work Order Maintenance Functions

1. Select the **Back Office** option.

Accessing Work Order Maintenance Functions

- After logging in to the Back Office, select the **Customer Maintenance and Accounts** option from the Main Menu and press [Enter].



Figure 16-1: Main Menu - Customer Maintenance and Accounts Option

- Select the **Work Order Options** option from the Customer Maintenance and Accounts menu and press [Enter].

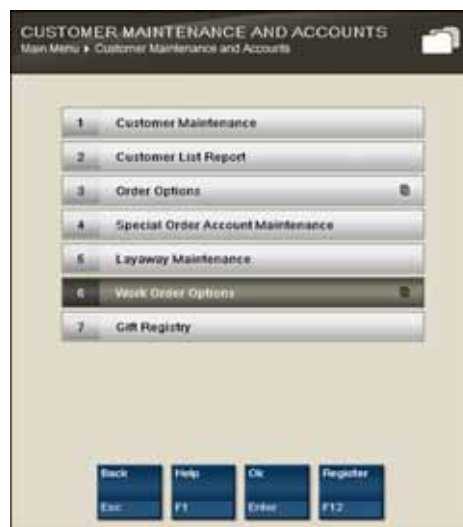


Figure 16-2: Customer Maintenance and Accounts Menu - Work Order Options

4. Oracle Retail Xstore Point of Service displays the Work Order Options menu. The following work order options are available:

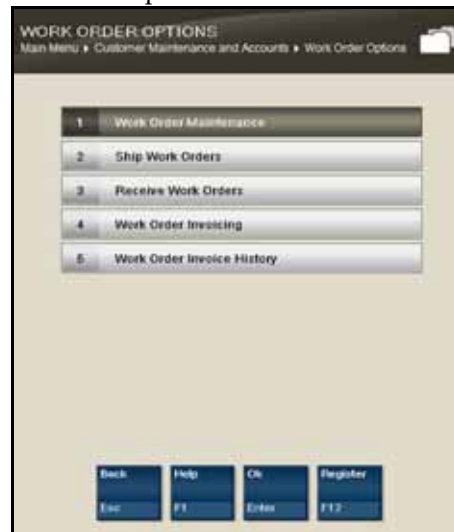


Figure 16-3: Work Order Options Menu

- **Work Order Maintenance** - Select this option to maintain Work Order information. Refer to [Maintaining Work Orders](#).
- **Ship Work Orders** - Select this option to ship Work Order items to the repair vendor. Refer to [Shipping Work Orders](#).
- **Receive Work Orders** - Select this option to receive completed Work Order items from the repair vendor. Refer to [Receiving Work Orders](#).
- **Work Order Invoicing** - Select this option to perform invoicing functions for Work Orders. Refer to [Work Order Invoices](#).
- **Work Order Invoice History** - Select this option to view existing Work Order invoice information. Refer to [Viewing Work Order Invoice History](#).

Maintaining Work Orders

1. After selecting the **Work Order Maintenance** option at the Work Order Options menu, the system prompts for Work Order search information. Enter the criteria you want to use for finding a Work Order record and select **Process**.




Figure 16-4: Work Order Search Form

- If Oracle Retail Xstore Point of Service finds the Work Order, it is displayed in a list. Press [Enter] to continue.
 - The search criteria you entered may result in more than one record being found. Select the record you want from the list and press [Enter].
2. Select a Work Order record and Oracle Retail Xstore Point of Service displays the Work Order screen as shown here.

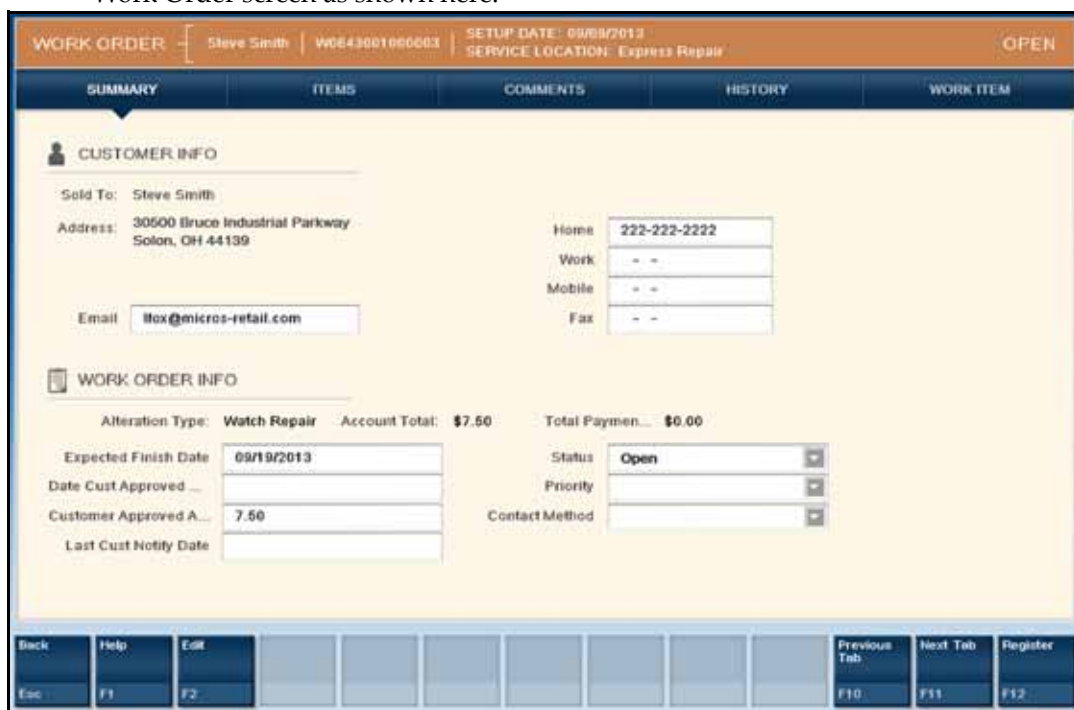


Figure 16-5: Work Order Screen, View-Only Mode

Note: When a screen or field is grayed out, the record can be seen, but not changed until you choose the *Edit* option.

Maintaining Work Order Records

A Work Order record always opens in a read-only mode and cannot be edited unless you change to the editing mode. You can navigate between the five tab sections by selecting the **Previous Tab** and **Next Tab** menu options. Each tab contains information that is related to a particular aspect of the Work Order.

After viewing a Work Order record you may decide that some of the information must be changed, or you may want to enter additional information in some fields. You must transition to an editing mode to make any changes to the record.

- **Work Order Summary Tab:** Shows the summary information for the Work Order, including its status, and customer contact information.
- **Work Order Items Tab:** Shows the item task-related information for the Work Order, including any instructions and comments for performing the task.
- **Work Order Comments Tab:** Shows any comments that have been entered for the Work Order.
- **Work Order History Tab:** Shows any status changes for the Work Order (view-only).
- **Work Order Work Item Tab:** Shows the item ID and description for the item being repaired/alterd, and the dollar value of the item.

To View and Edit a Work Order Record

1. With the Work Order record displayed, select the **Edit** option to go into an editing mode. The fields are no longer grayed out.

Figure 16-6: Work Order Summary Tab in Edit Mode

2. Make changes to any of the fields:
 - Select the field you want to change and replace the old entry by typing over it with the new information.
 - Any fields that require entries are marked with a red triangle in the upper left corner of the field.
 - Any fields that have lists attached display a down arrow on the right side of the field.

Static Information Area

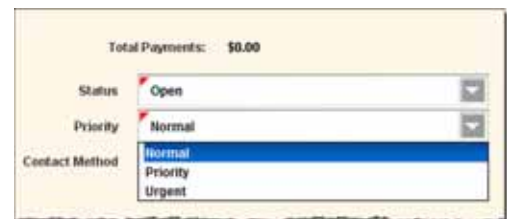
See Figure 16-6

- **Work Order Id:** A unique identifying number assigned to the Work Order. This number cannot be changed.
- **Service Location:** The actual location where Work Order services are performed. To edit the service location:
 - a. Select the **Edit Service Location** option.
 - b. Enter a new Work Order location or select a Service Location from the list and **Ok** to change the Service Location for this Work Order.

Summary Tab Information

See Figure 16-6

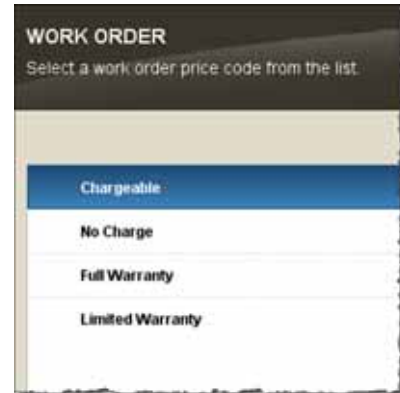
- **Customer Information:** The customer's name, street address, Email address and phone number information is shown here.
- **Alteration Type:** These categories are defined by the home office and assigned to the Work Order when it is created. The Alteration Type cannot be changed for this account.
- **Expected Finish Date:** This is the date the item should be ready for customer pickup. Depending upon your store policy, this date may be calculated automatically based on certain Work Order parameters entered during setup.
- **Account Total:** The total for the Work Order account. This amount cannot be changed.
- **Last Activity Date:** This date is automatically calculated by the system for the most recent activity on this account. This date cannot be changed.
- **Total Payments:** The total amount the customer has paid on this account. This amount cannot be changed.
- **Date Customer Approved Work:** The date that the customer reviewed and approved the work to be performed on the item(s) and the amount that will be charged.
- **Status:** The status for the Work Order account:
 - The Status may be changed as the Work Order moves through the Alteration/Repair process. For example, each new Work Order has a status of Open when it is created. If work is performed at the store, the in-store service provider may change the status to In Progress when work is begun on the item.
- **Customer Approved Amount:** This is the maximum dollar amount the customer has agreed to pay for the work to be performed on the item, without requiring additional notification.
- **Priority:** The priority of the Work Order account. The default is set to Normal, but may be changed to Urgent or Priority if the customer needs the item immediately.
- **Last Customer Notify Date:** The date the customer was last contacted about the Work Order account. For example, if the service provider notifies you that the repair is running behind schedule, you may need to inform the customer about the delay. You would update this field to track the date the customer was contacted.
- **Contact Method:** The customer's preferred mode of contact.
- **Contact Information:** The customer's name, street address, Email address and phone number information is shown here.



Menu Options

- **Change Price Type:** Select this menu option to edit the price type of this Work Order account:
 - a. Select the **Change Price Type** option. Oracle Retail Xstore Point of Service displays a list of price codes.
 - b. Select a price code from the list and **Ok** to change the price type for this Work Order.

For example, if the customer did not have proof that this item was covered by a warranty when the Work Order was originally set up, you may need to change a **Chargeable** price type to a **Warranty** price type if the customer returns to the store with proof that the item is covered under a warranty.



- **Edit Service Loc:** Select this menu option to edit the service location. See **Service Location**.
- 3. Select the **Save Changes** option to save any changes you made to the Work Order summary record.

To View and Edit Work Order Items

The Items tab shows the item task information for the Work Order, including instructions and comments for the task. In addition, you can add a new task, edit an existing task, and add parts. You must transition to an **editing mode** to make any changes to the record.

1. With the Work Order record displayed, select the **Item** tab.

2. Select the **Edit** option.

ITEM ID	DESCRIPTION	VALUE
0011	Timeless Black Leather Watch	\$316.00

Figure 16-7: Work Order Items Tab, Edit Mode

Information on the **Items** tab includes these columns:

- **Quantity:** If a part is needed to perform a task, this entry indicates how many parts are needed.
- **Task:** A brief description of the work that will be performed on the item.
- **Price Type:** Prices may be categorized; for example, an Actual price or Estimated price.
- **Status:** The current state of the task.
- **Charge:** The dollar amount that will be charged to the customer for performing the task.

The following menu options are available:

- **Add Task:** Select this option to add a new task to this Work Order. Refer to [Adding a Task](#) for procedural information.
- **Delete Task:** Select this option to delete a task from the Work Order. Refer to [Deleting a Task](#) for procedural information.
- **Convert Estimate:** Select this option to convert an estimated task amount to the actual cost of the task. This option is only available when there are estimated tasks on this Work Order account. You must convert all estimated tasks to actual task amounts before the account can be set to Ready For Pickup status. Refer to [Converting an Estimate](#) for procedural information.
- **Add Instruction:** Select this option to add, view, and edit task instructions. Refer to [Viewing/Adding Task Instructions](#) for procedural information.

- **Add Parts:** Select this option to add parts to the Work Order. Refer to [Adding Parts](#) for procedural information.
- **Delete Parts:** Select this option to remove parts from the Work Order. This option is only available when there are parts on this Work Order. Refer to [Deleting Parts](#) for procedural information.
- **Change Quantity:** Select this option to change the task quantity. Refer to [Changing the Quantity](#) for procedural information.
- **Change Price:** Select this option to change the task price. Refer to [Changing the Price](#) for procedural information.
- **Change Tax Location:** Select this option to change the tax location. Refer to [Changing the Tax Location](#) for procedural information.
- **Tax Exempt:** Select this option to change the tax to tax exempt. Refer to [Changing the Tax to Tax Exempt](#) for procedural information.
- **Change Tax Amount:** Select this option to change the tax amount. Refer to [Changing the Tax Amount](#) for procedural information.
- **Change Tax Percent:** Select this option to change the tax percentage. Refer to [Changing the Tax Percentage](#) for procedural information.

Note: Select the More... option as needed to access the menu options available at the Items tab.

3. Select the **Save Changes** option to save any changes you made to the Work Order items record.

Adding a Task

1. With the Work Order record displayed in edit mode, select the **Add Task** option.
2. Oracle Retail Xstore Point of Service displays a list of tasks available for this Work Order category. Use the up and down arrow keys to go to a task(s) and press **[Spacebar]** to select it. After marking all required tasks, press **[Enter]** to add them to the Work Order.

TASK	PRICE TYPE	CHARGE
Repair Clasp	REGULAR_PRI...	\$7.50
Replace Clasp	ESTMATE	\$11.00

Figure 16-8: Work Order Task List

3. Oracle Retail Xstore Point of Service adds the new task and its associated price type and charge to the Work Order. Select the **Save Changes** option to save any changes you made to the Work Order detail record.

Note: Oracle Retail Xstore Point of Service adjusts any charges as required. If a change to the Work Order causes the charge to exceed the customer authorization limit, you may be prompted to confirm the changes with the customer. This information can be edited at the Summary tab.

Deleting a Task

Note: Select the More... option as needed to access the menu options available at the Items tab.

1. With the Work Order record displayed in edit mode, select the **Delete Task** option.
2. Oracle Retail Xstore Point of Service displays the tasks currently on this Work Order. Select the task from the list and press [Enter] to remove this task from this Work Order.

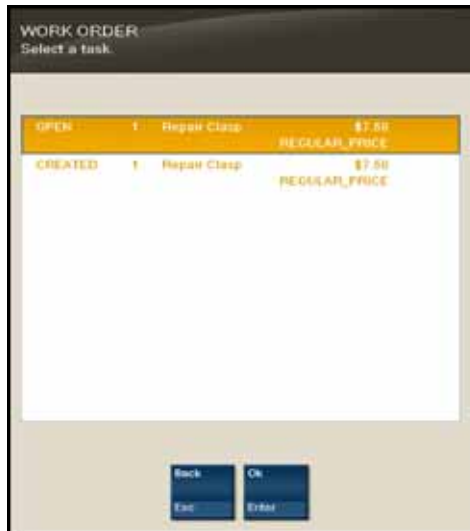


Figure 16-9: Current Work Order Task List

3. Oracle Retail Xstore Point of Service removes the task from the Work Order. Select the **Save Changes** option to save any changes you made to the Work Order detail record. Oracle Retail Xstore Point of Service adjusts any charges as required.

Converting an Estimate

You must convert all of the estimated task amounts to actual task amounts before the Work Order account can be changed to Ready For Pickup status.

1. With the Work Order record displayed in edit mode, select the **Convert Estimate** option.
2. Oracle Retail Xstore Point of Service displays the estimated tasks currently on this Work Order. Select the task from the list and press [Enter] to convert this task from an **estimated** task amount to an **actual** task amount.
3. Oracle Retail Xstore Point of Service displays a list of tasks with actual charges associated with the task. Use the up and down arrow keys to go to a task in the list and press [Spacebar].
4. Press [Enter] to update the Estimated task to an Actual amount task.
Oracle Retail Xstore Point of Service updates the task on the Work Order.
5. Select the **Save Changes** option to save any changes you made to the Work Order detail record.
Oracle Retail Xstore Point of Service adjusts any charges as required.

Note: If a change to the Work Order causes the charge to exceed the customer authorization limit, you are prompted to confirm the changes with the customer. This information can be edited at the Summary Tab.

Viewing/Adding Task Instructions

1. With the Work Order record displayed in edit mode, select the **Add Instruction** option.
2. Oracle Retail Xstore Point of Service displays the tasks currently on this Work Order. Select a task from the list and press **[Enter]** to view, edit, or add instructions.

The screenshot shows a mobile application interface titled "WORK ORDER" with the subtitle "Select a task." Below the title is a table with two columns: "ITEM" and "REGULAR PRICE". The table contains one row with the text "CREATED" and "REGULAR PRICE". At the bottom of the screen are four buttons: "Back", "Exit", "Edit", and "Enter".

Figure 16-10: Current Work Order Task List

3. Oracle Retail Xstore Point of Service displays the Work Order Task Instruction form. You can add, delete, or modify instructions on this form and then press **[Enter]** to add (or remove) these instructions to (from) the task.

The screenshot shows a mobile application interface titled "WORK ORDER" with the subtitle "Add, delete, or modify the work order task instruction." Below the title is a text input field containing the text "Save old battery to be returned to customer." At the bottom of the screen are four buttons: "Back", "Exit", "Edit", and "Enter".

Figure 16-11: Work Order Task Instruction Form

4. Select the **Save Changes** option to save any changes you made to the Work Order record. The instruction is now associated with this task and is shown on the screen.

Figure 16-12: Work Order Instructions

Adding Parts

You can add an item ID for a part that is needed to complete the Work Order task.

1. With the Work Order record displayed in edit mode, select the **Add Parts** option.
2. Oracle Retail Xstore Point of Service prompts for an item ID for the part to be added to this Work Order. Scan or key the item ID and press [Enter].

Figure 16-13: Part Item ID Prompt

3. Oracle Retail Xstore Point of Service adds the part and the associated price to the Work Order. Select the **Save Changes** option to save any changes you made to the Work Order detail record.
4. If you need to adjust the quantity required for any part that you added, use the **Change Qty** option to enter the number of parts needed. If you change any item's quantity, be sure to **Save Changes**.

Oracle Retail Xstore Point of Service adjusts any charges as required.

Note: If a change to the Work Order causes the charge to exceed the customer authorization limit, you may be prompted to confirm the changes with the customer. This information can be edited at the Summary Tab.

Deleting Parts

You can remove a part that was added to a Work Order but was not used to complete the Work Order task.

1. With the Work Order record displayed in edit mode, select the **Delete Parts** option.
2. Oracle Retail Xstore Point of Service displays a list of parts currently on this Work Order. Select a part from the list and press [Enter] to remove the part and its associated price from the Work Order.
3. Select the **Save Changes** option to save any changes you made to the Work Order detail record.

Oracle Retail Xstore Point of Service adjusts any charges as required.

Changing the Quantity

Note: Select the More... option as needed to access the menu options available at the Items tab.

1. With the Work Order record displayed in edit mode, select the **Change Quantity** option.
2. Oracle Retail Xstore Point of Service displays a list of line items currently on this Work Order. Select an item from the list and press [Enter].

Note: If the item you selected is not eligible for a quantity change, Oracle Retail Xstore Point of Service displays a message informing you that the item quantity cannot be changed.

3. Oracle Retail Xstore Point of Service prompts for the item quantity to be added to this Work Order. Enter the quantity and press [Enter]. Oracle Retail Xstore Point of Service adds the new quantity and the associated price to the Work Order.

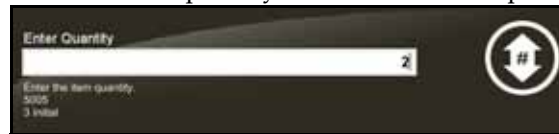


Figure 16-14: Item Quantity Prompt

4. Select the **Save Changes** option to save any changes you made to the Work Order record.

Oracle Retail Xstore Point of Service adjusts any charges as required.

Note: If a change to the Work Order causes the charge to exceed the customer authorization limit, you may be prompted to confirm the changes with the customer. This information can be edited at the Summary Tab.

Changing the Price

Note: Select the More... option as needed to access the menu options available at the Items tab.

1. With the Work Order record displayed in edit mode, select the **Change Price** option.
2. Oracle Retail Xstore Point of Service displays a list of line items currently on this Work Order. Select an item from the list and press [Enter].

Note: If the item you selected is not eligible for a price change, Oracle Retail Xstore Point of Service displays a message informing you that the item price cannot be changed.

3. Oracle Retail Xstore Point of Service prompts for the item price to be added to this Work Order. The item you selected is displayed in the price change prompt. Enter the new price and press [Enter].

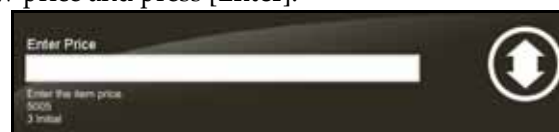


Figure 16-15: Item Price Prompt

4. Oracle Retail Xstore Point of Service updates the new price for the Work Order line item. Select the **Save Changes** option to save any changes you made to the Work Order detail record.

Oracle Retail Xstore Point of Service adjusts any charges as required.

Changing the Tax Location

Note: Select the More... option as needed to access the menu options available at the Items tab.

1. With the Work Order record displayed in edit mode, select the **Change Tax Loc** option.
2. Oracle Retail Xstore Point of Service displays a list of line items currently on this Work Order. Select an item from the list and press **[Enter]**.

Note: If the item you selected is not eligible for a tax location change, Oracle Retail Xstore Point of Service displays a message informing you that the item tax location cannot be changed.

3. Oracle Retail Xstore Point of Service prompts for the postal code for the new tax location. Enter the postal code and press **[Enter]**.



Figure 16-16: Postal Code Prompt

Oracle Retail Xstore Point of Service changes the tax on the item based on the new postal code.

Note: If the postal code you entered is not recognized as a valid tax location, the current store's tax rate is used.

4. If you are prompted for a tax change reason, select a reason from the list and press **[Enter]**.
5. Select the **Save Changes** option to save any changes you made to the Work Order detail record.

Oracle Retail Xstore Point of Service adjusts any charges as required.

Note: If a change to the Work Order causes the charge to exceed the customer authorization limit, you may be prompted to confirm the changes with the customer. This information can be edited at the Summary tab.

Changing the Tax to Tax Exempt

Note: Select the More... option as needed to access the menu options available at the Items tab.

1. With the Work Order record displayed in edit mode, select the **Tax Exempt** option.

2. Oracle Retail Xstore Point of Service displays a list of line items currently on this Work Order. Select an item from the list and press **[Enter]**.

Note: If the item you selected is not eligible for a tax exemption, Oracle Retail Xstore Point of Service displays a message informing you that the item tax cannot be changed.

3. If prompted with a list of the current taxes on the item, select the tax to change. Use the up and down arrow keys to select a tax to change and then press **[Enter]**.
4. Depending upon the customer's tax status, you have the following options:
 - If the customer associated with the Work Order has a current tax exemption on file, you are prompted to select the tax exempt identifier from the list of exemptions on file for this customer. Select the tax exemption to apply to the item.
 - <OR>
 - If the customer associated with the Work Order does not have a current tax exemption on file, you are prompted to enter the tax exempt information. Enter the tax exempt information and save your entries.

Oracle Retail Xstore Point of Service applies the tax exemption to the Work Order item.

5. Select the **Save Changes** option to save any changes you made to the Work Order detail record.

Oracle Retail Xstore Point of Service adjusts any charges as required.

Note: To add tax exempt information see the Oracle Retail Xstore Point-of-Service User Guide.

Changing the Tax Amount

Note: Select the More... option as needed to access the menu options available at the Items tab.

1. With the Work Order record displayed in edit mode, select the **Change Tax Amt** option.
2. Oracle Retail Xstore Point of Service displays a list of line items currently on this Work Order. Select an item from the list and press **[Enter]**.

Note: If the item you selected is not eligible for a tax change, Oracle Retail Xstore Point of Service displays a message informing you that the item tax cannot be changed.

3. Oracle Retail Xstore Point of Service may display a list of the current taxes on the item and prompt you to select the tax to change. If prompted, use the up and down arrow keys to select a tax to change and then press **[Enter]**.

Oracle Retail Xstore Point of Service prompts for the new tax amount. Enter the new tax amount and press [Enter].



Figure 16-17: New Tax Amount Prompt

Oracle Retail Xstore Point of Service changes the tax on the item to this new amount.

4. If you are prompted for a tax change reason, select a reason from the list and press [Enter].
5. Select the **Save Changes** option to save any changes you made to the Work Order detail record.

Oracle Retail Xstore Point of Service adjusts any charges as required.

Note: If a change to the Work Order causes the charge to exceed the customer's authorization limit, you may be prompted to confirm the changes with the customer. This information can be edited at the Summary tab.

Changing the Tax Percentage

Note: Select the More... option as needed to access the menu options available at the Items tab.

1. With the Work Order record displayed in edit mode, select the **Change Tax Percent** option.
2. Oracle Retail Xstore Point of Service displays a list of line items currently on this Work Order. Select an item from the list and press [Enter].

Note: If the item you selected is not eligible for a tax change, Oracle Retail Xstore Point of Service displays a message informing you that the item tax cannot be changed.

3. Oracle Retail Xstore Point of Service may display a list of the current taxes on the item and prompt you to select the tax to change. If prompted, use the up and down arrow keys to select a tax to change and press [Enter].
4. Oracle Retail Xstore Point of Service prompts for the new tax percentage. Enter the new tax percentage and press [Enter].



Figure 16-18: New Tax Amount Prompt

Oracle Retail Xstore Point of Service changes the tax percentage on the item.

5. If you are prompted for a tax change reason, select a reason from the list and press [Enter].
6. Select the **Save Changes** option to save any changes to the Work Order detail record.

Oracle Retail Xstore Point of Service adjusts any charges as required.

Note: If a change to the Work Order causes the charge to exceed the customer authorization limit, you may be prompted to confirm the changes with the customer. This information can be edited at the Summary tab.

To View and Add a Work Order Comment

Any comments associated with the Work Order are shown on the Comments tab. You can also add a new comment for a Work Order record.

The screenshot displays the 'WORK ORDER' screen with the 'COMMENTS' tab selected. The header shows the work order number 'W0643001000005', the associate 'Nancy Lynn Smith', the setup date '06/14/2013', and the service location 'Westfield Jewelry'. The 'OPEN' button is visible in the top right corner. The tabbed menu includes 'SUMMARY', 'ITEMS', 'COMMENTS', 'HISTORY', and 'WORK ITEM'. The 'ITEMS' tab is active, showing a table with the following data:

ITEM ID	DESCRIPTION	VALUE
6011	Timeless Black Leather Watch	\$0.00

The bottom toolbar contains buttons for 'Undo Changes', 'Help', 'Edit Item Value', 'Edit Item Desc', 'Save Changes', 'Previous Tab', 'Next Tab', and 'Register'. The status bar at the bottom indicates 'Back Office John Smith', 'Online', 'Datavantage Home Office 643', 'Register: 1', and the date/time '06/21/2013 1:39 PM'.

Figure 16-19: Work Order Comment Tab

Comments Tab Information

- **Created Time:** The date the comment was added to the Work Order record.
- **Created By:** An identifier for the associate who created the comment.
- **Comment:** The text of the comment.

Adding a Comment to the Work Order Record

1. Select the **Add Comment** option. Oracle Retail Xstore Point of Service displays the comment form.
2. Type a comment and press [Enter].

Oracle Retail Xstore Point of Service adds the new comment to the Work Order record.

WORK ORDER						READY_TO_PICKUP	
Janet Fox		W0643001010033		SETUP DATE: 02/25/2013 SERVICE LOCATION: ASAP Tailoring			
SUMMARY	ITEMS	COMMENTS	HISTORY	WORK ITEM			
Date: WORK_ORDER OPEN	2013-03-11 20:13:23.267	W0643001010033			\$4.25		
Date: WORK_ORDER READY_TO_PICKUP	2013-03-22 14:35:57.79	W0643001010033			\$4.25		

Back Help Previous Tab Next Tab Register
Esc F1 F10 F11 F12

History Tab Information

- 312 Oracle Retail Xstore Point-of-Service Manager's Guide

To View and Edit a Work Order Item Record

After viewing a Work Order item record you may decide that some of the information must be changed. You can change the item description and the item valuation. You must transition to an editing mode to make any changes to the record.

Work Item Tab Information

- **Item ID:** The item identifier.
- **Item Description:** A brief description of the item.
- **Value:** The dollar value of the item. This value is typically used for shipping insurance and store liability purposes.

Editing Item Information

With the Work Order item record displayed in edit mode, the following options are available:

Figure 16-21: Work Order Item Record - Edit Mode

- **Edit Item Value:** Select this option to change the valuation of the Work Order item. This is the value placed on the merchandise being serviced. This value is typically used for shipping insurance and store liability purposes.
 - When you select this option, Oracle Retail Xstore Point of Service prompts you to choose the item from a list of items on this Work Order account. Select the item and press **[Enter]**.
 - At the Work Order item value prompt, type a new value for this item and press **[Enter]**.

Figure 16-22: Work Order Item Value Prompt

Oracle Retail Xstore Point of Service updates the Work Order item valuation with this information.

- c. Select the **Save Changes** option to save any changes you made to the Work Order item record.
- **Edit Item Description:** Select this option to change the description of the Work Order item.
 - a. When you select this option, Oracle Retail Xstore Point of Service prompts you to choose the item from a list of items on this Work Order account. Select the item and press **[Enter]**.
 - b. At the Work Order item description prompt, type a new description for this item and press **[Enter]**. Oracle Retail Xstore Point of Service updates the Work Order item description with this information

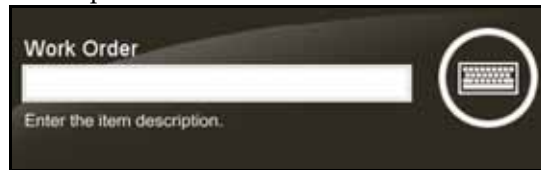


Figure 16-23: Work Order Item Description Prompt

- c. Select the **Save Changes** option to save any changes you made to the Work Order item record.

Shipping Work Orders

Use the shipping function to ship Work Order items to the repair vendor.

1. To ship a Work Order item to a repair vendor, select the **Ship Work Orders** option from the Work Order Options menu.
2. The system prompts for the shipping location (repair vendor) search information. Enter the



information as required to find the service location for the Work Order and select **Process** to continue.

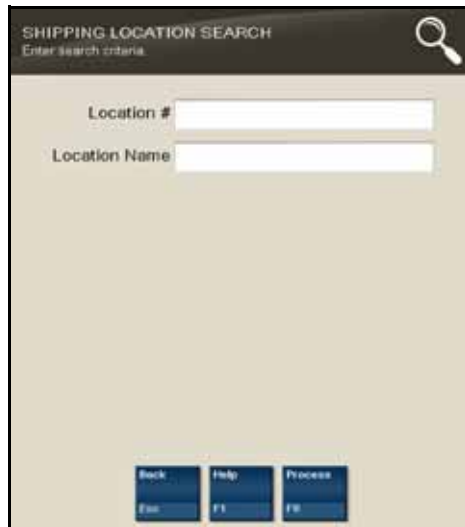
The image shows a software interface titled "SHIPPING LOCATION SEARCH" with a magnifying glass icon in the top right corner. Below the title is the instruction "Enter search criteria". There are two input fields: "Location #" and "Location Name". At the bottom of the form, there are three buttons: "Back", "Help", and "Process". Below these buttons are three keyboard shortcuts: "Esc", "F1", and "F8".

Figure 16-24: Shipping Location Search Form

Note: To see a list of all service locations, leave the fields blank and press **[Enter]**.

- If more than one service location matches the search criteria you entered, the system displays a list of service locations. Select a service location from the list and select **Process** to continue.
 - If only one location matches the search criteria, the system displays the Work Order accounts that are pending shipment to that service location.
3. Select a Work Order account from the list of Work Order accounts to be sent to this service location. Use the up and down arrow keys to go to an account in the list and press [Spacebar] to select it. Press **[Enter]** to continue.
 4. The system creates a shipping document for the Work Order and displays the shipping document information. Press **[Enter]** to continue with the shipping process.

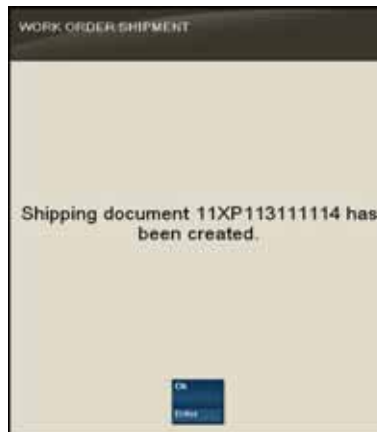
The image shows a software interface titled "WORK ORDER SHIPMENT". The main area of the screen displays the message "Shipping document 11XP113111114 has been created." At the bottom center, there is a single button labeled "OK".

Figure 16-25: Shipping Document Created Prompt

5. The system prompts: Do you want to print a shipping label? Select **Yes** to print a shipping label.
6. The system prompts for the label location on the label sheet. Use the arrow keys to select where the first label should be printed on the label sheet and press **[Enter]**. This allows you to use partial sheets to avoid wasting labels.

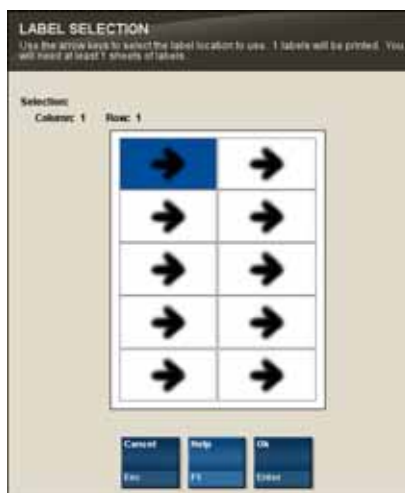


Figure 16-26: Shipping Label Selection Prompt

The system calculates the number of label sheets you need, the number of unused labels that will remain on the label sheet, and prompts you to load the label stock in the printer.



Figure 16-27: Print Label Prompt

7. Press **[Enter]** when you are ready to print the shipping label.

The system prints the labels and returns to the Shipping Location Search form where you can continue shipping Work Orders to service locations.



Figure 16-28: Shipping Label Sample

8. The system prompts: Do you want to print a packing slip?
 - Select **No** if you do not want to print a packing slip. The system skips printing a packing slip.

<OR>

- Select **Yes** to print a packing slip on the report printer.

Xstore returns to the Shipping Location Search Form (Figure 16-24).

Packing Slip

SHIP FROM: Store#: 110
Michelle's Lab
30500 Bruce Industrial Pkwy
Solon, OH 44139

SHIP TO:
ASAP Tailoring
4422 Stony Parkway
Bldg F
Solon, OH 44139
US

Date: June 8, 2011
Order Date: June 8, 2011
Order Number: 117A11311113I
Carrier:
Tracking #:

Barcode: 117A11311113I
WORK_ORDER

Part #	Description	Order Quantity	Ship Quantity
6005	Police Sun Glasses NLP	1	1

Account ID: W0110001000038

Figure 16-29: Packing Slip Sample

Receiving Work Orders

Use the receiving function to receive completed Work Order items from the repair vendor.

1. To receive a Work Order item from a repair vendor, select the **Receive Work Orders** option from the Work Order Options menu.



Figure 16-30: Work Order Options Menu - Receive Work Orders

2. The system prompts for the receiving location (repair vendor) search information. Enter the information as required to find the service location for the Work Order and select **Process** to continue.

Figure 16-31: Receiving Location Search Form

Tip: To see a list of all service locations, leave the fields blank and press [Enter].

- If more than one service location matches the search criteria you entered, the system displays a list of service locations. Select a service location from the list and select **Process** to continue.
 - If only one location matches the search criteria, the system displays the Work Order accounts pending receipt from this service location.
3. Select a Work Order account from the list of Work Order accounts to be received from this service location. Use the up and down arrow keys to go to an account and press [Spacebar] to select it. Press [Enter] to continue.

- The system creates a receiving document for the Work Order and displays the receiving document information. Press **[Enter]** to continue with the receiving process.

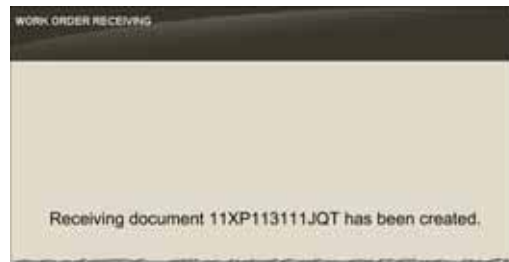


Figure 16-32: Receiving Document Created Prompt

The system prints a packing list for this receiving document, any receipts as configured for your store, and returns to the Receiving Location prompt where you can continue receiving Work Orders from service locations.

Once the work order is received, the system marks the Work Order item as **Ready To Pick Up**.

Work Order Invoices

Use this function to maintain your Work Order invoice information from the repair vendors.

- To maintain a Work Order invoice from a repair vendor, select the **Work Order Invoicing** option from the Work Order Options menu.



Figure 16-33: Work Order Options Menu - Work Order Invoicing Option

- The system prompts for the invoicing location. Enter the search criteria to find the location and select **Process** to continue.

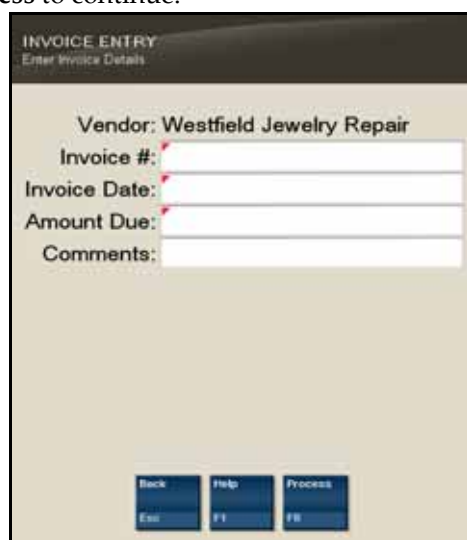


The screenshot shows the 'INVOICING LOCATION SEARCH' form. At the top, it says 'Enter search criteria.' There are two input fields: 'Location #' and 'Location Name'. At the bottom, there are three buttons: 'Back' (F1), 'Help' (F2), and 'Process' (F3).

Figure 16-34: Invoicing Location Search Form

Tip: To see a list of all service locations, leave the fields blank and press [**Enter**].

- If more than one service location matches the search criteria you entered, the system displays a list of service locations. Use the up and down arrow keys to select a service location from the list and select **Process** to continue.
- Enter the required information as found on the invoice from the service vendor and select **Process** to continue.



The screenshot shows the 'INVOICE ENTRY' form. At the top, it says 'Enter Invoice Details.' The 'Vendor' field is populated with 'Westfield Jewelry Repair'. Below it are four input fields: 'Invoice #', 'Invoice Date', 'Amount Due', and 'Comments'. At the bottom, there are three buttons: 'Back' (F1), 'Help' (F2), and 'Process' (F3).

Figure 16-35: Invoice Information Entry Form

- The system prompts you to select Work Order accounts for this invoice. Select the account(s) from the list and press **[Enter]** to continue.

WORK ORDER SEARCH
Select one or more of the following accounts.

NAME	SETUP DATE	ACCOUNT ID
Smith, Nancy	06/14/2013	W0643001000004
Smith, Nancy	06/14/2013	W0643001000005
Smith, Nancy	10/23/2013	W0643001000012
Smith, Nancy	10/23/2013	W0643001000012

Back Select & Continue
Esc Enter

Figure 16-36: Work Order Accounts

Note: You may select multiple accounts. Use the up and down arrow keys to navigate through the list and press the spacebar on each account you want to select.

- The system prompts for the cost of each Work Order on this invoice. Enter the information for each General Ledger # (or other information determined by your store's policy) and select **Save Invoice** to save the data.

WORK ORDER INVOICE

SERVICE #: Service4 SERVICE LOCATION: Westfield Jewelry Repair INVOICE #: W0643001000...

INVOICE DATE: 11/16/2014 AMOUNT DUE: \$ 0.00

Invoice Details

Enter the cost for each work order.

Work Order #	Cost	6200 - COR	6263 - ESAR	6266 - ESAO	7868 - CS	7870 - STK
W0643001000004	\$0.00					

Total Amount \$0.00

Cancel Invoice Help Save Invoice Add Misc Fee Register
Esc F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12

Back Office John Smith Online Datavantage Home Office 643 Register: 1 10/23/2013 9:55 AM F1

Figure 16-37: Work Order Cost Screen

The system displays a running total at the bottom of the screen as you enter the costs for each Work Order.

7. To add a fee, select **Add Misc Fee**.
8. The system verifies that the amounts you entered match the amount due for this invoice:
 - If the amounts do not match, the system displays a message indicating the amounts do not balance and you must reenter the invoice Work Order costs. Press **[Enter]** to acknowledge the prompt.

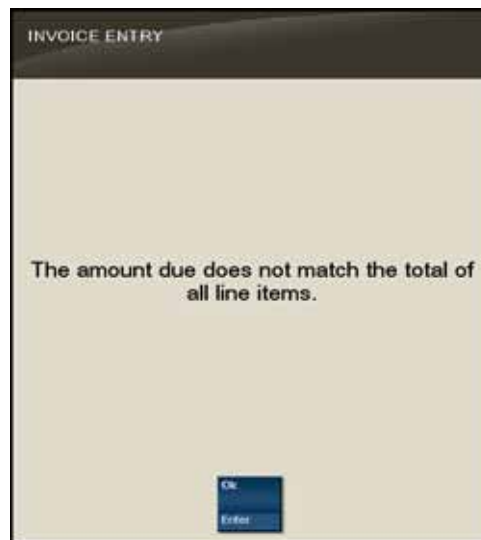


Figure 16-38: Amount Due Out of Balance Message

- When the Work Order account amounts you entered match the invoice amount, the system displays a prompt indicating the invoice data has been saved. Press **[Enter]** to acknowledge the prompt.

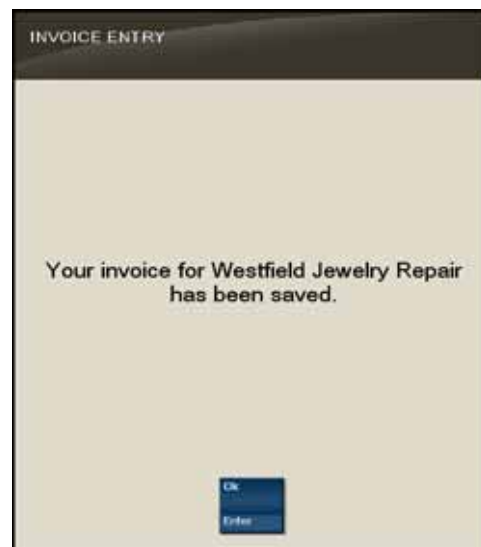


Figure 16-39: Invoice Information Saved Prompt

The system prints an invoice report for your records.

Viewing Work Order Invoice History

Use this function to view information about completed Work Order invoices.

1. To view Work Order invoice history, select the **Work Order Invoice History** option from the Work Order Options menu.

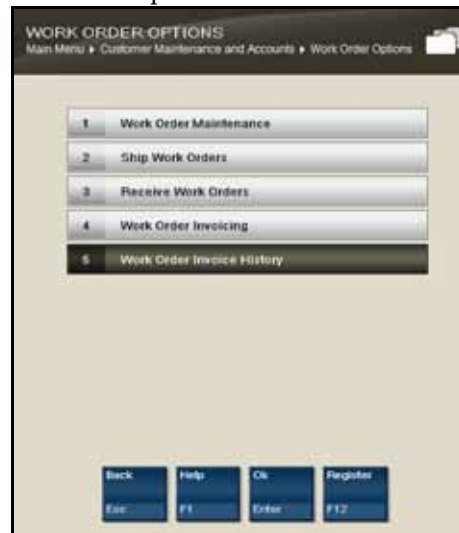


Figure 16-40: Work Order Options Menu - Work Order Invoice History Option

2. The system prompts for the invoicing location. Enter the search criteria to find the location and select **Process** to continue.

Figure 16-41: Invoicing Location Search Form

Tip: To see a list of all service locations, leave the fields blank and press **[Enter]**.

3. If more than one service location matches the search criteria you entered, the system displays a list of service locations. Use the up and down arrow keys to select a service location from the list and select **Process** to continue.

- Select the invoice you want to view for the selected service location and press **[Enter]** to continue.



INVOICE NUMBER	INVOICE DATE	INVOICE AMOUNT
45645	11/16/2010	\$23.98

Figure 16-42: Service Location Invoices

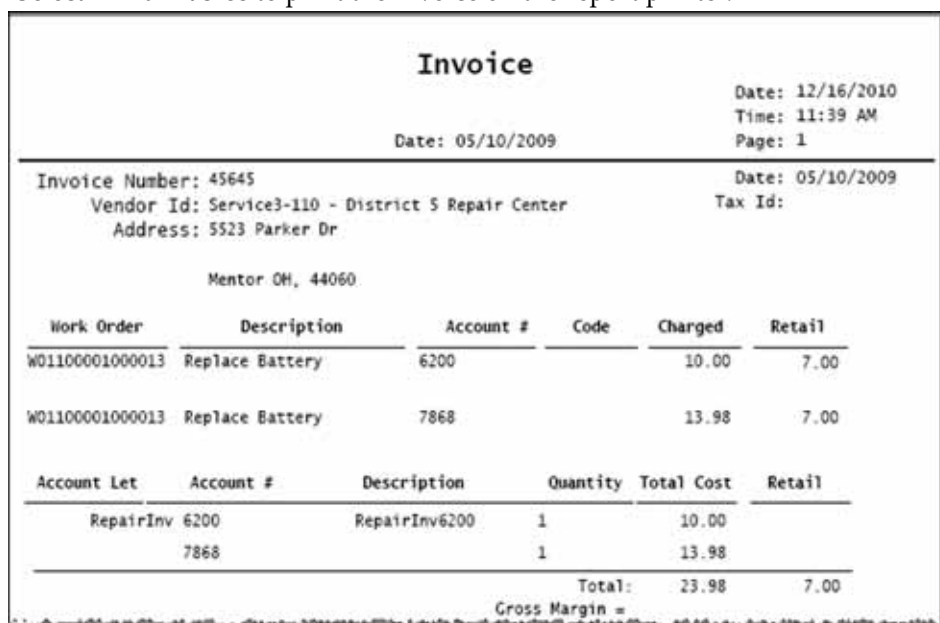
- The system displays the invoice detail:



LINE #	GL #	AMOUNT	WORK ORDER #
1	6200	\$10.00	W0643001010032
2	7868	\$10.00	W0643001010032
3	7870	\$3.98	W0643001010032

Figure 16-43: Invoice Line Detail

- Press **[Enter]** to close the invoice detail form and return to the Work Order Options Menu.
- Select **Print Invoice** to print the invoice on the report printer.



Invoice					
				Date:	12/16/2010
				Time:	11:39 AM
				Page:	1
Date: 05/10/2009					
Invoice Number: 45645					
Vendor Id: Service3-110 - District 5 Repair Center					
Address: 5523 Parker Dr					
Mentor OH, 44060					
Date: 05/10/2009					
Tax Id:					
Work Order	Description	Account #	Code	Charged	Retail
W01100001000013	Replace Battery	6200		10.00	7.00
W01100001000013	Replace Battery	7868		13.98	7.00
Account Let	Account #	Description	Quantity	Total Cost	Retail
RepairInv	6200	RepairInv6200	1	10.00	
	7868		1	13.98	
Total:				23.98	7.00
Gross Margin =					

Figure 16-44: Printed Invoice Example

Special Order Maintenance

Overview

After a Special Order account has been created, the account information is available from the Back Office. Use the Back Office Special Order Account Maintenance functions to track, update, and maintain Special Order accounts.

Note: Refer to the *Oracle Retail Xstore Point-of-Service User Guide* for information about setting up Special Order accounts.

SPECIAL ORDERS REPORT

A Special Orders Report is available from the Back Office Reports Menu. This report shows when the account was created, the owner's name, the account's status, and the item amount.

Note: Refer to the *Oracle Retail Xstore Point-of-Service User Guide* for information about this report.

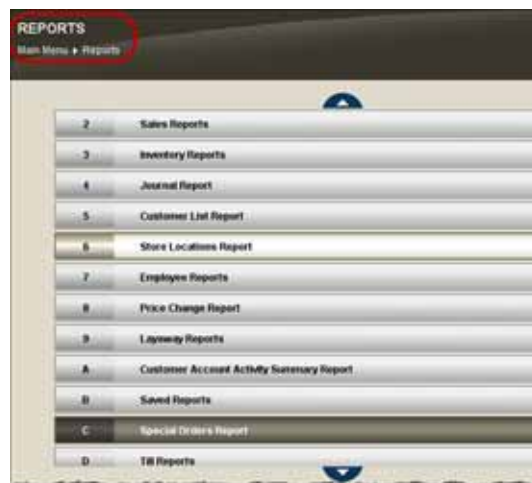


Figure 17-1: Reports Menu - Special Orders Report

Accessing Back Office Special Order Maintenance

1. Select the **Back Office** option.

Accessing Back Office Special Order Maintenance

2. After logging in to the Back Office, select the **Customer Maintenance and Accounts** option from the Back Office Main Menu and press [Enter].



Figure 17-2: Back Office Main Menu

Tip: You can also press the number or letter associated with the menu option on the keyboard to access the function.

3. Select the **Special Order Account Maintenance** option and press [Enter].



Figure 17-3: Customer Maintenance and Accounts Menu

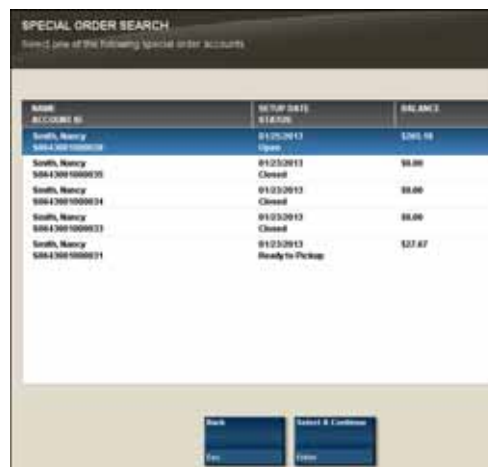
- Oracle Retail Xstore Point-of-Service displays the Special Order Search form, prompting for search criteria. Enter the criteria you want to use for finding a Special Order record and select **Process**:



The Special Order Search form is a web-based interface for finding special orders. It features a search bar at the top with a magnifying glass icon. Below the search bar, there are several input fields for search criteria: Special Order ID, Last Name, First Name, Special Order Status (a dropdown menu), Setup Date (with From and To date pickers), Last Activity Date (with From and To date pickers), and Sort By (a dropdown menu). At the bottom of the form, there are three buttons: Back, Help, and Process. Below these buttons are three keyboard shortcuts: Esc, F1, and F8.

Figure 17-4: Special Order Search Form

- If you enter a Special Order ID, Oracle Retail Xstore Point-of-Service displays that Special Order record if the ID exists and if it is unique.
- Your search criteria may result in multiple records being found. Your system may also be set up to display the accounts list even when only one record is found. You must select the record you want from the list and then press **[Enter]**.



The Special Orders Search Results List is a table displaying search results. It has three columns: NAME, ACCOUNT ID, and BALANCE. The table contains six rows of data. At the bottom of the table, there are two buttons: Back and Select & Continue. Below these buttons are two keyboard shortcuts: Esc and Enter.

NAME	ACCOUNT ID	BALANCE
Smith, Nancy	8004200100000000	\$205.18
Smith, Nancy	8004200100000005	\$0.00
Smith, Nancy	8004200100000004	\$0.00
Smith, Nancy	8004200100000003	\$0.00
Smith, Nancy	8004200100000001	\$27.67

Figure 17-5: Special Orders Search Results List

Oracle Retail Xstore Point-of-Service displays the Special Order screen for the selected record.

SPECIAL ORDER — Nancy T Smith | S0043001000031 | SETUP DATE: 01/23/2013 | LAST ACTIVITY DATE: 01/23/2013 | **READY TO PICKUP**

ITEMS | **ACTIVITY** | **COMMENTS**

CUSTOMER INFO

Sold To: Nancy T Smith
1234 Sunny Lane
Twinsburg, OH 44087

Company: Library
Email: lfox@micros-retail.com
Phone: 330-502-3561
330-502-8888

ORDER TOTALS

Subtotal: \$30.99
Fees: \$0.00
Tax: \$0.00
Total: \$30.99
Balance Due: \$27.67

STATUS	ITEM ID	DESCRIPTION	QTY	EXT PRICE
Received	S14003	Cotton Draw-string Aqua Short	1	\$26.99
Received	6006	Goose Down Pillow	1	\$4.00

Back | Help | Cancel Special Order | Previous Tab | Next Tab | Register
F10 | F11 | F12

Figure 17-6: Special Order Screen

Static Information Area

The upper portion of the screen shows the summary information for the Special Order account, including its status and customer contact information. This panel is always displayed when viewing any of the tabs on this screen.

Customer Information

The customer information area displays:

- **Sold To** - The purchasing customer's name and address information.
- **Company** - The purchasing customer's company, if applicable.
- **Email** - The purchasing customer's email address.
- **Phone** - The purchasing customer's telephone number(s).

Order Totals

The order totals information displays:

- **Subtotal** - The order subtotal (the shipping fee amount is not included in the subtotal).
- **Fees** - Additional cost associated with the order.
- **Tax** - The tax on the order.
- **Total** - The total for the order (the shipping fee amount is included in the total).
- **Balance due** - The amount due for the order.

Special Order Tab Information

Detailed Special Order information is presented on three tabs; *Items*, *Activity*, and *Comments*. You can navigate between the tab sections by using the **Previous Tab** and **Next Tab** menu options. Each tab contains specific information about the customer's Special Order account.

- **Items Tab:** Shows the item information for the Special Order account.
- **Activity Tab:** Shows the activity information for the Special Order account.
- **Comments Tab:** Shows any comments associated with the Special Order account.

Items Tab Information

SPECIAL ORDER — Nancy T Smith | S0643081000031 | SETUP DATE: 01/23/2013 | LAST ACTIVITY DATE: 01/23/2013 | **READY TO PICKUP**

ITEMS | ACTIVITY | COMMENTS

CUSTOMER INFO

Sold To: Nancy T Smith
1234 Sunny Lane
Twinsburg, OH 44087

Company: Library
Email: Rfox@micros.retail.com
Phone: 330-502-3561
330-502-8888

ORDER TOTALS

Subtotal: \$30.99
Fees: \$0.00
Tax: \$0.00
Total: \$30.99
Balance Due: \$27.67

STATUS	ITEM ID	DESCRIPTION	QTY	EXT PRICE
Received	514003	Cotton Draw-string Aqua Short	1	\$26.99
Received	6006	Goose Down Pillow	1	\$4.00

Back Help Cancel Special Order Previous Tab Next Tab Register
F1 F2 F3 F10 F11 F12

Figure 17-7: Items Tab Information

- **Status:** The status of the item (Open, Received, Ship, Picked Up, Cancelled, Cancelled to Escrow).
- **Item ID:** The item identifier.
- **Item Description:** The item description.
- **Quantity:** The item quantity.
- **Ext. Price:** The extended price for the item (price x quantity).

Activity Tab Information

SPECIAL ORDER [Nancy T Smith 50643001000031 SETUP DATE: 01/23/2013 LAST ACTIVITY DATE: 01/23/2013] READY TO PICKUP							
ITEMS		ACTIVITY			COMMENTS		
DATE	TYPE	ACTIVITY	ITEM ID	AMOUNT	STORE	REG	TRAN ID
01/23/2013	Item	Added	514003	\$26.99	643	1	794
01/23/2013	Item	Added	6006	\$4.00	643	1	794
01/23/2013	Deposit	Added		(\$3.32)	643	1	794
01/23/2013	Item	Picked Up	514003	\$26.99	643	1	798
01/23/2013	Item	Picked Up	6006	\$4.00	643	1	798
01/23/2013	Item	Picked Up	6006	\$4.00	643	1	799
01/23/2013	Item	Picked Up	514003	\$26.99	643	1	799
01/23/2013	Item	Picked Up	514003	\$26.99	643	1	806
01/23/2013	Item	Picked Up	6006	\$4.00	643	1	806
Back	Help				Cancel Special Order		
F10	F11				F5		
						Previous Tab	Next Tab
						F10	F11
							Register
							F12

Figure 17-8: Activity Tab Information

- **Date:** The date the Special Order activity took place.
- **Type:** The Special Order activity type associated with the amount of the activity.
- **Activity:** The action performed.
- **Item ID:** The item identifier.
- **Amount:** The amount for the associated type of activity on the account.
- **Store:** The store identifier where the Special Order activity took place.
- **Reg:** The register identifier where the Special Order activity took place.
- **Tran ID:** The transaction identifier for the Special Order activity.

Comments Tab Information

SPECIAL ORDER			Nancy T Smith 50643001000031		SETUP DATE: 01/23/2013 LAST ACTIVITY DATE: 01/23/2013		READY TO PICKUP			
ITEMS			ACTIVITY			COMMENTS				
CREATED TIME	CREATED BY	COMMENT								
March 22, 2013	100	Customer called to check on order status.								

Back	Help	Add Comment			Cancel Special Order					Previous Tab	Next Tab	Register
Esc	F1	F2			F3					F10	F11	F12

Figure 17-9: Comments Tab

- **Created Time:** The date this comment was added to this Special Order account record.
- **Created By:** The identifier for the employee who created the comment.
- **Comment:** The text that was entered.

Note: You can also add a new comment for this Special Order account record when viewing this tab. Select the *Add Comment* option, type a comment, then press [Enter]. Xstore adds the new comment to the Special Order account record.

To Cancel a Special Order Account

The option to cancel a special order account is available on all three tabs: *Items*, *Activity*, and *Comments* while you are viewing the account you want to cancel. Closed accounts cannot be canceled.

1. Search for the special order account that you want to cancel.
2. When Oracle Retail Xstore Point-of-Service displays the account, select the **Cancel Special Order** option.
3. Oracle Retail Xstore Point-of-Service displays a message asking if the customer is present during the cancellation of the special order account. Select **Yes** or **No**.



Figure 17-10: Checking for Presence of Customer

- If you select **No**, continue with [Customer Not Present](#).
- If you select **Yes**, continue with [Customer Present](#).

Customer Not Present

- If you select **No**, indicating the customer is not present:
 - a. The system displays a prompt asking if you are sure you want to cancel the special order account. Select **Yes**.

- b. The system displays a prompt indicating that the balance amount due to the customer has been transferred to an escrow account. Press [Enter] to respond to the prompt and continue.

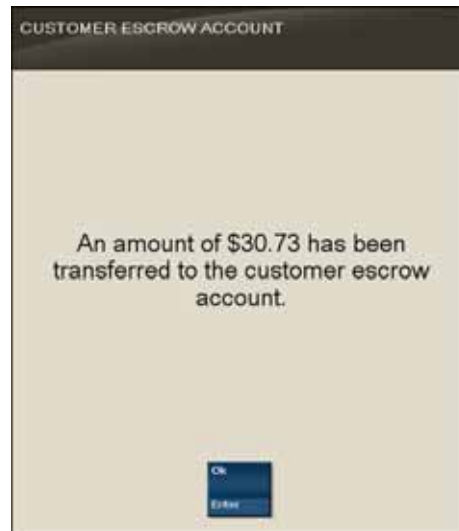


Figure 17-11: Customer Escrow Account Amount

- c. The system returns to the Special Order Search form. You may select Back to return to the Customer Maintenance and Accounts Menu and perform other options. See [Special Order Search Form](#).

The order status and item status are updated to **Cancelled to Escrow**.

SPECIAL ORDER		Nancy T Smith S0643001000031		SETUP DATE: 01/23/2013 LAST ACTIVITY DATE: 01/23/2013		CANCELLED TO ESCROW	
ITEMS		ACTIVITY		COMMENTS			
CUSTOMER INFO Sold To: Nancy T Smith 1234 Sunny Lane Twinsburg, OH 44087 Company: Library Email: lfox@micros.retail.com Phone: 330-502-3561 330-502-8088				ORDER TOTALS Subtotal: \$30.99 Fees: \$0.00 Tax: \$0.00 Total: \$30.99 Balance Due: \$0.00			
STATUS	ITEM ID	DESCRIPTION	QTY	EXT PRICE			
Cancelled to Escrow	514003	Cotton Draw-string Aqua Short	1	\$26.99			
Cancelled to Escrow	0006	Goose Down Pillow	1	\$4.00			

Navigation buttons: Back, Help, End, F1, Previous Tab, Next Tab, Register, F10, F11, F12

Figure 17-12: Cancelled to Escrow Status

To Cancel a Special Order Account

Customer Present

- If you select **Yes**, indicating the customer is present, Oracle Retail Xstore Point-of-Service displays the following prompt. Press **[Enter]** to continue.



Figure 17-13: Prompt if Customer Is Present

Note: Refer to the *Oracle Retail Xstore Point-of-Service User Guide* for more information about Special Order accounts at the POS.

- Select the **Register** option from the menu.



Figure 17-14: Register Menu Option

- At the Register Pre-Sale screen, assign an associate to the transaction if your system's configuration requires an associate and press **[Enter]**.
- The Customer Lookup form displays. Enter search criteria in the form for the customer whose special order account must be canceled and select **Process**.
- If more than one customer name matches your criteria, select the correct customer from the list and choose **Select & Continue**.
- The Register Sale screen displays and the customer who owns the special order account is associated with it. Select **Extended Transaction** from the menu.
- Select **Special Order** from the Extended Transaction menu.

7. Oracle Retail Xstore Point-of-Service displays a list of special order accounts for the selected customer. Select the special order account to be canceled and press [Enter] to continue.



8. The system displays the details of the special order account you selected in the **Special Order Mode**. Select the **Cancel Special Order** option on the menu.

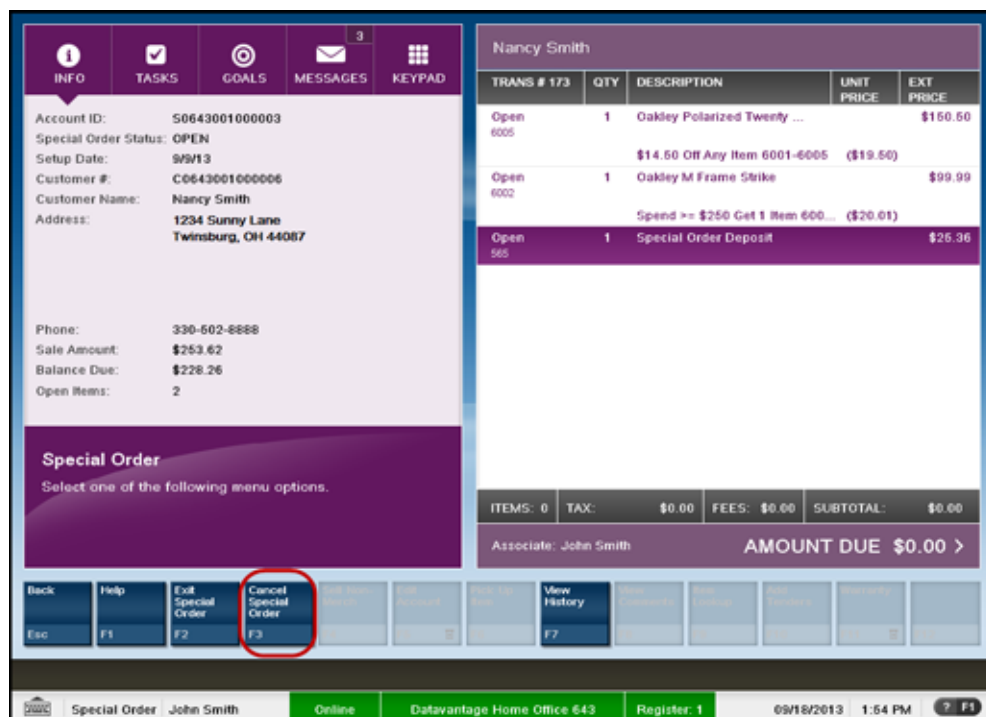


Figure 17-15: Special Order Screen

Note: For more information on cancelling special orders, see the *Oracle Retail Xstore Point-of-Service User Guide*.

Overview

You can print shelf labels for any item in the current item file. Shelf labels can be printed to a laser report printer if the report printer supports printing multiple labels per page, or to a label printer if using ZPL II communication.

In addition to scanning/entering items in order to print labels, the system also provides an option to print shelf labels for all of the items on an entire receiving document at once, and from previously saved batches if using ZPL II communication.

Note: You must load the appropriate label stock into the printer for each label printing job. The system does not perform a check for the correct stock before printing.

Printing Shelf Labels

1. After logging in to the Back Office (see [Accessing the Back Office](#)), select the **Inventory** option from the Main Menu and press [Enter].



Figure 18-1: Back Office Main Menu - Inventory Option

Tip: Instead of scrolling up or down the menu list to select an option, you can immediately access any option on the menu by pressing the number or letter associated with it on the keyboard (2=Flash Sales, 3=Inventory, C= Customer Maintenance and Accounts, etc.).

- At the Inventory menu, select the **Print Shelf Labels/Tickets** option and press **[Enter]**.



Figure 18-2: Inventory Menu

- When prompted scan the barcode or manually enter the item Id and press **[Enter]**.

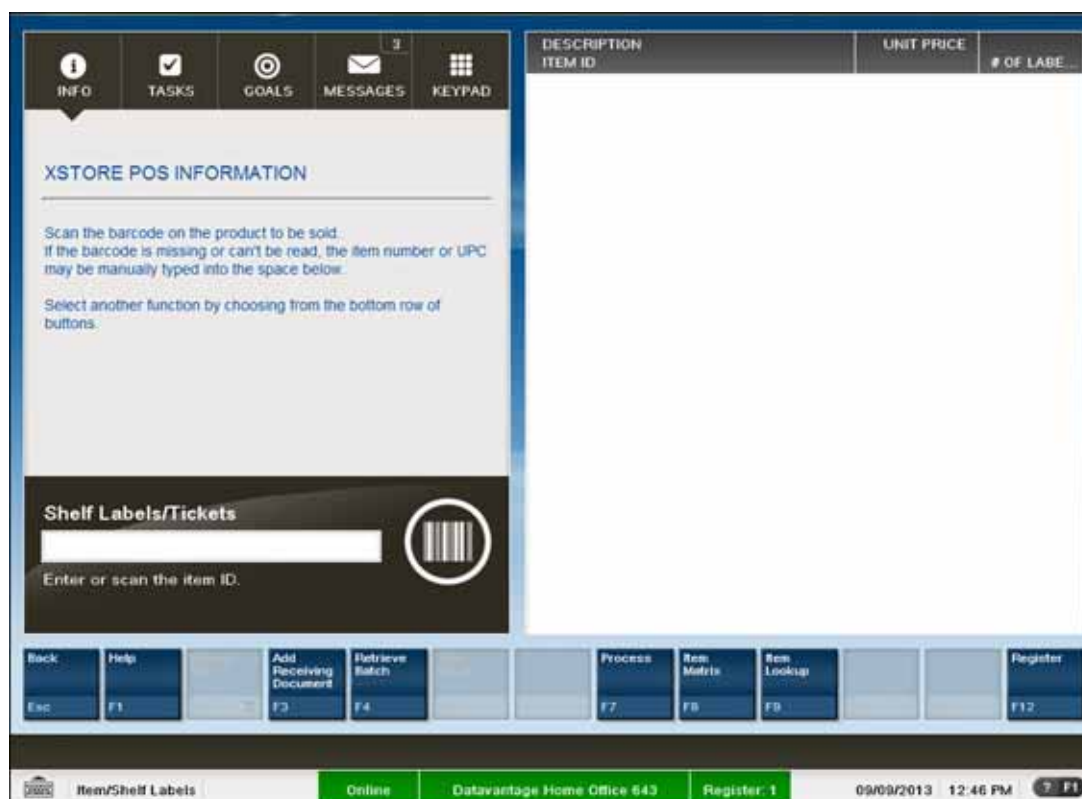


Figure 18-3: Item Id Prompt

Note: If you are using ZPL II communication with a label printer, the *Retrieve Batch* option is available if you previously defined and saved a named print batch. See [To Retrieve a Batch - ZPL II Only](#).

4. When prompted for the number of labels you want to print for this item, type the quantity and press [Enter].

Figure 18-4: Label Quantity Prompt

Note: By default, the system displays the number of items in your on hand inventory.

5. The next steps depend upon your label printer setup:
 - If you *are not* using ZPL II communication with a label printer, continue with step 6 below.
 - If you *are* using ZPL II communication with a label printer, skip to [ZPL II Label Printers](#).
6. Oracle Retail Xstore Point of Service adds each Item Id and number of labels to the View Port area of the screen. The item description and unit price are also shown.

DESCRIPTION	ITEM ID	UNIT PRICE	# OF LABELS
COTTON JERSEY TIERED DRESS	1002	\$119.00	10

Figure 18-5: View Port Displays Items Added for Labels

Additional Options

- Note:**
- **Change Item** - To remove an item from the list, change the label quantity, or change the item label price, see [To Change an Item](#).
 - **Item lookup** - To search for an item to add to the list, see [To Look Up an Item](#).
 - **Add Receiving Document** - To add items from a receiving document, see [To Add a Receiving Document](#)
-

7. When you have entered and/or edited all the items and label quantities, select the *Process* option to continue with label setup.
8. Oracle Retail Xstore Point of Service prompts you to select the type of label from the list. Select the label type and press **[Enter]** to continue.



9. Oracle Retail Xstore Point of Service shows the number of label sheets you need and prompts you to select the location for the first printed label. Select the location for the first label and press **[Enter]**.

Note: The column/row you selected is shown in the Selection area on the form. In Figure 18-6, Column: 1, Row: 1:

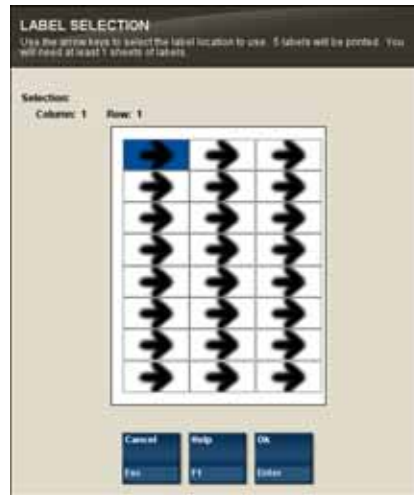


Figure 18-6: Label Location Prompt

Tip: Label location selection allows you to use partial sheets of labels to ensure that expensive labels are not wasted.

10. When prompted, press [Enter] to acknowledge the message informing you of the number of label sheets required.



Figure 18-7: Print Label Prompt

11. Oracle Retail Xstore Point of Service flashes a message **Calculating label layout** and prints the labels.

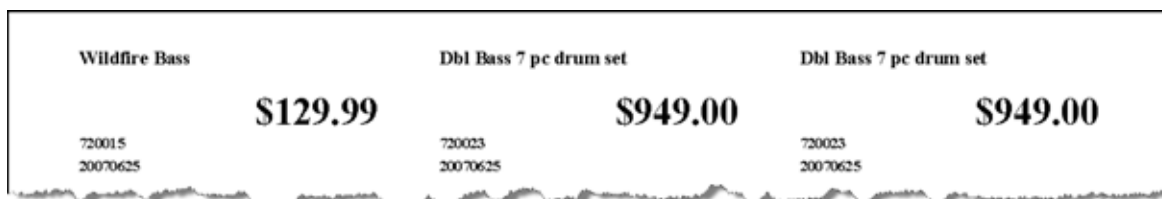


Figure 18-8: Sample Labels

Note: If you exit from the Item/Shelf Labels screen without printing the labels, Oracle Retail Xstore Point of Service displays a warning message that all current label settings will be lost. Select **Yes** to return to the Inventory Menu or select **No** to continue working with labels.

ZPL II Label Printers

...continued from step 5.

Note: If you previously defined and saved a Named Batch, you can retrieve the batch by selecting **Retrieve Batch** from the Item/Shelf Labels menu. See [To Retrieve a Batch - ZPL II Only](#).


1. After entering the item Id and label quantity:
 - If the item you entered is associated with a pre-defined stock label type, the item is automatically added to the view port with this icon . Go to step 2.
 - If the item you entered is not associated with a pre-defined stock label type, you are prompted to select a label type from the list. This assigns the selected label type to the item for this instance only not for future label printing, and does not affect future label printing.



Figure 18-9: Stock Label Types

- Select the stock label type.
- Select a processing option:
 - * Select **Process** to associate the stock label type to the item.
 - * <OR>
 - * Select **Assign To All** to assign the selected Stock type to all items in the current list.

Note: All items in the list will print on the same label stock type. However, this selection will not update the pre-defined stock type of the items and will not apply to items that are added after the Assign To All option is selected.

- Xstore returns to the Enter/Scan Item Id prompt screen.
2. The following options are available before printing the labels:
 - **Change Item** - To remove an item from the list, change the label quantity, change the item label price, or change an item's stock label type, see [To Change an Item](#).
 - **Item lookup** - To search for an item to add to the list, see [To Look Up an Item](#).
 - **Add Receiving Document** - To add items from a receiving document, see [To Add a Receiving Document](#).
 - **Retrieve Batch** - To print a previously saved batch, see [To Retrieve a Batch - ZPL II Only](#).
 - **Save Batch** - To save this label printing instance as a batch, see [To Save a Batch - ZPL II Only](#).
 3. When you have entered and/or edited all the items and label quantities, select the **Process** option to continue with label printing.

Tip: Before printing, Oracle Retail Xstore Point of Service automatically groups the items by stock type and verifies all items are associated with a label stock type. If Oracle Retail Xstore Point of Service detects that any of the items do not have an assigned label stock, you are prompted to select a label stock.

4. Xstore displays the Load Label Type message.

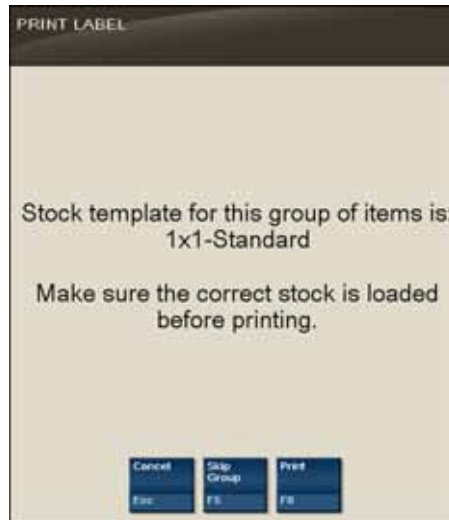


Figure 18-10: Load Label Stock Message

- Select **Print** to print the labels in this stock group. Continue printing all stock groups, making sure you have loaded the appropriate label stock for each. Go to step 5.

<OR>

- Select **Skip Group** if you do not want to print these labels at this time. If there is another stock group, the Load Label Type message displays for the next group. Make sure you have loaded the appropriate label stock for each group. Continue printing all stock groups.

Go to step 5 below.

Note: You can select **Back** to return to the item entry screen.

5. If prompted, select **Yes** to save and name this batch so it can be printed in the future, or select **No** if you do not want to print this batch again.

If you are not prompted, you can save the batch by selecting the **Save Batch** option. For more information see [To Save a Batch - ZPL II Only](#) and [To Retrieve a Batch - ZPL II Only](#).

To Change an Item

Select **Change Item** to edit an item. The following options are available from the *Change Item* menu before you print labels for the items.

Change Quantity: Select **Change Quantity** to change the number of labels to be printed.

- Use the arrow keys to select the item and press [Enter].
- At the Enter Quantity prompt (see Figure 18-4), enter the number of labels you want to print for the item and press [Enter].

Oracle Retail Xstore Point of Service updates the label quantity on the View Port for the item.

Change Price: Select **Change Price** to change the price that is printed on the label.

- Use the arrow keys to select the item and press [Enter].
- At the Enter Price prompt, enter the price of the item to be printed on the label and press [Enter].

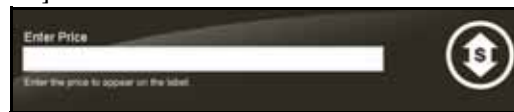


Figure 18-11: Enter Price Prompt

Oracle Retail Xstore Point of Service updates the label unit price on the View Port for the item.

Change Label - [ZPL II ONLY] Select **Change Label** to specify a different stock label type for the item.

- Use the arrow keys to select the item and press [Enter].
- Select the stock label type.



Figure 18-12: Stock Label Types



- Select a processing option:

Select **Process** to associate the Stock Label type to the item.

<OR>

Select **Assign To All** to assign the selected Stock Label type to all items in the current list.

Note: All items in the list print on the same label stock type. This selection does not update the pre-defined stock type of the items and does not apply to items that are added after the Assign To All option is selected.

Delete Item: Select **Delete Item** to remove an item from the list of item labels to be printed.

- Use the arrow keys to select the item and press **[Enter]**.

Important: There is no confirmation prompt before deleting the item. Be sure you are highlighting the correct item in the View Port display area.

Oracle Retail Xstore Point of Service removes the item from the list of item labels to be printed.

To Look Up an Item

Item Lookup: Select **Item Lookup** to find an item using the item lookup search criteria form. The item can be added to the list of item labels to be printed.

- At the Item Lookup form, enter the search criteria and select **Process**.

Figure 18-13: Item Lookup Form

Tip: Your store may be configured with advanced lookup options, which provide the ability to add Custom Groups and Details to further define your search criteria. Select the exclude box to not include an item in your search.

The 'ITEM LOOKUP' screen features a search criteria section with the following fields:

- Item ID: [Text Input]
- Department: [Dropdown Menu: <ALL>]
- Subdepartment: [Dropdown Menu: <ALL>]
- Class: [Dropdown Menu: <ALL>]
- Subclass: [Dropdown Menu: <ALL>]
- Style ID: [Text Input]
- Description: [Text Input]
- Gender: [Dropdown Menu: <ALL>]
- Season: [Dropdown Menu: <ALL>]
- Material: [Dropdown Menu: <ALL>]
- Line: [Dropdown Menu: <ALL>]
- Shoe: [Dropdown Menu: <ALL>]
- Use Type: [Dropdown Menu: <ALL>]
- Exclude: [Checkbox]

- If more than one item matched the search criteria you entered, select the item from the list and **Ok**. Oracle Retail Xstore Point of Service displays the item information.
- Select the **Add Item** option to include the item on the list of item labels to be printed.

The 'Item Lookup Results' screen displays detailed information for a 'Red M Tee Shirt'. The top section shows item details: Item ID 338182, Style # 338988, Color Red, Size Medium, and In Stock status. Below this, there are tabs for Product Information, Inventory Stock, Related Items, Style Grid, Price History, and Sales History. The 'Product Information' tab is active, showing a hierarchy of Department (Men's Apparel - 738), Subdepartment (Men's Shirts - 738188), and Season. It also lists Vendor Information (Vendor, Orderable: Yes), Product Attributes (Item Type: STANDARD, Stock Status, Reorderable: Yes, Today's Status, Next Status), and other details like Class (Men's Tees - 738188188), Subclass, Style ID (338988), Part #, Order Lead Days (8), Unit of Measure, Tax Group (State/County Tax), and Resourcing Plan. A visual of the red t-shirt is shown on the right, with the price \$12.98. At the bottom, there are buttons for Back, Home, Add Item, and a numeric keypad.

Figure 18-14: Item Lookup Results - Add Item Option

- Enter the number of labels to be printed for the item and press **[Enter]** to add the item to the list of item labels to be printed. By default, the on hand quantity for the item is shown in the Label Quantity focus bar prompt (Figure 18-4).

To Add a Receiving Document

Add Receiving Document: Select this option to print labels for *all* of the items on a receiving document.

- At the Document Search form, scan the barcode for the Receiving Document or enter search criteria to locate the Receiving Document.

Figure 18-15: Document Search Form

Oracle Retail Xstore Point of Service displays a list of receiving documents that match the criteria you entered. You may need to scroll through the list if multiple documents are displayed.

Figure 18-16: List of Receiving Documents

- Select the receiving document that has the items that need labels and choose **Ok**. Oracle Retail Xstore Point of Service adds all of the items on the Receiving Document to the list of item labels to be printed, and displays them in the View Port area of the screen.

Note: By default, a label will be printed for each item/quantity in the shipment. Use the *Change Quantity* option to edit the number of labels to be printed.

To Save a Batch - ZPL II Only

Batch options are only available when using ZPL II. Use this option to assign a name to the current list of items so it can be used again in the future. See [To Retrieve a Batch - ZPL II Only](#) below for information about reusing the batch to print labels.

1. Select **Save Batch** from the Item/Shelf Labels screen.
2. When prompted, enter a name for the batch and press **[Enter]**.

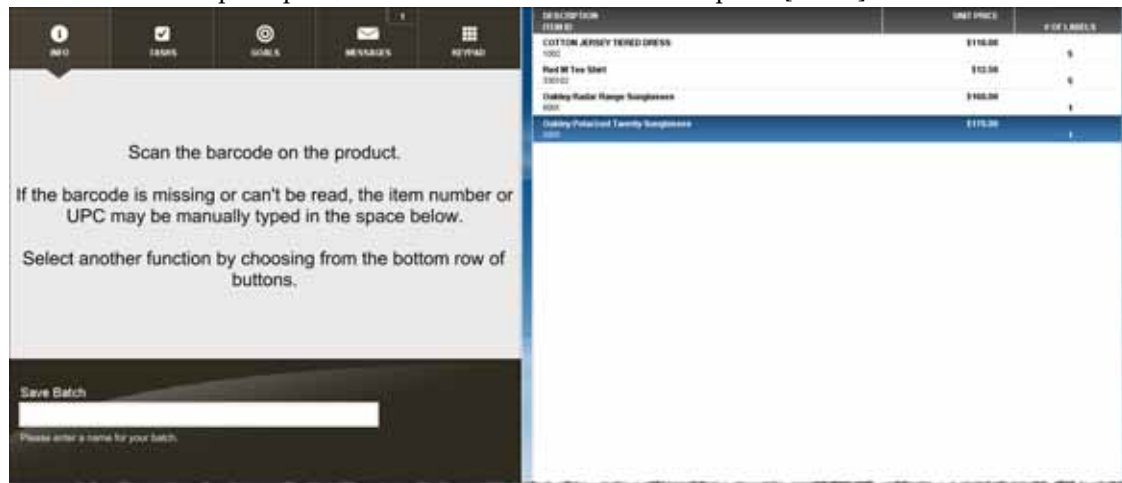


Figure 18-17: Enter Batch Name Prompt

3. Xstore saves the batch information and it can be retrieved for printing later.

To Retrieve a Batch - ZPL II Only

Use this option to retrieve a list of previously save batches. See [To Save a Batch - ZPL II Only](#) above for more information about saving a batch for reuse.

1. Select **Retrieve Batch** from the Item/Shelf Labels screen.
2. When prompted, select a Batch from the list and press **[Enter]**.
3. The items in the batch are shown on the View Port.
4. Continue with step 2.

To Delete a Batch - ZPL II Only

Use this option to delete a previously saved batch.

1. Select **Retrieve Batch** from the Item/Shelf Labels screen.
2. When prompted, select a Batch from the saved Batch List and select **Delete Batch**.
3. At the confirmation prompt, select **Yes** to delete the batch. Selecting **No** returns to the saved Batch List and the selected batch is not deleted.
4. Xstore returns to the Saved Batch list and the selected batch is removed from the list.

Training Mode

Overview

Training Mode allows you to train new employees on the system—at both the POS Register and in the Back Office—without being concerned that any live data may be impacted.

In Training Mode, store employees can simulate most of the functions provided by Oracle Retail Xstore Point of Service in normal operating mode. Any transactions performed in Training Mode are distinguished from transactions conducted in operating mode in several ways. First, the data elements associated with live and training transactions are separated from each other. In addition, any artifacts related to them, such as receipts, reports, etc., are also kept separately.

Your system's configuration applies to both the live and training modes. For example, if you are using Till Accountability in the live mode, the rules for Till Accountability also apply in training mode. Even though a till may be attached to the register in live mode, the first time that you log into the training mode you must assign a till to an employee and attach a till to the register from the Back Office.

You can exit training mode at any time and return to live operating mode.

Accessing Training Mode

Tip: Training Mode can be accessed from both the Register Login screen and the Back Office Login screen.

You can log into the training mode using the same password that you use in the live, production mode. In Training Mode, Oracle Retail Xstore Point of Service shows only the functions and menu options that are permitted by your security level in production mode.

Starting Training Mode

1. To log in to Training Mode from the Back Office:
 - * Log in to the Back Office using your employee ID and password.

Starting Training Mode

- * Select the **Enter Training Mode** option at the Back Office Main Menu.



Figure 19-1: Back Office Main Menu - Training Mode Option

Note: If you select the *Enter Training Mode* menu option *before* logging in to the Back Office, Xstore displays the Register login screen in Training mode.

2. Oracle Retail Xstore Point of Service prompts to confirm that you want to enter Training Mode. Select **Yes** to enter Training Mode. If you select **No**, Oracle Retail Xstore Point of Service returns to the Back Office Main Menu or to the Register Login screen, depending upon the location from which you logged in.



3. When prompted, enter your employee ID and password.

The system displays the same screen that it would in regular (non-training) mode. If the system is configured to prompt for a commissioned associate in regular mode, that screen also appears in training mode. If your system is configured to show the Customer Lookup form, that form displays.

Note: The background color of the menu options and the screen is red. The Title Bar name in the upper right corner of the screen toggles between the words “Register” or “Back Office” and “TRAINING”.



Figure 19-2: Training Mode - Back Office Screen Example

You can perform most functions exactly the same way as when the register is in normal production mode. However, the following functions *cannot* be performed while the register is in Training Mode:

- The cash drawer does not open.
- No authorizations or settlements can be performed.
- Oracle Retail Xstore Point of Service does not communicate with the Environment (Xenvironment is an application that interacts with Oracle Retail Xstore Point of Service and the operating system to perform some critical functions, particularly during store opening and closing). For this reason, you can simulate a store close without impacting live operations in your store.

If your system is configured to print receipts while in training mode, the receipts clearly indicate that they were generated while the system was in Training Mode.

To Exit Training Mode

1. Select the **Exit Training Mode** option.
2. Oracle Retail Xstore Point of Service prompts you to confirm that you want to exit Training Mode. Select **Yes** to exit from Training Mode.

Starting Training Mode

Oracle Retail Xstore Point of Service returns to normal production mode.

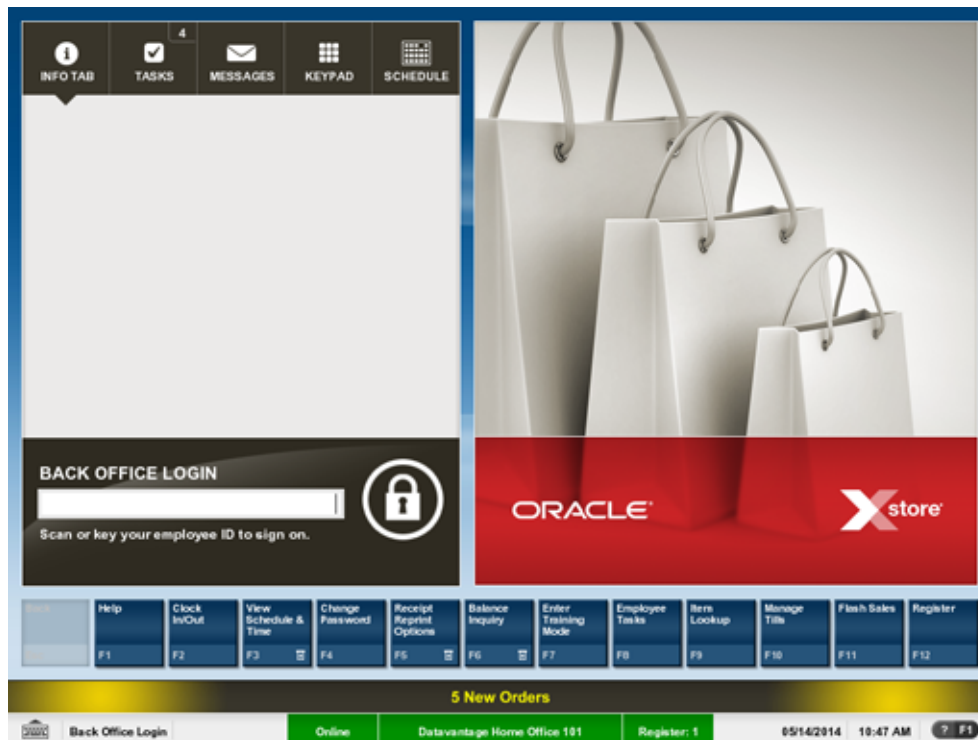


Figure 19-3: Back Office Login Screen - After Exiting Training Mode

Miscellaneous Functions

Overview

This chapter includes information about the functions that can be performed in the Back Office, but are not closely associated with a specific functional task. Like other Back Office functions, these activities are logged by the system for accountability and reporting purposes.

The following functions are included in this section:

- Change your password - See [Changing Your Password](#).
- Open a browser to access the World Wide Web - See [Opening a Browser](#).
- Dashboard View - See [Using the Dashboard](#).
- Enabling/Disabling Hardware - See [Enabling and Disabling Hardware](#).
- Reinitializing Hardware - See [Reinitialize Hardware](#).
- Managing Networked Cash Drawers - See [Managing Networked Cash Drawers](#).
- Configuring Networked Cash Drawers - See [Configuring Networked Cash Drawers](#).
- Releasing Cash Drawers - See [Releasing a Cash Drawer](#).
- Mobile Client Device Access - See [Mobile Client Device Access](#).
- Updating the PINpad key - See [Update PINpad Key \(TransArmor\)](#).
- Issuing Tax Free Invoices - See [Issuing Tax Free Invoices](#).
- Reprinting Tax Free Invoices - See [Reprinting Tax Free Invoices](#).
- Voiding Tax Free Invoices - See [Voiding a Tax Free Invoice](#).
- Base Data Update - See [Base Data Update](#).
- Tax Free Invoice Returns - See [Tax Free Invoice Returns](#).

Changing Your Password

Note:

This function is also available from the POS register and the Employee Maintenance Menu in the Back Office. Refer to [Employee Maintenance](#).

If you need to change another employee's password, not your password, use the process described in [Changing an Employee's Password](#).

Changing Your Password

The **Change Password** option is available from the Back Office Login screen - *before* you log in to the system.

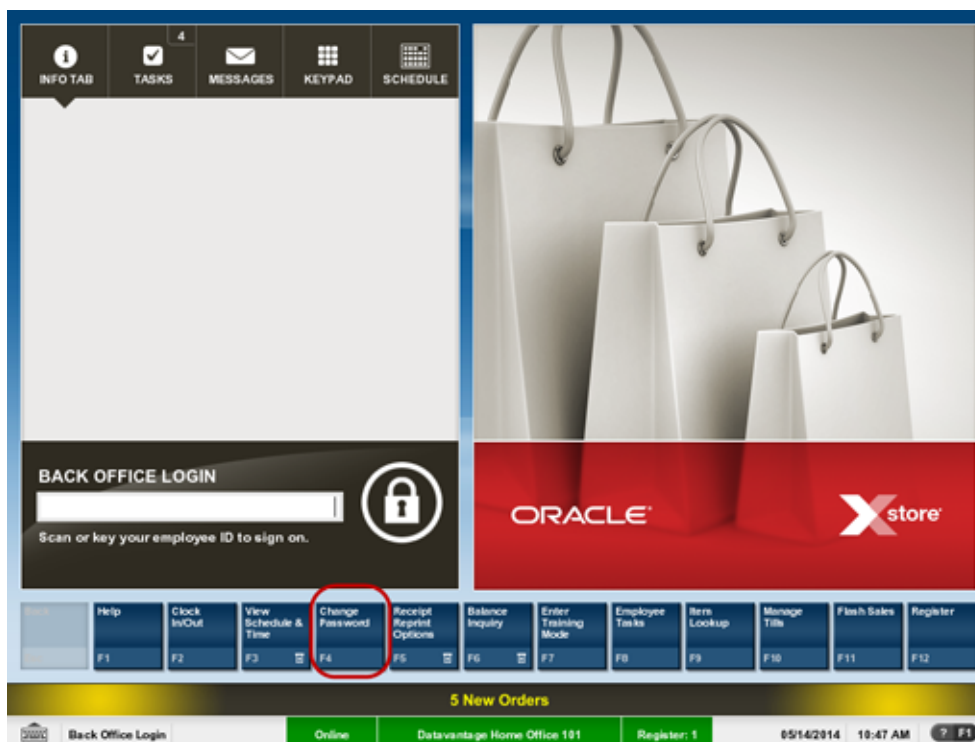


Figure 20-1: Back Office Login Screen

1. Select the **Change Password** option from the Back Office Login screen. Oracle Retail Xstore Point of Service prompts for your employee ID. If you are using the Fingerprint Scan, the prompt asks for your fingerprint.



Figure 20-2: Change Password Prompt: Scan or Key Entry Accepted

2. Type or scan your Employee ID at the Change Password prompt and press **[Enter]**, or scan your finger if your system is set up to use a biometric device.
3. If prompted for your password, enter your **current** password and press **[Enter]**.

Note: If you forgot your current password and your store is configured with challenge questions, see [Forgot Password Challenge Questions](#).



Figure 20-3: Change Password Login Screen

4. Oracle Retail Xstore Point of Service prompts you to enter and confirm your new password. Type your new password in the first field, and type the password again to confirm it in the field below.

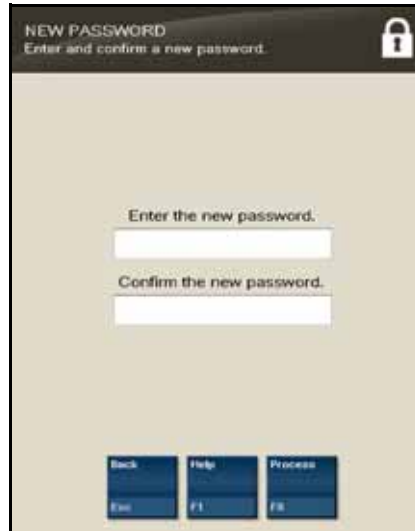


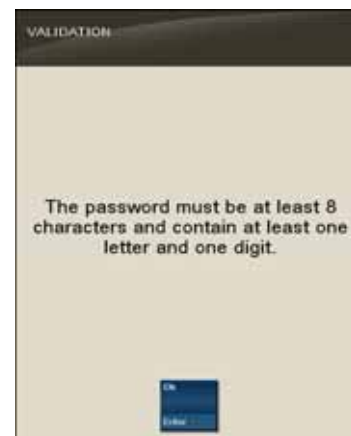
Figure 20-4: New Password Prompt

Tip: Passwords may be case sensitive, so be sure you note whether the keyboard Caps Lock key is on or off when you enter and confirm your new password.

5. Select **Process** to store your new password:
 - If the system accepts the password, a confirmation message is shown indicating that your password was changed. Press [Enter] to acknowledge this prompt and return to the Login screen.

Note: The system may enforce certain rules regarding passwords. For example, a minimum number of characters may be required, and there may be a restriction on how frequently you can reuse an old password.

- If the new password you entered is invalid (according to your system's password requirements), the system displays a message. You must press [Enter] to acknowledge the prompt.



Oracle Retail Xstore Point of Service returns to the New Password prompt and you can enter a different password.

Forgot Password Challenge Questions

If your store is configured to use password challenge questions, you can re-set your password without knowing your current password by answering the questions. The answers to the questions are set up in the Back Office see the [Establish Password Challenge Questions](#).

1. Select the **Change Password** option from the Register Login screen or the Back Office Login screen. Oracle Retail Xstore Point of Service prompts for your employee ID.
2. Type or scan your employee ID at the Change Password prompt and press **[Enter]**. If fingerprint scans are supported, scan your finger at the prompt.
3. Select the **Forgot Password** menu option.



Figure 20-5: Forgot Password Menu Option

4. Enter your last name for verification.

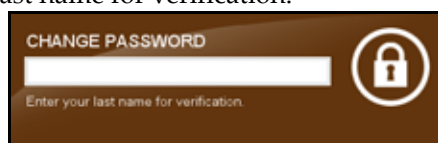



Figure 20-6: Change Password Verification

5. For each challenge question, type the answer and then select **Next Question**. For the last question, select **Process**.



6. Once you've answered all the questions correctly, the New Password prompt displays. Type your new password in the first field and type the password again to confirm it in the field below.




Figure 20-7: New Password Prompt

7. Select **Process** to store your new password. If the system accepts the password, a confirmation message is shown indicating your password has been changed.
8. Press **[Enter]** to acknowledge this prompt and return to the Register Login screen.

Note: The system may enforce certain rules regarding passwords, such as the minimum number of characters required or whether you can reuse an old password.

If your new password is not valid, press **[Enter]** to acknowledge the validation prompt and try again.

Opening a Browser

Your system may provide an option to access a web browser for navigating Internet sites. The option is available from the Back Office Main Menu. If this option is available to you, you may have a selection of browsers from which you can choose.

1. Select the **Browser** option from the Back Office Main Menu.



2. Select an option from the configured websites listed on the Browser menu. Use the up and down arrow keys to navigate among the options and press **[Enter]**.



Figure 20-8: Browser Menu Options

The system opens the supported browser within the Oracle Retail Xstore Point of Service application and displays the website that you selected. For example, Oracle website is shown in the figure that follows. The Browser option allows you to access information without having to exit from Oracle Retail Xstore Point of Service.

- If you navigate to additional websites from within the browser, use the **Browser Back** or the **Browser Forward** options to navigate among other websites that you visited during a browser session.



Figure 20-9: Open Browser Example

- After you are finished working in the web browser, select the **Back** option to return to the list of websites on the Browser Menu in Oracle Retail Xstore Point of Service. You may then repeatedly use Back to return to previous screens as necessary.

Using the Dashboard

The goal of the dashboard is to automatically show timely sales data information—collected from various areas within the organization—in one place. The data shown on the screen is an analysis as to how your business is operating; using graphics, summaries, and lists to display the information.

Information shown on the Dashboard includes:

- Sales Performance - WTD, MTD, and YTD values as a running totals section, up to and including the current day's sales
- Net Sales for the Top 5 Departments from today
- The top 5 best-selling items from today
- The top 5 sales associates from today
- Store Goals performance data

In addition to the information displayed on the page, menu options are provided to allow you to view and print the Flash Sales report, the Daily Sales report, the Best Sellers report, and the Employee Tasks report.

Using the Dashboard

To view the Dashboard, select the **Dashboard** option from the Back Office Main Menu and press [Enter].



Dashboard Information

The Dashboard screen is divided into several informational areas as shown in the figure below:

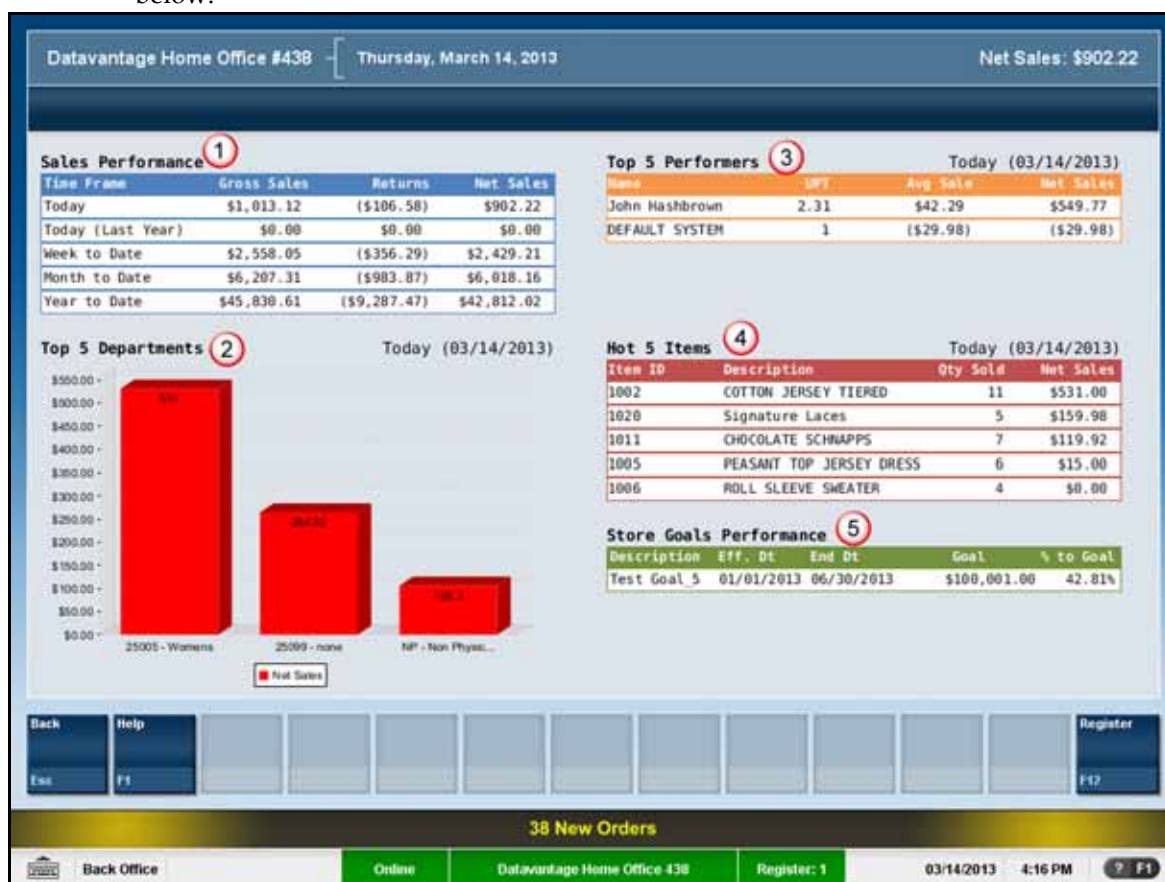


Figure 20-10: Dashboard Screen

1 Sales Performance

This section shows the Gross Sales, Returns, and Net Sales for Today, a year ago (Today - last year), Week-to-Date, Month-to-Date, and Year-to-Date. The data displayed in this section is a running totals section. This information shows the current day's sales in near real time, so these values change depending on when the Dashboard is displayed.

Note: Additional sales data is available on the Flash Sales and other Sales reports.

Top 5 Departments

This section shows a graph representing the top 5 department sales. One axis of the graph shows the Net Sales dollars, and the other shows the Department ID.

Top 5 Performers

This section shows the top 5 sales associates from today, listed in descending order, based on Net Sales dollars. In addition to Net Sales dollars, the Units per Transaction (UPT), and Average Sale dollars are also displayed.

Note: How the UPT and Average Sale data are calculated:

- Units per transaction = total units sold/# of transactions
 - Average Sale = Net Sales/# of transactions
-

Hot 5 Items

This section shows the top 5 selling items from today. The items are ranked in descending order, based on Net Sales dollars. The item ID, description, and quantity sold are shown for each item in the list.

Note: Non-merchandise items are not included in this list.

Store Goals Performance

This section shows the currently active goals for the store. Information shown here includes the goal description, effective and ending dates, the goal, and the percent completed toward the goal.

Enabling and Disabling Hardware

This option provides a way to temporarily disable and then enable hardware devices. This process writes out a `hardwareconfig.xml` file to a patch directory for the devices that have been disabled, reloads the hardware configurations, and then re-initializes the hardware.

To begin, select the **Enable/Disable Hardware** option from the Back Office Main Menu.




Figure 20-11: Back Office Main Menu - Enable/Disable Hardware Option

- To *disable* a device or devices, go to [To Disable a Hardware Device](#)
- To *enable* a device or devices, go to [To Enable a Hardware Device](#).

To Disable a Hardware Device

1. Press the [Spacebar] to select a hardware device—or devices—to be disabled, then select **Disable Device**.

Note: The green check mark  next to the device name indicates the device is currently enabled.

The selected device(s) will be highlighted in blue.

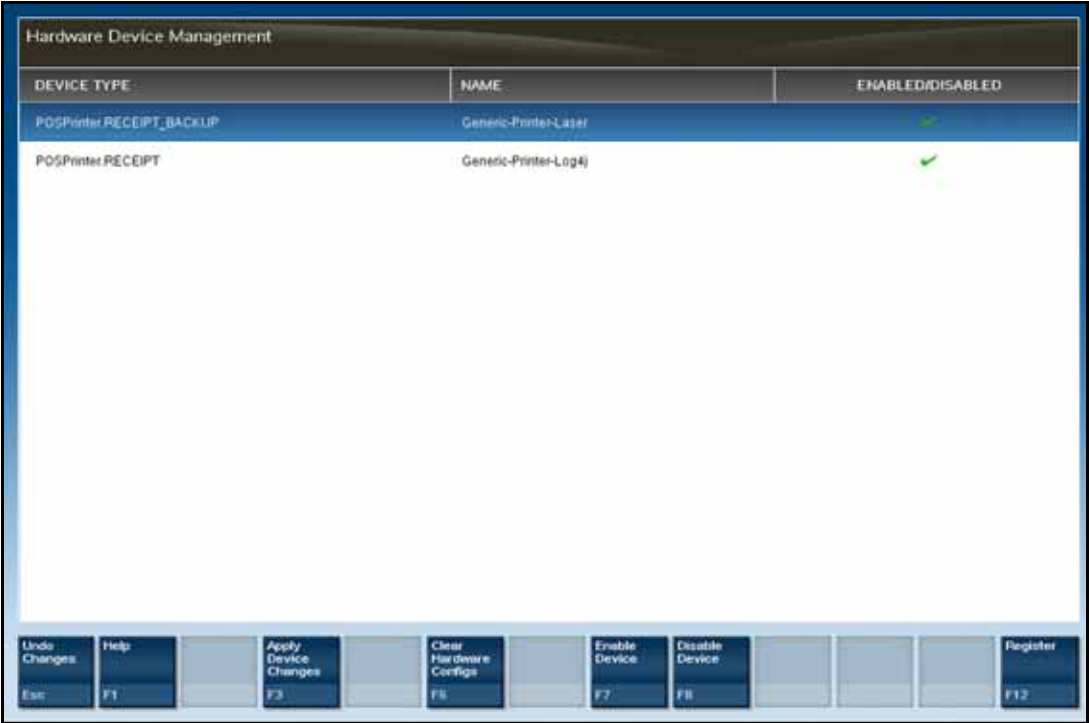


Figure 20-12: Hardware Device Management Screen - No Devices Selected

2. When prompted, press [Y] to confirm you want to disable the selected device(s).

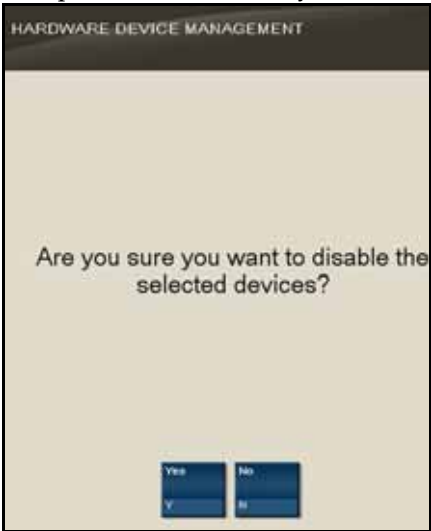


Figure 20-13: Confirm Disable Device

- On the Hardware Device Management screen, the red **X** indicates the device is disabled. Verify this is the device or devices you want to disable and select **Apply Device Changes**.

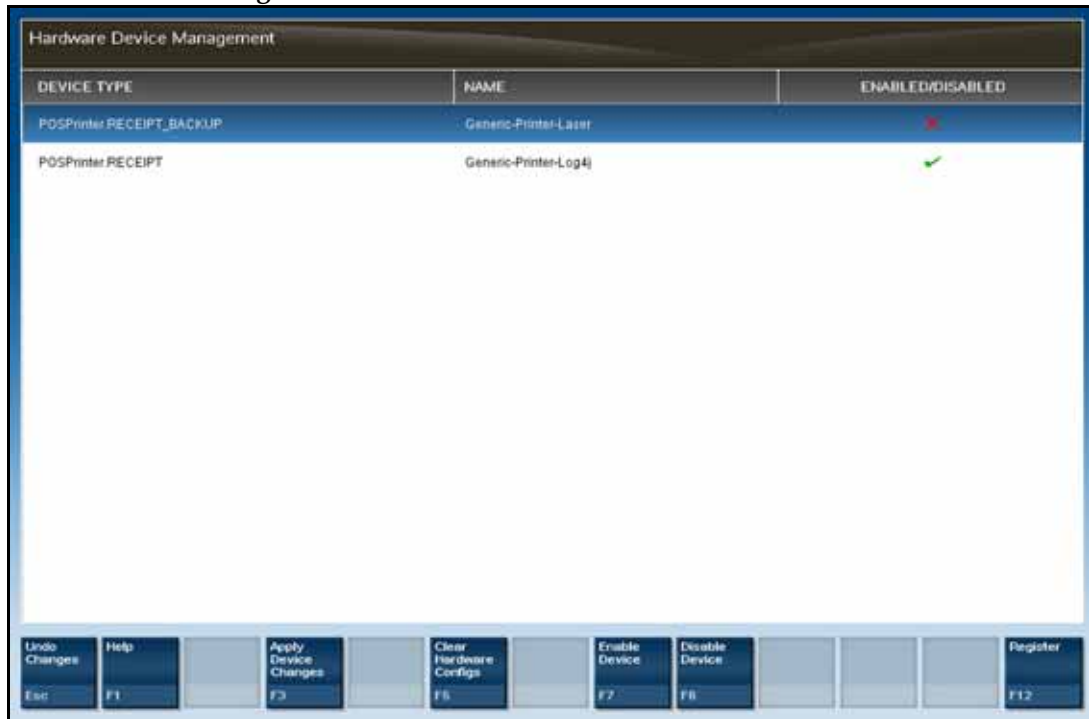


Figure 20-14: Hardware Device Management Screen - Disabled Devices

- When prompted, press [Y] to confirm you want to disable the selected device(s). The system writes out a temporary `hardwareconfig.xml` file with the devices that have been disabled.

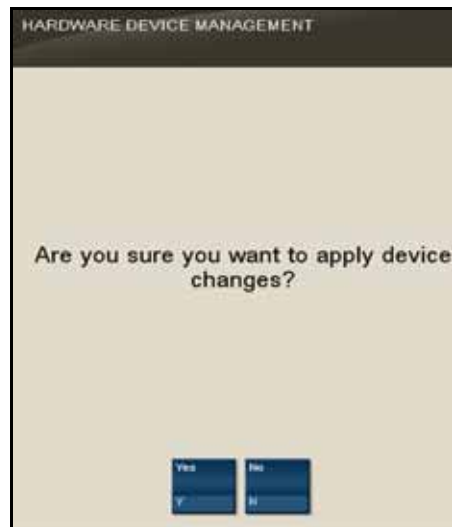


Figure 20-15: Confirm Apply Device Changes

To Enable a Hardware Device

Note:

You have two options to enable a hardware device:

- Select **Enable Device** to enable only the selected device(s), without removing any configuration overrides (patch file entries) that may exist for other devices. For example, this option can be used when you have disabled several devices and only want to enable one device, not all of the disabled devices.
- Select **Clear Hardware Configs** to remove all overrides to the device configuration file, which will enable all disabled devices. For example, this option can be used when you want to enable all disabled devices at once. The system removes the hardware configuration overrides (patch file entries) that were created when the devices were disabled.

1. Select a hardware device, or devices, to be enabled.

The red **X** next to the device name indicates the device is currently disabled.

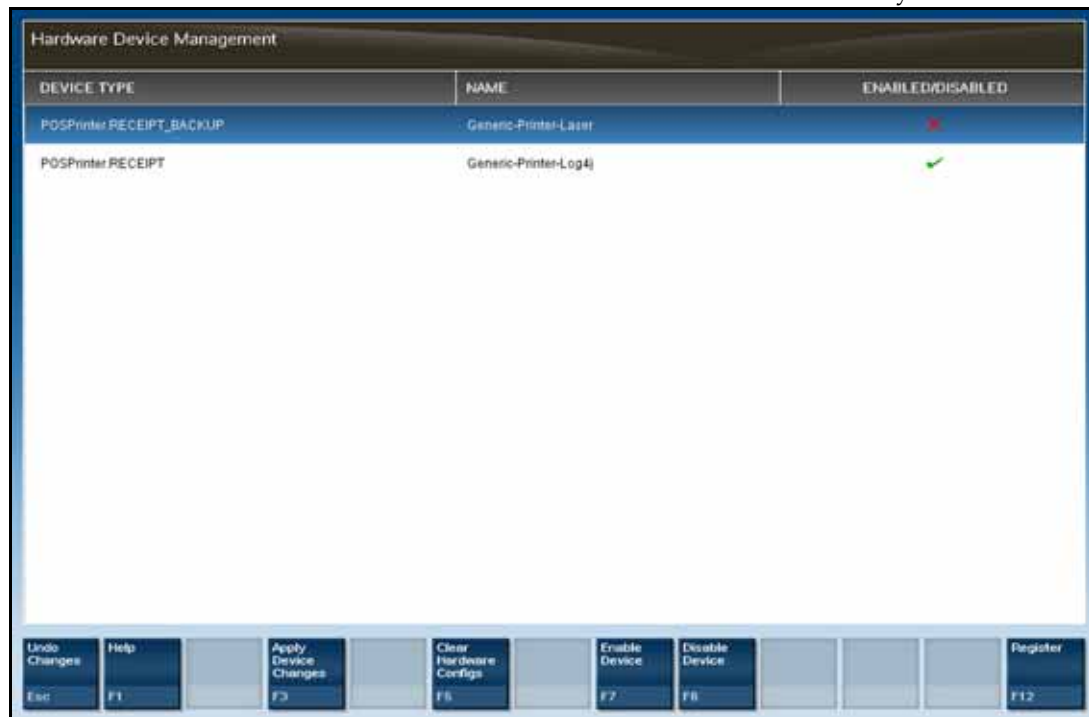


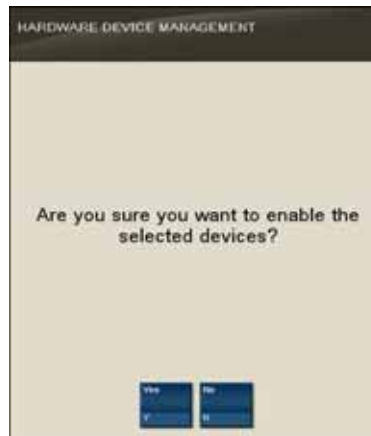
Figure 20-16: Hardware Device Management Screen - Disabled Devices

2. Enable the device(s).

- To enable one or more selected devices:
 - * Select the disabled device(s) in the list and select **Enable Devices**.
 - * Select **Apply Device Changes**.

Reinitialize Hardware

- * When prompted, press [Y] to confirm you want to enable the selected devices.



<OR>

- To enable *all* disabled devices at once:
 - * Select **Clear Hardware Configs**. You do not need to select a hardware device in the list when using this option. All disabled devices are enabled by default.
 - * When prompted, press [Y] to confirm you want to remove all the configuration overrides in the temporary `hardwareconfig.xml` file.

3. The hardware devices are enabled.

Note: If there are any device errors detected when enabling a device, the system displays a warning message about the non-functional devices.

Reinitialize Hardware

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

Note: Reinitializing hardware is also used to register a VeriFone device with TransArmor.

Networked Cash Drawers

Managing Networked Cash Drawers

When working with Xstore Mobile devices, networked cash drawers allow monies to be collected.

1. Select the **Manage Hardware** option from the Back Office Main Menu.
2. Select the **Managed Networked Cash Drawers** option from the list.



Figure 20-17: Manage Hardware Screen - Manage Networked Cash Drawers

Upon navigating to the screen, a discovery is performed to identify all networked cash drawers on the network.

3. A list of all discovered networked cash drawers are displayed.

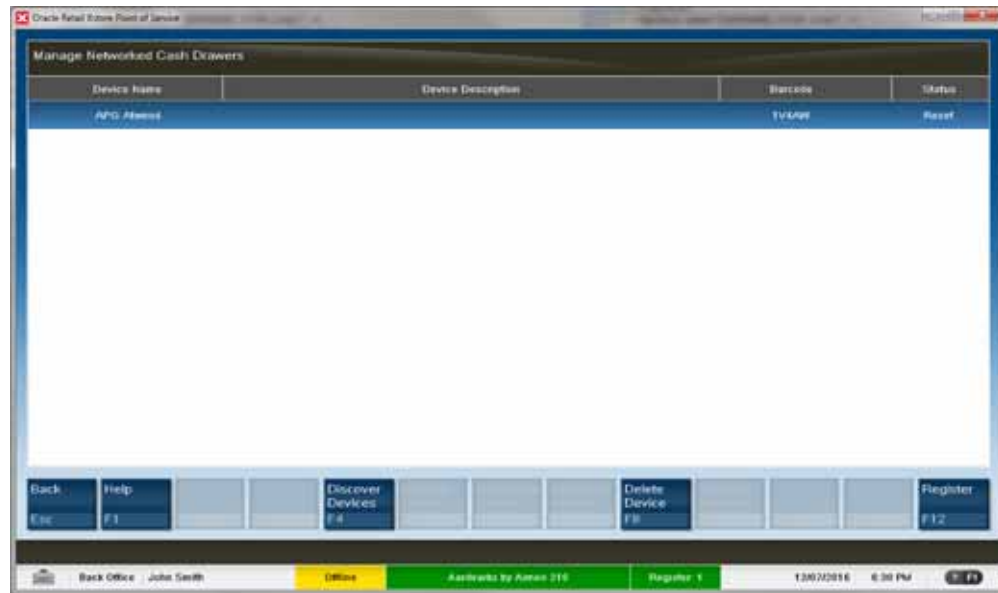


Figure 20-18: Example List of Discovered Networked Cash Drawers

The status of the cash drawer may be:

- New - Configuration has not been entered.
- Active - The cash drawer is available to use.
- Inactive - The cash drawer is not available to use.
- Reset - Restored to factory settings and configuration needs to be entered.

4. Select a cash drawer from the list.

You can Activate and Deactivate cash drawers by selecting the correlating button. The Activate button changes the status to ACTIVE. The Deactivate changes the status to INACTIVE.

You can delete the cash drawer from the Database by selecting the **Delete Device** button.

Use the **Discover Devices** button to find new networked cash drawers on the network.

Note: The Activate, Deactivate, Delete and Configure activities are controlled by user security. An employee must have the proper security privileges to use these buttons.

Configuring Networked Cash Drawers

1. Select the **Configure Button** on the Manage Networked Cash Drawers screen.

CONFIGURE
Enter Configuration Information

IP Address 10.145.58.85
Netmask 255.255.252.0
Gateway 10.145.56.1
DNS Host APG_NetPRO_AM48
TCP Port 30998
Description Front drawer.
Beep On Open No ☒ Beep On Extended Open No

Back Help Clear Configs Save Configs
Esc F1 F5 F8

Figure 20-19: Configure Screen

2. Enter the required data to configure the screen. If the drawer is an existing drawer, the configurable values will be shown with the option to change the values.
3. Select the **Save Configs** button to apply the changes to the Configure screen.

You are returned to the Manage Networked Cash Drawers screen.

Note: You can clear all configurations by selecting the **Clear Configs** button.

Releasing a Cash Drawer

On occasions when the cash drawer cannot be opened (maybe due to a network loss), it is possible to manually release the cash drawer in-use and allow other users to use them.

Note: Ensure there is no current transaction taking place prior to using this process.

1. Navigate to the Manage Networked Cash Drawers screen.

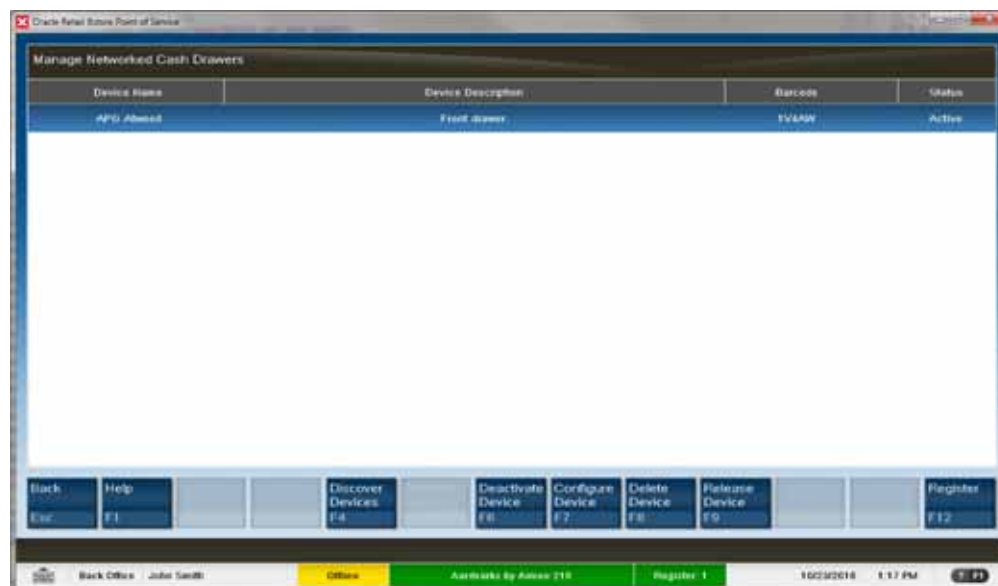


Figure 20-20: Manage Network Cash Drawers Screen

2. Select the in-use cash drawer from the list of cash drawers.
3. Select the **Release Device** button.

Note: The Release Device button is controlled by user security. An employee must have the proper security privileges to release the cash drawer.

4. Confirm you want to release the cash drawer: "Are you sure you want to release the cash drawer <cash drawer id and name>?"



Figure 20-21: Release Device Confirmation

5. Select [Yes] on this prompt, to continue.

The cash drawer is manually released from being in-use and is available to use again.

Mobile Client Device Access

This option allows you to manage the mobile devices to function as a register in the store. When installing a new mobile device the Xstore Mobile server will initially block that device from running Xstore until an administrator goes into this function to enable the newly configured device.

From the Manage Hardware menu, select the Mobile Client Device Access option.



Figure 20-22: Mobile Client Device Access Screen

To enable the mobile device to function as a register in the store select the **Allow** button or select the **Disallow** button to disable access to any currently enabled mobile device.

Select the **Delete** button to remove the device configuration from the Xstore register.

See also the *Xstore Point-of-Service Mobile User Guide* for more information about operating the mobile device.

Update PINpad Key (TransArmor)

If your store is using TransArmor for credit card authorizations, use the Update PINpad Key option to advance the Device Derivation Key (DDK) when needed.

1. Select the **Update PINpad Key** option from the Back Office Main Menu.



Figure 20-23: Update PINpad Key Menu Option

2. A warning prompt displays indicating that this option should only be used at the direction of the Home Office. Select **Ok** to proceed or press **[Enter]** to return to the main menu.



Figure 20-24: TransArmor Prompt - Home Office Warning

- If the update is successful, Xstore prompts: PINpad device key is successfully updated.
- If the update is not successful, Xstore prompts: PINpad is no longer usable because the device key update was not successful. Call the Help Desk.

Tax Free Invoices

Issuing Tax Free Invoices

Some countries offer “Tax Free Shopping” to shoppers from other countries, and allow for the reclaiming of value added tax (VAT) on their purchases.

Oracle Retail Xstore Point of Service has been integrated with the two largest providers:

- Global Blue
- Premier Tax Free (PTF) (part of the Fintrax group)

If Oracle Retail Xstore Point of Service at the store has been configured to integrate with one of these Tax Free Providers, then eligible shoppers can request a Tax Free Invoice (TFI) during the sale, which they can later use to reclaim the VAT they have paid on their purchases. See the *Oracle Retail Xstore Point of Service User Guide* for more information.

Tax Free Invoices on a sale can be printed after its completion in the back office from either the:

- Journal or the,
- Invoice Menu

Note: The country where the store is located could have limitations in terms of how many days the sale can be held.

Issuing a Tax Free Invoice from the Electronic Journal

In the journal you can select a single sale for the issuing of the TFI.

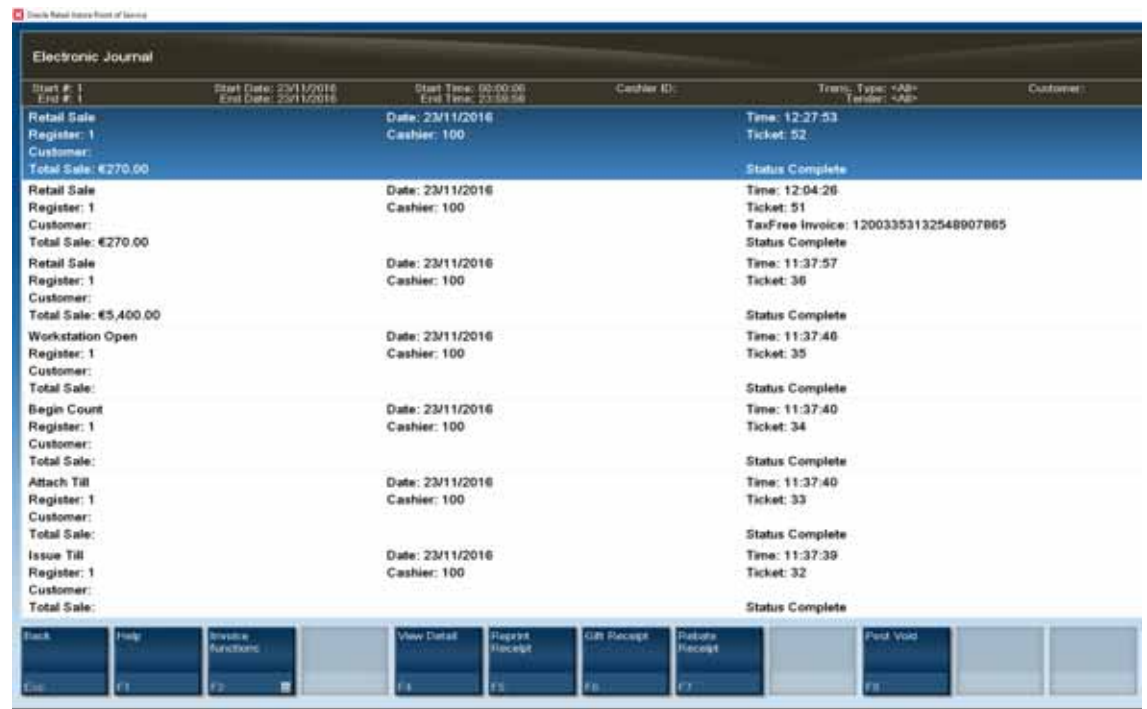


Figure 20-25: Electronic Journal Screen

1. Select the transaction that the invoice is required for.
2. Select the **Invoice Functions** button.



Figure 20-26: Invoice Functions Menu

3. Select **Issue Invoice**.



Figure 20-27: Issue Invoice Type

4. Select **TaxFree** as the type of issue to print.

The tendering screen opens. The tax free invoice will automatically print during the sale completion process.

Issuing a Tax Free Invoice from the Invoice Menu

This option is similar to issuing a TFI from the Electronic Journal but it allows more than one receipt to be collected as a group and one invoice printed. This is useful when a single receipt does not reach the minimum expected value. The receipts can be grouped disregarding any customers associated with them: the customer associated to the TFI is a separate entity, however.

- In some countries it is not allowed to group receipts into only one TFI.
- In some countries, the minimum expected value is intended to be valid for each single receipt.
- Some countries have a limitation in terms of time frame: all the receipts must be issued in the same month, or in the last 30 days and so on.



Figure 20-28: Invoice Options Menu

1. Select **Issue Tax Free Invoice** from the Invoice Options menu.
2. Select the **Search** button to start a transaction search.

TRANSACTION SEARCH
Enter search criteria or scan the receipt barcode

Register #	Start	0	End	1
Ticket #	Start		End	
Date/Time	From Date	23/11/2016	To Date	23/11/2016
	Start Time	00:00:00	End Time	23:59:59
Cardless ID	Start Range		End Range	
Customer # or Last Name				
Gtg Trans Amount	Start Amount	0.00	End Amount	99999999.99

Buttons: Back, Help, Process, Esc, F1, F8

Figure 20-29: Transaction Search

- Enter the search criteria or scan the receipt barcode and press **Process**. Transactions eligible for the tax free are listed.

Transaction For Tax Free Invoice

Date	Register	Ticket	Total	Customer
23/11/2016	1	52	\$270.00	
23/11/2016	1	36	\$5,400.00	

Buttons: Back, Help, Process, Esc, F1, F8

Footer: Issue Tax Free Invoice, John Smith, Office, Store ID: 744 741, Register: 1, 23/11/2016, 14:01

Figure 20-30: Transaction for Tax Free Invoice

- Select one or more transactions. After each press of the **Process** button, the transaction is added to the list of selected receipts.



Figure 20-31: Tax Free Consolidation

The screen displays the Totals (count and value of the selected receipts). You can remove a transaction using the **Remove Transaction** button if necessary.

Select **Issue Tax Free Invoice**. Enter the customer's data to continue the process. See the *Oracle Retail Xstore Point of Service User Guide* for more information.

Reprinting Tax Free Invoices

A Tax Free Invoice (TFI) can be reprinted after a transaction that issued a TFI completes.

Note:

- When integrated to Global Blue, the reprinting of a Tax Free Invoice actually performs a voiding of the current TFI and a reissuing of a new TFI under a new invoice number, and it is this new TFI that is printed.
- When integrated to Premier Tax Free (PTF), the TFI is actually reprinted, maintaining the same invoice number, but this operation is allowed only once.

Reprinting a Tax Free Invoice from the Electronic Journal

From the journal you can select both "Retail Sale" and "Deferred Invoice" transactions. The "Deferred Invoice" transactions are created when a TFI is issued after the sale completion. In the journal you can see the reference to the invoice, for the "Retail Sale" transactions, and the reference to the sale, for the "Deferred Invoice" transactions. If the TFI was issued for more than one "Retail Sale", the "Deferred Invoice" transaction has a message with the number of the receipts included in it.

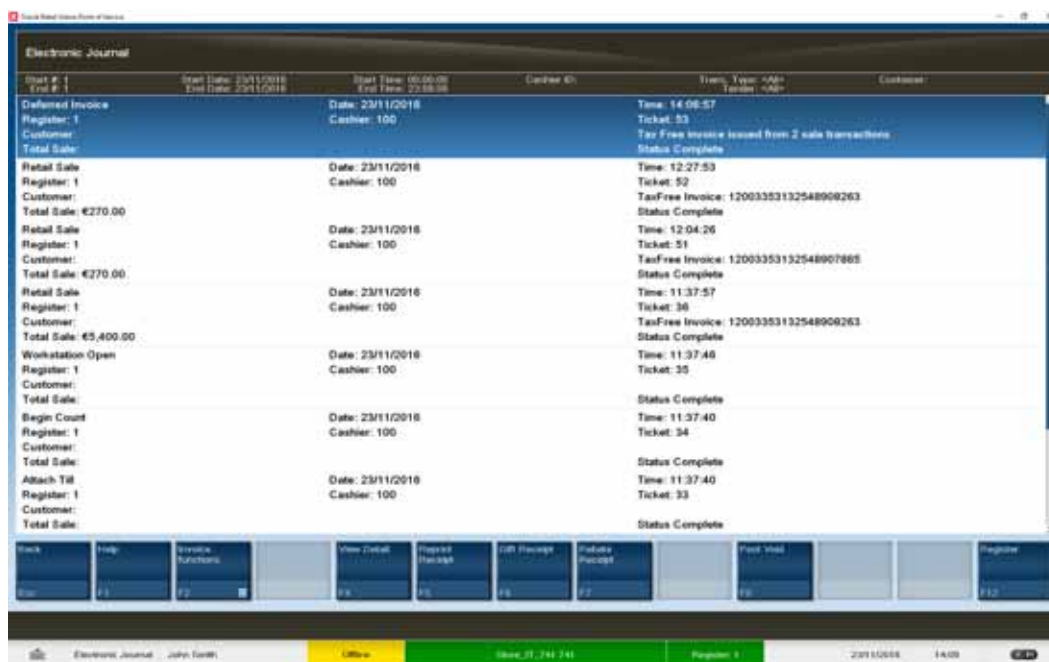


Figure 20-32: Electronic Journal Screen

1. Select the transaction that the invoice is required for (Retail Sale or Deferred Invoice).
2. Select the **Invoice Functions** button.



Figure 20-33: Confirm Tax Free Reprint/Reissue

3. Select **Yes** to continue and reprint the selected tax free invoice.

Reprint a Tax Free Invoice from the Invoice Menu

1. Select **Invoice Search** from the Invoice Options menu.



Figure 20-34: Invoice Options Menu

- 2. Enter the invoice search criteria or scan the taxfree barcode.

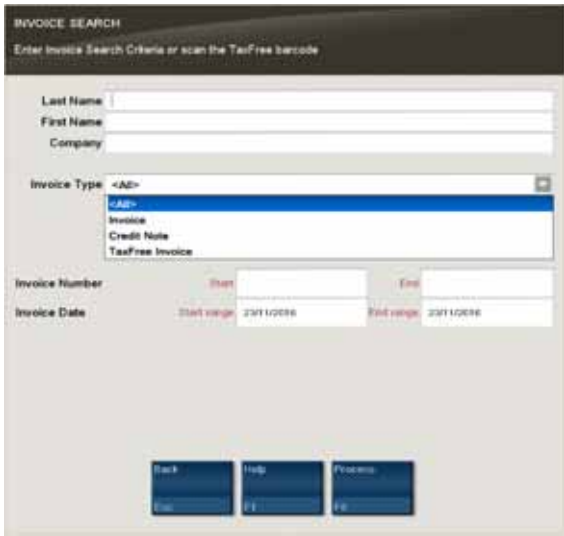


Figure 20-35: Invoice Search

- 3. Select **TaxFree** as the invoice type and press **Process** to start a transaction search. The Electronic Journal is displayed showing only the transactions with valid invoices.



Figure 20-36: Electronic Journal Screen

4. Select the required transaction and press **Reprint Receipt**.

Voiding a Tax Free Invoice

A Tax Free Invoice (TFI) can be voided but it may no longer be available to be voided after a certain amount of time has passed.



Figure 20-37: Electronic Journal Screen

1. Select the transaction that the invoice is required for.
2. Select the **Invoice Functions** button.

3. Select the **Void Invoice** button and press [Enter] for Ok.



Figure 20-38: Invoice Functions Menu



Figure 20-39: Confirm Tax Free Invoice Void

4. Select **Yes** to continue and void the selected tax free invoice.

Base Data Update

Based on the provider, periodically the system could update the local data. It is also possible to force that update using the specific button in the Invoice menu called **Update Tax Free Configuration**.



Figure 20-40: Invoice Options Menu

Tax Free Invoice Returns

If the current receipt contains both sales and returns, only the sales are used for the TFI.

If you try to return an item from a receipt that was already included in a TFI, the system informs you that the old TFI will be voided and a new one issued.

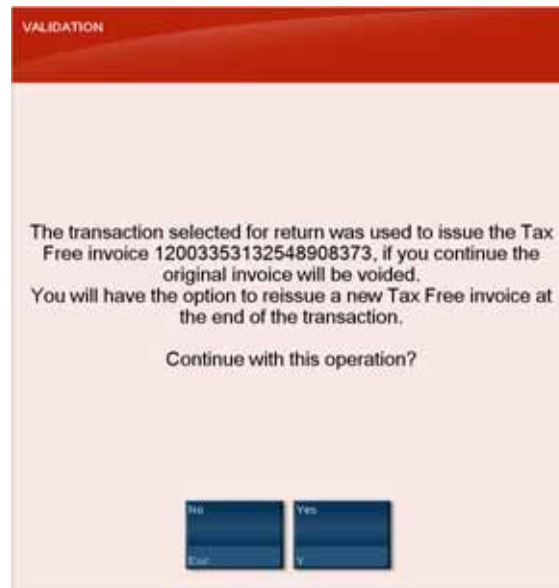


Figure 20-41: Return TFI Transaction

The void of the old TFI is only possible if all the constraints are satisfied. For more information see Returns of Tax Free Invoice Transactions in the *Oracle Retail Point-of-Service User Guide*.

A

- add
 - new customer record
 - new employee
- audit
 - store bank
 - till

B

- back office
 - training mode
- balance inquiry
 - overview
- bank deposit
 - prepare for
- begin count
 - register open
- biometric device
 - fingerprint enrollment
- Black Book
- break time
 - scheduling

C

- calculator
 - deposit
- close
 - register
- convert
 - estimated work order task
 - work order estimate to actual cost
- customer list report
- customer maintenance
 - accessing
 - adding new customer
 - loyalty program
 - viewing customer record

D

- delete
 - employee record
 - messages
 - scheduled shift
- deposit
 - calculator
 - mid-day

E

- electronic journal
 - accessing
 - detail information
 - journal report
 - post void
 - print gift receipt
 - reprint receipt
 - search parameters
 - transaction detail
 - view
- email flag
 - email receipts
- employee
 - borrowed
- employee advance
- employee break
 - scheduling
- employee maintenance
 - comment tab information
 - general tab
 - information
 - human resources (HR) tab information
 - security tab information
- employee name & address information
- employee maintenance general tab
- employee productivity report
- employee record
 - termination date
 - void

- employee schedule
 - apply a new shift
 - apply pre-defined shift
 - change existing shift type
 - change time-off
 - changing
 - copy a day schedule
 - copy a week schedule
 - define new shift breaks
 - define new shift type
 - override time off
 - print time off records
 - remove time off
 - remove time-off
- employee shift
 - remove from schedule
- employee time-off
 - add to schedule
 - remove from schedule
- employee's password
 - case sensitive
 - change
 - rules
- employee's record
 - add comment to

F

- fingerprint enrollment
 - biometric device
- focus bar
 - example
- form
 - data entry type
 - search type

G

- gift receipt
 - from electronic journal

J

- Journal Report

K

- keys
 - function

L

- label sheets
 - label location
- labels
 - using partial sheets
- layaway
 - detail tab
 - information
 - maintain account
 - search for account
 - Summary Tab information
- layaway comments tab
 - definition
- layaway detail tab
 - definition
- layaway summary tab
 - definition
- locate Order
 - order maintenance screen

M

- manager's menu
 - payroll record
- menu
 - list
- message tab
 - keyboard navigation
- messages
 - definition
 - register specific
- mid-day deposit
- My Tasks

N

- new employee
 - create password for
 - create record for
 - search for record

O

- open
 - register
- open store
 - open register

- open/close
 - register
 - store
- option
 - unavailable
- over/short
 - audit

P

- paid in
 - definition
 - paid out receipt barcode
- paid out
 - definition
- password
 - changing other employee's password
 - changing your password
- payday advance
- payroll categories
- payroll date
 - payroll maintenance
- payroll maintenance
 - definition
- payroll record
 - double overtime hours
 - edit
 - edit non-working hours
 - edit posted payroll
 - edit working hours
 - hours worked
 - mark as reviewed
 - overtime hours
 - personal hours
 - post to Home Office
 - posting day
 - review required exception
 - sick hours
 - vacation hours
- payroll report
- POS Register
 - training mode
- post void
 - from electronic journal
 - till management
- Posted Timecard Report
- posting day
 - payroll record
- printing
 - shelf labels
 - stock labels

- prompt
 - entry required type
 - response required type
 - selection required type
 - system information type

R

- receiving document
 - print shelf labels for
- reconcile till
 - till accountability
- register accountability
 - definition
- register open
 - begin count
- register specific messages
- remove fingerprint record
- report
 - Employee Productivity
 - Payroll
 - posted timecard
- report viewing
 - magnification level
- reprint receipt
 - from electronic journal
- reserved item
 - shipping

S

- schedule
 - add employee time-off
 - apply a new shift
 - apply pre-defined shift
 - change employee time-off
 - change existing shift type
 - changing
 - copy a day schedule
 - copy a week schedule
 - define new shift breaks
 - define new shift type
 - override time off
 - print employee time off records
 - remove employee time-off
 - remove time off exception
- sharing employees
 - borrowed employee
- shelf labels
 - create

- shipping
 - reserved items
- status bar
 - about
- store bank
 - audit
- store close
 - bank deposit
 - lead register
 - message
 - registers open
- store open
- symbol
 - submenu

T

- task tab
 - keyboard navigation
- tasks
 - definition
- tax exempt
 - work order
- temporary position
 - borrowed employee
- tender group counts
 - editing
- tenders
 - editing group counts
- terminated employee
 - security privileges
 - view record
- termination date
 - employee record
- till
 - assign till
 - issue till
 - register accountability
 - till accountability
- till accountability
 - assign till
 - definition
 - reconcile till
- till management
 - post void
- till options
 - mid-day deposit
 - till audit
- timecard
 - viewing
- timecard maintenance
 - definition

- timecard record
 - add comment
 - add new
 - change information
 - clock in/clock out
 - delete record
 - edit
 - exception
 - history
 - work code
- timeclock record
 - modified symbol
- training mode
 - accessing
 - functions not allowed
- TransArmor
 - register a VeriFone device (reinitialize hardware)
 - update PINpad key

V

- viewing customer record

W

- work code
 - employee schedule
 - timecard record
- work order
 - add part to
 - add task
 - add task instruction
 - authorization limit
 - change to tax exempt
 - comment
 - comments tab
 - description
 - information
 - convert estimate
 - convert estimate to actual
 - delete part from
 - delete task
 - detail tab
 - description
 - information
 - estimated task
 - history tab
 - description

- information
- item description
- item value
- summary tab
 - description
 - information
 - view
- work item tab
 - description
 - information
- work order maintenance
- work order task
 - add instruction to

X

- Xstore documentation
 - conventions used in