Oracle® Retail Xstore Point-of-Service

Mobile User Guide

Release 18.0

F12257-04

July 2019

ORACLE®

Oracle Retail Xstore Point-of-Service Mobile User Guide, Release 18.0

F12257-04

Copyright © 2019, Oracle and/or its affiliates. All rights reserved.

Primary Author: Tracy Gunston

Contributor: Alex Meske, John Becker

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Value-Added Reseller (VAR) Language

Oracle Retail VAR Applications

The following restrictions and provisions only apply to the programs referred to in this section and licensed to you. You acknowledge that the programs may contain third party software (VAR applications) licensed to Oracle. Depending upon your product and its version number, the VAR applications may include:

(i) the **MicroStrategy** Components developed and licensed by MicroStrategy Services Corporation (MicroStrategy) of McLean, Virginia to Oracle and imbedded in the MicroStrategy for Oracle Retail Data Warehouse and MicroStrategy for Oracle Retail Planning & Optimization applications.

(ii) the **Wavelink** component developed and licensed by Wavelink Corporation (Wavelink) of Kirkland, Washington, to Oracle and imbedded in Oracle Retail Mobile Store Inventory Management.

(iii) the software component known as **Access Via™** licensed by Access Via of Seattle, Washington, and imbedded in Oracle Retail Signs and Oracle Retail Labels and Tags.

(iv) the software component known as **Adobe Flex™** licensed by Adobe Systems Incorporated of San Jose, California, and imbedded in Oracle Retail Promotion Planning & Optimization application.

You acknowledge and confirm that Oracle grants you use of only the object code of the VAR Applications. Oracle will not deliver source code to the VAR Applications to you. Notwithstanding any other term or condition of the agreement and this ordering document, you shall not cause or permit alteration of any VAR

Applications. For purposes of this section, "alteration" refers to all alterations, translations, upgrades, enhancements, customizations or modifications of all or any portion of the VAR Applications including all reconfigurations, reassembly or reverse assembly, re-engineering or reverse engineering and recompilations or reverse compilations of the VAR Applications or any derivatives of the VAR Applications. You acknowledge that it shall be a breach of the agreement to utilize the relationship, and/or confidential information of the VAR Applications for purposes of competitive discovery.

The VAR Applications contain trade secrets of Oracle and Oracle's licensors and Customer shall not attempt, cause, or permit the alteration, decompilation, reverse engineering, disassembly or other reduction of the VAR Applications to a human perceivable form. Oracle reserves the right to replace, with functional equivalent software, any of the VAR Applications in future releases of the applicable program.

Content

Send Us Your Comments xix

Preface xxi

Audience xxi
Documentation Accessibility xxi
Related Documents xxi
Customer Support xxii
Review Patch Documentation xxii
Improved Process for Oracle Retail Documentation Corrections xxii
Oracle Retail Documentation on the Oracle Technology Network xxiii
Conventions xxiii

1 Introduction to Oracle Retail Xstore Mobile

About this Guide 1-1
Main Menu 1-3
Mobile Handheld 1-3
Mobile Tablet 1-4
Windows 10 Based Oracle Workstation 610 UI 1-8
Interface 1-8
Text Field 1-8
Buttons 1-9
Back Button 1-9
Context Menu Button 1-10
Selection Menu 1-11
List 1-12
Status Bar 1-12
Date/Time Picker 1-13
Scrolling List /Tabs 1-14

2 Custom Branding

XstoreMobileBranding.properties 2-1
Example Configuration 2-3
Configuration Descriptions 2-3
File Contents 2-4

3 Sale

Start Transaction ... 3-2
Register Login ... 3-2
Entering Pre-Sale Information ... 3-3
Selecting Commissioned Associates ... 3-4
Associating a Customer with a Transaction ... 3-5
Changing Country ... 3-7
Loyalty Registration ... 3-8
Entering Items ... 3-9
Adding an Item ... 3-9
Quick Items Tab (Mobile Tablet Only) ... 3-10
RFID ... 3-10
Item Restrictions ... 3-11
Customer Age Verification ... 3-11
Cashier Age Restrictions ... 3-11
Time Restrictions ... 3-12
Other Prompts ... 3-13
Adjusting an Item ... 3-14
Context Menu Options ... 3-15
Adding Item Coupons ... 3-16
Redeeming a Rain Check ... 3-18
Tendering the Transaction ... 3-20
Completing the Transaction ... 3-20
Email Receipt Options ... 3-23
Receipts ... 3-25
Printing a Gift Receipt ... 3-25
Select Gift Certificate Items in a Sale ... 3-25
Group Gift Receipt Items ... 3-27
Reprint Receipts and Documents (Mobile Tablet Only) ... 3-28
Print a Rebate Receipt ... 3-29
Reissue a Gift Receipt ... 3-29
Reprint a Document ... 3-30
Reprint the Last Receipt ... 3-30

4 Return Transactions

With Original Receipt or Credit Card ... 4-1
Entering Returns without Original Receipt ... 4-10
Blind Returns and Unverified Returns ... 4-10
Returning Non-Merchandise Items Without a Receipt ... 4-15
Entering Returns without Original Receipt, Using Customer Purchase History ... 4-18
Taxes For Return Items ... 4-19
Exchanging Serial Numbers ... 4-20

5 Processing Tenders

Selecting Tenders ... 5-1
Sale Tenders ... 5-1

Cash 5-3
Check (Personal) 5-6
Credit Card 5-10
Manual Entry 5-13
Gift Card 5-14
Manual Entry 5-16
Redeem Store Credit 5-17
Tender Authorization 5-19
Retry Authorization 5-19
Manual Authorization 5-20

6 Customer Maintenance

Searching for a Customer Record 6-2
Edit Customer 6-5
Customer Information Consent 6-6
Adding a New Customer Record 6-7
Enroll in Loyalty 6-10
Removing a Customer 6-11
View/Edit Customer Information 6-12
Customer Maintenance Fields (Mobile Tablet Only) 6-13
Dashboard Tab 6-14
Transaction Summary 6-14
Wish List 6-14
Last 365 Days 6-15
Contact Information Tab 6-15
Associations Tab 6-16
Purchase History Tab 6-17
Transaction Row 6-17
Item Row 6-17
Item Information 6-17
Accounts Tab 6-18
Loyalty Configured 6-18
Loyalty Cards 6-18
Customer Account Activity 6-19
Context Menu Buttons 6-19
No Loyalty Programs 6-19
Awards Tab 6-19
Current Awards 6-20
Entitlements 6-20
Tasks Tab 6-20
Status 6-21
Comments Tab 6-21
Adding a Comment 6-21
Addresses Tab 6-22
Add an Address 6-22
Edit an Address 6-23
Designate a Primary Address 6-24

Delete an Address 6-24
House Account Tab 6-25
House Account Details 6-26
Authorized Buyers 6-26
Journal 6-26
Change House Account Status 6-27
Change House Account Limit 6-27
Change Authorized Buyers 6-28
Add an Authorized Buyer 6-28
Edit an Authorized Buyer 6-29
Deactivate an Authorized Buyer 6-30
Designate a Primary Buyer 6-30
Wish List Tab 6-31
Change Country 6-32

7 Searching for Items

Searching for Items Using Item Lookup 7-1
Add Item to Transaction 7-4
Locating Items: Inventory Lookup 7-5
Printing a Rain Check 7-7

8 Discounts

Adding a Discount to an Item or Transaction 8-1
Transaction Level Discounts 8-2
Group Discounts 8-4

9 Modifying a Transaction

About This Chapter 9-1
Adding Non-Merchandise Items to the Sale 9-1
Modifying Customer Information 9-3
Modifying Line Items in a Sale 9-4
Changing the Item Quantity 9-4
Changing the Item Price 9-5
Discount an Item 9-7
Changing Item Taxes 9-9
Changing the Item Tax Location 9-10
Exempting an Item From Tax 9-11
Changing the Item Tax Amount 9-12
Changing the Item Tax Percentage 9-14
Voiding an Item 9-15
Modifying Discounts 9-16
Removing Discounts 9-19
Changing the Commissioned Associate 9-20
Select the Associate From a List 9-20
Enter the ID for an Associate 9-21
Adding/Editing a Line Item Comment 9-23

Adding a Comment 9-23
Removing a Comment 9-24
Changing Transaction Taxes 9-25
Change Transaction Tax 9-25
Change Transaction Tax Location 9-26
Exempt a Transaction From Tax 9-27
Change Transaction Tax Amount 9-29
Change Transaction Tax Percentage 9-30
Suspending/Resuming a Transaction 9-32
Suspending a Transaction 9-32
Resuming a Transaction 9-33
Cancel a Transaction 9-34

10 Send Sale Transaction

Adding Send Sale Items to a Sale 10-1
Editing a Send Sale 10-9

11 Special Orders (Mobile Tablet Only)

Create a Special Order 11-1
Open an Existing Special Order 11-5
Modify Special Order Items 11-6
Change the Item Expected Date 11-7
View Special Order History 11-7
Pick Up a Special Order 11-8
Cancel a Special Order 11-8

12 Layaway Transactions (Mobile Tablet Only)

Create a Layaway 12-2
Open a Layaway 12-5
Layaway Payment 12-6
Pick Up Layaway Items 12-7
Add Items to an Existing Layaway 12-7
Edit Items in a Layaway 12-8
Add Coupon 12-9
Add Discount 12-9
Change Item 12-10
Cancel a Layaway 12-10
Add a Comment 12-11
View Comments 12-12
View Layaway Payment History 12-12
View Layaway Payment Schedule 12-13
View Layaway Activity History 12-13
Automatic Prompts for Accounts Requiring Attention 12-14

13 Work Order Transactions

Creating a New Work Order 13-2
Work Order Item - In the Current Sale Transaction. 13-6
Work Order Item - Using Original Transaction Receipt 13-8
Work Order Item - No Receipt; Manual Item Entry 13-10
Work Order Item - Customer History 13-12
Work Order Item - Item Not on File 13-14
Work Order Categories 13-16
Receipt Samples 13-21
Modifying a Work Order 13-23
Task Maintenance 13-24
Add Task 13-25
Delete Task 13-25
Convert Estimate 13-25
Add Instruction 13-26
Item Maintenance 13-26
Add Item 13-27
Delete Item 13-27
Edit Item Value 13-27
Edit Item Desc 13-28
Parts Maintenance 13-28
Add Parts 13-29
Delete Parts 13-29
Edit Line Item 13-29
Add Item Discount 13-30
Change Quantity 13-31
Change Price 13-31
Change Item Tax 13-31
Work Order Maintenance 13-32
Cancel Work Order 13-32
Change Price Type 13-33
Edit Service Location 13-33
Pickup Work Order 13-34
Work Order History 13-34
View History 13-35
View Comments 13-36
Add Comment 13-37
Picking Up a Completed Work Order 13-38

14 Warranty and Service Plan Transactions

Selling a Warranty/Service Plan 14-1
Adding a Warranty/Service Plan After a Purchase 14-5
Adding a Warranty/Service Plan to an Item 14-7
To Add a Warranty/Service Plan to an Item - In the Current Transaction 14-8
To Add a Warranty/Service Plan to an Item- Using Customer History Information. 14-11
To Add a Warranty/Service Plan to an Item - Using the Customer's Original Sale Receipt .. 14-12

To Add a Warranty/Service Plan to an Item - Manual Entry 14-14
Changing the Warranty/Service Plan Customer 14-17

15 Order Transactions Through Order Broker Cloud Service

Order Status 15-1
Order Item Status 15-2
Fulfillment Options 15-3
Pickup This Store 15-3
Pickup Other Store 15-3
Legacy Order Types Disabled 15-3
Legacy Order Types Enabled 15-3
Customer Delivery 15-3
Creating an Order 15-4
Customer Delivery 15-7
Pickup Other Store 15-9
Pickup This Store 15-11
Open an Order Broker Order 15-11
Edit Order Items 15-12
Edit Delivery Information 15-14
Change Order Type 15-14
Cancel Order Items or an Entire Order 15-15
Pick Up an Order 15-16
Back Office Customer Maintenance 15-21
Order Maintenance 15-21
Order Worklist 15-22
View Order 15-24
Check Inventory 15-26
Accept Order 15-26
Pick/Reserve Order 15-27
Scan Pick Slip Items 15-28
Print Pick List 15-30
Picking/Reserving an Order 15-31
Un-reserve Order 15-32
Reject Order 15-34
Shipping an Order 15-35
Maintaining/Viewing an Order 15-38
Allocating an Item 15-39

16 Pre-Sale Transactions

Pre-Sale Account Transactions 16-2
If a customer is associated with the transaction 16-2
If a customer has not been associated with the transaction 16-4
Creating a Pre-Sale Transaction 16-5
Picking Up Pre-Sale Items 16-8
Canceling a Pre-Sale Account 16-10

17 Hold Account Transactions

Hold Account Transactions 17-1
If a customer is associated with the transaction 17-1
If a customer has not been associated with the transaction 17-3
Creating a New Hold Account 17-3
Searching for a Hold Account 17-5
Picking Up Hold Items 17-5
Canceling a Hold Account 17-8

18 Xcommerce

Create an Xcommerce Transaction 18-1
Remove Item 18-1
No Items 18-2

19 Gift Registry

Selling Gift Registry Items 19-1
Assign the Gift Registry 19-1
Returning/Cancelling Gift Registry Items 19-3

20 Task Management (Mobile Tablet Only)

My Tasks Screen 20-1
Task Filters 20-2
Assigned Associate 20-2
Activity 20-2
Status 20-3
Start Date 20-3
End Date 20-3
Sort Tasks 20-3
Task Notes 20-3
Open Customer Record 20-3
Viewing Your Tasks 20-4
View Your Tasks from the Register 20-4
View Your Tasks from the Back Office 20-4
Creating a Task 20-5
Add a Note 20-6
Edit a Task 20-7
Updating Task Status 20-8

21 Register Open and Close

Register Open 21-1
Open Register 21-2
Close Register 21-4
Lock/Unlock a Register 21-5
Locking a Register 21-5
Unlocking a Register 21-5

22 Airside Store Transactions

Associate Flight Information 22-1
Make an Airside Sale on Arrivals 22-2
Make an Airside Sale to Staff 22-3

23 View Schedule and Time (Mobile Tablet Only)

View Your Timecard 23-1
Timecard Information 23-2
Timecard Maintenance 23-3
Timecard Comment 23-3
View Another Timecard 23-3
View All Work Schedules 23-4
Schedule Information 23-4
View Another Schedule Week 23-5
Select the Schedule Week 23-6
Print Your Schedule 23-6

24 Actions Menu

Balance Inquiry 24-1
Change Password 24-5
Change your Password with Challenge Questions 24-6
Clock In/Out 24-7
Overview 24-7
Clock In 24-7
Clock Out 24-9
Change Work Code 24-10
Item Lookup 24-12
Item Viewer 24-14
Product Information 24-14
Merchandise Hierarchy 24-15
Vendor Information 24-15
Product Attributes 24-15
Today's Sales 24-15
Inventory Stock 24-16
Stock Ledger 24-16
Kit Component Items 24-16
Serial Inventory 24-16
Related Items 24-17
In This Style 24-17
Cross Reference Numbers 24-17
Substitute Items 24-17
Style Grid 24-18
Price History 24-18
Sales History 24-19
Weekly Sales 24-19
Annual Sales 24-19

12 Week Unit Sales Trend 24-19
Print a Rain Check 24-20
Inventory Locator Lookup 24-20
Price Inquiry 24-21

25 Till Management

About This Chapter 25-1
Till Maintenance 25-2
Cash Pickup 25-2
Cash Transfer (From Store Bank To Till) 25-5
Attach Cash Drawer 25-7
Remove Cash Drawer 25-10
Till Options 25-12
No Sale 25-12
Post Void 25-13
Performing a Post Void from the Register 25-13
Open the Till Options Menu (Mobile Tablet Only) 25-16
Change Float (Mobile Tablet Only) 25-17
Paid In and Paid Out Transactions (Mobile Tablet Only) 25-19
Paid Out 25-19
Paid In 25-21
Tender Exchange (Mobile Tablet Only) 25-22

26 Hardware

About This Chapter 26-1
Reinitialize Hardware 26-2

27 Receiving

About This Chapter 27-1
Start Receiving 27-2
Search for a Receiving Document 27-3
Create a New Receiving Document 27-4
Select or Add a Carton 27-6
Item Entry Screen 27-7
Enter Items 27-8
Change Item Quantity 27-9
Void a Line Item 27-10
Change Item Cost 27-12
Receive Carton in Total 27-13
Add a Comment to a Carton 27-15
View Exceptions 27-16
Add a Comment to a Document 27-18
Receive Document in Total 27-19
Save Document 27-21

28 Shipping

About This Chapter 28-1
Start Shipping 28-2
Main Menu 28-2
Search for a Shipping Document 28-4
Create a New Shipping Document 28-5
Edit a Shipping Document 28-7
Enter Shipping Items 28-8
Change Item Quantity 28-9
Void a Line Item 28-11
Add a Comment to a Shipping Document 28-12
Look Up an Item 28-14
Add the Search Item 28-16
View Exceptions 28-17
Save Document 28-18
Shipping Label and Packing Slip 28-20

29 Physical Inventory Counting

About this Chapter 29-2
Inventory Counting Steps - Overview 29-3
Inventory Count Documents 29-4
Finding an Existing Inventory Count Document 29-4
Creating a New Inventory Count Document 29-10
Cycle Count Type Setup 29-11
Supply Count Type Setup 29-15
Physical Count Type Setup 29-16
Count Process 29-17
Cycle Count Process 29-17
Supply Count Process 29-24
Physical Count Process 29-31
Automatic Variance Processing 29-40
How the Variance is Calculated in Automatic Variance Processing 29-41
Automatic Variance Processing Examples: 29-42
Manual Variance Processing 29-43
Variance Report 29-45
Store Layout Maintenance (Mobile Tablet Only) 29-47
Inventory Adjustment 29-51
Inventory Count Technical Limitations 29-54

30 Inventory Adjustment

Open Inventory Adjustment 30-2
Perform an Inventory Adjustment 30-3
Change an Item 30-5
Change Item Quantity 30-6
Void Item 30-7
Save and Exit 30-8

31 Item Transfer

About This Chapter 31-1
Start Item Transfer 31-1
Perform Transfer 31-3
Adjust Item 31-5
Change Item Quantity 31-5
Void Item 31-7
Additional Options 31-8
Save & Exit 31-8
Transfer All 31-9
Print Item List 31-11

32 Inventory Replenishment

Accessing the Back Office 32-1
Inventory Replenishment Document 32-2
Search for a Replenishment Document 32-2
More Information About Document Searches 32-3
Inventory Replenishment Order Status Definitions 32-5
Adding Items to an Inventory Replenishment Order 32-5
Inventory Replenishment Options 32-5
Print Options 32-7
Print Request Detail Status Report 32-7
Replenishment Order Worksheet 32-8
Force Close 32-8
Submit an Order 32-9
Add or Edit Header Comments 32-10
Delete Header Comments 32-12
Add Non-Merchandise 32-13
Change an Item 32-15
To Change Item Quantities 32-16
Item Lookup 32-16
To Add/Edit Item Comments 32-18
To Delete an Item Comment 32-18
To Void an Item 32-19
Creating a New Inventory Replenishment Order 32-20

33 Shelf Labels

Printing Shelf Labels 33-1
ZPL II Label Printers 33-5
To Change an Item 33-7
To Look Up an Item 33-9
To Add a Receiving Document 33-10
To Save a Batch - ZPL II Only 33-11
To Retrieve a Batch - ZPL II Only 33-11
To Delete a Batch - ZPL II Only 33-12

34 Reporting

Report Menu Configuration and Security 34-1
How to Access Reports on Xstore Mobile Tablet 34-3
Saving a Report 34-5
View Saved Reports 34-7
Report Printing Options 34-8

Send Us Your Comments

Oracle Retail Xstore Point-of-Service Mobile User Guide, 18.0

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document.

Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

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

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

> **Note:** Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the Online Documentation available on the Oracle Technology Network Web site. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: retail-doc_us@oracle.com

Please give your name, address, electronic mail address, and telephone number (optional).

If you need assistance with Oracle software, then please contact your support representative or Oracle Support Services.

If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at http://www.oracle.com.

Preface

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

Audience

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

Documentation Accessibility

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

Access to Oracle Support

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

Related Documents

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

- *Oracle Retail Xstore Suite Release Notes*
- *Oracle Retail Xstore Suite 18.0/Merchandising 16.0.2 Implementation Guide*
- *Oracle Retail Xstore Suite Implementation and Security Guide*
- *Oracle Retail Xstore Point-of-Service User Guide*
- *Oracle Retail Xstore Point-of-Service Mobile User Guide*
- *Oracle Retail Xstore Point-of-Service Reports Guide*
- *Oracle Retail Xstore Point-of-Service Manager's Guide*
- *Oracle Retail Xstore Point-of-Service Shipping, Receiving, and Inventory Guide*
- *Oracle Retail Xstore Office User Guide*
- *Oracle Retail Xstore Point-of-Service Frameworks and Technologies Guide*

- *Oracle Retail Xstore Suite Deal Pricing Guide*
- *Oracle Retail Xenvironment User Guide*
- *Oracle Retail Xstore Point-of-Service Services Guide*
- *Oracle Retail Xstore Point-of-Service Technical Guide*
- *Oracle Retail Xstore Point-of-Service Host Interface Guide*
- *Oracle Retail Xstore Point-of-Service POS Log Files*
- *Oracle Retail Xstore Point-of-Service Database Dictionary Guide*
- *Oracle Retail Xstore Office Database Dictionary Guide*

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

`https://support.oracle.com`

When contacting Customer Support, please provide the following:

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

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 18.0) or a later patch release (for example, 18.0.1). If you are installing the base release or additional patches, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

Improved Process for Oracle Retail Documentation Corrections

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

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

`http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html`
An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the

same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

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

Oracle Retail Documentation on the Oracle Technology Network

Oracle Retail product documentation is available on the following web site:

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

(Data Model documents are not available through Oracle Technology Network. 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, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Introduction to Oracle Retail Xstore Mobile

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

Xstore Mobile is built utilizing the existing Xstore core frameworks and work flows to ensure a consistent experience for the associate. It is platform independent and runs on iOS, Android, and Windows 10 based Oracle Workstation 610 UI. The application is built as a thin client, enabling speed of deployment and without operating system dependencies. The UI on the Mobile Tablet is simple to use and takes advantage of the look and feel of the current desktop application where relevant.

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

About this Guide

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

- Chapter 2, "Custom Branding"- Describes how to customize the Xstore Mobile user interface for your brand.
- Chapter 3, "Sale" - Describes the sale transaction process.
- Chapter 4, "Return Transactions"- Describes the return transaction process.
- Chapter 5, "Processing Tenders" - Describes the tendering process.
- Chapter 6, "Customer Maintenance" - Includes activities that relate to entering new customers into the customer database and updating customer information.
- Chapter 7, "Searching for Items" - Describes how to look up an item to view information about it.
- Chapter 8, "Discounts"- Describes the transaction and group discount process.
- Chapter 9, "Modifying a Transaction" - Explains each of the adjustments that can be made to sale items in Xstore Mobile.
- Chapter 10, "Send Sale Transaction" - Describes the process of sending an item to a customer-specified offsite location after it is purchased.

- Chapter 11, "Special Orders (Mobile Tablet Only)"- A special order transaction is typically performed when an item is currently not available at store.
- Chapter 12, "Layaway Transactions (Mobile Tablet Only)" - A layaway item is a sale item that cannot be taken from a store when it is purchased because the customer does not pay the entire cost of the item at that time. Instead, the store reserves the item for the customer until the customer pays for the item in full.
- Chapter 13, "Work Order Transactions" - Work orders are labor services such as repairs and alterations.
- Chapter 14, "Warranty and Service Plan Transactions" - Describes the process of purchasing a warranty/service plan to support the product after its purchase.
- Chapter 15, "Order Transactions Through Order Broker Cloud Service" - Describes the order transaction process and inventory availability across all sales channels.
- Chapter 16, "Pre-Sale Transactions" - Pre-sale transactions must be paid in full at setup and associated with a customer.
- Chapter 17, "Hold Account Transactions"- A hold account transaction is typically performed when customers plan to purchase merchandise but would like the store to hold the item for a short period.
- Chapter 18, "Xcommerce" - Xstore Xcommerce provides the ability to pull items from a guided selling website and sell in the store or create an Omni-Channel order.
- Chapter 19, "Gift Registry" - The gift registry tool assists the customer in purchasing gifts for someone registered.
- Chapter 20, "Task Management (Mobile Tablet Only)" - Displays tasks assigned to associates in a store for completion such as appointments.
- Chapter 21, "Register Open and Close" - Describes the procedures for opening and closing a register.
- Chapter 22, "Airside Store Transactions" - Describes the procedures for associating a flight number to a transaction and performing airside sales.
- Chapter 23, "View Schedule and Time (Mobile Tablet Only)" - To review timecard and schedules.
- Chapter 24, "Actions Menu" - Describes the processes for Changing Passwords, Item Lookup, Clock In/Out, Balance Inquiry, and Price Inquiry.
- Chapter 25, "Till Management" - Describes the till options and maintenance functions.
- Chapter 26, "Hardware" - Describes using Reinitialise Hardware to reset peripheral hardware devices.
- Chapter 27, "Receiving" - Describes inventory receiving.
- Chapter 28, "Shipping" - Describes inventory shipping.
- Chapter 29, "Physical Inventory Counting" - Describes how to create, perform, update, and submit inventory counts. Also covers Store Layout maintenance for the Mobile Tablet.
- Chapter 30, "Inventory Adjustment"- Describes how to make adjustments to inventory counts.
- Chapter 31, "Item Transfer" - Describes how to transfer items between inventory buckets.

- Chapter 32, "Inventory Replenishment" - Allows stores to review suggested inventory orders and create their own inventory replenishment orders.
- Chapter 33, "Shelf Labels" - Describes the process to print shelf labels.
- Chapter 34, "Reporting" - Describes the process to view and print reports.

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

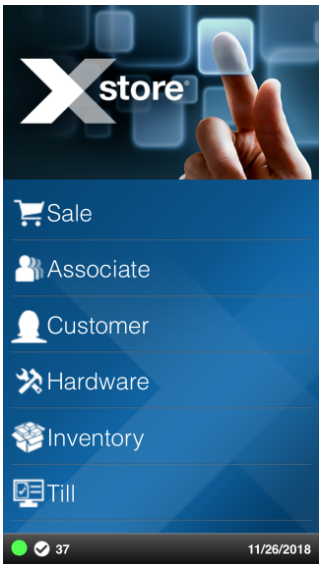
Main Menu

This section describes the Main Menu.

Mobile Handheld

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

Figure 1–1 Mobile Handheld Main Menu



Select the respective option to access the appropriate functionality.

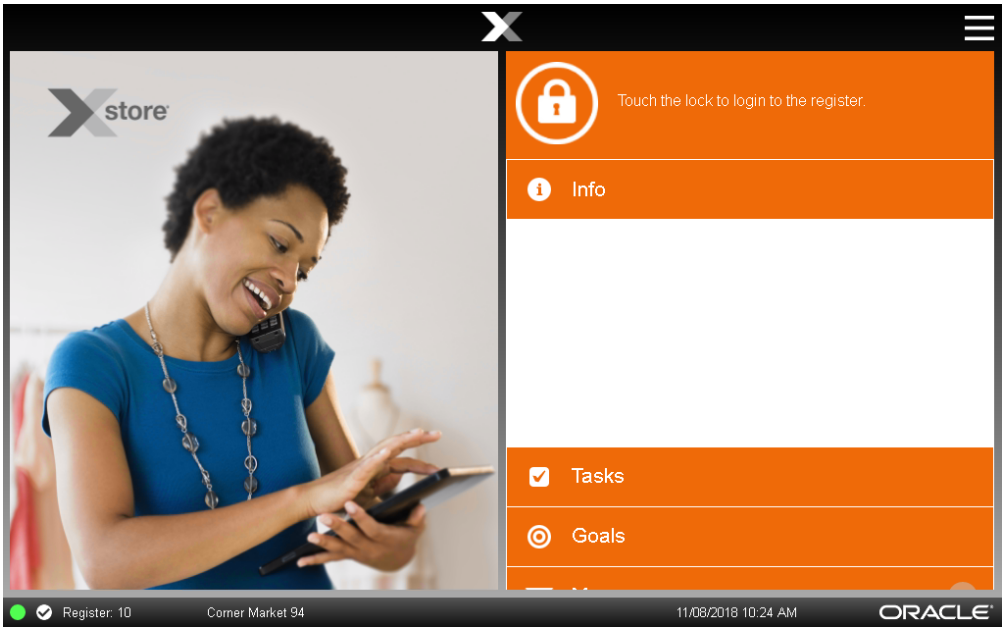
- **Sale** - Perform transactions.
- **Associate** - Change Password
- **Customer** - Balance Inquiry, Customer Maintenance, Order Options, Receipt Reprint Options
- **Hardware** - Reinitialize Hardware
- **Inventory** - Perform inventory actions such as Inventory Adjustment, Inventory Counts Options, Inventory Replenishments, Item Transfer, Item Lookup, Receiving, and Shipping. Also includes Print Shelf Labels and Exchange Serial Number options.

- **Till -** Lock Register, Open/Close Register, Till Maintenance, Till Options
- **Actions -** Balance Inquiry, Change Password, Clock In /Out, Item Lookup

Mobile Tablet

The main menu for Xstore Mobile Tablet is the first screen displayed when opening the application. It has been designed specifically for use with tablets and has the look and feel of the Mobile Handheld and desktop versions. An example of the home screen on a tablet is shown below:

Figure 1–2 Tablet Home Screen

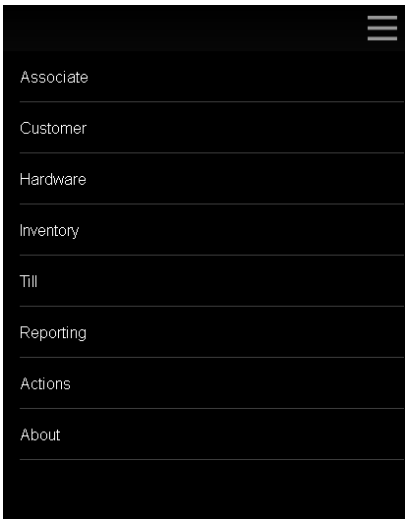


The tabs (now known as a scrolling list), are shown on the right hand side rather than the left. This is because most associates will hold a tablet in their left hand and naturally drive the device with their right hand. This is a configurable option so for left-handed users the format can be transversed.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

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

The **Context Menu** Button in the upper-right hand corner of the screen has the following options when in the Login screen.

Figure 1–3 Tablet Login Screen Context Menu



Select the respective option to access the appropriate functionality.

Table 1–1 Mobile Tablet Context Menu Options Outside Sale Mode

Context Menu Option	Sub-Menu Options	
Associate	Change Password	
	My Tasks	
	View Schedule & Time	View Schedule
		View Timecard
Customer	Balance Inquiry	Gift Card Balance
		Gift Certificate Balance
		Gift Receipt Inquiry
		Loyalty Balance
		Store Credit Balance
	Customer Maintenance	
	Receipt Reprint Options	Rebate Receipt
		Reissue Gift Receipt
		Reprint Document
		Reprint Last Receipt
	Work Order Options	Receive Work Orders
		Ship Work Orders
		Work Order Invoice History
		Work Order Invoicing
		Work Order Maintenance
Hardware	Reinitialize Hardware	

Table 1–1 (Cont.) Mobile Tablet Context Menu Options Outside Sale Mode

Context Menu Option	Sub-Menu Options	
Inventory	Inventory Adjustment	
	Inventory Counts Options	Inventory Count
		Store Layout Maintenance
	Inventory Replenishment	
	Item Lookup	
	Item Transfer	
	Print Shelf Labels/Tickets	
	Receiving	
	Serial Number Exchange	
	Shipping	
Till	Lock Register	
	Register Open/Close	
	Till Maintenance	Attach Cash Drawer Till
		Cash Pickup
		Cash Transfer
		Remove Cash Drawer Till
	Till Options	Change Float
		No Sale
		Paid In
		Paid Out
		Post Void
Reporting	Airport Reports	
	Customer Account Activity Summary Reports	
	Customer List Report	
	Dashboard	
	Employee Reports	
	Flash Sales	
	Inventory Reports	
	Journal Report	
	Layaway Reports	
	Price Change Report	
	Sales Report	
	Saved Reports	
	Special Orders Report	
	Store Locations Report	
	Till Reports	

Table 1–1 (Cont.) Mobile Tablet Context Menu Options Outside Sale Mode

Context Menu Option	Sub-Menu Options	
Actions	Balance Inquiry	Gift Card Balance
		Gift Certificate Balance
		Gift Receipt Inquiry
	Change Password	
	Clock In/Out	
	Item Lookup	
	Price Inquiry	
About	Privacy Policy	
	EULA	

Table 1–2 Mobile Tablet Context Menu Options Within Sale Mode

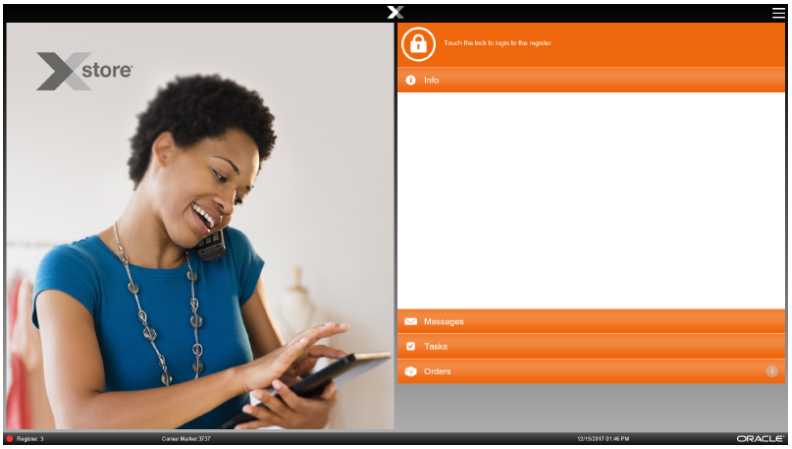
Context Menu Option	Sub-Menu Options
Return Item	
Sell Non-Merch	Sell Non-Merch
	Sell Gift Card
	Sell Gift Certificate
Extended Transaction	Send Sale
	Warranty
	Layaway
	Special Order
	Work Order
	Pre-Sale
	Hold
Register Options	Balance Inquiry
	Reissue Gift Receipt
	House Account payment
	House Account Reversal
	Redeem Rain Check
	Assign Gift Registry
	Lock Register
Customer Options	Assign Customer
	Remove Customer
	View Customer
Find Item	Price Inquiry
	Item Lookup
	Inventory Locator
Resume/Suspend Transaction	

Windows 10 Based Oracle Workstation 610 UI

Xstore Mobile POS can be installed as a thin client on a Workstation 610. In addition to all the functions available on the tablet version of Xstore Mobile POS, the thin client also provides the following functionality:

- Count a cash drawer
- Perform a mid-day deposit
- Perform a till audit
- Attach a till
- Remove a till

Figure 1–4 Workstation 610 Home Screen



Interface

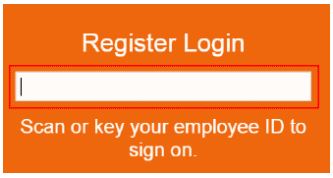
The interface for Xstore Mobile is made up of common elements in any mobile application. These elements include text fields, buttons, links, lists, and menus used to select options, enter data, or open new screens.

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

Text Field

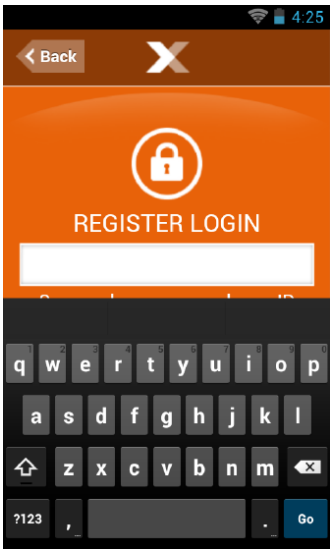
A text field is used for keying in information. When a text field is selected, an on-screen keyboard opens on the mobile device, which you can use to enter the requested information.

Figure 1–5 Text Field Example



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

Figure 1–6 Text Field with Keyboard Example



Buttons

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

Table 1–3 Buttons

Buttons	Description
	Standard Buttons
	Back Button
	Context Menu Button
	Item Lookup Button

Back Button

The **Back** button exits out of the current activity and returns to the previous activity. You are prompted whether to save current work before canceling an action. The text in a Back button may differ and the activity to which it returns depends upon its location in the application.

Table 1–4 Back Buttons

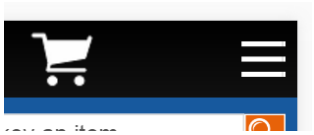
Button	Text in Back Button
	Back button

Table 1–4 (Cont.) Back Buttons

Button	Text in Back Button
	Cancel button
	Cancel Sale

Context Menu Button

Figure 1–7 Context Menu Button



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

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

Figure 1–8 Context Menu on Mobile Tablet

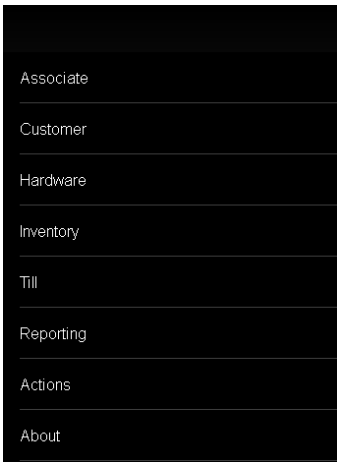
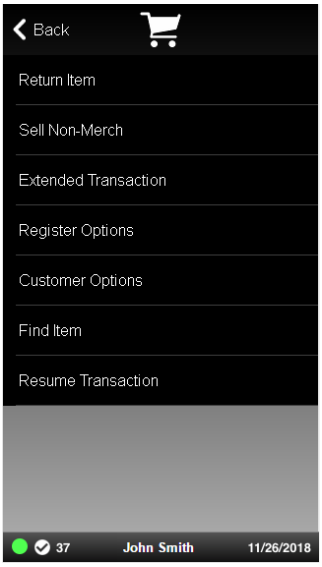


Figure 1–9 Context Menu on Mobile Handheld



Selection Menu

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

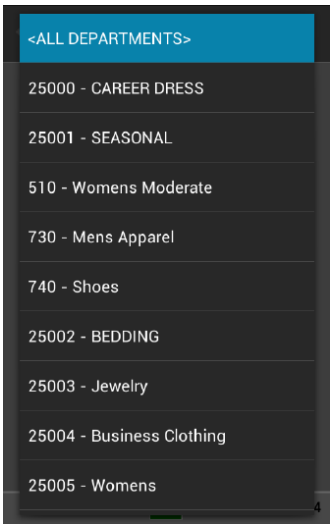
A closed selection menu displays the option that has been selected (below).

Figure 1–10 Selection Menu Displaying Selected Option



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

Figure 1–11 Selection Menu

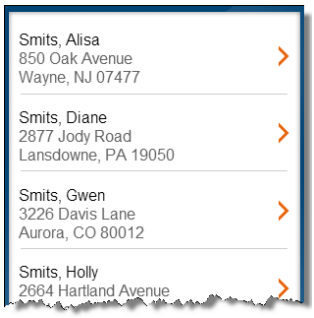


List

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

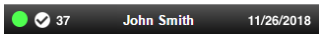
- Lists are frequently used to display search results, such as customers returned by a Change Country, or documents returned when you Search for a Receiving Document.
- Lists are also used for standard menus throughout the Xstore Mobile application.

Figure 1–12 List



Status Bar

Figure 1–13 Status Bar



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

The status bar has the following organization:

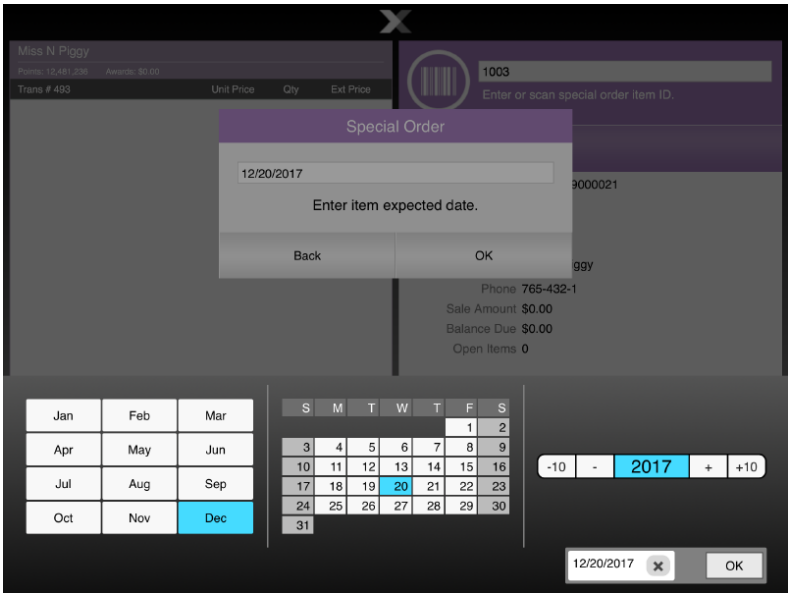
- On the left, the register number and whether the register is open or closed.

  - If the register is open, the first indicator will be green and a check mark next to it.
  - If the register is closed, the first indicator will be red and a cross next to it.
- In the center, the name of the logged-in user. If no user is currently logged in, nothing will be displayed in the middle.
- On the right, Xstore Mobile displays the business date.

Date/Time Picker

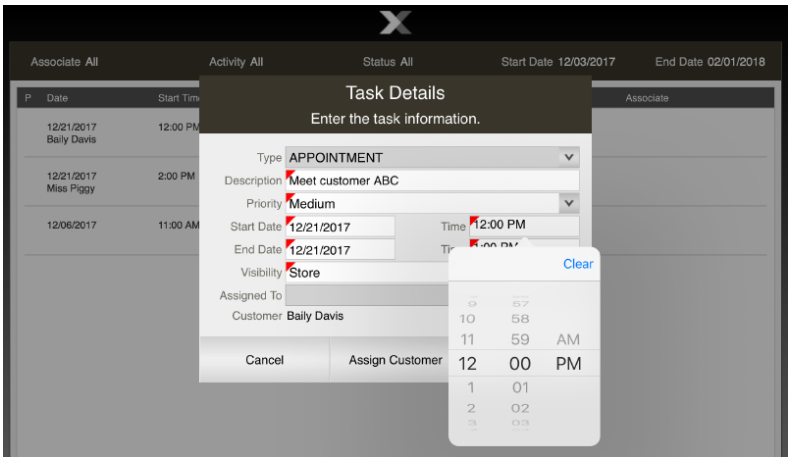
The Date/Time Picker is used on all date entry fields in both the Mobile Handheld and Mobile Tablet. Select the Month, Day and Year as required.

Figure 1–14 Mobile Tablet Date Picker Example



Select the Hour, Minute and AM/PM as required.

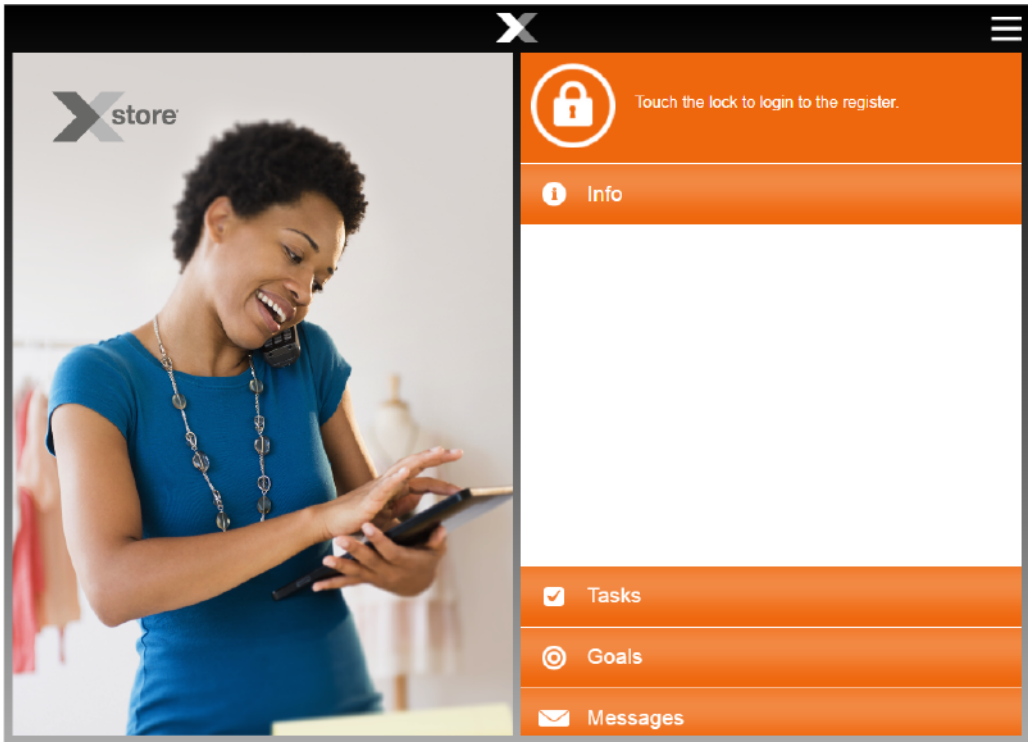
Figure 1–15 Mobile Tablet Time Picker Example



Scrolling List /Tabs

This window displays different messages that are selected by the options and they are equivalent to the tabs at the top of the window on the desktop version of Xstore.

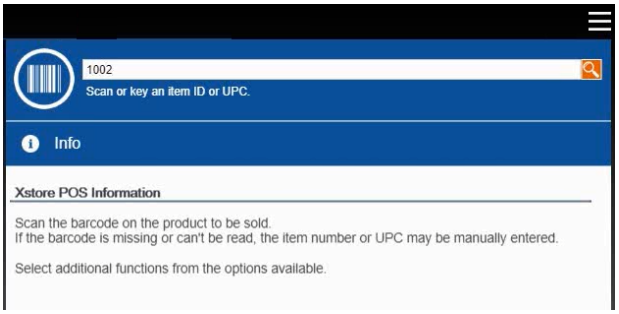
Figure 1–16 Xstore Mobile Tablet Main Screen



In a base implementation, Xstore Mobile Tablet displays the following options:

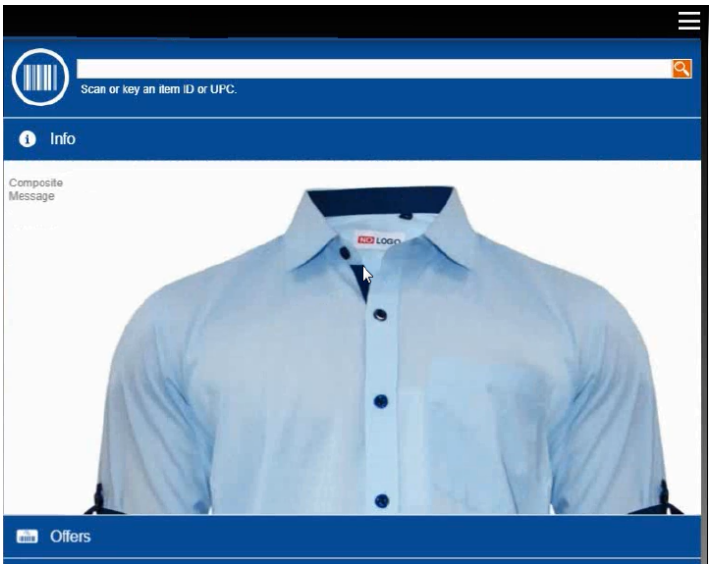
- **Info Tab:** The Info tab may display product-specific information for an item-entry scenario, customer/item detail information for a layaway transaction, or instructions for recording a repair or alteration selection.

Figure 1–17 Default Info Tab



Only one message displays per item in the Info tab. This may be a text message, an image or a composite message (graphic and text). This information may relate to the item directly or to recommend other products that relate to the item being purchased. A couple examples of this would be a customer purchasing a shirt that has a coordinating jacket and tie. These two items, the jacket and tie, could be set up to display on the Information Tab in Xstore for the associate to recommend to the customer. Another example would be the purchase of an item that would require another purchase, for instance a watch that does not come with a battery.

Figure 1–18 Info Tab Showing Item Information



If DisplayMessageAsNotify setting is configured, then multiple item text messages pop up in Xstore during the sales process.

- **Customer Tab**: Shows customer detail.
- **Tasks Tab:** The Tasks tab displays open and in progress tasks with start date/time prior to the current date and end date/time equal to the current date or in the future. Tasks shown here are view only.

  The following information is displayed for each task:

- **Activity** - The type, status, and description associated with the task.
- **Associate** - The assigned associate, appointment start date and time, and end date and time.

- **Goals Tab:** The Goals tab displays information from the corporate office about the goals set for your store for a specified date range. You are not required to log in to view store goals. These goals are visible to all employees.

  The goals are listed in the following order:

  1. Completed goals
  2. Active goals
  3. Future goals

  The goals are displays in color, based on their status:

  - **Green** - Goals completed and met.
  - **Red** - Goals completed but not met.
  - **Black** - Active, current, and future goals.

  Each goal has an effective date and an end date. The store goal is shown in the **Goal** column and the current amount achieved toward the goal is shown in the **% To Date** column.

  > **Note:** Future goals display "N/A"' in the % To Date column until they become active.

  Sales Goal to date progress is calculated using net sales. Progress toward store goals can also be found in the Store Goals report and on the Dashboard.

- **Offers Tab:** The Offers tab displays e-awards, coupons and entitlements that are available and whether they have been applied to the transaction. When a customer is linked to a transaction, the number of offers is displayed. As qualifying items are added to the transaction, entitlements are automatically applied to the basket. Coupons need to be scanned or entered to be applied to the transaction. The different offer types are represented by distinguishing icons on both the offers tab and the sales display panel.

  The following information is displayed for each offer:

  - Offer ID - ID for the e-award, coupon or entitlement.
  - **Description** - Description of the coupon.
  - **Expires** - Expiration of offer.
  - **Applied?** - Indicates whether the coupon has been applied to the transaction.

    If a customer decides they do not want to use an offer for that transaction, it can be removed manually. To remove an offer, select the discount from the sales display panel and void the line from the transaction. The offer shows as canceled under the applied column.

- **Associated Items Tab:** This tab allows users to call customers' attention to items they may be interested in, based upon their purchases. Oracle Retail Xstore Point of Service displays a picture of each item, with a description of the item beneath it.

- **Messages Tab:** You are not required to log in to view messages. These messages are visible to all employees. The information shown on the Messages tab may be from the corporate office, or from your store management.

  Messages require no action, and may be store-specific (only displayed in your store, not corporate-wide) or register-specific (only displayed on a designated register).

  These messages are time-based and do not display after the expiration date has passed.

  Note: If the message contains a URL, click the link icon to open the URL.

  Messages use icons to indicate priority:

  – **Exclamation Point** - High priority

  – **No icon** - Medium priority

  – **Down Arrow** - Low Priority

- **Keypad Tab:** The keypad option displays a numeric keyboard for entering numbers. The keypad automatically displays when you are in a field requiring a numeric value such as the Tender field.

2

Custom Branding

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

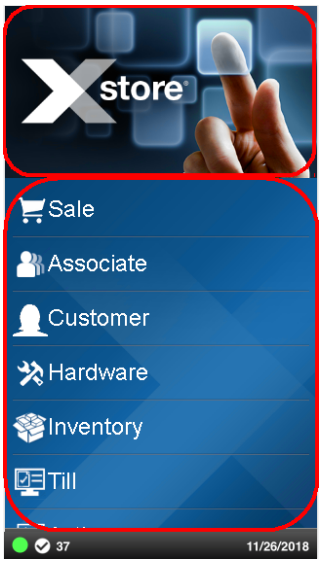
Custom branding in Xstore Mobile is performed by placing override configurations in the `XstoreMobileBranding.properties` override file within the cust_config directory.

The configurations in this file are described in XstoreMobileBranding.properties.

XstoreMobileBranding.properties

This file has the following properties:

Figure 2–1 Xstore Mobile Handheld - Custom Branding



The top section shows the main menu logo image.

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

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

  Examples:

  ```
  mainMenuLogoImageUrl=res/graphics/ branding/xstoremobile/ XstoreM_
  MainImage.png
  ```

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

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

  Example:

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

The lower section shows the main menu background image. This image has the following configurations:

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

  Examples:

  ```
  mainMenuMainBackgroundImageUrl=res/graphics/ branding/xstoremobile/
  XstoreM_MainBackground.png
  ```

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

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

  Example:

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

Figure 2–2 Item List Header - No Customer Assigned



The header image for a sale without an assigned customer.

This images has the following configurations and applies to both the Mobile Handheld and Mobile Tablet:

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

  Examples:

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

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

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

  Example:

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

Example Configuration

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

Table 2–1 Images Used in XstoreMobileBranding.properties Example

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

Configuration Descriptions

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

Table 2–2 Areas Configured in XstoreMobileBranding.properties

Image	Area	Description

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

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

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

File Contents

The complete file, as described in Configuration Descriptions, would be the following:

Main Menu logo configuration

```
mainMenuLogoImageUrl=res/graphics/branding/Sample/Star.png
```

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

Main Menu background configuration

```
mainMenuMainBackgroundImageUrl=res/graphics/branding/Sample/ Diamond.png
```

```
mainMenuMainBackgroundStyles=background-size: auto; background-repeat:
repeat; background-position: 50%;
```

```
saleItemHeaderNoCustomerImageUrl=res/graphics/branding/Sample/
Lightning.png
```

```
saleItemHeaderNoCustomerStyles=background-repeat: no-repeat;
background-position: left center;
```

3

Sale

The Sale option in Xstore Mobile Handheld and Mobile Tablet provides users with the ability to perform sale transactions. To begin a sale transaction, select the **Sale** option (left) on the Main Menu of Xstore Mobile Handheld or touch the lock to login to the register on the Xstore Mobile Tablet. See Figure 1–2.

Figure 3–1 Main Menu - Sale Option



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

This chapter covers the following functions:

- Start Transaction
- Register Login
- Entering Pre-Sale Information
- Entering Items
- Context Menu Options
- Adding Item Coupons

- Redeeming a Rain Check
- Tendering the Transaction
- Receipts
- Reprint Receipts and Documents (Mobile Tablet Only)

Start Transaction

To start a sale transaction:

Figure 3–2 Main Menu - Sale Option



1. Select **Sale** in the Main Menuto start a new transaction.

Register Login

No transactions can be entered into Oracle Retail Xstore Point of Service until you log in at the Register Login screen. This prevents unauthorized personnel from accessing the register. Logging in also allows the system to record each associate's sales, calculate commissions, and compare sales to employee goals.

Depending upon your system's configuration, you may be required to clock in before logging in. For more information about the clock-in procedure, refer to Clock In/Out.

To log in to a register:

Figure 3–3 Register Login - Mobile Handheld

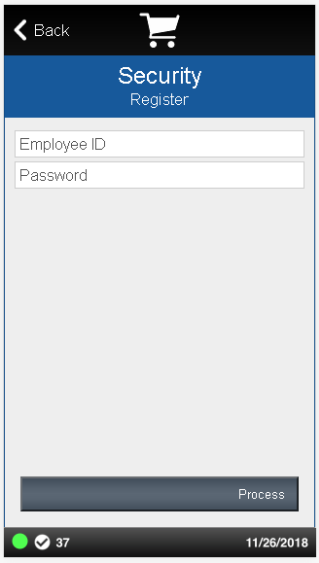
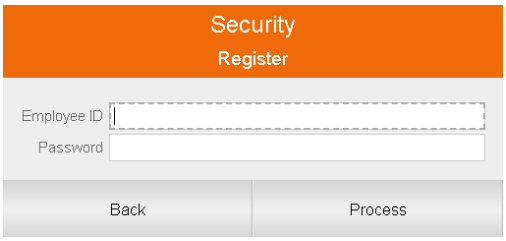


Figure 3–4 Register Login - Mobile Tablet



1. Enter Employee ID.
2. Enter Password.
3. Select **Process**.

Entering Pre-Sale Information

Depending on your store configuration, pre-sale screens that display after login may include:

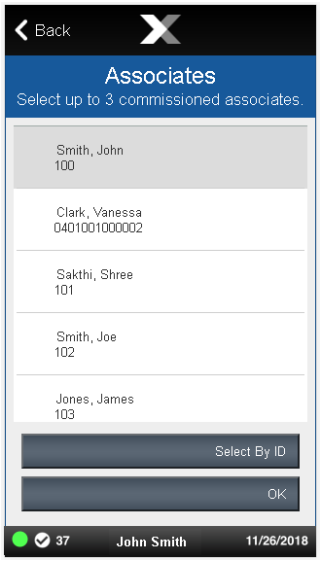
- Associate Flight Information
- Make an Airside Sale on Arrivals
- Make an Airside Sale to Staff
- Associating a Customer with a Transaction
- Loyalty Registration

Selecting Commissioned Associates

If your store tracks the associates' sales for commissions and sales goals, you may be prompted to select a commissioned associate (or associates) to be linked to the items in a sale transaction. There are two ways to select a commissioned associate for a transaction:

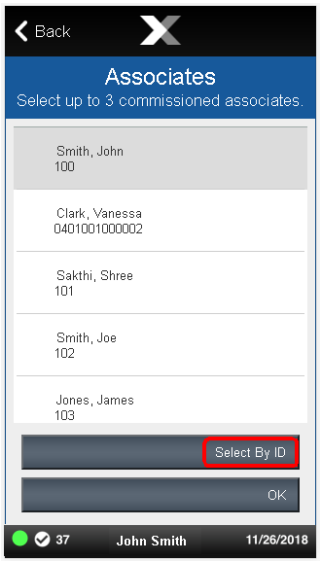
- Select the sale associate(s) for this transaction from the list and select **OK**.

Figure 3–5 Select Associate



- Select the **Select By ID** option.

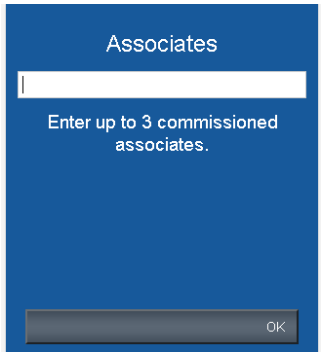
Figure 3–6 Associates - Select by ID



For each associate to add to the transaction:

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

Figure 3–7 Associates - Blank Field



3. When you are finished adding associates, leave the associate ID field blank.
4. Select **OK**.

Continue the transaction with:

Loyalty Registration

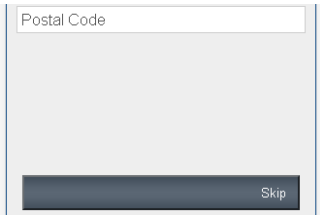
<OR>

Adding an Item

Associating a Customer with a Transaction

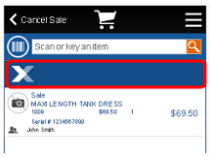
Depending upon your system's configuration, you may be prompted for customer information so that a customer may be assigned to the transaction.

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



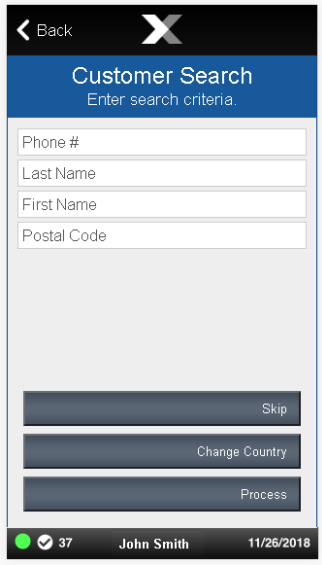
If you are in the sale screen, selecting the region where a customer name would show if a customer had been added, prompts for the customer lookup.

Figure 3–8 Customer Quick Add



To assign a customer to a transaction:

Figure 3–9 Customer Search Criteria



1. Enter search information. Enter as much information as possible in the Customer Search form to limit the number of customer records that are returned.
2. Select the **Process** button.

   To change the states/provinces in the State search menu, see Changing Country.

Figure 3–10 Customer Search Results

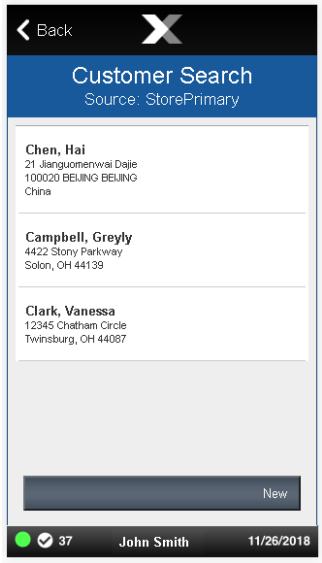
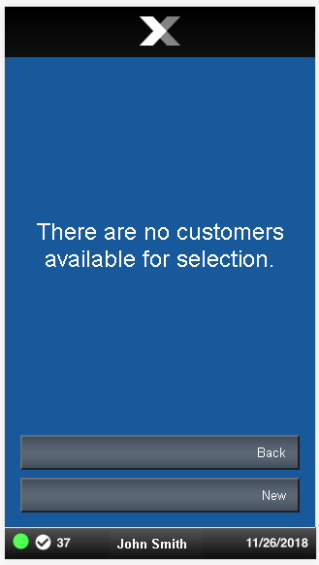


Figure 3–11 Customer Search - No Results



3. If a list of matching customer records is found, select a customer from the list. <OR>

   Select the **New** button to add a customer. See Adding a New Customer Record for more information.

   Continue the transaction with either:

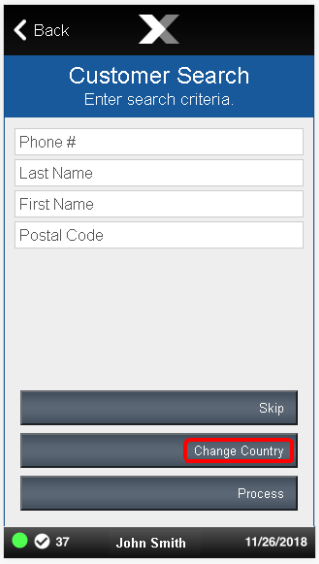
   Loyalty Registration <OR>

   Adding an Item

Changing Country

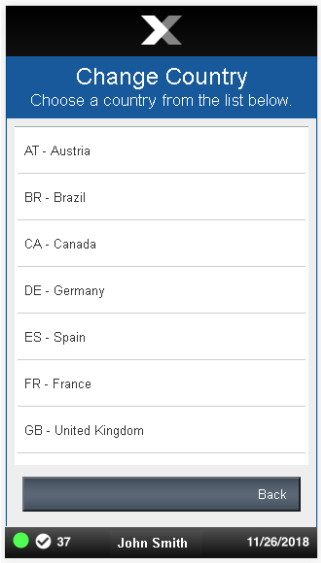
To change the states/provinces in the State field (if present) to those of a different country:

Figure 3–12 Customer Search - Change Country Option



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

Figure 3–13 Change Country



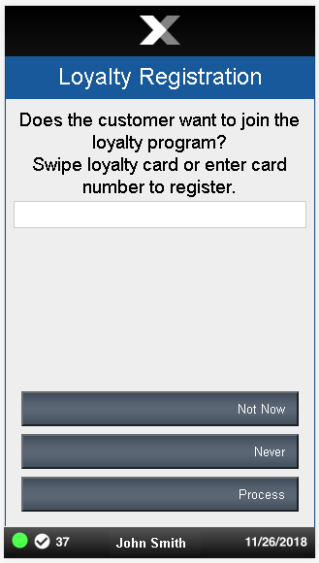
2. Select the proper country.

   Return to Associating a Customer with a Transaction

Loyalty Registration

If a customer is not registered with a loyalty program, Xstore Mobile prompts to add a loyalty card.

Figure 3–14 Loyalty Registration



Do one of the following:

- Register a Card - Swipe a loyalty card, or enter the card number and select the **Process** button.
- Continue Without Adding a Card - Select the **Not Now** button.
- Never Ask Again About a Card - the **Never** button.

Entering Items

Use the options on the Register Sale menu to enter items, add discounts, and to add non-merchandise items such as gift certificate sales. Refer to Adding a Discount to an Item or TransactionEmail Receipt OptionsModifying Line Items in a Sale, Adding Non-Merchandise Items to the Sale and Gift Registry for more information about these activities.

You may also be able to enter extended transactions such as:

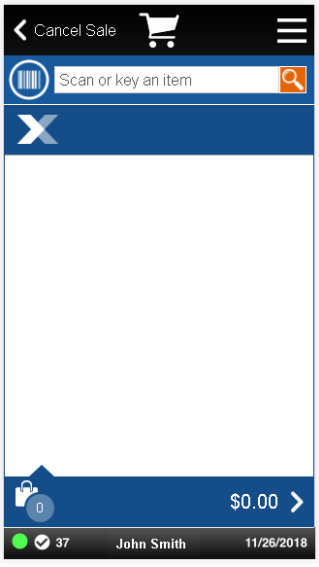
- Special Orders (Mobile Tablet Only)
- Work Order Transactions
- Order Transactions Through Order Broker Cloud Service
- Send Sale Transaction
- Warranty and Service Plan Transactions
- Pre-Sale Transactions
- Hold Account Transactions.

Note: To look up an item see Searching for Items

Adding an Item

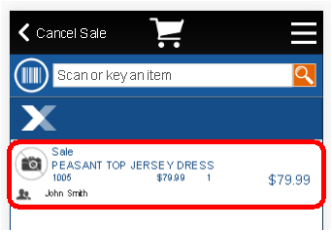
To add an item to a transaction:

Figure 3–15 Sale Screen - Scan Item Prompt



1. Scan an item barcode to add it to the transaction or enter an Item ID manually. Repeat as needed per item.

Figure 3–16 Sale Screen - Item Line



Note: Performing a long press on the item line within a transaction, takes you to that item's product detail screen.

Quick Items Tab (Mobile Tablet Only)

The Quick Items tab contains items that are frequently purchased. This option allows you to add frequently purchased items more easily. You can select multiple items if required.

To add an item to the sale transaction by using the quick items tab, follow the steps below.

1. Select the Quick Items tab. Frequently purchased items are displayed.
2. Select an item to add to the transaction. Use the up and down arrows as required.
3. The item is displayed on the Sales Display Panel and on the customer display.

RFID

To support RFID (radio-frequency) scanning, Xstore POS can be integrated to the MagLinQ devices. These devices scan the EPC (Electronic Product Code), which includes scanning and retrieving both the product ID and RFID Reference Tag Number simultaneously.

Scan the RFID tag on the item.

Xstore reads the RFID Electronic Product Code (EPC) tag whilst the product barcode provides the product ID and the RFID tag extracts the unique reference number of the product.

If the scanner is not working, manually enter the product ID.

Item Restrictions

When certain items are selected, restrictions may apply. These include the following:

- Customer Age Verification
- Cashier Age Restrictions
- Time Restrictions

Customer Age Verification

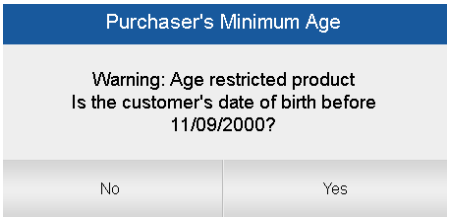
Xstore Point of Service allows you to configure customer age verifications to determine whether a customer meets the age requirements to buy certain items. You can set different age levels for verification (for example, 18 years and 21 years).

An additional age verification is only requested, if an item with a higher restriction is added to the transaction. For example, if the first purchased item has an age limit of 21 and the second item has an age limit of 18, there is only an age verification for the first item, but not for the second one.

To sell an item with an age verification, follow the steps below.

1. Enter an item where an age verification is necessary. Xstore Point of Service displays a prompt relating to the date of birth of the customer is before a specified date.

Figure 3–17 Age Restricted Product



- Select **Yes** to confirm the prompt. The item is shown on the Sales Display Panel. For additional items requiring an age verification 18 years, no prompt is displayed.
- Select **No**. The item is not added to the Cart. If additional items with an age verification are entered, the prompt is shown again.

Cashier Age Restrictions

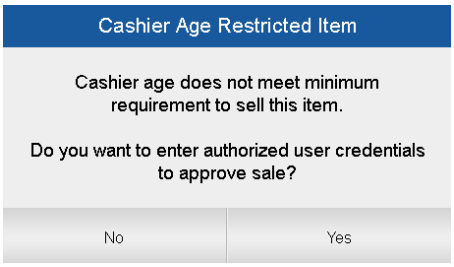
Xstore Point of Service allows you to configure cashier age restrictions to determine whether a cashier has the permission to sell certain items. You can activate/deactivate the cashier age restriction per store.

An additional age verification is only requested if an item with a higher restriction is added to the transaction. For example, if the first purchased item has an age limit of 18, there is only an age verification for the first item, but not for the second one.

If the cashier age restriction is activated and there is no date of birth entered for the cashier, the system displays the cashier age restriction prompt.

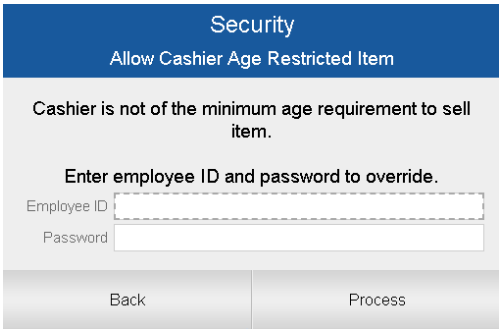
1. Enter an item with a cashier age restriction. Xstore POS displays a prompt requesting authorization of the transaction.

Figure 3–18 Cashier Age Restricted Item



2. Select **Yes** to authorize the transaction. If **No** is selected, the item is not added to the sale.

Figure 3–19 Cashier Age Restricted Item Override



3. Users holding the required security privileges must:
   a. Enter their user name.
   b. Enter their password.

The item is added to the sales transaction and shown on the Sales Display Panel.

Time Restrictions

Xstore Point of Service allows you to configure a time frame in which certain items cannot be sold and/or returned, for example, alcohol. If this function is enabled, items with a restricted time frame can only be sold during authorized hours and days. You can activate/deactivate the time frame restriction by item, department and sub-department.

To sell an item with a time restriction, follow the steps below.

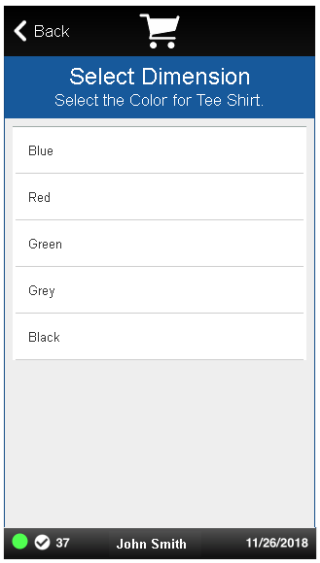
1. Enter an item with a restricted time frame.
2. Xstore Point of Service validates the system time and day against the configured restricted time frame.
3. The system displays the prompt, that the item is currently restricted and not available for sale.
4. Press **OK** to close the prompt.

Other Prompts

- Style Items

  A style is an entry in the Item database that has properties such as size, color, and width, and so on. Multiple regular items may be associated with a style ID. If you enter a Style ID, the system prompts for additional information.

Figure 3–20 Style Item

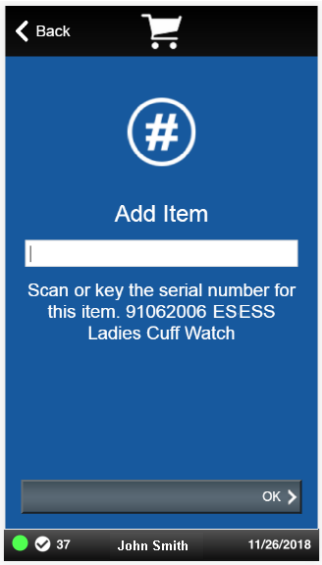


Select the dimension.

- Serial Numbers

  If prompted for an item serial number:

Figure 3–21 Serial Numbers



Enter the item serial number and select **OK**.

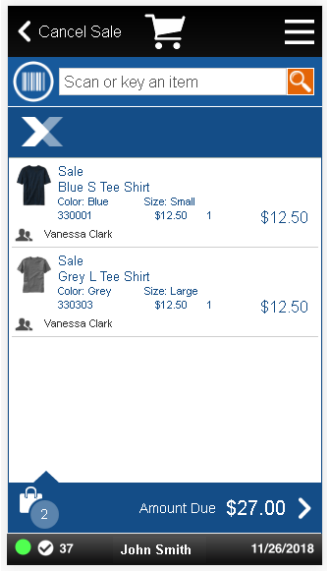
To adjust an item, see Adjusting an Item.

When you are finished entering/adjusting items, tender the transaction. See Tendering the Transaction.

Adjusting an Item

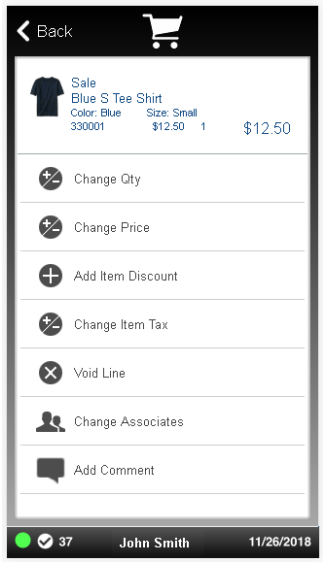
To adjust an item that has been added to a transaction:

Figure 3–22 Sale Screen



1. Select the item in the item list.

Figure 3–23 Item Adjustment Menu



2. Select the change to make to the item.

See Chapter 9, "Modifying a Transaction" for information about the changes that can be made to an item.

To make another item adjustment, repeat these steps.

To add another item to the transaction, see Adding an Item.

When you are finished entering/adjusting items, tender the transaction. See Tendering the Transaction.

Context Menu Options

To access all additional transaction options through the context menu, select the 1 in the upper-right corner of the transaction screen. This opens the context menu for transactions.

Figure 3–24 Mobile Handheld Context Menu - Sale Mode

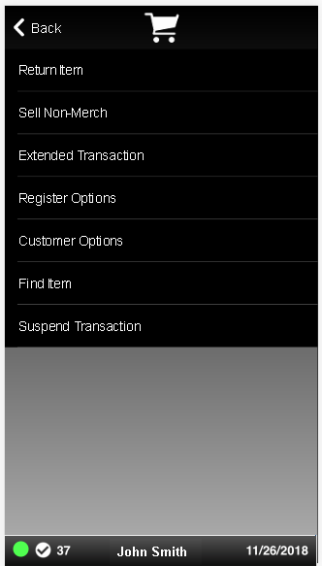


Table 3–1 Mobile Tablet Context Menu Options Sale Mode

Context Menu Option	Sub-Menu Options
Return Item	NA
Sell Non-Merch	Sell Non-Merch
	Sell Gift Card
	Sell Gift Certificate
Extended Transaction	Order
	Send Sale
	Warranty
	Work Order
	Pre-Sale
	Hold

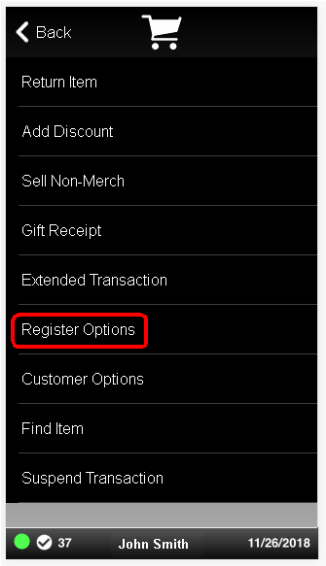
Table 3–1 (Cont.) Mobile Tablet Context Menu Options Sale Mode

Context Menu Option	Sub-Menu Options
Register Options	Balance Inquiry
	Redeem Rain Check
	Assign Gift Registry
	Lock Register
Customer Options	Assign Customer
Find Item	Price Inquiry
	Item Lookup
	Inventory Locator
Suspend Transaction	NA

Adding Item Coupons

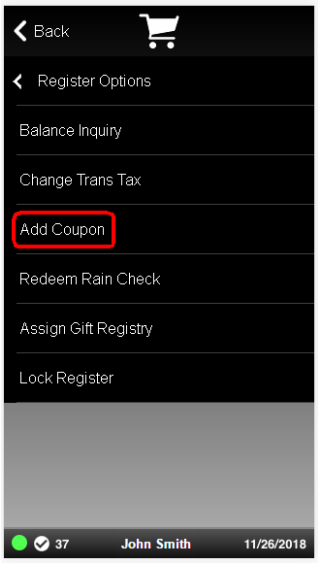
To add a coupon to a transaction:

Figure 3–25 Register Options



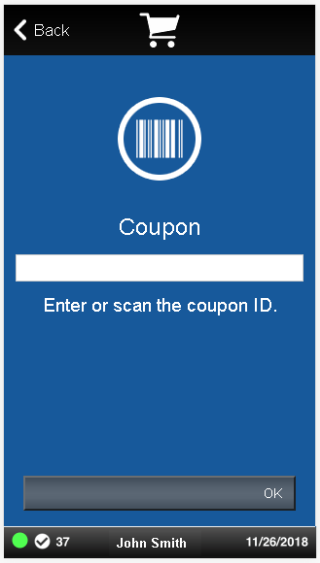
1. Select **Register Options** in the Context Menu.

Figure 3–26 Add Coupon



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

Figure 3–27 Enter Coupon ID



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

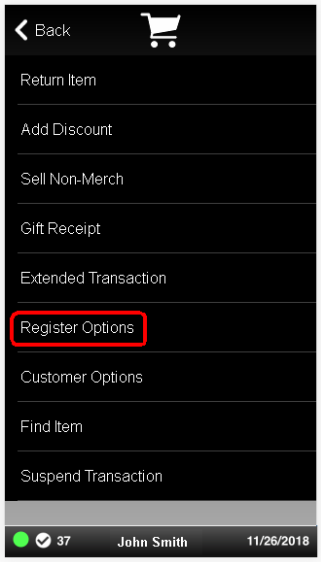
The coupon is applied to the transaction and Xstore Mobile returns to the item entry screen.

Redeeming a Rain Check

Rain Check is an optional feature that allows customers to purchase out of stock items for the same price at a later date.

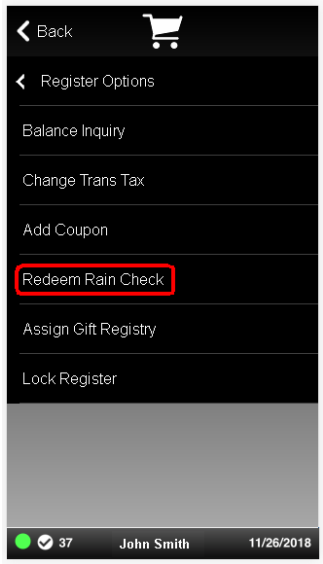
To redeem a rain check:

Figure 3–28 Register Options



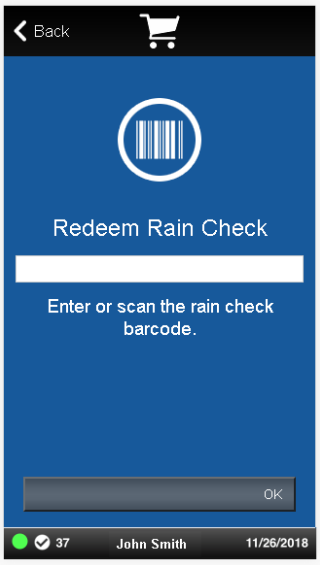
1. Select **Register Options** in the Context Menu.

Figure 3–29 Redeem Rain Check



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

Figure 3–30 Enter Redeem Rain Check Barcode



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

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

- If you sell non-merchandise items such as gift cards or services such as gift wrapping, refer to Adding Non-Merchandise Items to the Sale for more information.
- If you do not know the item number and cannot scan the item, use the "Item Lookup" option to find the item number. Refer to Searching for Items Using Item Lookup for more information.
- If the item is not found in the current inventory at this store, use the "Inventory Lookup" option to locate the item at another location. Refer to Locating Items: Inventory Lookup for more information.
- To add a discount, refer to Adding a Discount/Award to an Item or Transaction for more information.
- To change the tax (both item and transaction), refer to Changing Item Taxes or more information.
- If your system is configured to support awards and the customer's accumulated rewards can be applied to this transaction, select the Add Discount menu option. Refer to Adding a Discount/Award to an Item or Transaction for more information.

Tendering the Transaction

The tendering process requires that you select or enter two basic items of information:

- Form of payment (also called tender type-cash, check, credit card, and so on.)
- Amount paid with that tender type

Depending upon the form of payment and your store's policies, you may have to enter or select additional information; for example:

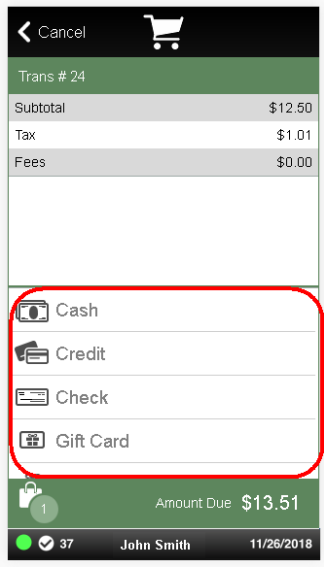
- Credit card account number, CID number, and expiration date
- Additional tender types if the first tender type did not pay the total due
- Additional forms of customer ID (driver's license number, birth date, credit card number, or other ID)
- Customer name
- Customer address
- Security approval for large sales or refunds

Refer to Chapter 5, "Processing Tenders" for additional information about specific tenders.

Completing the Transaction

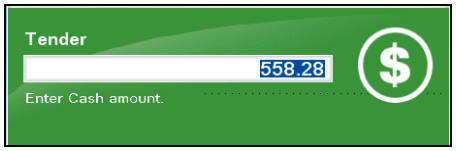
1. When you are ready to complete the transaction, you can press **Enter** at the item prompt, or select the **Add Tenders** option to display a list of tender types. You can also swipe a credit card in a MSR or in a signature capture device.
2. At the tender list, use the up and down arrow keys to select the tender type and press **Enter** to continue, or select the number associated with the tender option.

Figure 3–31 List of Tender Types



3. At the tender amount prompt, enter the amount of the tender and press **Enter** to continue. Depending upon the tender type you selected, the tender amount prompt may default to the total amount due for the sale transaction.

Figure 3–32 Tender Cash Amount Prompt

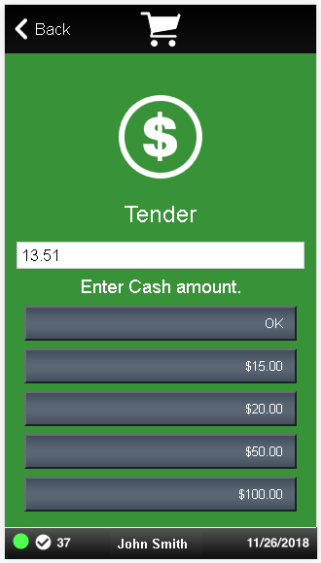


Note: Split Tenders: You may enter a partial amount if the purchase is paid with more than one tender type. After selecting a tender type, entering the amount and pressing **Enter**, the system automatically prompts for the remaining balance due and you may select any of the valid tender types.

<OR>

Select one of the Quick Cash buttons.

Figure 3–33 Quick Cash Button



4. A prompt may display asking if the sale is complete.

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

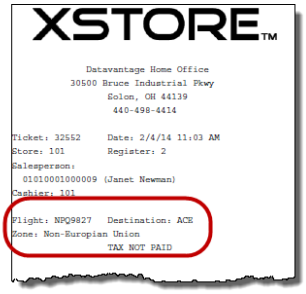
If prompted, press **Y** for Yes to complete the transaction. Press **N** for No to return to the Sale Tender screen.

5. The system prints receipts as required.

Note: If your store issues email receipts, additional/different prompts display. Refer to Email Receipt Options for more information about sending email receipts.

Note: See Printing a Gift Receipt for information about printing Gift Receipts.

The Airside store receipt prints the Flight number, Destination, Zone, and tax exemption (if applicable).



6. Depending upon the configuration of your system, you may be prompted to scan a cash drawer. Scan the appropriate cash drawer for your system.

Note: **Note:** If you are prompted that the cash drawer is unavailable, either wait for the cash drawer to become available, or scan a different cash drawer.

7. Close the cash drawer to complete the transaction.
8. On occasion, upon completing a transaction, a prompt may open asking whether to apply a system update.

Note: If you agree to perform the system update, you will not be able to create any new transactions for a certain grace period. Existing transactions can be completed during the grace period.

Once the system is not in a transaction or if the required period has expired, the update will be automatically applied without asking the user. You cannot use the system during system updates.

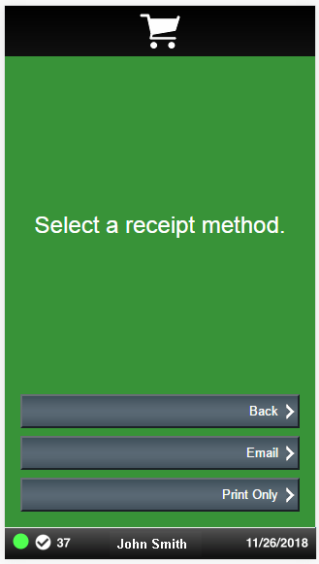
- Select **No** to be asked again after a period of time.
- Select **Yes** to apply the update. A confirmation prompt opens:
  - Select **Apply** to perform the update.
  - Select **Cancel** to cancel the update and be asked to perform the update after a period of time.

Email Receipt Options

If your store issues email receipts, you may be prompted for more information after the sale is tendered. Any receipts that have been set up for email delivery are generated as PDF documents and sent to the customer's email address as an email attachment. This email receipt process assumes the customer has an active email address and has given permission to receive email from the store.

1. After tendering the sale, you are prompted to select a receipt method, unless the customer has been set up to automatically receive email receipts, in which case go directly to the next step.

Figure 3–34 Sale Complete Prompt - Email Receipts Enables



Note: The choice you make here applies to all receipts. For example, if you choose to email receipts, then all receipts such as Gift and Customer receipts are sent in an email. You cannot print one but email the other.

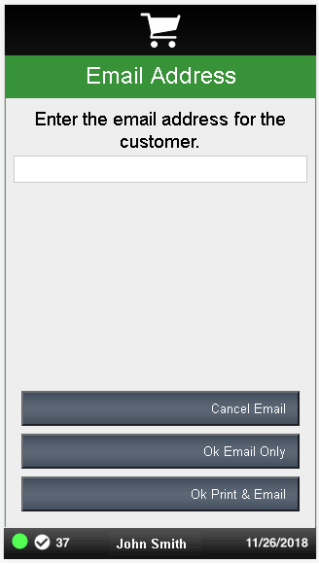
However, any receipt types that are not supported for distribution in an email, per your store policy, automatically print on the receipt printer.

- To print the receipt(s), select **Print Only**. All receipts are printed on the receipt printer and the transaction is complete.
- To email the receipt(s) to the customer, select **Email** and continue with step 2 below.

2. If you chose to email the receipt(s), you are prompted for the customer's email address:
   - If no customer is associated with the sale, enter the customer's email address.
   - If a customer with an email address on file is associated with the sale, verify the customer's email address is correct as shown on the prompt. You can change the address if needed.

3. Select a receipt option:

Figure 3–35 Email Address Form



- To email the receipt(s) to this email address, select **Ok Email Only** and the transaction is complete.
- To both print the receipts and send an email copy to this email address, select **Ok Print and Email** and the transaction is complete.
- If you decide not to send an email receipt, select **Cancel Email** to return to the Sale Complete prompt (Figure 3–34) where you can choose to print the receipts.

Note: The customer may have indicated that they wish to have email receipts as their default. If this is the case, you will not be prompted for the customer's email address.

Email addresses are validated for proper format. If the email address does not have proper formatting, a warning message displays. Press **Enter** to acknowledge the message and return to the Email Address prompt where you can correct the error.

If you make any changes to a customer's email address on file, you may be prompted whether or not the customer's profile should be updated with this new email address:

- Select **No** to send the receipt to the new address, but keep the old address on file.
- Select **Yes** to send the receipt to the new address and to also update the customer's profile with the new email address.

If there are multiple receipts on the transaction, they are sent as multiple PDFs in one email.

Receipts

This section describes the Receipt functions.

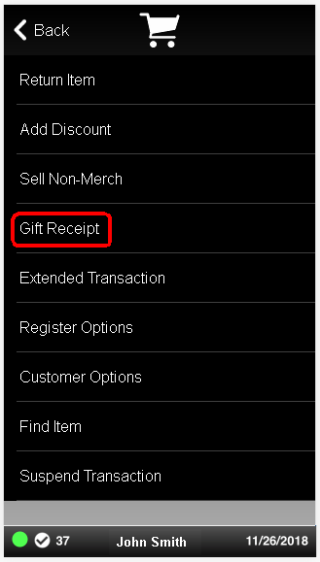
Printing a Gift Receipt

During a transaction, items may be selected for a gift receipt before a tender is selected, or between adding tenders. Gift receipts can also be issued immediately after a completed sale transaction, or from the Electronic Journal for eligible items in a transaction. Eligible items include regular sale items, special order pickup items, and layaway pickup items.

Select Gift Certificate Items in a Sale

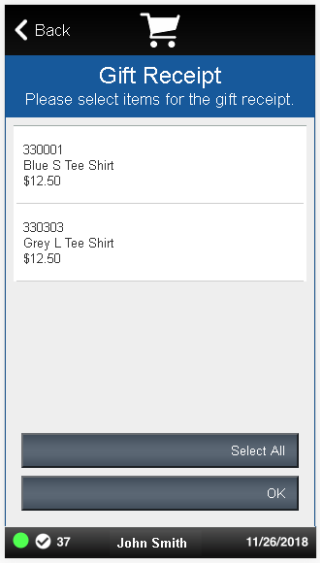
While a sale transaction is being performed, you may use the following steps to select items to be issued gift certificates:

Figure 3–36 Gift Receipt Option



1. During a sale transaction, select **Gift Receipt** in the Context Menu. Xstore Point of Service displays a list of items eligible for gift receipts.

Figure 3–37 Gift Receipt Items



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

   <OR>

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

3. Click **OK**.

   The gift certificate items are labeled in the View Port with a gift icon. Gift certificates will be printed at the end of the transaction.

4. At the end of the transaction, if you are prompted whether to group gift certificate items, see Group Gift Receipt Items.

5. At the end of the transaction, you may be prompted whether to print a gift certificate for each item:

Figure 3–38 Print Separate Gift Receipt Prompt



- Click **Yes** to print a gift certificate for each item.
- Click **No** to print one gift certificate for all items.

Group Gift Receipt Items

After tendering the sale, if there are multiple items that have been labeled as requiring a gift receipt, you may be prompted whether to group items on separate gift receipts. For example, you can group 2 items on one receipt, and 3 items on another receipt.

To group items on gift receipts:

Figure 3–39 Group Gift Receipts



1. If you are prompted whether to group gift receipts, select an option:
   - Click **Yes** to group gift receipt items. A gift receipt grouping window opens.
   - Click **No** to continue the transaction without creating gift receipt groups.
2. Select the items to group on one gift receipt.
3. Click **Add Grouping**.

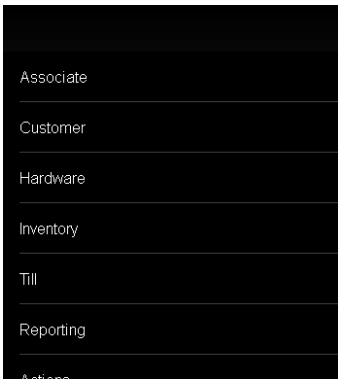
   The selected items are grouped into one gift receipt and removed from the list.
4. Repeat Steps 2 to 3 for each gift receipt group.
5. Click **Finish and Print** to print the gift receipts and complete the transaction.

Reprint Receipts and Documents (Mobile Tablet Only)

The reprint options provide a way to recover when there is a printer error or the printer jams. They allows you to reprint a receipt or a rebate offer for the customer.

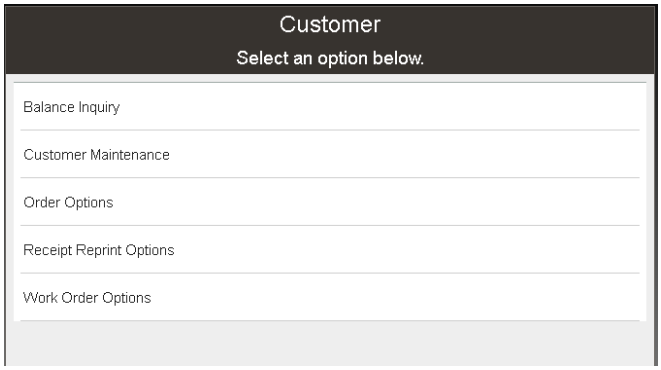
1. Go to the register login screen and select the **Context Menu**.

Figure 3–40 Mobile Tablet Context Menu



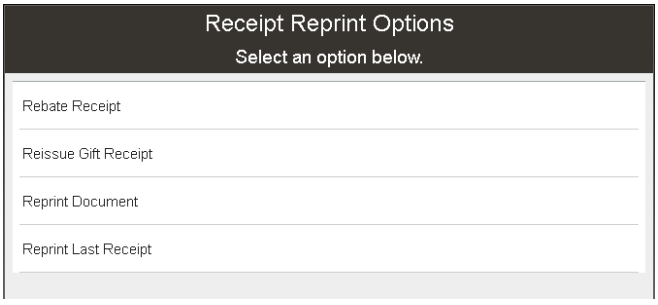
2. Select **Customer** from the Context Menu.

Figure 3–41 Mobile Tablet Customer Menu



3. Select **Receipt Reprint Options** from the Customer menu.

Figure 3–42 Mobile Tablet Receipt Reprint Options Menu



The following options are available:

- Print a Rebate Receipt

- Reissue a Gift Receipt
- Reprint a Document
- Reprint the Last Receipt

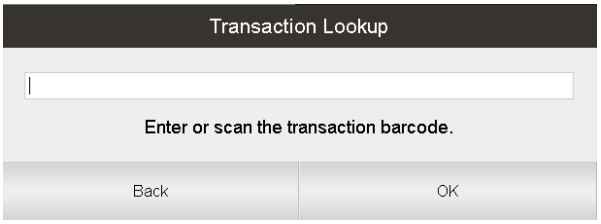
Print a Rebate Receipt

...continued from step Reprint Receipts and Documents (Mobile Tablet Only)

Rebate receipts may be offered to customers so that they can retain the original receipt for a purchase, and mail in the rebate receipt as proof of purchase.

1. Select **Rebate Receipt**. The system prompts for transaction information.

Figure 3–43 Mobile Tablet Transaction Lookup



2. Enter the transaction information by doing one of the following:
   - Scan the barcode on the original sale receipt.
   - Enter the barcode information and press **Enter**. The rebate receipt prints on the receipt printer.

> **Note:** The receipt is clearly labeled as a rebate authorization receipt.

This receipt cannot be used for merchandise returns.

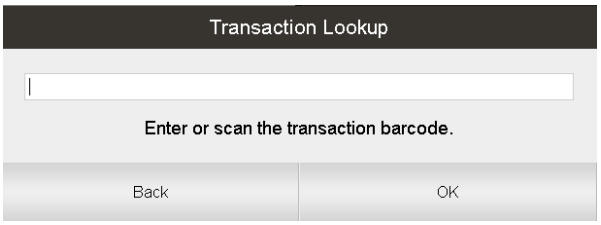
Reissue a Gift Receipt

...continued from step Reprint Receipts and Documents (Mobile Tablet Only)

To create gift receipts for a previously completed transaction:

1. Select **Reissue Gift Receipt**. The system prompts for transaction information.

Figure 3–44 Mobile Tablet Transaction Lookup



2. Enter the transaction information by doing one of the following:
   - Scan the barcode on the original transaction receipt.
   - Enter the barcode information and press **Enter**.

Xstore Mobile displays a list of items eligible for a gift receipt.

3. Select the gift receipt items using the appropriate procedure:
   - Select Gift Certificate Items in a Sale
   - Group Gift Receipt Items

   Xstore Mobile prints the receipt.

Reprint a Document

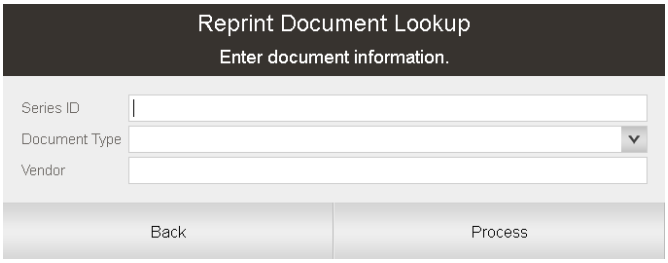
...continued from step Reprint Receipts and Documents (Mobile Tablet Only)

To reprint a document (such as a rebate offer):

1. Click **Receipt Document**.

   The Reprint Document Lookup window opens.

Figure 3–45 Mobile Tablet Reprint Document Lookup



2. Enter the search information for the document:
   - Series ID - Enter the ID for the document series.
   - Document Type - Select the type of document.
   - Vendor - Enter the name of the vendor who produced the document.
3. Click **Process**.

   Xstore Point of Service displays a list of documents matching the search criteria.
4. Click the correct document.
5. Press **Enter**.

   Xstore Point of Service reprints the document on the report printer.

Reprint the Last Receipt

...continued from step Reprint Receipts and Documents (Mobile Tablet Only)

To reprint the last receipt created by the register:

1. Click **Reprint Last Receipt**.

Figure 3–46 Receipt Reprint Confirmation Prompt



Xstore Point of Service prompts whether to reprint the last receipt.

2. Click **Yes** to reprint the last receipt.

> **Note:** The receipt is clearly labeled as a reprinted receipt.

4

Return Transactions

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

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

This section covers the following topics:

- With Original Receipt or Credit Card
- Entering Returns without Original Receipt
- Entering Returns without Original Receipt, Using Customer Purchase History
- Taxes For Return Items
- Exchanging Serial Numbers

With Original Receipt or Credit Card

Verified Returns (With Original Receipt or Credit Card)

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

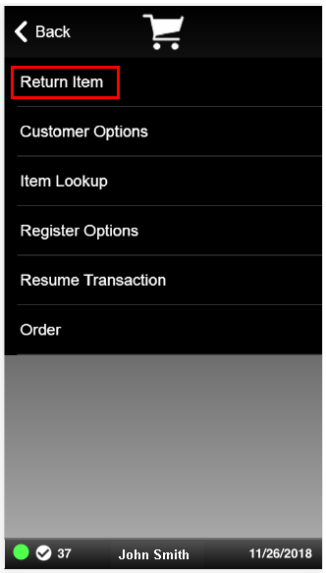
If you scan the transaction barcode at the Sale screen:

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

If you select the **Return Item** menu option:

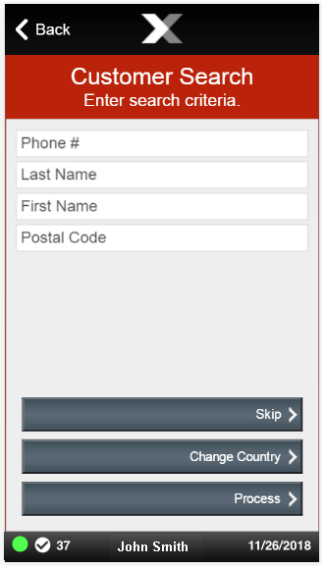
1. Select the Return Item option from the Context Menu. Perform the following steps to create a verified return.

Figure 4–1 Return Item Option



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

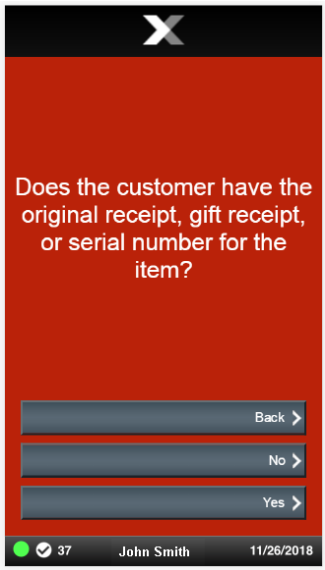
Figure 4–2 Customer Search Form



Note: For more information about the Change Country option on the Customer Search form, see Change Country.

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

Figure 4–3 Return Original Receipt Prompt

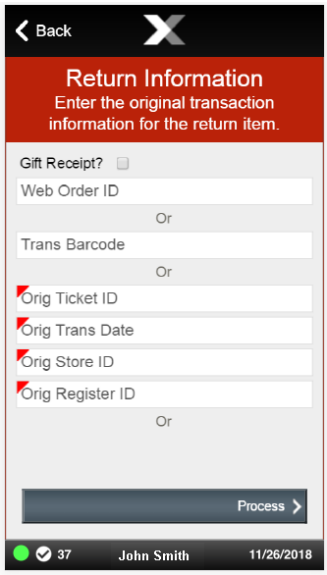


Note: Depending on your payment system, the original credit card may not be an option.

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

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

Figure 4–4 Original Transaction Return Information

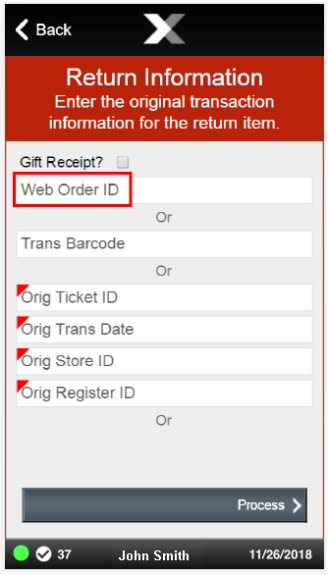


Note: What happens if the original transaction is not found or is missing data

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

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

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



5. Oracle Retail Xstore Mobile searches the database for the original transaction information.

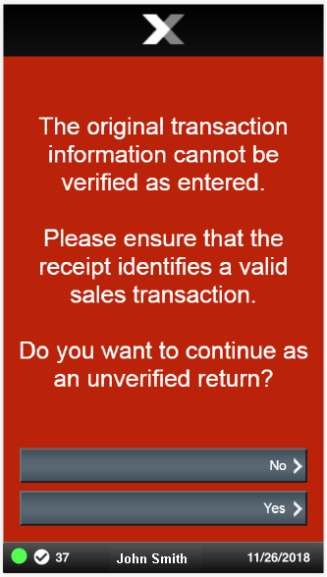
   - If you swiped or entered the customer's credit card number, enter or scan the item ID. If more than one transaction is found, select the transaction from the Available Transactions list when prompted.

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

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

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

Figure 4–5 Original Transaction Information Not Found Prompt



- Select **No** to enter/scan the receipt information again.
- Select **Yes** to process the return as an unverified return.

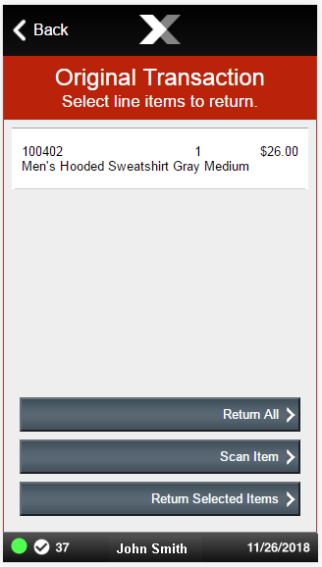
See Entering Returns without Original Receipt for processing information. If you want to search for the original transaction using the customer's credit card, go to step 1.

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

See Entering Returns without Original Receipt for processing information.

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

Figure 4–6 Original Transaction information

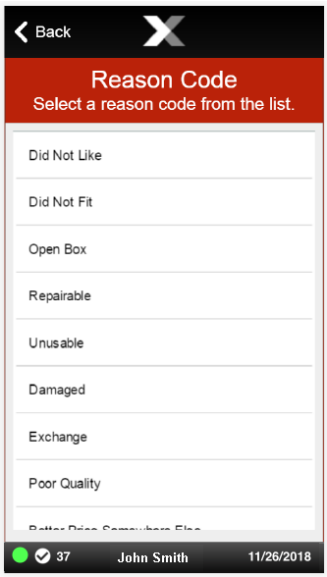


Note: Depending upon your system's configuration and the number of items in the transaction, you may be prompted for the item quantity to be returned. If prompted, enter the quantity and press **Enter** to continue.

Serialized items within a kit can be exchanged through functionality in the Back Office. See the Oracle Retail Xstore Mobile Manager's Guide for more information about Back Office processing.

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

Figure 4–7 List of Return Reasons



8. Depending upon the return reason you chose, you may be prompted for additional information as shown in Figure 4–8 below. Enter the required information and press **Enter** to continue.

Figure 4–8 Return Comment Form



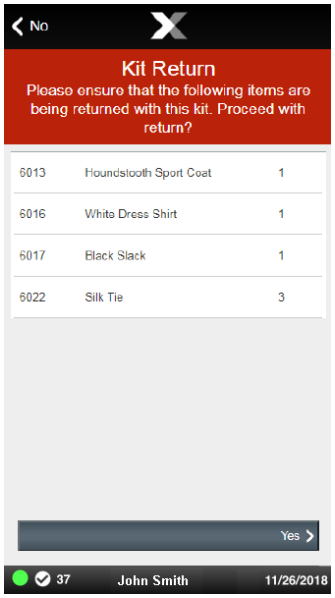
9. If you are prompted for a serial number, enter the serial number and press Enter to continue.

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

---

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

Figure 4–9 Kit Return Screen



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

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

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

> **Note:** Depending upon your return policy, certain items may be returned at a prorated value from their original purchase price. If so, the amount refunded for these prorated items is determined by the number of days between the original date of purchase and the date of return. For example, some store return policies offer a full refund if the item is returned within 30 days. After 30 days, a reduced refund (declining over time following the purchase date) is calculated automatically.

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

When the transaction is complete, the system prints receipts.

Entering Returns without Original Receipt

This section describes the return process without the original receipt.

Blind Returns and Unverified Returns

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

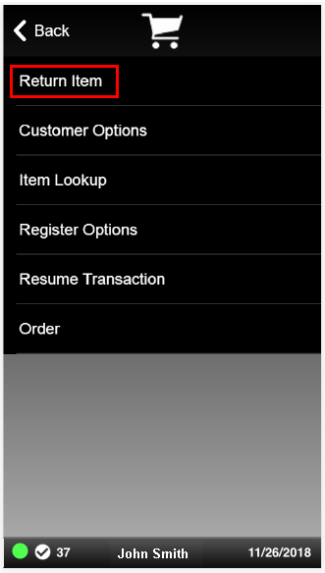
If the customer does not have the original receipt for the return item, or the customer's receipt cannot be verified, perform the following procedure to complete the return transaction.

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

---

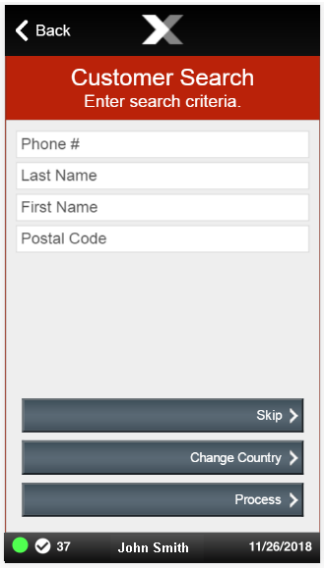
1. Select the **Return Item** option from the Context Menu. Use the following steps to perform a blind (or unverified) return.

Figure 4–10 Return Item Option



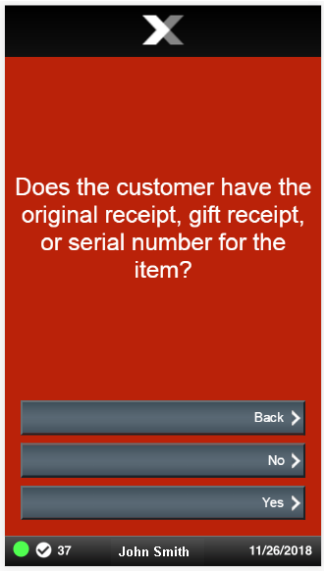
2. Depending upon your system's configuration, you may be prompted for customer information if a customer has not been associated with the current transaction. Enter the customer's information and select the Process option.

Figure 4–11 Customer Search Form



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

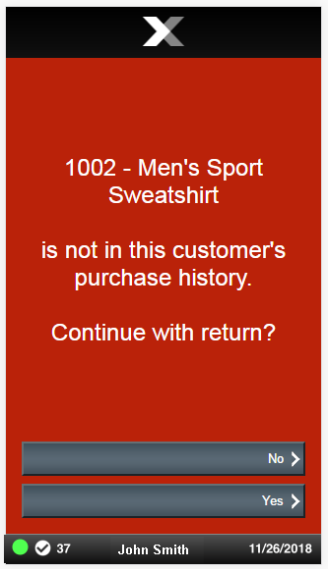
Figure 4–12 Return Original Receipt Prompt



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

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

Figure 4–13 Item Not in Customer's Purchase History Prompt



Go to step 7 below.

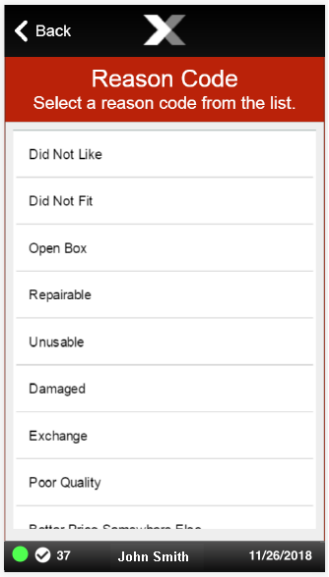
If the item is found in the customer's purchase history, select a transaction from the list and press **Enter** to create a verified return. Continue with step 6 of With Original Receipt or Credit Card.

<OR>

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

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

Figure 4–14 List of Return Reasons



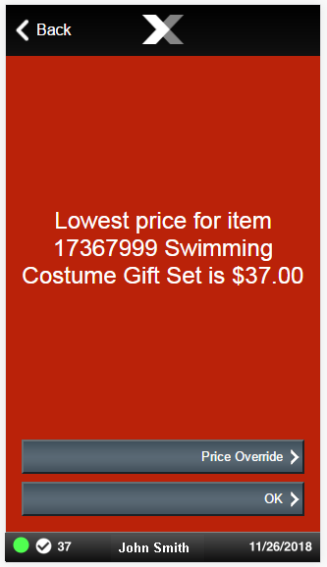
8. Depending upon the return reason you chose, you may be prompted for additional information as shown in Figure 4-12 below. Enter the text of your comment and press **Enter** to continue.

Figure 4–15 Return Comment Form



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

Figure 4–16 Lowest Price for Item Prompt

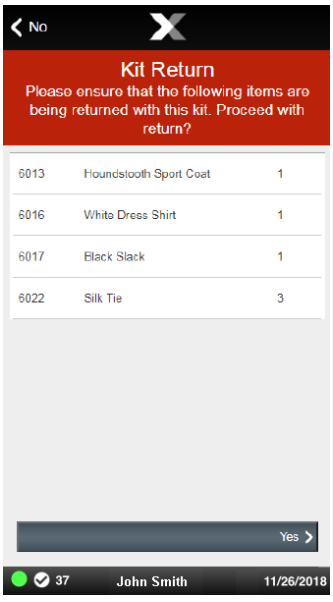


10. If you are prompted for a serial number, enter the serial number and press **Enter** to continue.

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

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

Figure 4–17 Kit Return Screen



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

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

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

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

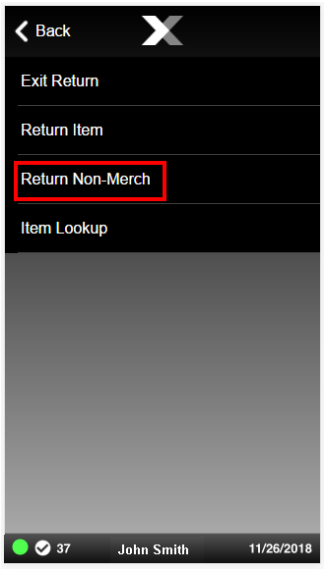
      Note: Note: Your store may have a blind return threshold. If the amount of the return exceeds this threshold, a Blind Return Threshold Amount security prompt displays. A manager will need to enter an **Employee ID** and **Password** to override. If your store does not allow overrides, you will be unable to complete the return.

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

Returning Non-Merchandise Items Without a Receipt

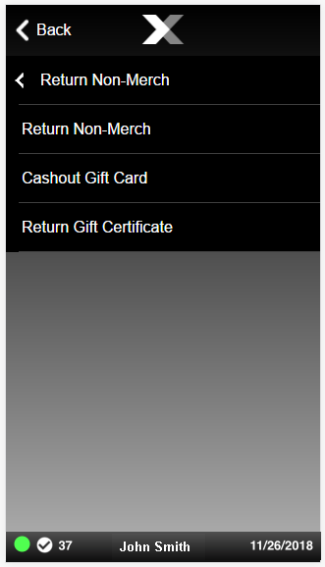
1. Select **Return Item** from the Context Menu. The system prompts you to specify whether or not the customer has a receipt or serial number for the return item.
2. Respond to the prompt by selecting **No**. After confirming that the customer does not have the original receipt, select **Return Non-Merch**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

Figure 4–18 Register Return Screen



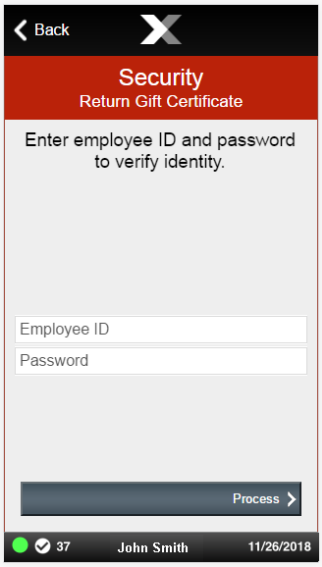
3. Select the category of non-merchandise item to be returned from the list and press **Enter** to continue.

Figure 4–19 List of Non-Merchandise Categories



4. The options to return a gift card or a gift certificate may require a security login, depending on store policy. To perform those two options, you must have the required security level. Enter your login ID and password when prompted, and select **Process**.

Figure 4–20 Security Verification Prompt



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

Entering Returns without Original Receipt, Using Customer Purchase History

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

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

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

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

Figure 4–21 Available Transactions



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

- Date: The original transaction date.
- Trans: The original transaction ID number.
- Qty Avail: The item quantity available for return from the original transaction.

– Trans Total: The original **transaction** total amount.

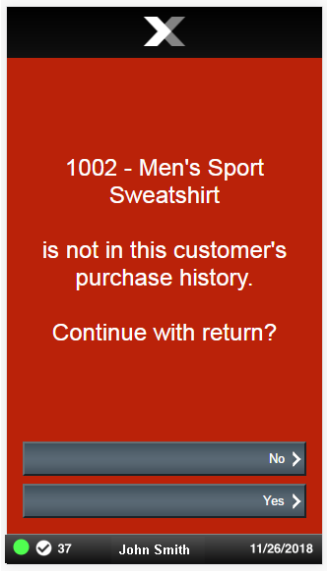
To use the customer's purchase history record for return pricing, select a transaction from the list and press **Enter**. Go to step 6 to complete the return.

To use Blind Return processing rather than selecting the item from the customer's purchase history record, select **Continue Blind Return** option and go to step 5 to complete the return.

- Item Not Found:

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

Figure 4–22 Item Not in Customer's Purchase History Prompt



– Select **Yes** to continue with a blind return. Go to step 5. (This option may be controlled by security permissions. If so, you may be prompted for a manager override to continue).

– Select **No** to cancel the return from customer's purchase history process. The system returns to the **Scan or Enter the Return Item** prompt in return mode.

Taxes For Return Items

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

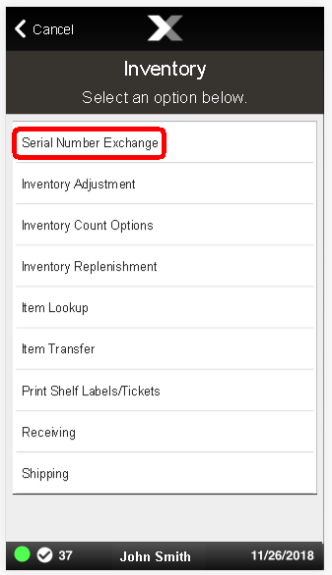
Note: If an original store number is not entered (because the customer does not have the original receipt), the return store's tax rate is used.

You can change the tax on the return item using the **Change Item** option on the menu. Refer to Changing Item Taxes for more information about changing taxes.

Exchanging Serial Numbers

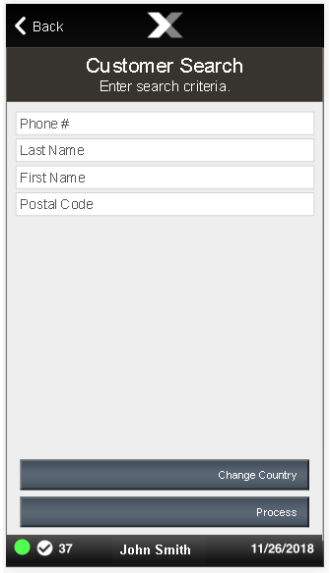
This option allows a serialized item to be exchanged and the new serial number to be linked with the old transaction. Blind or unverified returns are not supported.

Figure 4–23 Inventory Menu



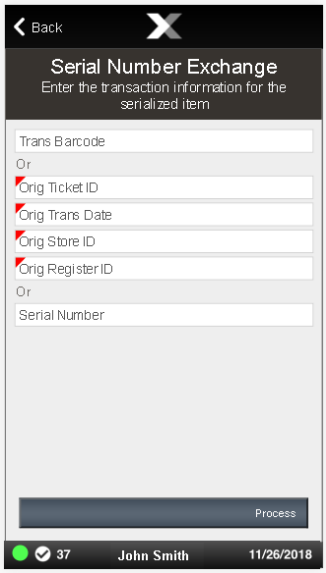
1. Select **Serial Number Exchange** from the Inventory menu.

Figure 4–24 Customer Search



2. Enter the criteria to search for the customer.

Figure 4–25 Transaction Search



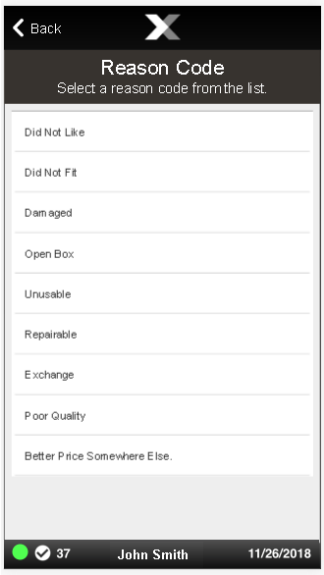
3. Scan the receipt or manually enter the receipt information to bring up the transaction. When the receipt has one or more serialized items in the transaction only those serialized items will display as a list.

Figure 4–26 Select Item



4. Select an item from the list to exchange the serial number listed with the new serial number.

Figure 4–27 Serial Number Exchange Reason Code List



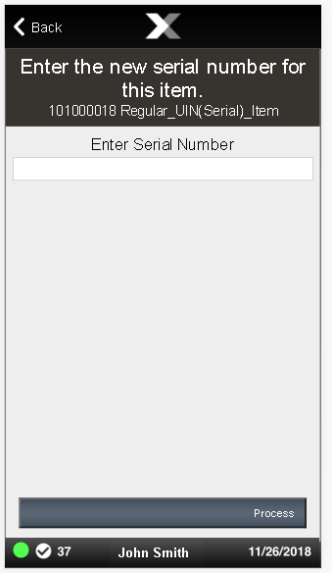
5. Select a reason code from the list.

Figure 4–28 Serial Number Exchange Comment Prompt



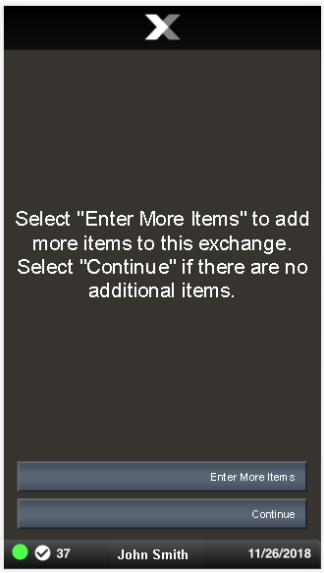
6. Enter a comment as to why the exchange is required and press **OK**.

Figure 4–29 New Serial Number Prompt



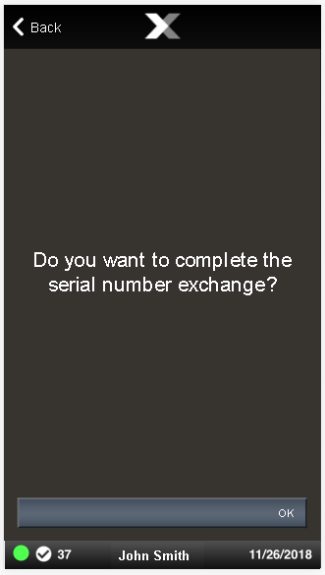
7. Scan or enter the new serial number.

Figure 4–30 Serial Number Exchange More Items Prompt



8. When there is more than one item to exchange, select the option **Enter More Items** and repeat steps 4 to 7, otherwise select **Continue**.

Figure 4–31 Complete Serial Number Exchange Prompt



9. Select **OK** to complete the serial number exchange.

   A receipt ticket prints listing each item exchanged and the new serial number for each item. Only the items that have new serialized numbers will print on the ticket.

Note: If a customer decides to return a serialized item, that had been exchanged, the system will have the latest serial number on file for that item.

5

Processing Tenders

Tendering is the last step that occurs just before completing a sale. You must select a form of payment or refund, and it may involve check or credit card authorizations, if any of these tender types are selected.

For all tender types, you must select or enter two basic items of information:

1. Form of payment (also called tender type; that is, cash, check, credit card, and so on)
2. Amount paid for each selected tender type

Depending upon the form of payment and your system's requirements, you may have to enter or select additional information, for example:

- Credit card account number, CID number, and expiration date
- Additional tender types if the first tender type did not pay the total due
- Additional forms of customer ID (driver's license number, birth date, credit card number, hotel guest's room number, or other ID)
- Customer name
- Customer address
- Security approval for large sales or refunds

This section covers the following topics:

- Selecting Tenders
- Sale Tenders

Selecting Tenders

The exchange of tender for merchandise is the final step in a transaction. Many types of tender can be exchanged for merchandise.

1. When you are ready to complete the transaction, press **Enter** to list the tenders that are available for the type of transaction you are processing. You can also swipe a credit card at the sale screen.
   - If you swiped a credit card, refer to Credit Card.

Sale Tenders

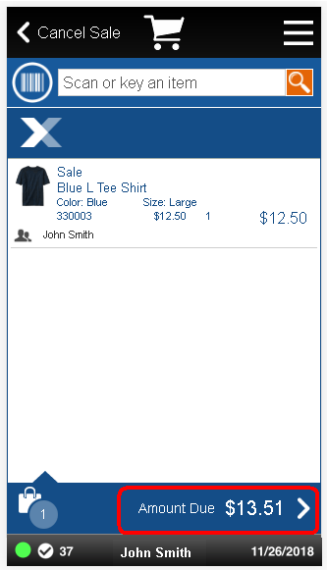
The following tender types are available:

- Cash

- Check (Personal)
- Credit Card
- Gift Card
- Redeem Store Credit

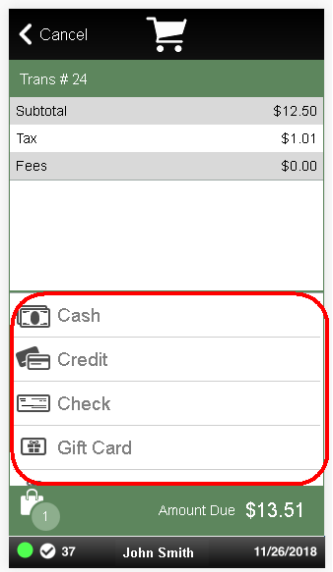
To tender a transaction:

Figure 5–1 Sale Screen



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

Figure 5–2 Available Tenders



Note: Your tender list may be different form the example shown here.

2. Select the proper tendering method. To tender a sale, refer to the section for the appropriate tender type as indicated below:

Table 5–1 Tender Types

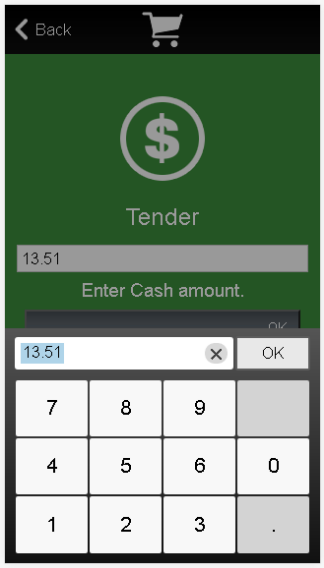
Tender Type	Refer to
Cash	Cash
Check	Check (Personal)
Credit/Debit Card	Credit Card, and Debit Card
Gift Card	Gift Card
Gift Certificate	NA
Redeem Store Credit	Redeem Store Credit
Redeem Merchandise Credit Card	NA
Travelers Check	NA
Foreign Currency	NA
Coupon	NA

Cash

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

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

Figure 5–3 Enter Cash Amount



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

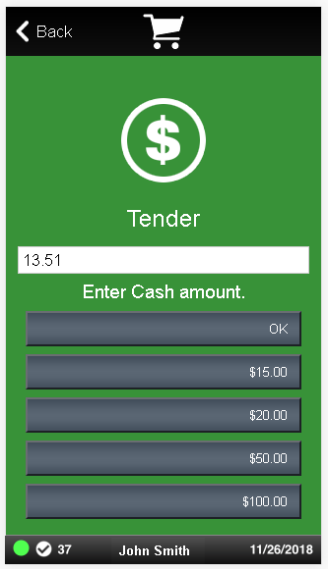
2. Enter the amount of cash presented by the customer and then press **Enter**.

   Enter dollar amounts.

   <OR>

   Choose one of the Quick Cash options.

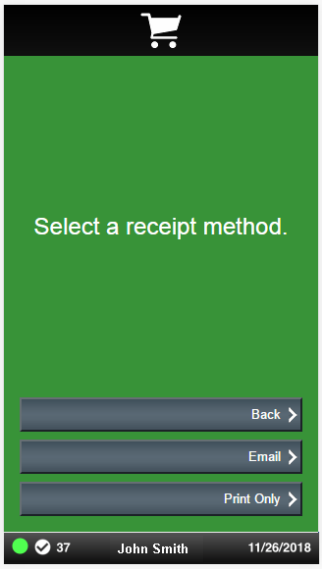
Figure 5–4 Quick Cash Options.



   A prompt may display asking if the sale is complete.

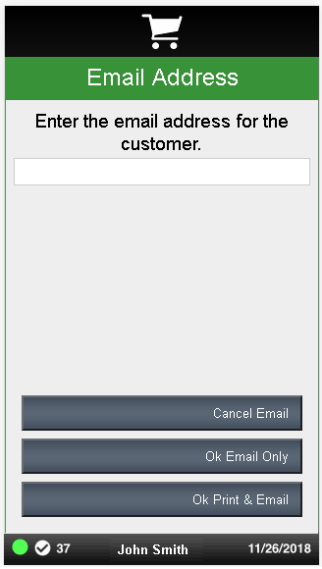
3. Select the method for providing the receipt:

Figure 5–5 Receipt Method



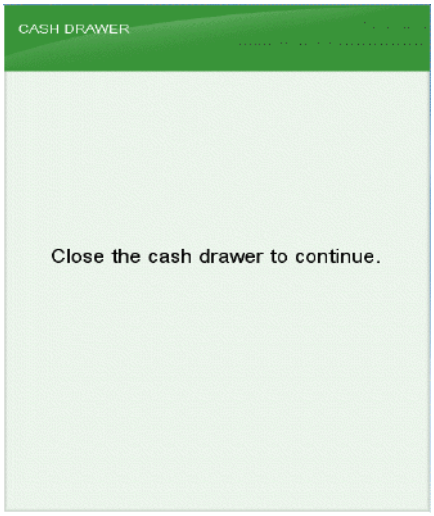
- Click **Email** to email the receipt and, if necessary, also provide a printed copy.
- Click **Print Only** to provide only a printed copy. The transaction ends.

Figure 5–6 Email Address



4. If you selected an email receipt, enter the customer's email address.
5. When you complete the sale, Xstore Mobile opens the cash drawer. You can accept money from the customer, place it in the cash drawer and return the change due amount, if the total of all tenders exceeds the amount due.

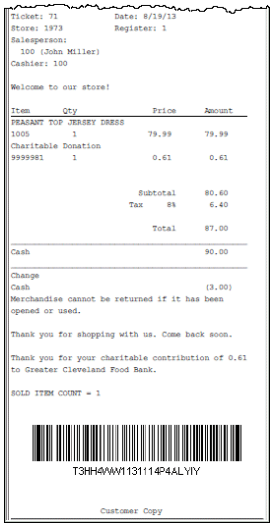
Figure 5–7 Close Register Prompt



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

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

Figure 5–8 Customer Sale Receipt - Cash Tender Example



Check (Personal)

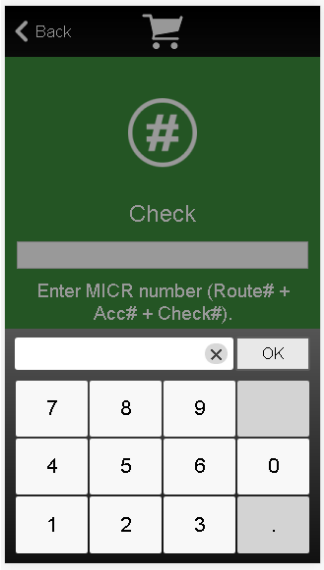
A personal check is a type of tender that can be exchanged for merchandise. Depending upon your store policy, the prompts for additional tender information may be different from the prompts shown here. These prompts display when a MICR is not available, or if your store policy requires additional information for check processing.

1. After all items have been entered or scanned, select the Check option and then press **Enter**.

Note: Note: After selecting the Check option from the Sale Tender list, the system may automatically prompt you to place the check in the MICR device. After the system gets the required information from the check, other on-screen prompts may follow, depending on your system's configuration. If the MICR fails to read the check information, the system may display a prompt that allows you to reinsert the check and try again, or disable the device and enter the information manually. Disabling a device may require a particular security level.

2. If prompted, enter the check's MICR number (Route number + Account number + Check number) and then press **Enter**.

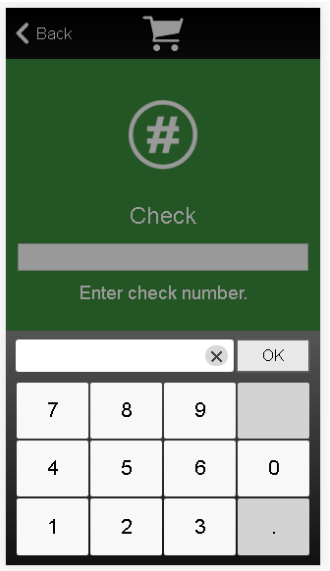
Figure 5–9 Check MICR Number Prompt



Note: The entry must consist of a single string of characters with no other embedded spaces or additional characters.

3. If prompted, enter the check number and then press **Enter**. It must be the same check number that you entered when the system prompted for the MICR number.

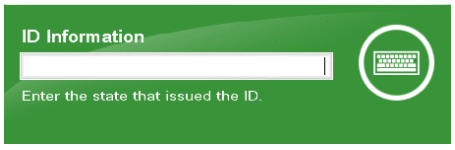
Figure 5–10 Check Number Prompt



4. If prompted, enter the state from which the customer's ID was issued and then press **Enter**.

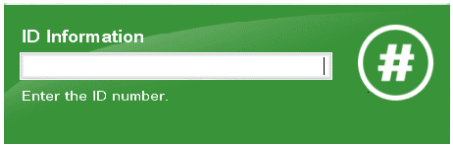
> **Note:** Enter only the two-letter abbreviation for the state.

Figure 5–11 Tender State Prompt



5. If prompted to enter the customer's driver's license number, a credit card number, or other form of ID, enter the ID number and then press **Enter**.

Figure 5–12 ID Prompt



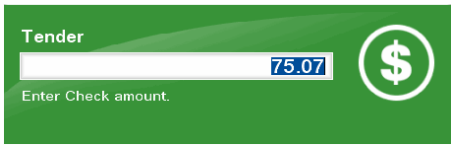
6. If prompted, enter the customer's birth date (as printed on the state-issued ID card) in the MM/DD/YYYY format and then press **Enter**.

Figure 5–13 Check Birth Date Prompt



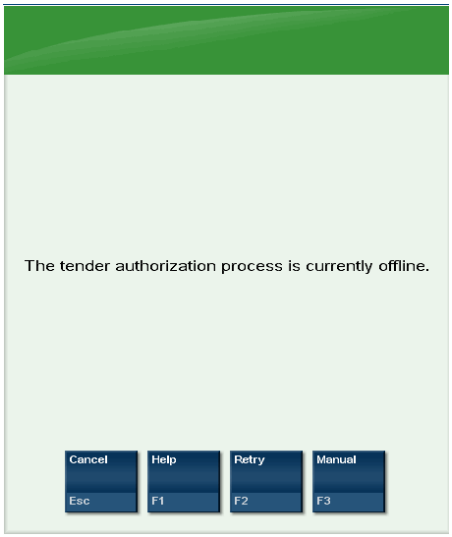
7. Enter the check amount, or accept the default amount for the total due, and press **Enter**.

Figure 5–14 Check Amount Prompt



8. If the tender authorization is currently offline, a message displays prompting you to perform one of the following activities:

Figure 5–15 Tender Authorization Offline Prompt



- Select **Cancel** to re-tender with another tender type. Xstore Mobile returns to the tender list where you can select a different tender type.
- Select **Retry** to attempt to process the check again.
- Select **Manual** to begin the manual authorization process.

If you chose to authorize the card manually, follow the instructions on the prompt and enter the authorization number in the Authorization Number field. Select **OK** to continue.

9. After the information is processed, the system displays a prompt asking if the sale is complete. Press **Y** for Yes to continue and complete the sale. If you press **N** for No, Xstore Mobile returns to the Sale Tender screen.

Note: If your store issues email receipts, additional/different prompts display. Refer to Chapter 3, Email Receipt Options, for more information about sending email receipts.

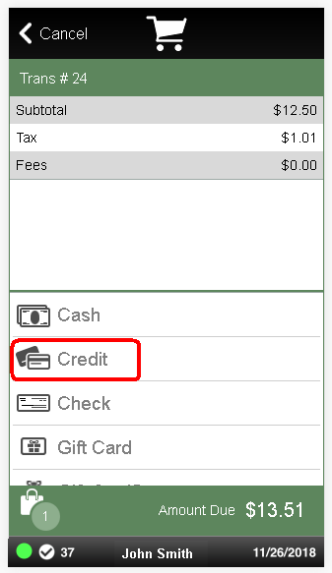
Credit Card

Note: This section applies to Credit and Debit Cards.

Note: Debit Cards are supported via Oracle Retail EFTLink.

To tender a transaction with a credit card:

Figure 5–16 Tender - Credit

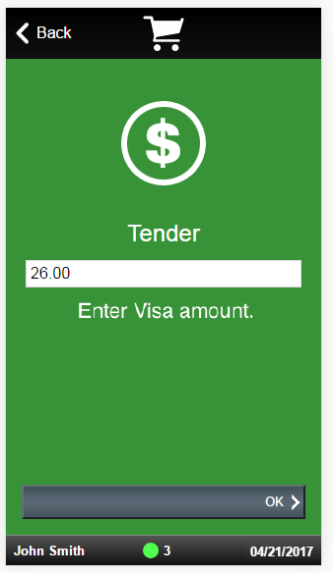


1. Select **Credit**.

   Enter the card information by doing one of the following:

   Swipe the card on the Xstore Mobile device or enter the card manually. See Manual Entry.

Figure 5–17 Enter Tender Amount

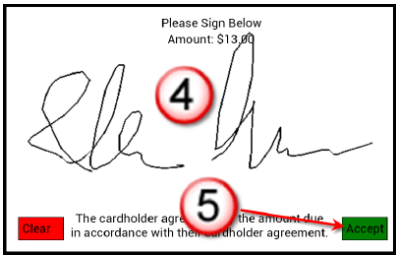


2. Enter the tender amount. Default value is the total for the transaction.
3. Select **OK**.

   Xstore Mobile attempts to authorize the tender.

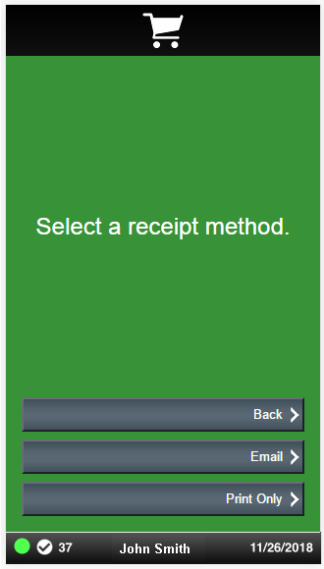
   - If authorization is successful, continue the transaction.
   - If authorization fails, either use a different tender, or continue with Tender Authorization.

Figure 5–18 Authorization Signature



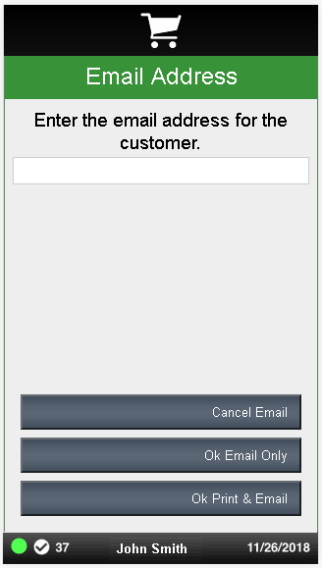
4. The customer should provide their signature.
5. After the customer signs, select **Accept**.

Figure 5–19 Receipt Method



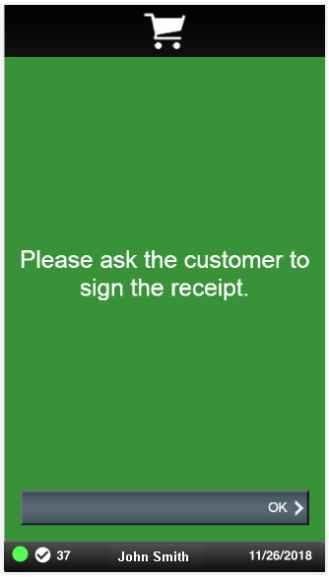
6. Select the method for providing the receipt:
   - Click **Email** to email the receipt and, if necessary, also provide a printed copy.
   - Click **Print Only** to provide only a printed copy. The transaction ends.

Figure 5–20 Email Address



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

Figure 5–21 Receipt Signature Prompt



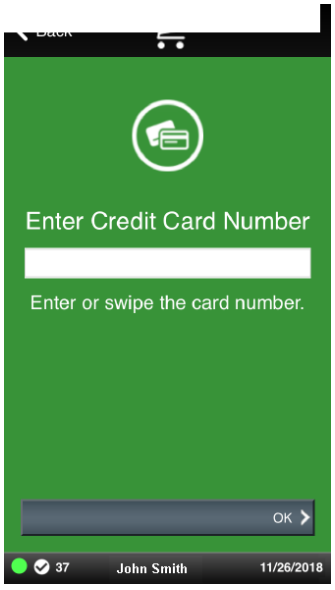
8. If necessary, confirm that the customer signed the receipt.

The transaction is complete.

Manual Entry

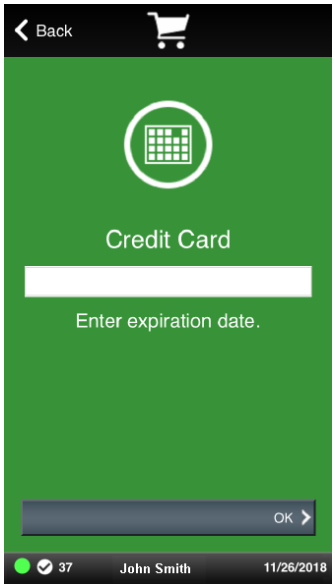
To enter a card manually:

Figure 5–22 Enter Credit Card Number



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

Figure 5–23 Enter Expiration Date



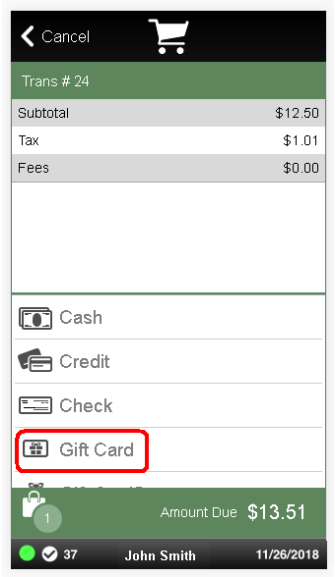
3. Enter the card expiration date in MMYY format.
4. Select **OK**.

Continue the transaction.

Gift Card

To tender a transaction with a gift card

Figure 5–24 Tender - Gift Card

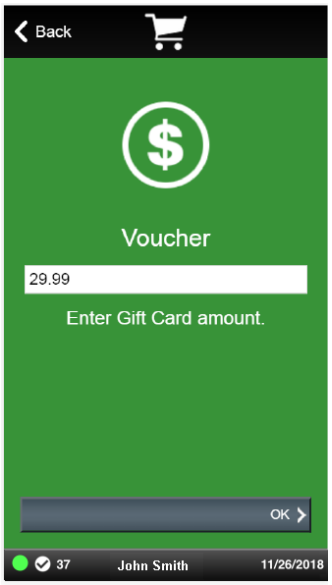


1. Select **Gift Card**.

   Enter the card information by doing one of the following:

Swipe the card on the Xstore Mobile device or enter the card manually. See Manual Entry.

Figure 5–25 Enter Gift Card Amount

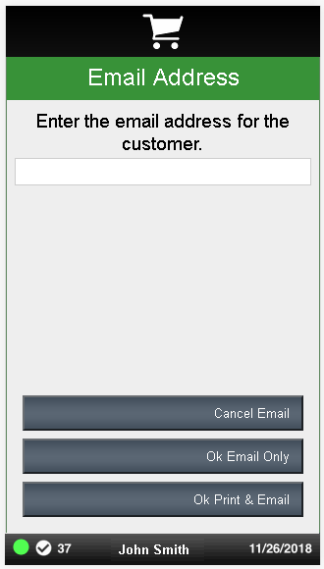


2. Enter the amount to tender on the gift card.
3. Select **OK**.

   Xstore Mobile attempts to authorize the tender.

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

Figure 5–26 Email Address



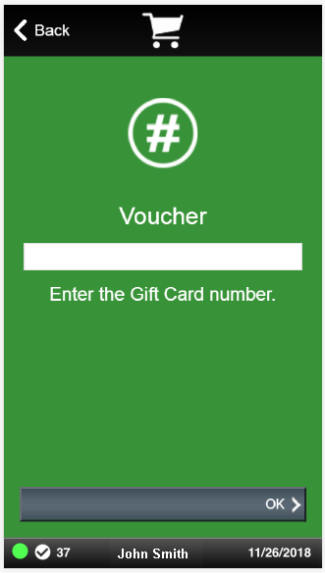
- If you selected an email receipt, enter the customer's email address.

The transaction is complete. Return to the Main Menu.

Manual Entry

To enter a card manually:

Figure 5–27 Enter Gift Card Number



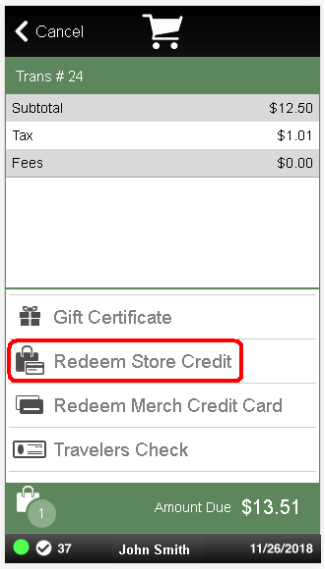
1. Enter the card number.
2. Select **OK**.

Continue the transaction.

Redeem Store Credit

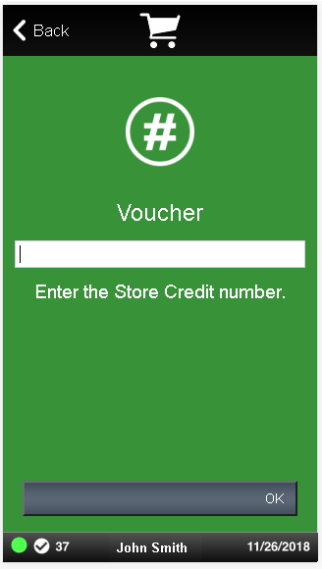
To tender a transaction by redeeming store credit:

Figure 5–28 Tender - Redeem Store Credit



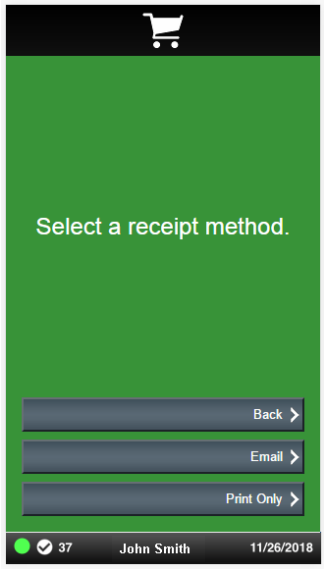
1. Select Redeem **Store Credit**.

Figure 5–29 Enter Store Credit Number



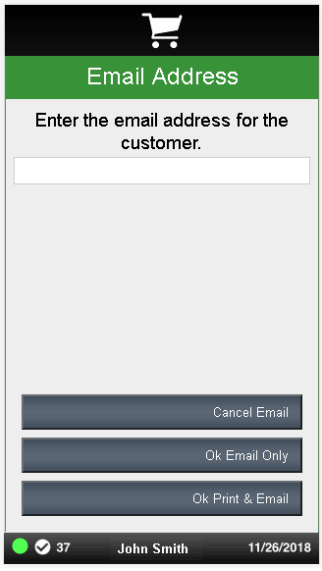
2. Scan the store credit receipt or enter store credit number.
3. Select **OK**.

Figure 5–30 Select Receipt Method Prompt



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

Figure 5–31 Email Address



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

The transaction is complete. Return to the Main Menu.

Tender Authorization

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

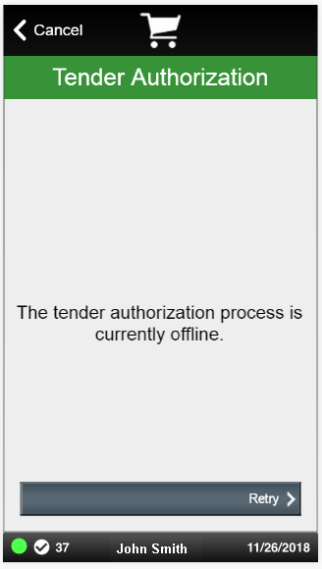
Retry Authorization

To attempt the authorization again:

Troubleshoot the connection to the authorizer.

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

Figure 5–32 Tender Authorization Offline



1. Select the **Retry** button.

If the retry is successful, continue the transaction.

If the retry fails, either perform another retry, or continue with Manual Authorization.

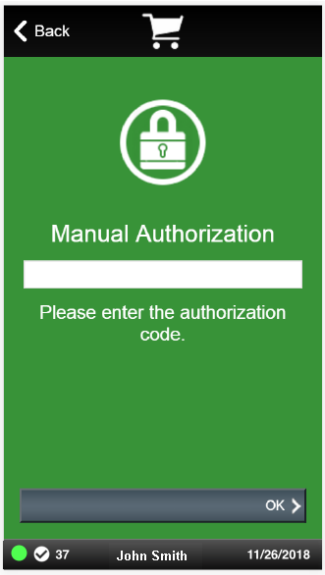
Manual Authorization

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

To enter manual authorization information:

1. Select the **Manual** button.

Figure 5–33 Enter Authorization Code



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

Continue the transaction.

6

Customer Maintenance

Customer Maintenance includes activities that relate to entering new customers into the customer database, updating customer information, viewing or printing customer information, and deleting a customer record.

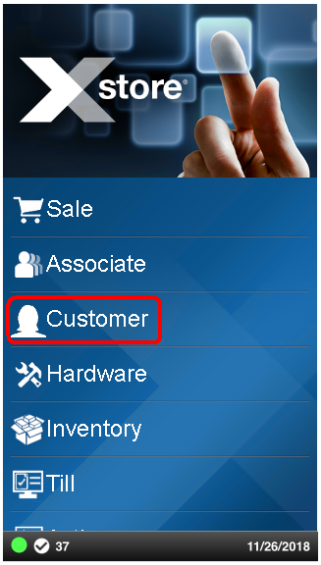
Customer Maintenance is typically required when an associate discovers that a customer's name is not in the database and must be entered for the first time. Other common situations that trigger customer maintenance occur when incorrect customer information is found and must be revised, and when information is lacking and must be entered.

This section covers the following topics:

- Searching for a Customer Record
- Edit Customer
- Customer Information Consent
- Adding a New Customer Record
- Enroll in Loyalty
- Removing a Customer
- View/Edit Customer Information
- Customer Maintenance Fields (Mobile Tablet Only)
- Change Country

Note: Customer maintenance activities are controlled by user security. An associate must have privileges in the system to perform any customer maintenance activities.

Figure 6–1 Customer Menu Option



Searching for a Customer Record

When you want to assign a customer to the sale during a transaction, the database is searched to see if the customer record already exists. If the record is found in the database, you may want to view the information or confirm that it is correct. If the record is not found in the customer database, you can create a new customer record and enter the information provided by the customer.

Note: You must first log in to the register by entering your employee ID and password at the login prompt.

---

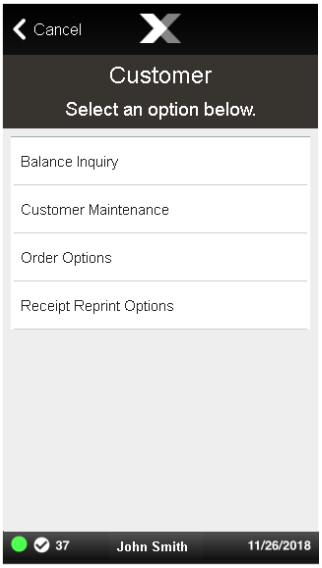
1. Enter your search criteria and then select Process.

Note: If the customer has a loyalty card, you may swipe it. You can also search by Customer number.

---

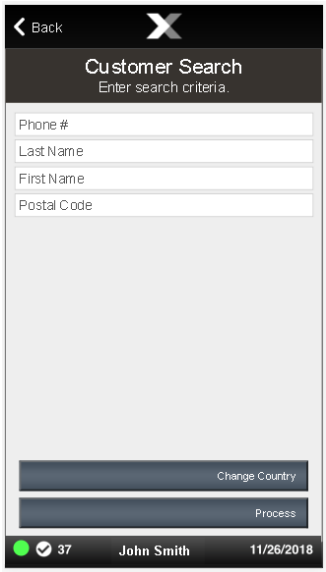
2. Select **Customer** from the Main Menu.

Figure 6–2 Customer Menu



3. Select **Customer Maintenance** from the Customer Menu.

Figure 6–3 Customer Search Form



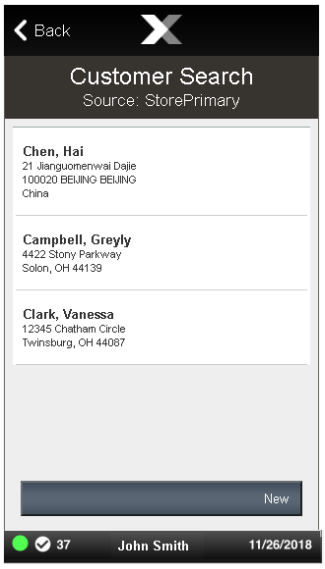
Note: Enter as much information as possible in the Customer Search form to limit the number of customer records that are returned. You may enter partial names in the Last and First name fields.

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. Press **Enter** to close the message.

4. Enter your search criteria and then select **Process**.

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

Figure 6–4 Customer Search Results



Note: The Source field 

below the header **Customer Search** indicates the data source from which this information was retrieved. The data source depends upon your system's configuration. If your system is integrated with the Oracle Retail Customer Engagement Cloud Services (formerly MICROS Retail Relate) application and the customers are found there, Customer Engagement is indicated as the source. Customers may also be found in other configurable sources such as the Xstore Mobile database or Xcenter.

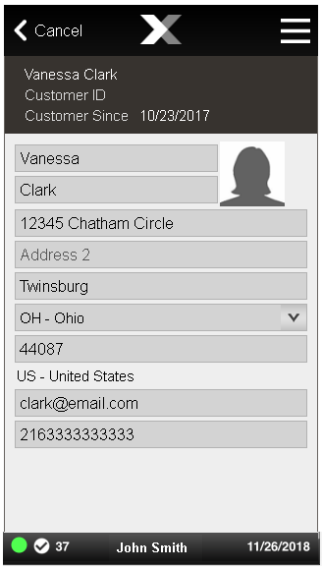
6. Choose one of these options:

   - **Back** - Returns to the Customer Search form.
   - **Select** - Opens the selected customer record for viewing, or editing.
   - **New** - Displays a form for adding a new customer record to the customer database. See Adding a New Customer Record.

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

   If only one name matches the search criteria, the system may automatically display the customer record rather than presenting a list, if your system is set up to do so.

Figure 6–5 Customer Record



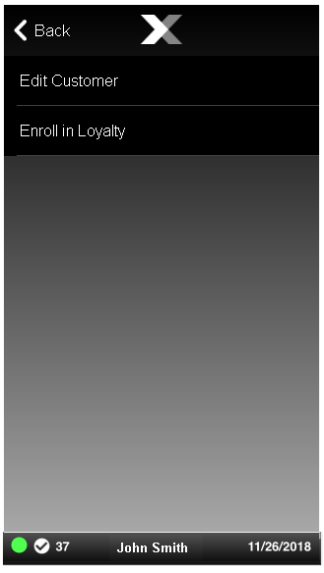
A customer record always opens in a read-only mode and cannot be edited unless you change to the editing mode.

7. Choose one of these options:
   - **Back** - Returns to the Customer Search form.
   - **Edit Customer** - Allows you to change information in the customer record. See Edit Customer.
   - **Enroll in Loyalty** - Enroll the customer in the loyalty program.

Edit Customer

To edit a customer from the Customer Maintenance screen:

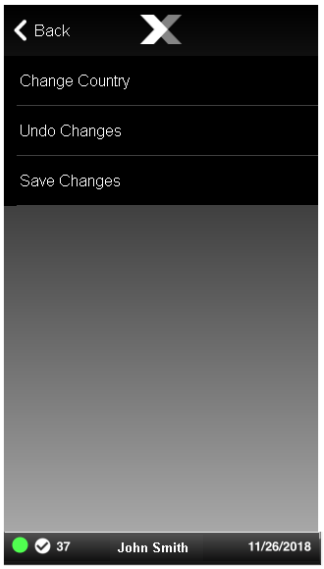
Figure 6–6 Customer Context Menu Options



1. In the Context Menu, select **Edit Customer** to activate the fields on the window.
2. Select the field you want to change and replace the old entry by typing over it with the new information.

Note: Any field 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.

Figure 6–7 Save Changes Option



3. In the Context Menu, select **Save Changes** to save the information to the database. Select **Undo Changes** if you decide not to keep the changes you made.

Customer Information Consent

Xstore allows retailers to capture a customer's consent for collecting their personal information.

If this functionality is enabled, when creating a new customer record or by accessing the customer record in the transaction, you are automatically prompted with a Consent Preferences pop up. If the customer has already given consent and the terms and conditions are current, then they will not be prompted again. However, if the terms and conditions have been updated, the customer will be prompted to update their consent preferences.

The terms and conditions are provided by the retailer. Xstore provides the ability to configure multiple consent check boxes for the customer to select.

Once the customer has agreed to the terms and conditions and the consent boxes have been checked, select the **Accept** button.

If the customer declines consent, the consent captured date is cleared and it may impact the ability to perform some specific transaction types depending on the retailer's configurations.

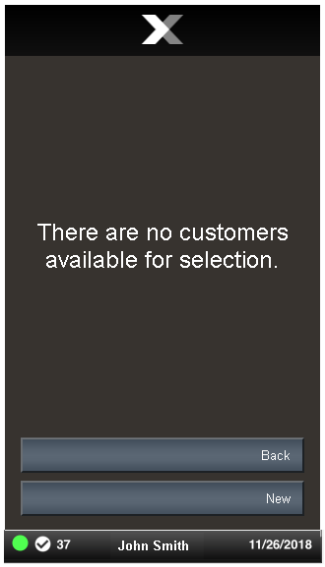
After selecting the **Accept** button, the terms and conditions may be reviewed and signed electronically by the customer.

Customers and employees may ask the retailer to remove their personal information by anonymizing or deleting it from their records. If a customer or employee requests to remove their data, a check is made to ensure that the customer or employee is eligible to be removed from the application. For example, customers with any open transactions would not be eligible for data removal. Open transactions include open orders, a house account balance, or open layaway transactions, and so on.

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 below if there is no current record.

Figure 6–8 Customer Not Found Message



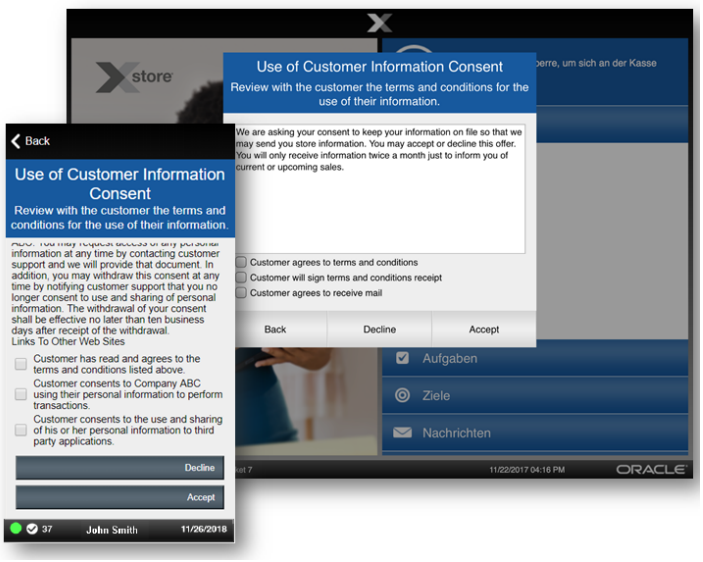
1. Select **New** to display the Customer Maintenance Screen in edit mode.

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

   If customer information consent functionality is not enabled, continue at step 4.

   If customer information consent functionality is enabled, a terms and conditions screen opens showing consent preferences and requesting that the customer accepts or declines to the terms and conditions listed. See Customer Information Consent for more information.

Figure 6–9 Customer Information Consent Form

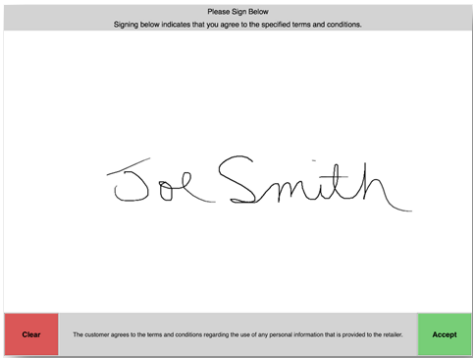


Select the relevant check boxes if the customer agrees to accept the terms and conditions, and consent preferences.

To refuse consent, select **Decline** to return to the previous screen.

2. Select **Accept**. Ask the customer to electronically sign the signature capture on the mobile device to acknowledge they are accepting the terms and conditions displayed on the previous screen.

Figure 6–10 Signature Capture and Verify Customer Consent

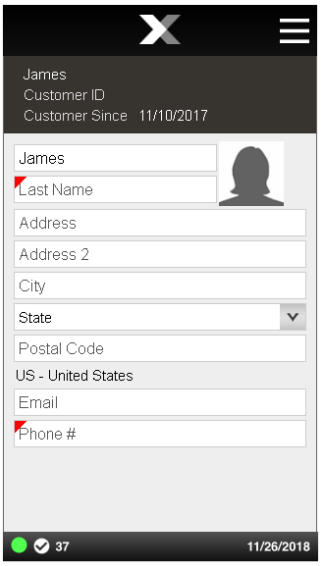


3. Select **Accept** to confirm the customer has acknowledged the terms and conditions, and signed the receipt. The customer's acceptance is associated to the customer record.

   A confirmation screen is displayed indicating that the customer's consent selections have been updated in the system. Select **OK** to continue. The customer maintenance screen opens with editable fields.

4. 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 6–11 Customer Record - Edit Mode

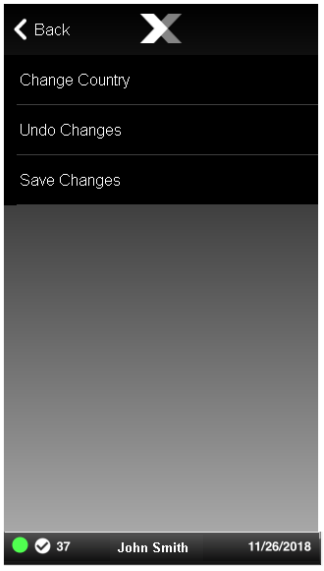


Any field that requires an entry is marked with a red triangle in the upper left corner of the field.

Any field that has a selectable list of options displays a down arrow on the right side of the field.

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

Figure 6–12 Save Changes Option

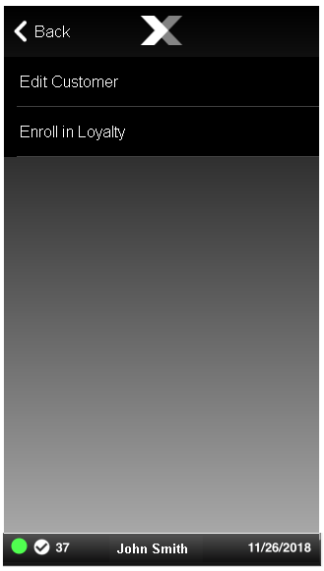


5. In the Context Menu, select **Save Changes** to save the information to the database. Select **Undo Changes** if you decide not to keep the changes you made.

Enroll in Loyalty

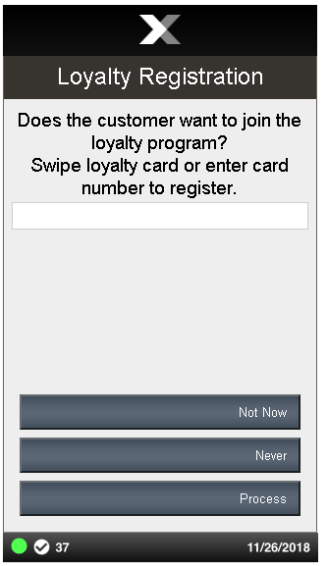
To register a customer to the loyalty program:

Figure 6–13 Customer Context Menu Options



1. In the Context Menu, select **Enroll in Loyalty**.

Figure 6–14 Loyalty Registration

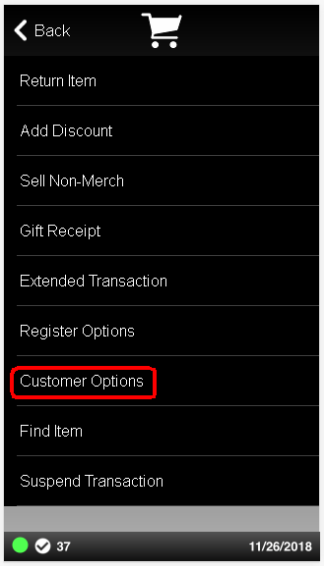


2. Swipe the loyalty card or enter card number.
3. Select **Process**.
4. Select **Save Changes** to save the loyalty card information to the customer's record.

Removing a Customer

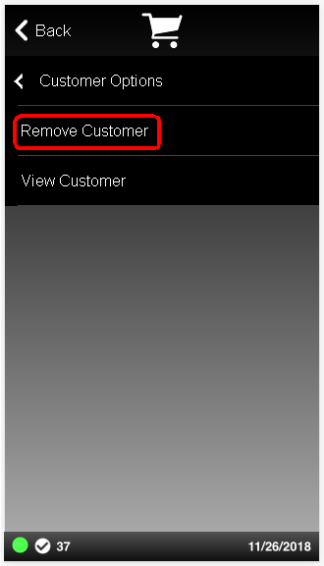
To remove a customer from a transaction:

Figure 6–15 Customer Options



1. Whilst in the transaction, select **Customer Options** in the Context Menu.

Figure 6–16 Remove Customer



2. Select **Remove Customer**.

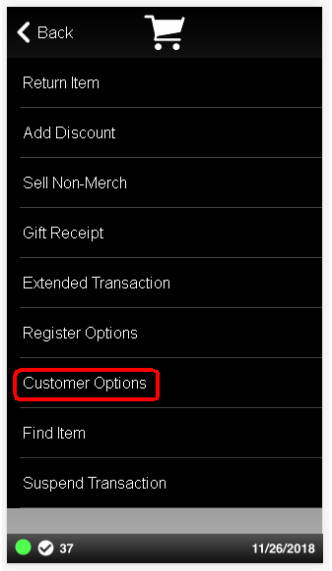
   The customer is removed from the transaction. Return to the sale screen.

Note: To add a different customer to the transaction, select **Customer Options\Assign Customer**.

View/Edit Customer Information

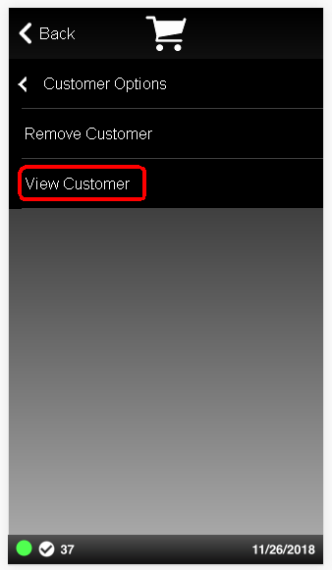
To view or edit information about the customer assigned to a transaction:

Figure 6–17 Customer Options



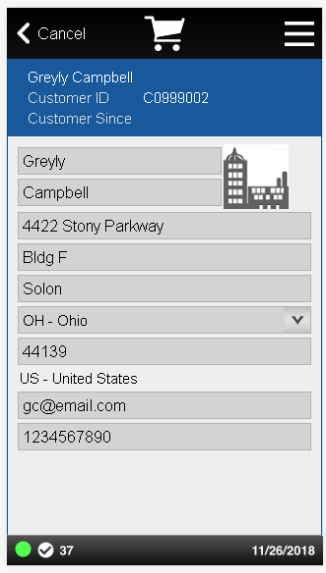
1. Select **Customer Options** in the Context Menu.

Figure 6–18 View Customer.



2. Select **View Customer**.

Figure 6–19 Customer Detail



Do one of the following:

- Select **Cancel** to return to the sale screen.
- Select **Edit Customer** to edit the customer information. See Edit Customer.
- Select **Enroll in Loyalty** to assign a loyalty card to the customer. See Enroll in Loyalty.

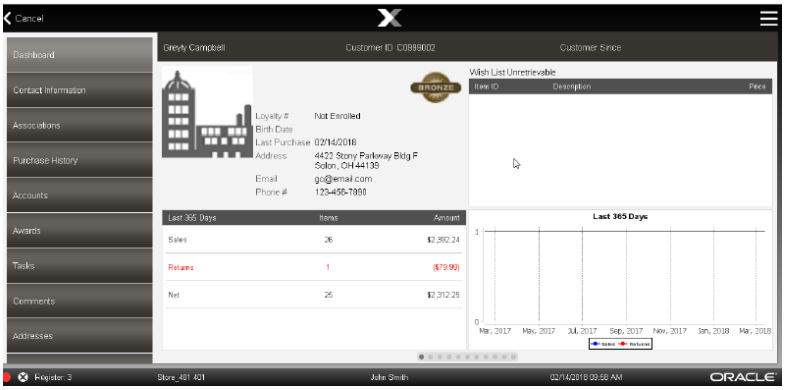
Customer Maintenance Fields (Mobile Tablet Only)

The Customer Maintenance screen is divided into several tabs containing information about the customer.

- Dashboard Tab
- Contact Information Tab
- Associations Tab
- Purchase History Tab
- Accounts Tab
- Awards Tab
- Tasks Tab
- Comments Tab
- Addresses Tab
- House Account Tab
- Wish List Tab

Dashboard Tab

Figure 6–20 Customer Maintenance - Dashboard Tab



The Dashboard tab displays the following information:

- **Loyalty #:** Loyalty number.
- **Birth Date:** Date of birth.
- **Last Purchase:** Last purchase date.
- **Address:** Primary address.
- **Email:** Primary e-mail address.
- **Phone #:** Primary phone number.
- Summary of the transactions in the last year. See Transaction Summary.
- **Wish List:** Items in the customer's wish list.
- **Last 365 Days:** Graph of the transactions in the last year.

Transaction Summary

The transaction summary table displays the following columns:

- **Last 365 Days:** Types of transactions performed in the last year.
- **Items:** Total number of items in the transaction type.
- **Amount:** Total amount in each transaction type.

Wish List

The Wish List table displays the following information about each item in the customer's wish list:

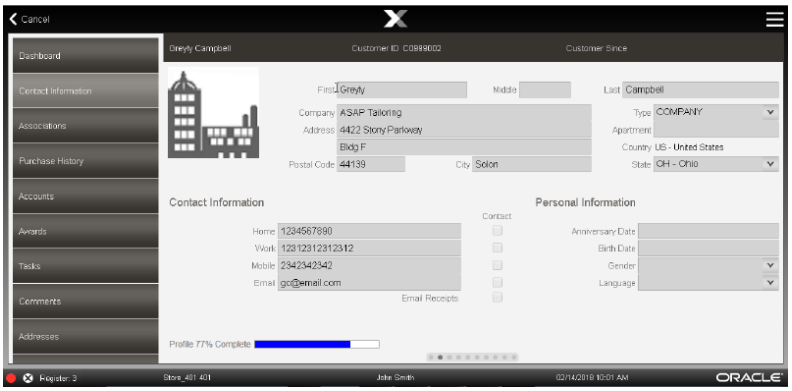
- **Item ID:** ID of the item.
- **Description:** Description of the item.
- **Price:** Price of the item.

Last 365 Days

The Last 365 Days graph is a line graph plotting the amount of each transaction plotted the date of the transaction. This graph displays one line for sale transactions and one line for return transactions.

Contact Information Tab

Figure 6–21 Customer Maintenance - Contact Information Tab



The Contact Information tab contains the following fields:

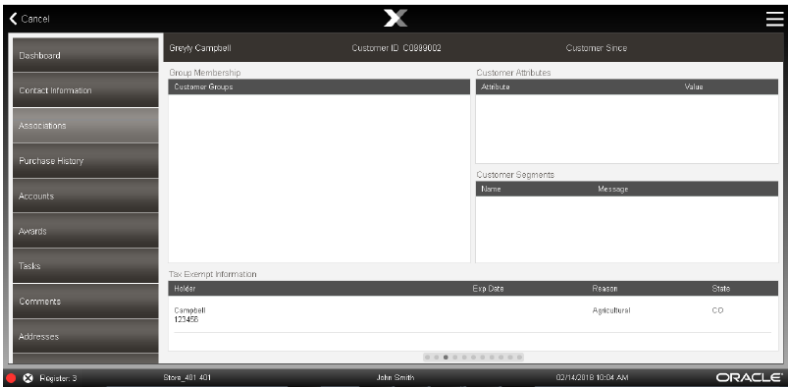
- **First**: First name.
- **Middle:** Middle name or middle initial.
- **Last**: Last name.
- **Company**: Company or organization associated with the customer.
- **Type**: Type of company or organization.
- **Address**: Primary street address.
- **Apartment**: Primary address apartment.
- **Country**: Country of primary address.
- **Postal Code**: Postal or zip code.
- **City**: City of the primary address.
- **State**: State or province of the primary address.
- **Home:** Home telephone number.
- **Work**: Work telephone number.
- **Mobile**: Mobile telephone number.
- **Email**: Primary e-mail address.
- **Contact**: Indicates whether the customer permits the store to contact them through the associated telephone number or e-mail address.
- **Email Receipts**: Indicates whether the customer allows the store to send e-mail receipts to the primary e-mail address.
- **Anniversary Date**: Date on which the customer was added to the system.

- **Birth Date**: Customer birthdate.
- **Gender:** Customer gender.
- **Language:** Primary language for the customer.
- **Profile x% Complete:** Percentage of customer record completion.

If Customer Information Consent functionality is enabled, the consent preferences are accessible via the **Review Customer Consent** option within the Customer Options menu.

Associations Tab

Figure 6–22 Customer Maintenance - Associations Tab



The Associations tab contains the following fields:

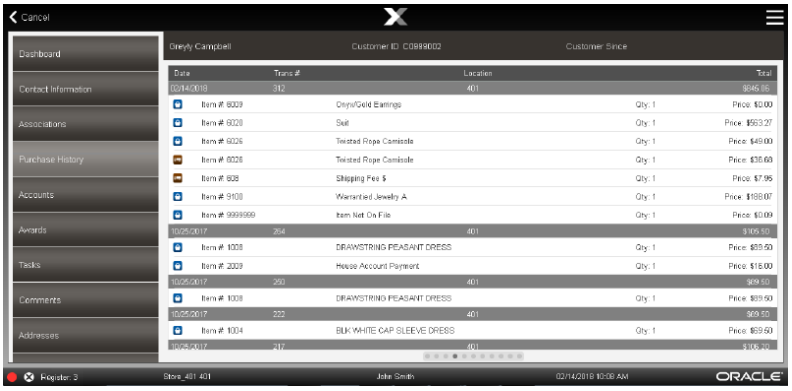
- **Group Membership:** The group to which the customer belongs. Groups are defined by the store or home office. A customer may be associated with one or more groups. If groups are not defined, no customer groups are listed in this section.
- **Customer Attributes:** Attributes for the customer. Attribute categories are defined by the home office and provide additional information about the customer.
- **Customer Segments:** Segments to which the customer belongs. Segments are groupings that share common criteria. This information is provided by Customer Engagement. Identifying a customer with a segment may be helpful in customer analysis and in sale promotions.

> **Note:** This field cannot be edited. Segments are provided by Oracle Retail Customer Engagement.

- **Tax Exempt Information:** Tax exemptions associated with the customer. A customer may have one or more exemptions.

Purchase History Tab

Figure 6–23 Customer Maintenance - Purchase History Tab



This tab shows detailed information about sales transactions for the customer within the last 365 days. This tab displays the following rows:

- Transaction Row - Displays information about a transaction.
- Item Row - Displays information about an item within a transaction.
- Item Information - Displays information about a selected item.

> **Note:** This field cannot be edited. Segments are provided by Oracle Retail Customer Engagement.

Transaction Row

Transaction rows display the following information:

- **Date:** Date of the transaction.
- **Trans #:** ID number of the transaction.
- **Location:** Location ID.
- **Total:** Total amount of the transaction.

Item Row

Item rows display the following information:

- **Item #:** ID number of the item.
- **Description:** Description of the item.
- **Qty:** Quantity of the item.
- **Price:** Price of the item.

Item Information

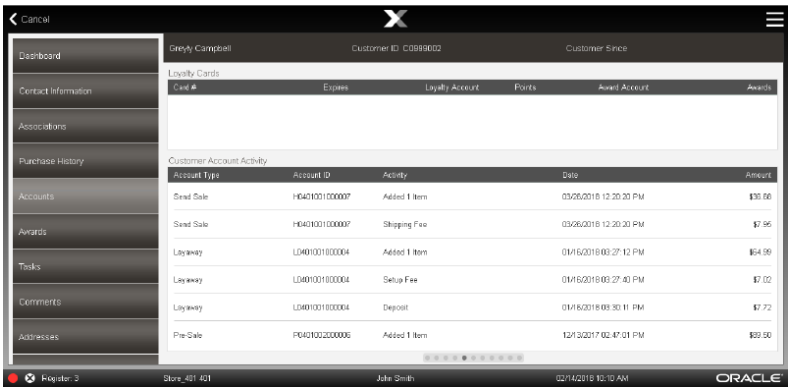
After selecting an item row, this area displays information about the selected item:

- Picture of the item (if available).
- **Price:** Price of the item.

- **Style:** ID of the item style (if available).
- Item dimensions (if available).

Accounts Tab

Figure 6–24 Customer Maintenance - Accounts Tab



Your system's configuration determines the information displayed on this tab.

If your system is configured for a loyalty program, this tab lists the customer's loyalty program information.

If your system is not configured for a loyalty program, this tab lists any of the customer's special accounts such as work order accounts, layaway accounts, pre-sale accounts, hold accounts, and send sale accounts.

Note: The information in this tab cannot be edited.

Loyalty Configured

If loyalty is configured on your system, the Accounts tab will display the following information:

- Loyalty Cards - Information about the loyalty cards associated with the customer.
- Customer Account Activity - Loyalty activity for the customer.

Loyalty Cards

This section displays the following information for each loyalty card:

- **Card #:** Card number.
- **Expires:** Card expiration date.
- **Loyalty Account:** Loyalty account ID.
- **Points:** Number of points accumulated in the loyalty account.
- **Award Account:** Award account ID.
- **Awards:** Awards in the awards account.

Customer Account Activity

This section displays the following information about the customer's account activity:

> **Note:** Activity rows that have been voided show a line through the entire row.

- **Account Type:** Type of customer account.
- **Account ID:** ID of the account.
- **Activity:** Type of activity.
- **Date:** Date of the activity.
- **Amount:** Amount associated with the activity.

Context Menu Buttons

The Account tab includes the following options specific to this tab:

- **Print Balance Receipt:** Prints a receipt showing loyalty account balance information.
- **Print Loyalty History:** Prints a Loyalty Account History report on the report printer. The information in this report includes the information shown in the Customer Account History section of the Account tab. This report provides current and historical information about a customer's loyalty accounts. See the *Oracle Retail Xstore Reports Guide* for more information about this report.

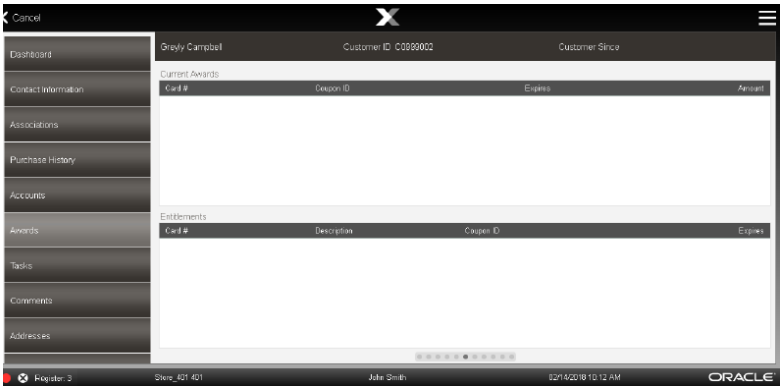
No Loyalty Programs

If loyalty programs are not used by your system, the Accounts tab will display the Customer Account Detail information.

The Customer Account Detail lists special accounts that are owned by the customer. The account status (such as OPEN or CLOSED) is noted along with a date and current amount due on the account if applicable.

Awards Tab

Figure 6–25 Customer Maintenance - Awards Tab



The Awards tab is for viewing the customer's current awards and entitlements information in separate sections. You can edit the customer and loyalty information within customer maintenance but the award and entitlement information is for viewing only. You cannot apply the awards or entitlements to the transaction from this screen.

Current Awards

This section displays the following information for each loyalty award:

- **Card #:** Card number associated with the award.
- **Coupon ID:** ID of the award coupon.
- **Expires:** Expiration date of the coupon.
- **Amount:** Amount of the coupon.

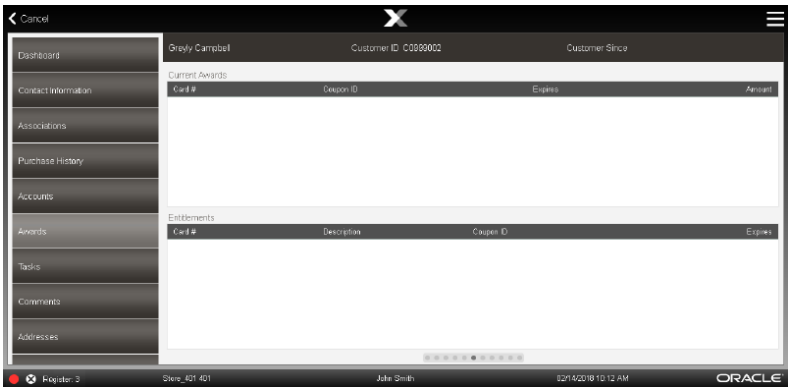
Entitlements

This section displays the current entitlements:

- **Card #:** Card number associated with the entitlement.
- **Description:** Description of the entitlement.
- **Coupon ID:** ID of the award coupon.
- **Expires:** Expiration date of the coupon.

Tasks Tab

Figure 6–26 Customer Maintenance - Tasks Tab



The Tasks tab displays all tasks associated with the customer. This tab displays the following information for each task:

- **Priority:** Importance of the task: high, medium, or low.
- **Date:** Date the task should begin.
- **Start Time:** Time the task should begin.
- **Duration:** Length of time designated for the task.
- **Activity:** Type of task.
- **Status:** Indicates the progress of the task.

- **Associate:** The employee or employee group responsible for completing the task.

Status

The status field can have one of the following values for a task:

- **Open:** The task is open, but not started.
- **In Progress:** The task has been started, but not completed.
- **Cancelled:** The task has been cancelled and cannot be reopened or edited.
- **Closed:** The task has been completed and cannot be reopened or edited.

Comments Tab

Figure 6–27 Customer Maintenance - Comments Tab



The Comments tab shows any comments associated with this customer. This tab displays the following information for each comment:

- **Created on:** Information about when the comment was created, and the comment itself.
- **Created by:** ID of the employee who entered the comment.

Adding a Comment

To add a comment:

1. If necessary, click **Save Changes** to save the customer record.

   Note: When creating a new customer, comments cannot be added until the information for the customer has been saved.

2. Click **Add Comment**.

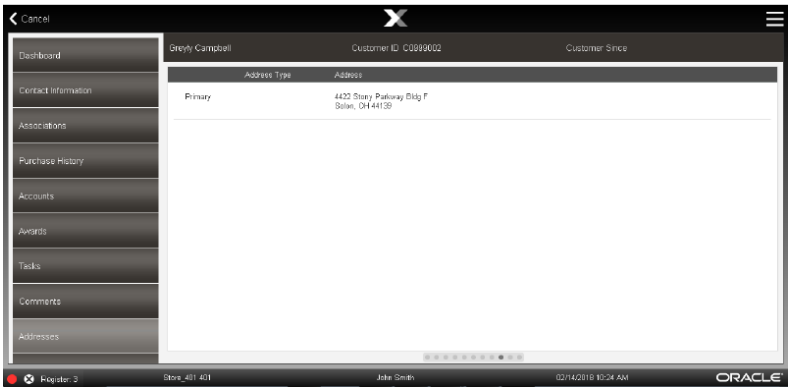
   An Add Comment window opens.

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

   The comment is saved and added to the customer record.

Addresses Tab

Figure 6–28 Figure 6-27: Customer Maintenance - Addresses Tab



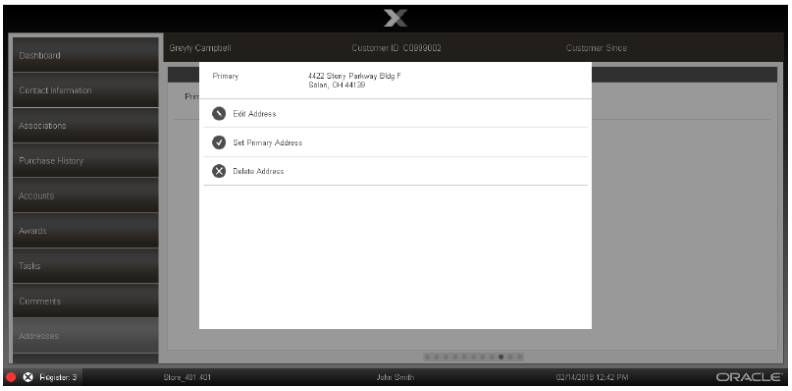
The Addresses tab shows all the addresses associated with the customer. This tab displays the following information for each customer address:

- **Address Type:** Type of address. For example, Home, Work, or Primary.
- **Address:** The address.

To make changes to the addresses for a customer, perform the appropriate procedure:

- Add an Address - Add an address to a customer record.
- Edit an Address - Edit an address assigned to a customer record.
- Designate a Primary Address - Change the primary address for a customer.
- Delete an Address - Remove an address from a customer record.

Figure 6–29 Customer Maintenance - Address Menu



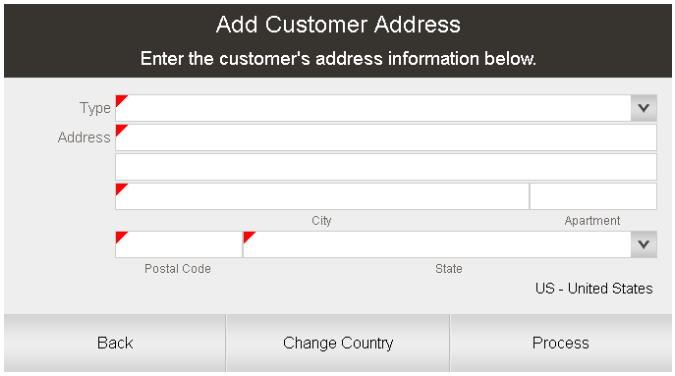
Add an Address

To add an address for a customer:

1. From the Context Menu select **Add Address**.

   An Add Customer Address window opens.

Figure 6–30 Customer Maintenance - Add Address



2. If necessary, change the country for the address. See Change Country.
3. If it is available, use **Address Lookup** to find the address.
4. If necessary, enter the address information:

   Note: Required fields are marked with a red triangle in the upper-left corner.

   - **Type:** Type of address (for example, Home, Work, or Vacation).
   - **Address:** The first and second lines of the address.
   - **Postal Code:** Postal or zip code for the address.
   - **State:** State or province for the address.
   - **City:** City for the address.
   - **Apartment:** Apartment for the address.
   - **Country:** Country of the address. Click the **Change Country** button to change this value. See Change Country.
5. Click **Process**.

   The address is added to the list of customer addresses.

Edit an Address

To edit an address for a customer:

1. Select the address to edit in the list of addresses:
   - Click the address.
   - Use the up and down arrows to highlight the correct address, then press the Spacebar.
2. Click **Edit Address**.

   An Edit Customer Address window opens.
3. If it is available, use **Address Lookup** to find the address.
4. If necessary, make changes to the address information:

Note: Required fields are marked with a red triangle in the upper-left corner.

- **Type:** Type of address (for example, Home, Work, or Vacation).
- **Address:** The first and second lines of the address.
- **Postal Code:** Postal or zip code for the address.
- **State:** State or province for the address.
- **City:** City for the address.
- **Apartment:** Apartment for the address.
- **Country:** Country of the address. Click the **Change Country** button to change this value. See Change Country.

5. Click **Process**.

   The address is added to the list of customer addresses.

Designate a Primary Address

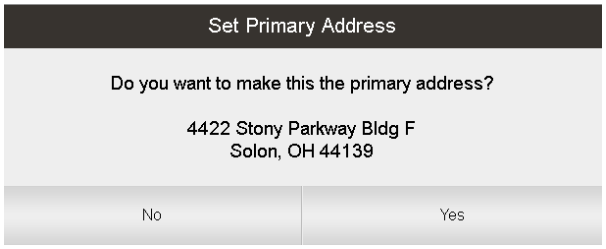
To change the primary address for a customer:

- Click the address.
- Use the up and down arrows to highlight the correct address, then press the Spacebar.

1. Click **Set Primary Address**.

   Xstore opens a confirmation prompt.

Figure 6–31 Customer Maintenance - Set Primary Address



2. Click **Yes** in the confirmation prompt.

   Click **No** if it is the incorrect address. Xstore returns to the **Addresses** tab.

Note: Click **No** if it is the incorrect address. Xstore returns to the Addresses tab.

The address is set as the primary address for the customer. The new primary address is displayed on the top of the list of customer addresses.

Delete an Address

To delete an address from a customer record:

1. Select the address to delete in the list of addresses:

   Note: You cannot delete the primary address for the customer.

   - Click the address.
   - Use the up and down arrows to highlight the correct address, then press the Spacebar.

2. Click **Delete Address**.

   Xstore opens a confirmation prompt.

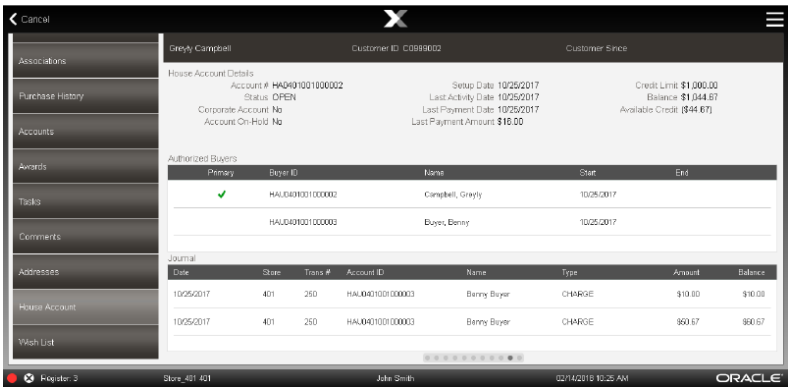
3. Click **Yes** in the confirmation prompt to delete the address.

   Note: Click **No** to return to the **Addresses** tab without deleting an address.

   The address is deleted from the customer record.

House Account Tab

Figure 6–32 Customer Maintenance - House Account Tab



The House Account tab displays the following types of information about the customer's house account:

- House Account Details - Details about the house account.
- Authorized Buyers - Information about each buyer authorized to use the house account.
- Journal - Information about each activity performed on the house account.

Note: This information is only available for customers who have set up a valid house account.

To make changes to the information in the House Account tab:

- Change House Account Status - Change the status of a house account.

- Change House Account Limit - Change the credit limit for a house account.
- Change Authorized Buyers - Make changes to the authorized buyers associated with a house account.

House Account Details

This section displays the following information about the house account:

- **Account #:** ID number for the house account.
- **Status:** Status of the account: OPEN, HOLD, or CLOSED.
- **Corporate Account:** If Yes, this is a corporate House Account and cannot be changed.
- **Account On-Hold:** If Yes this account cannot be used for purchases; however, payments can be made on the account.
- **Setup Date:** Date the account was created.
- **Last Activity Date:** Date of the most-recent activity on the account.
- **Last Payment Date:** Date of the most-recent payment on the account.
- **Last Payment Amount:** Most-recent payment amount on the account.
- **Credit Limit:** Credit limit on the account.
- **Balance:** Balance amount on the account.
- **Available Credit:** Difference between the credit limit and the outstanding balance on the account that is available for purchases.

Authorized Buyers

This section displays the following information about the people authorized to use the house account:

- **Primary:** A green check mark is displayed in this column for the primary authorized buyer for the account.
- **Buyer ID:** House account ID of the buyer.
- **Name:** Name of the buyer.
- **Start:** Date on which the buyer is first permitted to use the account.
- **End:** Date on which the buyer is no longer permitted to use the account.

Journal

This section displays the following information for each activity performed on the account:

- **Date:** Date of the activity.
- **Store:** ID of the store where the activity took place.
- **Trans #:** ID number for the transaction in which the activity took place.
- **Account ID:** ID of the house account.
- **Name:** Name of the customer.
- **Type:** Type of activity performed.
- **Amount:** Amount of the activity.

- **Balance:** Balance of the account following the activity.

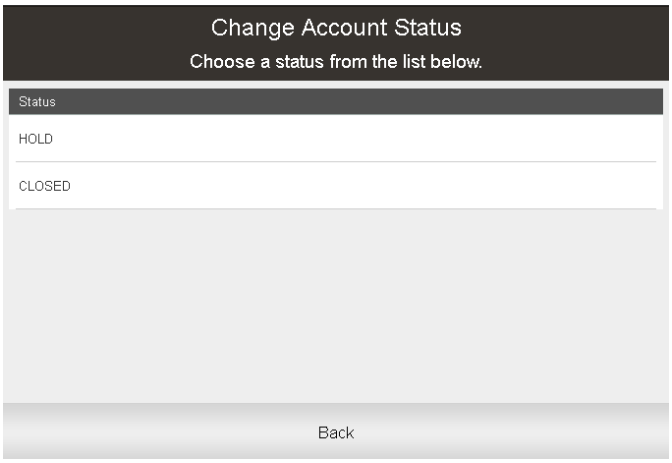
Change House Account Status

To make changes to a customer's house account:

1. From the Context Menu, select **Change Status**.

   A Change Account Status window opens.

Figure 6–33 Change Account Status Window



2. Select the new status for the account:

   - **HOLD:** The authorized buyer cannot use the account for new purchases, but can make payments on the account. The edit options for account limit and authorized buyer options are not available for accounts that are on hold.
   - **CLOSE:** The house account is no longer available for any activity.
   - **REINSTATE:** An account with a status of HOLD can be activated again by selecting this option.
   - **OPEN:** An account with a status of CLOSED can be activated again by selecting this option.

   The status of the house account is changed.

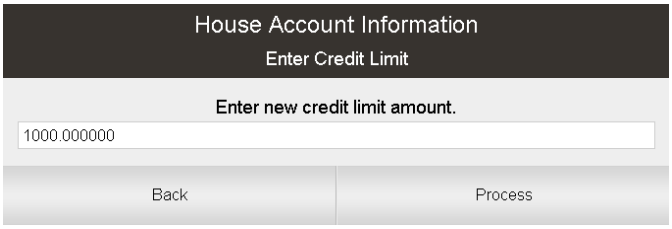
Change House Account Limit

To change the credit limit for a house account:

1. From the Context Menu, select **Edit Credit Limit**.

   A House Account Information window opens with the current credit limit for the account.

Figure 6–34 Customer Maintenance - House Account Credit Limit



2. Enter the new credit limit for the house account.
3. Click **Process**.

   The credit limit for the house account is changed to the new value.

Change Authorized Buyers

A house account can have more than one buyer associated with it. To make changes to the authorized buyers for a house account, use the appropriate procedure:

- Add an Authorized Buyer - Add an authorized buyer to a house account.
- Edit an Authorized Buyer - Edit information for an authorized buyer.
- Deactivate an Authorized Buyer - Deactivate an authorized buyer.
- Designate a Primary Buyer - Change the primary buyer to another person.

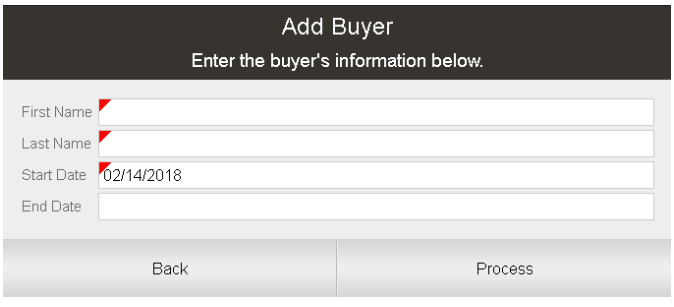
Add an Authorized Buyer

To add an authorized buyer to a house account:

1. From the Context Menu, select **Add Buyer**.

   An Add Buyer window opens.

Figure 6–35 Customer Maintenance - House Account Add Buyer



2. Enter the information for the buyer:

Note: Required fields are marked with a red triangle in the upper-left corner.

- **First Name:** First name of the new buyer.
- **Last Name:** Last name of the new buyer.

- **Start Date:** Date on which the buyer will first be permitted to use the house account.
- **End Date:** Date on which the buyer will no longer be permitted to use the house account.

3. Click **Process**.

   The name of the new authorized buyer is listed in the **Authorized Buyers** section of the **House Account** tab.

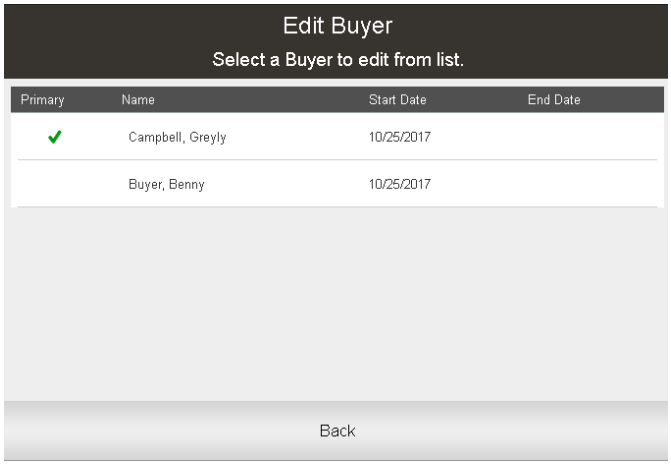
Edit an Authorized Buyer

To edit an authorized buyer associated with a house account:

1. From the Context Menu, select **Edit Buyer**.

   An Edit Buyer window opens.

Figure 6–36 Customer Maintenance - House Account Edit Buyer



2. Select the buyer to edit:
   - Click the buyer.
   - Use the up and down arrows to highlight the correct buyer, then press the Spacebar.
3. Enter the updates for the buyer:

   Note: Required fields are marked with a red triangle in the upper-left corner.

   - **First Name:** First name of the new buyer.
   - **Last Name:** Last name of the new buyer.
   - **Start Date:** Date on which the buyer will first be permitted to use the house account.
   - **End Date:** Date on which the buyer will no longer be permitted to use the house account.
4. Click **Process**.

The information for the buyer is updated in Xstore.

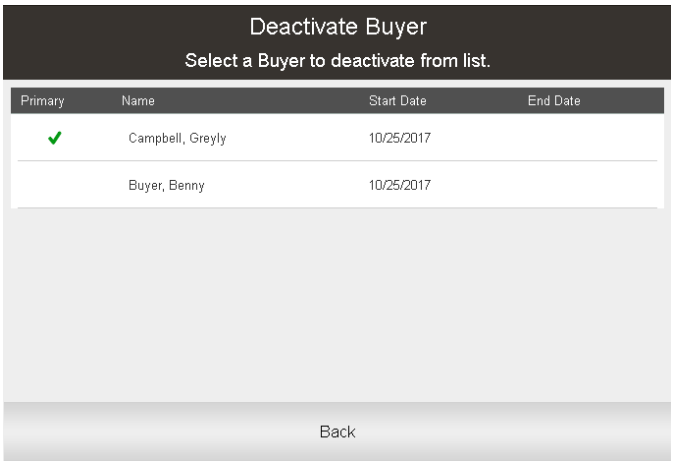
Deactivate an Authorized Buyer

To deactivate an authorized buyer associated with a house account:

1. Click **Deactivate Buyer**.

   A Deactivate Buyer window opens.

Figure 6–37 Customer Maintenance - House Account Deactivate Buyer



2. Select the buyer to deactivate:
   - Click the buyer.
   - Use the up and down arrows to highlight the correct buyer, then press the Spacebar.

     The End Date for the selected buyer is set to today's date.

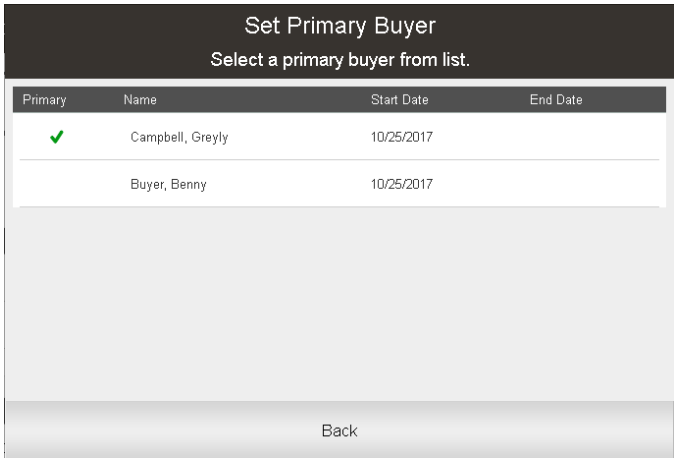
Designate a Primary Buyer

To change the primary buyer for a house account:

1. From the Context Menu, select **Set Primary Buyer**.

   A Set Primary Buyer window opens.

Figure 6–38 Customer Maintenance - House Account Set Primary Buyer



2. Select the buyer to designate as the primary buyer:
   - Select the buyer.
   - Use the up and down arrows to highlight the correct buyer, then press the Spacebar.

     The selected buyer is designated as the primary buyer and moved to the top of the Authorized Buyers list, with a green check mark next to their name. The list is sorted alphabetically below the primary buyer's name.

Wish List Tab

Figure 6–39 Customer Maintenance - Wish List Tab



If Xstore is integrated with Oracle Retail Customer Engagement, this tab displays any items in the customer's personal wish list. A customer account may have multiple wish lists associated with it, but only one wish list can be viewed at a time. To view another wish list, select the **Wish List Options** button then select **Another Wish List** option.

This tab displays the following information for each wish list item:

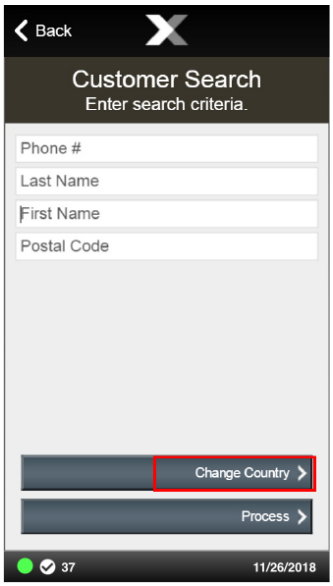
- **Item ID:** ID of the item.
- **Description:** Description of the item.

- **Orderable:** Indicates whether the item can be ordered.

Change Country

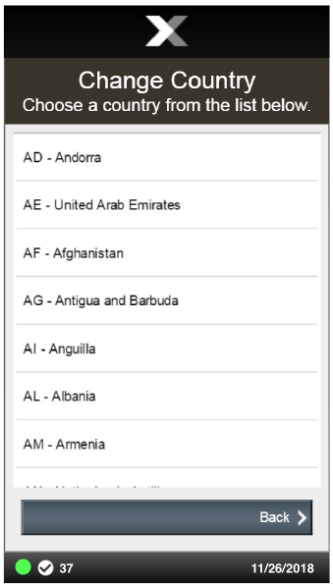
To change the states/provinces in the State field (if present) to those of a different country:

Figure 6–40 Change Country



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

Figure 6–41 Change Country List



2. Select the country.

7

Searching for Items

During a transaction you may need to search for a particular item.

- To search your store inventory, see Searching for Items Using Item Lookup below.
- To search other stores, see Locating Items: Inventory Lookup.
- To print a Rain Check, see Printing a Rain Check.

Searching for Items Using Item Lookup

Use the item lookup function to search for an item based on many criteria (SKU, style, department, and so on) and retrieve detailed information about the item. For kits, you can use item lookup to view the component items that make up the kit. If item lookup is initiated from a sale, you can add the item to the sale directly from the lookup screen if all eligibility parameters have been met.

1. At the Register Sale screen, select the **Find Item** button from the Register Sale context menu:

Figure 7–1 Find Item Option

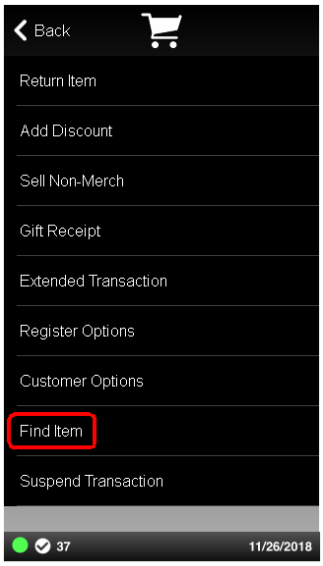
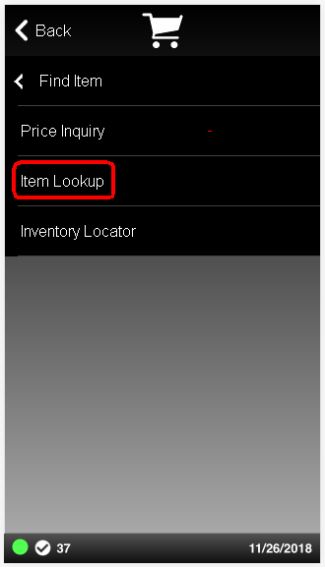
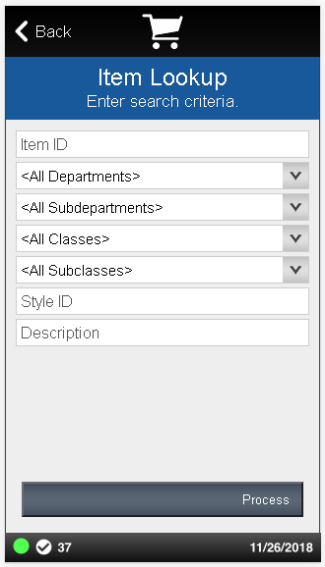


Figure 7–2 Find Item Menu



2. Select **Item Lookup** in the Find Item menu.

Figure 7–3 Item Lookup Criteria



3. Scan an item to proceed directly to the item detail screen or enter the item search criteria:
   - **Item ID:** ID of the item.
   - **Department:** Department to which the item belongs.
   - **Subdepartment:** Subdepartment to which the item belongs.
   - **Class:** Class to which the item belongs.
   - **Subclass:** Subclass to which the item belongs.

- **Style ID:** ID of the style assigned to the item.
- **Description:** Content in the description of the item.

  If advanced search options are configured on your Mobile Tablet system, use the advanced options to further refine the search such as specifying season, gender, material, line, and so on:

- Select the value for any search criteria you are using.
- Select **Exclude** for any unused search criteria.

4. After you have entered your search criteria, select **Process** to continue.

Note: If you enter only a few lookup criteria, the result will be a longer list of items. Entering more criteria narrows the scope of the search and results in fewer items being listed. You do not have to make an entry in every criteria field.

Figure 7–4 Item List



5. If several items match the criteria you entered, select an item in the list.
6. Xstore Mobile displays detailed information about the selected item

Figure 7–5 Item Details



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

   <OR>

   Continue with the appropriate procedure:

   - **Add Item**: You can add the displayed item to the current sale in progress. This option is only available if item lookup was accessed from a sale transaction. See Add Item to Transaction.
   - **Order Item**: You can place an order for the displayed item. This option is only available for items that can be ordered and if item lookup was accessed from a sale transaction. See Order Transactions Through Order Broker Cloud Service for more information.
   - **Print Rain Check**: If available, you can print a rain check to purchase out of stock items for the same price at a later date. See Printing a Rain Check.
   - **Special Order**: You can place a special order for the displayed item. This option is only available for items that can be special ordered and if item lookup was accessed from a sale transaction.
   - **Layaway Item**: You can create a layaway account for the displayed item or place it on an existing account. This option is only available for items that are eligible for layaways and if item lookup was accessed from a sale transaction.
   - **Inventory Locator**: You can search for stores with the item in stock.

Add Item to Transaction

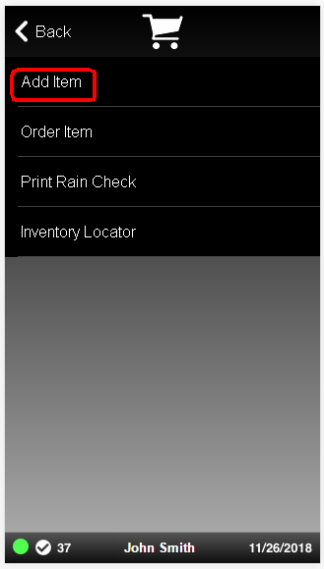
To add the searched-for item to a transaction:

Figure 7–6 Context Menu Button



1. Select the Context Menu Button in the Item Detail screen.

Figure 7–7 Add Item Option



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

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

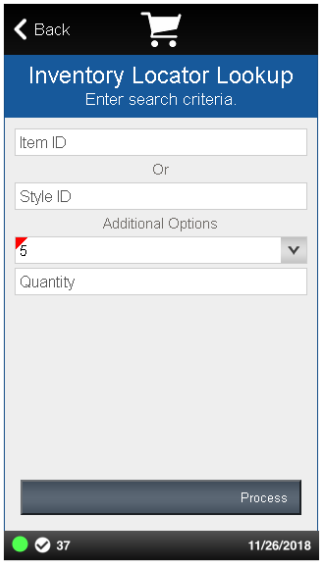
Locating Items: Inventory Lookup

Occasionally an item may not be available in your store inventory, but the customer would like to see which stores in your chain have the item in stock. You can use the inventory lookup process to search a centralized database to locate these items within

a set parameter range. For example, you could locate a specified item at a store within 25 miles of your location that has at least three of the specified item on hand.

1. At the Register Sale screen, select the **Find Item** button from the Register Sale menu (Figure 7–1).
2. At the Item Finder menu, select **Inventory Lookup** (Figure 7–2). The system prompts for the Inventory Locator criteria.
3. Enter the information as needed and select **Process** to perform the inventory locator search:

Figure 7–8 Inventory Locator Lookup Form



REQUIRED Information:

- **Item ID or Style ID:** You must enter either an item ID or a style ID.

OPTIONAL Information:

- **Distance:** Select the distance from your store (for example, all locations with this item in stock within 25 miles of the current store).
- **Quantity:** Enter the minimum quantity of the item that the target store has in stock. For example, you may use this option if the customer needs a specific quantity of this item.

4. Xstore Mobile returns a list of locations matching the search criteria.

Figure 7–9 Inventory Locator Results



This list includes the quantity of this item in stock at each store, the address and telephone number for the store, and the distance from this store to each target location.

5. Select **OK** to close the Inventory Locator.

Printing a Rain Check

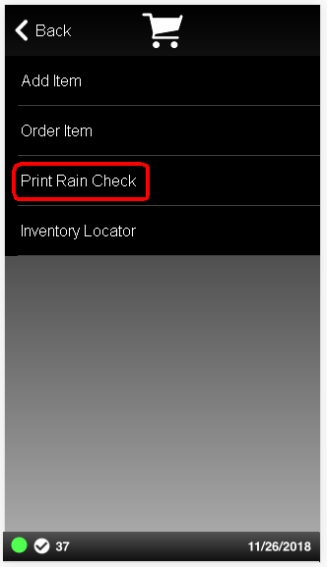
To print a rain check for the item:

Figure 7–10 Context Menu Button



1. Select the Context Menu button in the Item Detail screen.

Figure 7–11 Print Rain Check Option



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

Figure 7–12 Print Rain Check



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

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

8

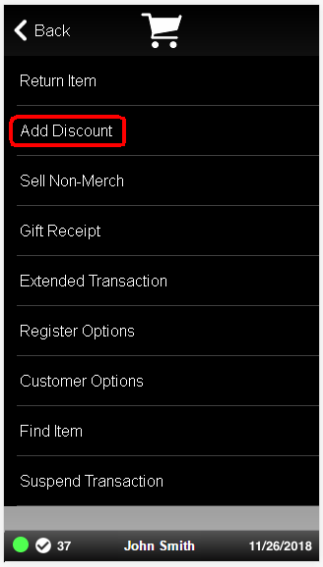
Discounts

A transaction discount is applied equally to each eligible item in the transaction, and a group discount is applied to a group of selected items in a transaction. Discounts may be specified as either amounts (for example, $5.00 off) or percentages (for example, 10% off) for both item and transaction discounts.

Adding a Discount to an Item or Transaction

1. After adding an item or items at the Register Sale screen, select the **Add Discount** option from the **Context Menu** button in the upper-right corner of the transaction screen.

Figure 8–1 Add Discount Option



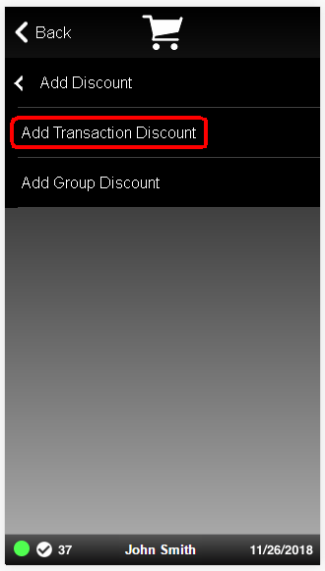
Xstore Mobile prompts you for the discount type: Transaction, or Group.

2. Select the discount type:
   - If you chose a transaction discount, continue with Transaction Level Discounts, step 1.
   - If you chose a group discount, continue with Group Discounts, step 1.

Note: Because each Xstore Mobile menu is configurable, the discount options shown on your system may be different than the options shown here.

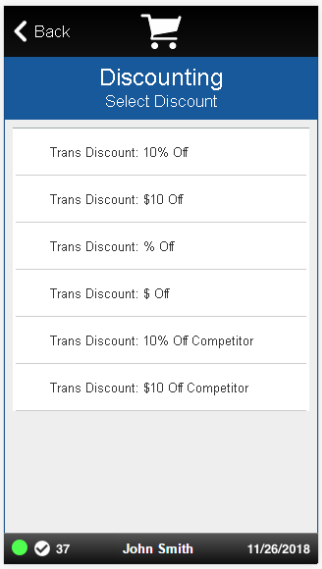
Transaction Level Discounts

Figure 8–2 Add Transaction Discount Option



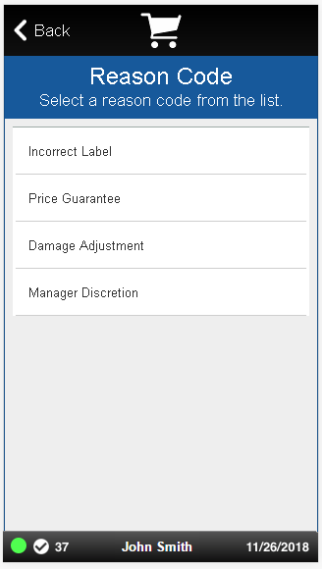
1. Select **Add Transaction Discount**.

Figure 8–3 Select Discount Menu



2. Select the discount to apply.

Figure 8–4 Reason Code List



3. Select the reason for applying the discount.

Figure 8–5 Enter Discount Amount

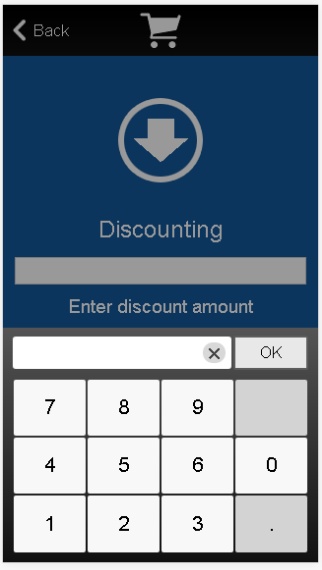
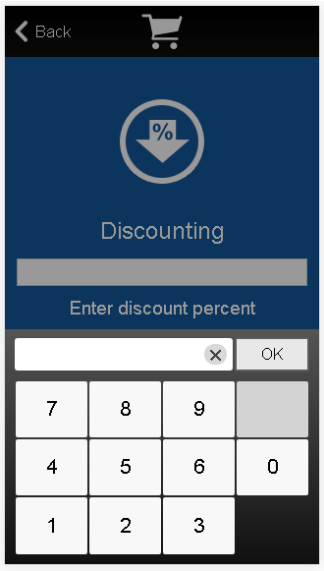


Figure 8–6 Enter Discount Percent



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

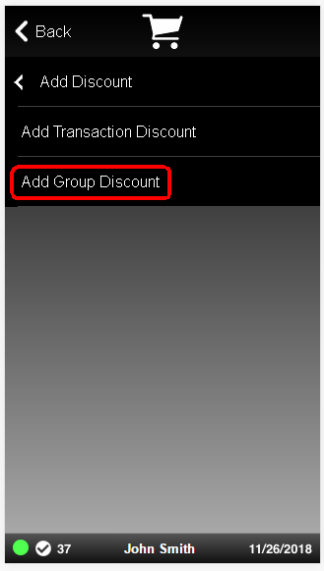
   The discount is applied to the transaction. Return to the sale screen.

Group Discounts

A Group Discount can be applied to a group of selected items in a transaction. The customer purchases these grouped items and receives a price that is less than the retail price of the items if they were sold singly.

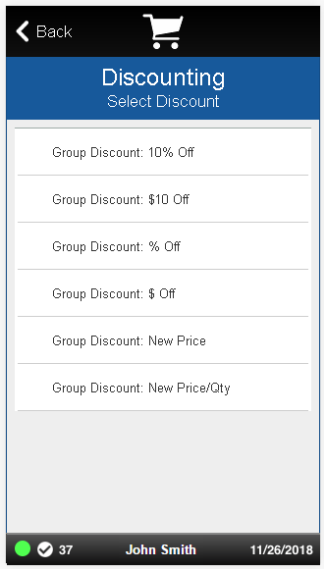
To add a discount to a group of items in a transaction:

Figure 8–7 Add Group Discount



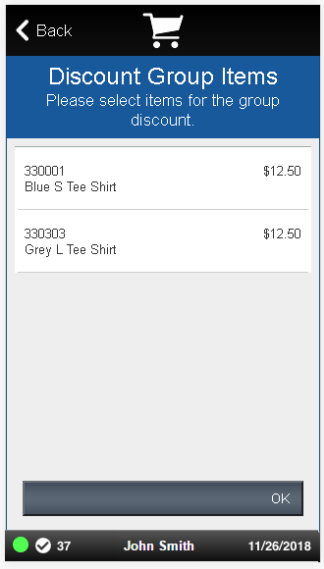
1. Select **Add Group Discount**.

Figure 8–8 Select Discount



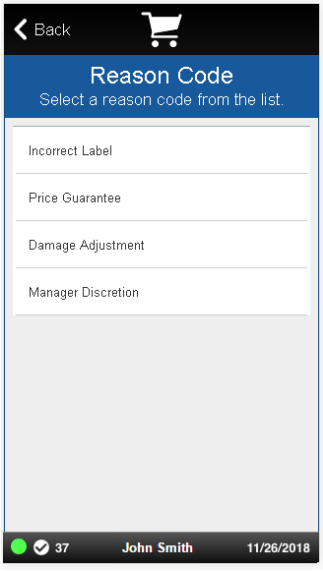
2. Select the discount to apply.

Figure 8–9 Items Eligible for Group Discount



3. Xstore Mobile displays a list of the items on the transaction that are eligible for a group discount. Select the items to include in the group.
4. Select each item to be included in the group discount.
5. When you have selected all the items for the group discount, press **OK** to continue.

Figure 8–10 Reason Code List



6. If prompted, select the reason for applying the discount.

Figure 8–11 Enter Discount Amount

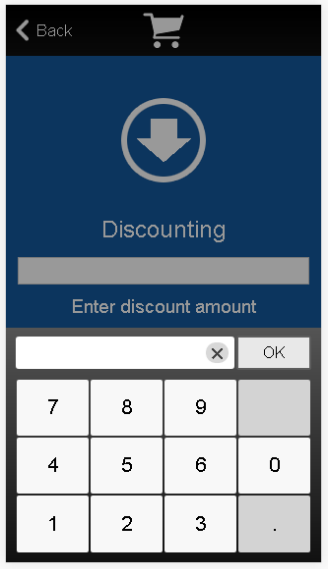
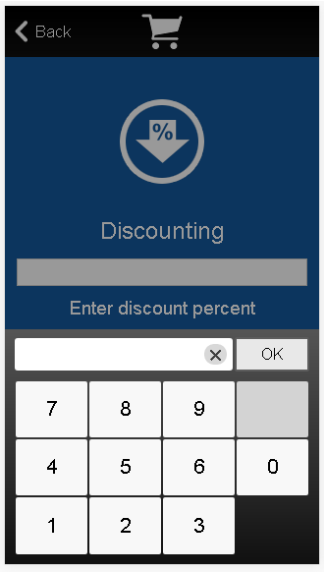


Figure 8–12 Enter Discount Percent



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

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

9

Modifying a Transaction

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

About This Chapter

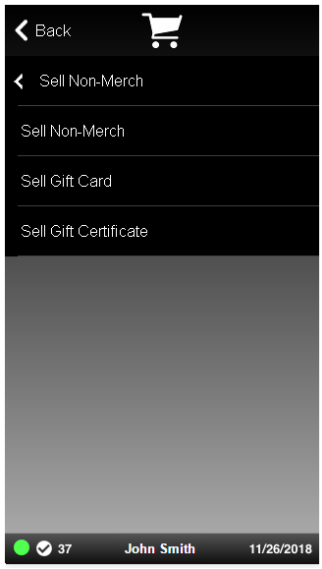
After selecting an item in the sale screen (see Adjusting an Item), the following options are available:

- Adding Non-Merchandise Items to the Sale
- Modifying Customer Information
- Modifying Line Items in a Sale
  - Changing the Item Quantity - Change the quantity of an item in a transaction.
  - Changing the Item Price - Change the price of an item.
  - Voiding an Item - Remove an item from a transaction.
  - Changing the Commissioned Associate - Change the associate who receives the commission on an item.
  - Adding/Editing a Line Item Comment - Add/remove a comment to a line item.
  - Changing Item Taxes - Change the tax on an item.
- Changing Transaction Taxes
- Suspending/Resuming a Transaction
- Change Transaction Tax

Adding Non-Merchandise Items to the Sale

1. At the Sale screen, select **Sell Non-Merch** from the Sale menu to display the list of non-merchandise items.

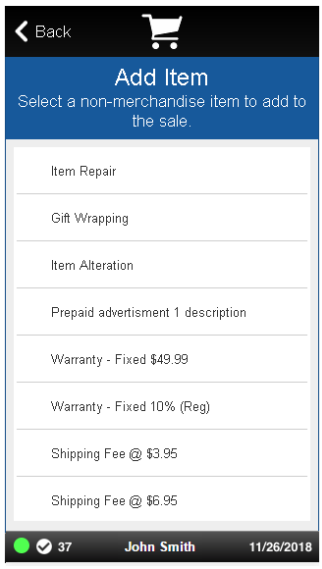
Figure 9–1 List of Non-Merchandise Options



Note: Because each Xstore Mobile menu is configurable, the non-merchandise items shown on your system may be different than the options shown in this guide. Depending upon your item choice, you may be prompted for additional information (such as a price).

2. Use the up and down arrow keys to select an item from the list and press **Enter** to continue.
3. If prompted, use the up and down arrow keys to select a non-merchandise item from the list and press **Enter** to add the item to the sale.

Figure 9–2 List of Non-Merchandise Items



4. Depending upon your item choice, you may be prompted for additional information. If prompted, enter the information as required and press **Enter** to continue.

Figure 9–3 Prompt For Price



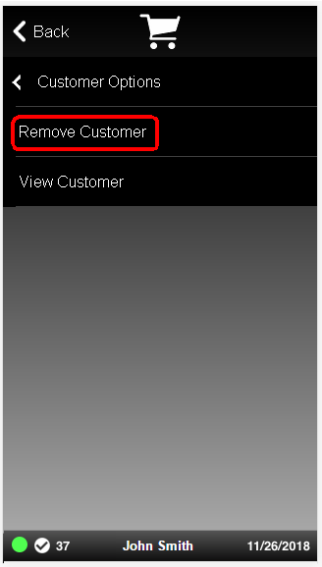
Xstore Mobile adds the non-merchandise item to the sale and the non-merchandise information is shown.

Modifying Customer Information

Perform the following steps to remove the customer from a transaction:

1. From the sale menu, select **Customer Options** in the Context Menu.

Figure 9–4 Remove Customer



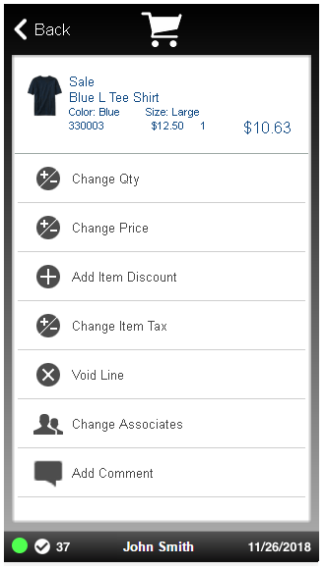
2. Select **Remove Customer**. The transaction sale screen displays with the customer removed.

Note: To add a different customer to the transaction, select **Customer Options** and then **Assign Customer**.

Modifying Line Items in a Sale

1. From the sale menu, select an item line to change or modify a line item.
2. Select an option from the **Change Item** menu.

Figure 9–5 Change Item Menu Options



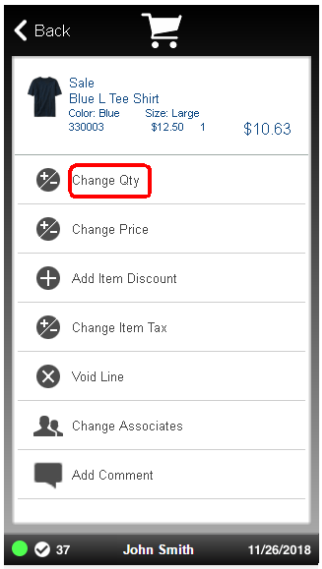
The following options are available:

- Change the item quantity - See Changing the Item Quantity.
- Change the item price - See Changing the Item Price.
- Change the item tax - See Changing Item Taxes.
- Void a line item - See Voiding an Item.
- Change the commissioned associate - See Changing the Commissioned Associate.
- Add/Edit line item comments - See Adding/Editing a Line Item Comment.
- Modify Discount - This option is only available when a discount is on the transaction. After selecting this option you are prompted to select the discount you want to change. See Adding a Discount to an Item or Transaction.

Changing the Item Quantity

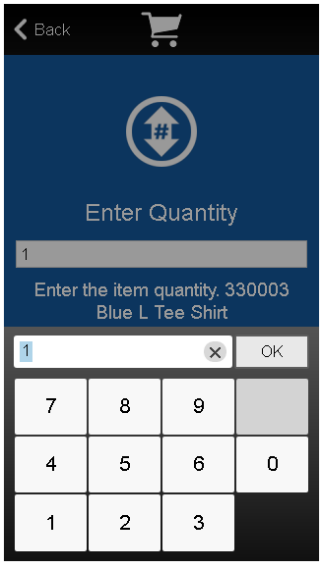
To change the quantity of a selected item (see Adjusting an Item):

Figure 9–6 Change Quantity Option



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

Figure 9–7 Enter Quantity Prompt



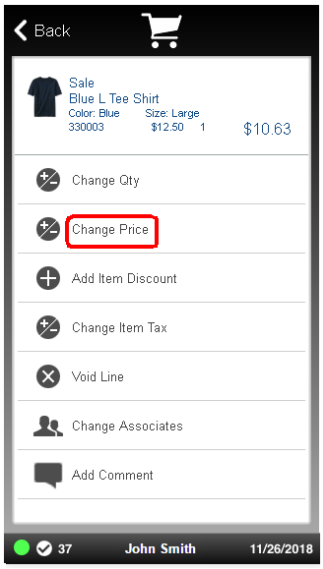
2. Enter the new quantity for the item.
3. Select the **OK** button.

   Return to the transaction screen.

Changing the Item Price

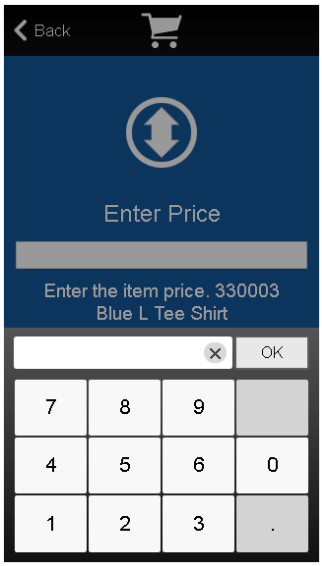
To change the price of a selected item (see Adjusting an Item):

Figure 9–8 Change Price Option



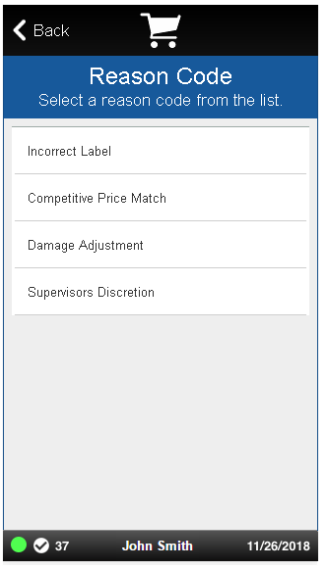
1. Select **Change Price**.

Figure 9–9 Enter Price Prompt



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

Figure 9–10 Reason Code List



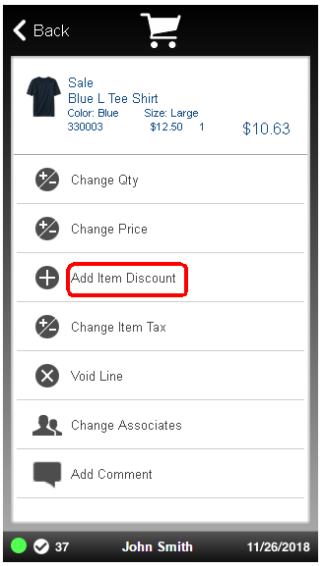
4. Select the proper reason for the price change.

   Return to the transaction screen.

Discount an Item

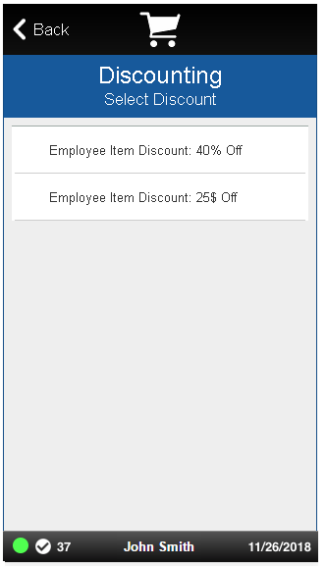
To add a discount to a selected item (see Adjusting an Item):

Figure 9–11 Add Item Discount Option



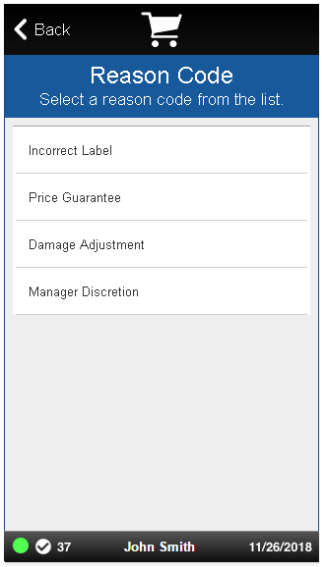
1. Select the **Add Item Discount** button.

Figure 9–12 Discount List



2. Select the proper discount.

Figure 9–13 Reason Code List



3. Select the proper reason for the discount.

   If prompted to enter an amount:

Figure 9–14 Discount Amount Prompt

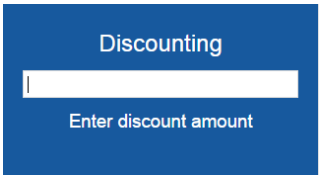
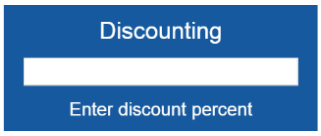


Figure 9–15 Discount Percent Prompt



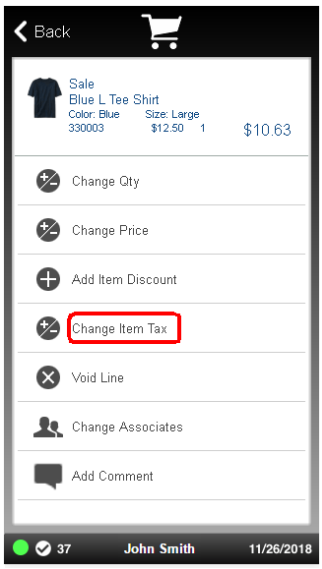
4. Enter the discount amount.
5. Select **OK**.

   Return to the transaction screen.

Changing Item Taxes

To change the tax on a selected item (see Adjusting an Item):

Figure 9–16 Change Item Tax Option



1. Select **Change Item Tax**.

   Continue with the proper procedure:

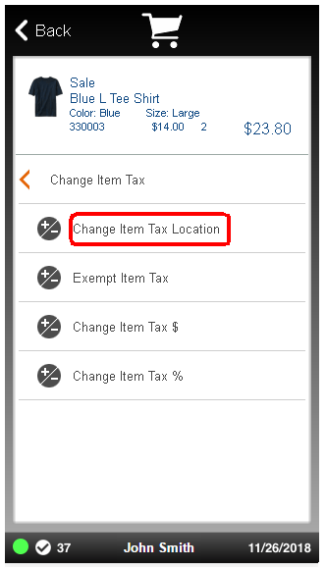
   - Changing the Item Tax Location
   - Exempting an Item From Tax
   - Changing the Item Tax Amount

- Changing the Item Tax Percentage

Changing the Item Tax Location

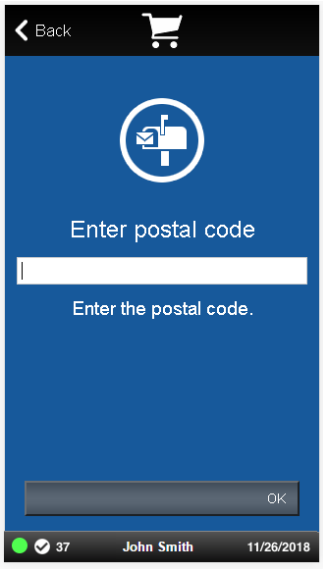
To change the location used to determine the tax on an item:

Figure 9–17 Change Item Tax Location Option



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

Figure 9–18 Enter Postal Code



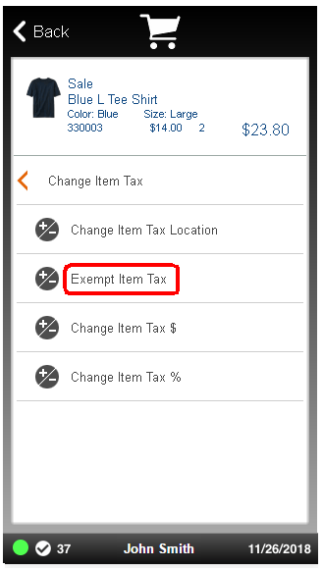
2. Enter the postal/zip code for the new location.
3. Select **OK**.

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

Exempting an Item From Tax

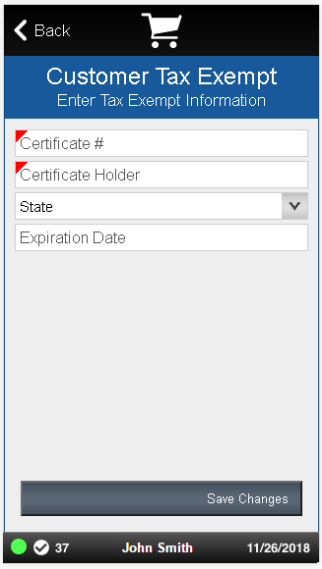
To exempt an item from tax:

Figure 9–19 Exempt Item Tax Option



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

Figure 9–20 Customer Tax Exempt Entry Form



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

Figure 9–21 Reason Code List



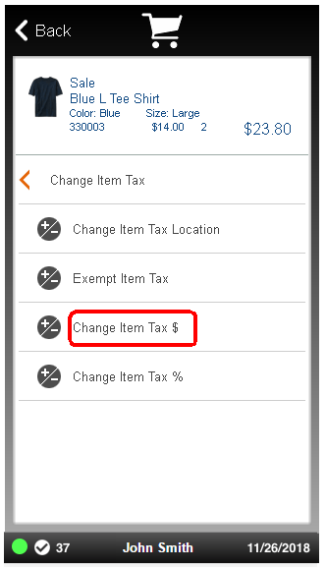
4. Select the reason for the tax change.

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

Changing the Item Tax Amount

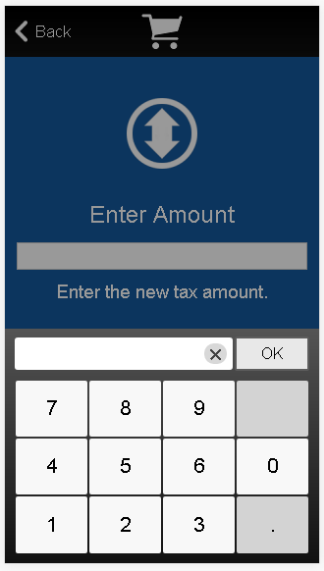
To change the amount of the item tax:

Figure 9–22 Change Item Tax Amount



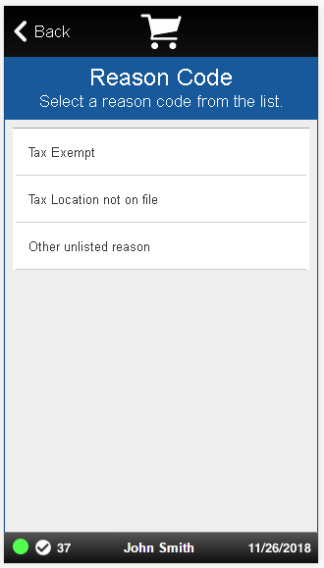
1. Select **Change Tax $**in the Change Item Tax Menu.

Figure 9–23 Enter Tax Amount



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

Figure 9–24 Reason Code List



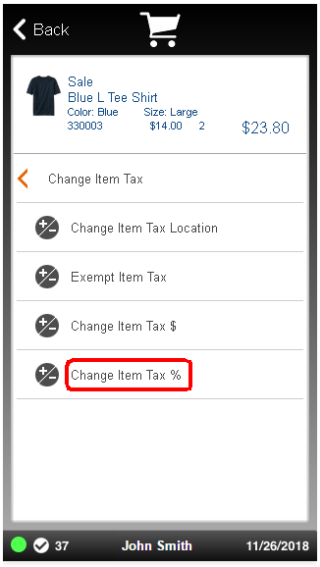
4. Select the reason for the tax change.

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

Changing the Item Tax Percentage

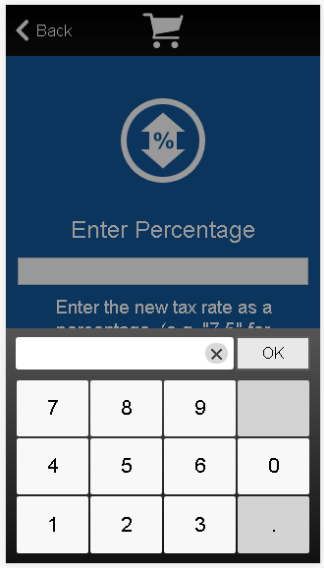
To change the percentage of the item tax:

Figure 9–25 Change Item Tax Percentage Option



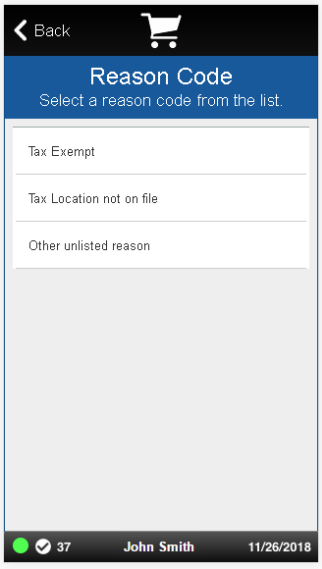
1. Select **Change Tax%** in the Change Item Tax Menu.

Figure 9–26 Enter Tax Rate



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

Figure 9–27 Reason Code List



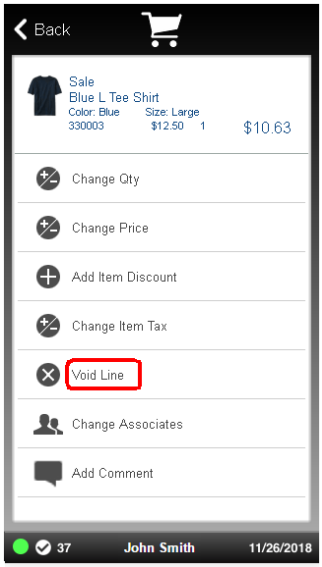
4. Select the reason for the tax change.

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

Voiding an Item

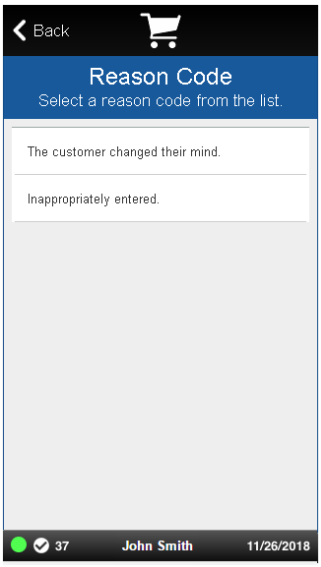
To void a selected item (see Adjusting an Item):

Figure 9–28 Void Line Option



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

Figure 9–29 Reason Code List



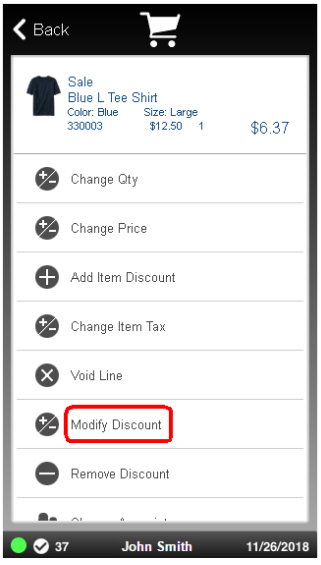
2. Select the proper reason for voiding the line.

   Return to the transaction screen.

Modifying Discounts

This option is only available when a discount is on the transaction. After selecting this option you are prompted to select the discount you want to change. To change the discount on a selected item (see Adjusting an Item):

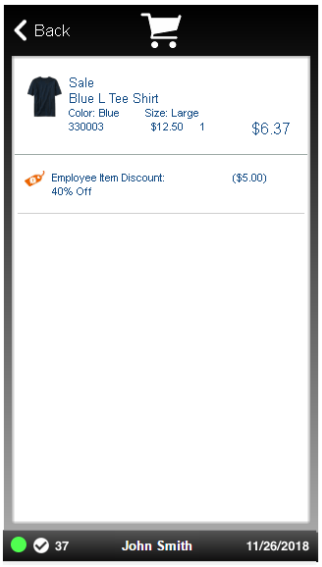
Figure 9–30 Modify Discount



1. Select the **Modify Discount** button.

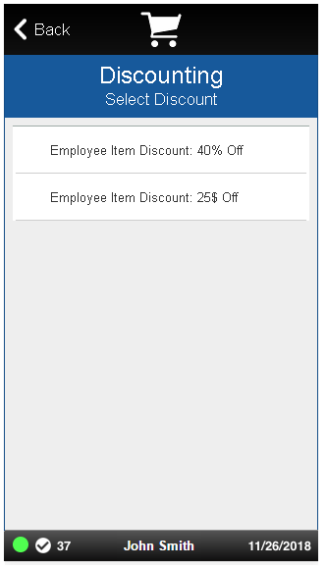
2. Select the discount to modify.

Figure 9–31 Select Discount



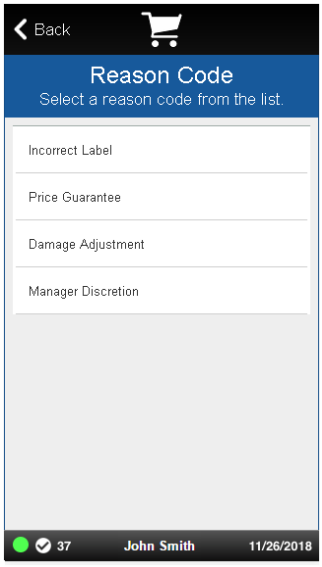
3. Select the proper discount.

Figure 9–32 Discount List



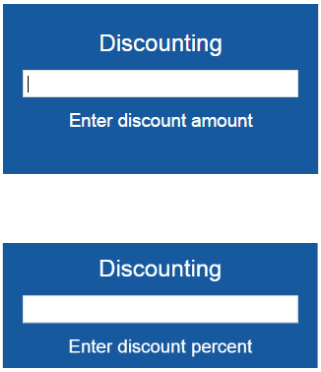
4. Select the proper reason for the discount.

Figure 9–33 Reason Code List



If prompted to enter an amount:

Figure 9–34 Discount Amount and Percent Prompt



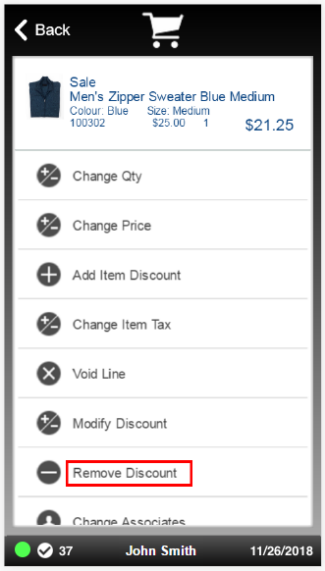
5. Enter the discount amount.
6. Select **OK**.

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

Removing Discounts

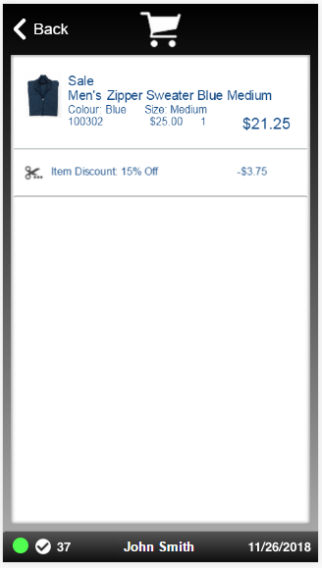
To remove a discount on a selected item (see Adjusting an Item):

Figure 9–35 Remove Discount Option



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

Figure 9–36 Discount List



2. Select the discount to remove.

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

Changing the Commissioned Associate

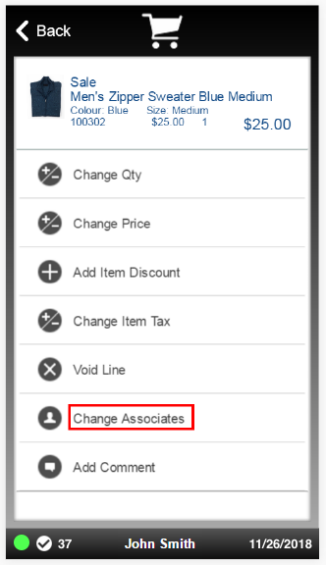
To change the associate receiving a commission on a selected item (see Adjusting an Item), do one of the following:

- Select the Associate From a Listt
- Enter the ID for an Associate

Select the Associate From a List

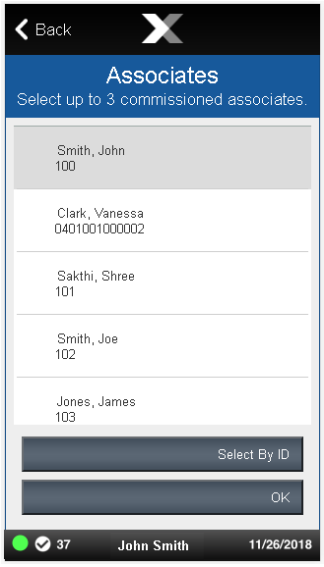
To select the new commissioned associate from a list of associates:

Figure 9–37 Change Associates Option



1. Select **Change Associates**.

Figure 9–38 Associates List



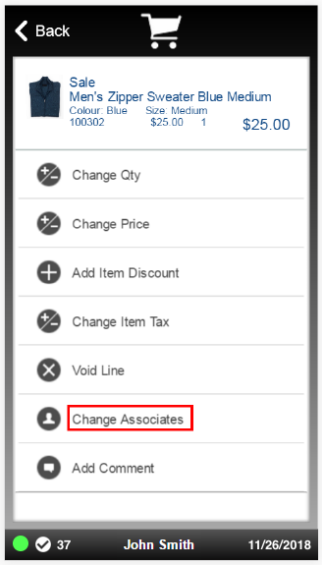
2. Select the proper associate(s) in the list.

   Return to the transaction screen.

Enter the ID for an Associate

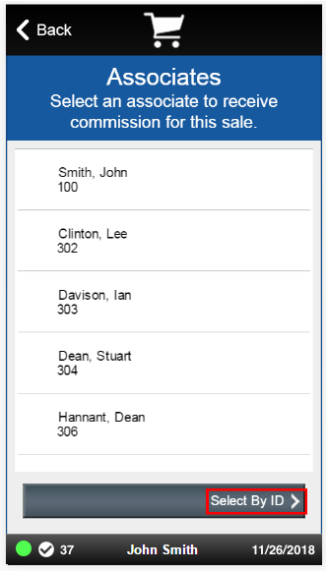
To select the new commissioned associate by entering an associate ID, do the following:

Figure 9–39 Change Associates Option



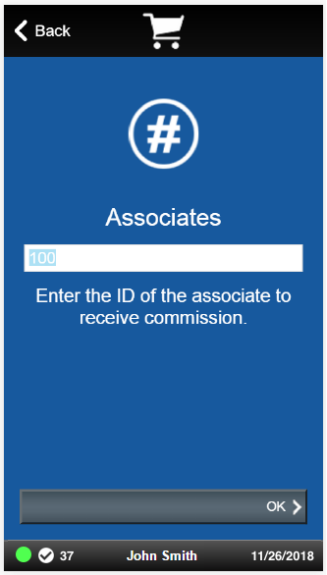
1. Select the **Change Associates** button.

Figure 9–40 Associates List



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

Figure 9–41 Associate ID Entry Form



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

   Return to the transaction screen.

   When you are finished adding associates:
5. Leave the associate ID field blank.
6. Select **OK.**

Adding/Editing a Line Item Comment

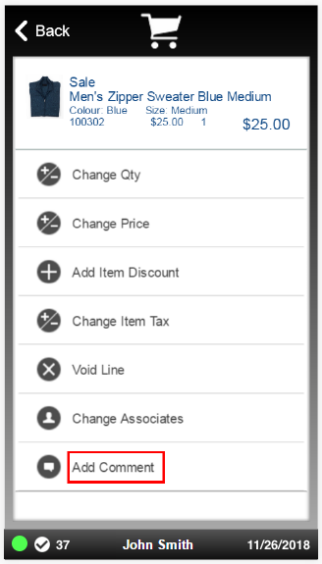
This section describes how to add or edit line item comments.

Adding a Comment

Note: Multiple comments can be entered on one item.

To add a comment to a selected item (see Adjusting an Item):

Figure 9–42 Add Comment Option



1. Select **Add Comment**.

Figure 9–43 Line Item Comments Entry Form



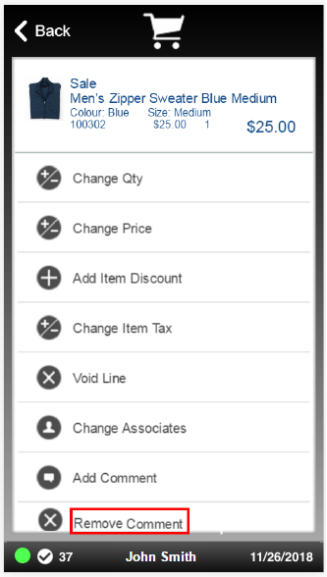
2. Enter the comment.
3. Select **OK**.

   Return to the transaction screen.

Removing a Comment

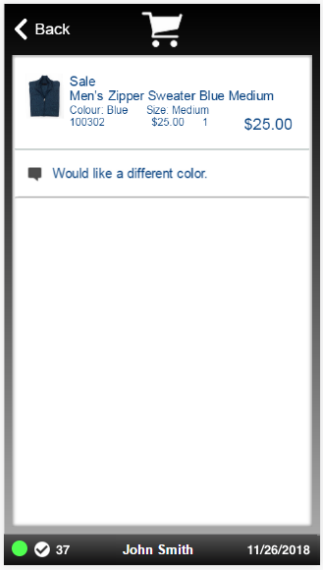
To remove a comment from a selected item (see Adjusting an Item):

Figure 9–44 Remove Comment Option



1. Select **Remove Comment**.

Figure 9–45 Comment List



2. Select the comment to remove.

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

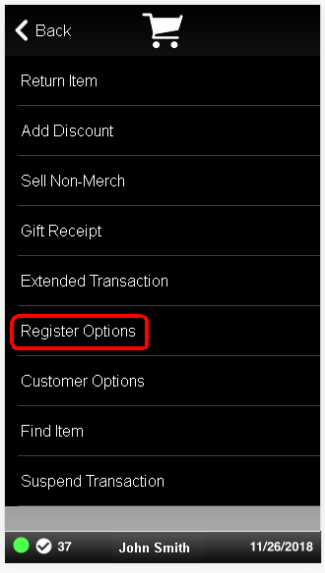
Changing Transaction Taxes

This section deals with changing transaction taxes.

Change Transaction Tax

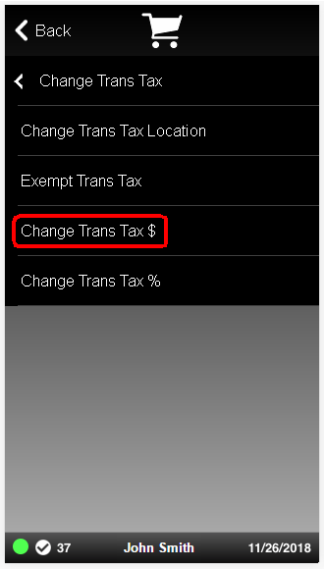
To change the tax applied to a transaction:

Figure 9–46 Register Options



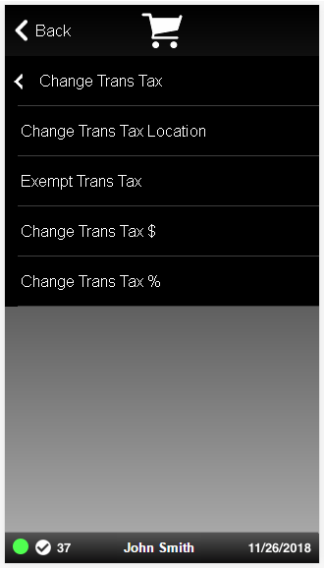
1. Select **Register Options** in the Context Menu.

Figure 9–47 Change Trans Tax



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

Figure 9–48 Change Trans Tax Menu



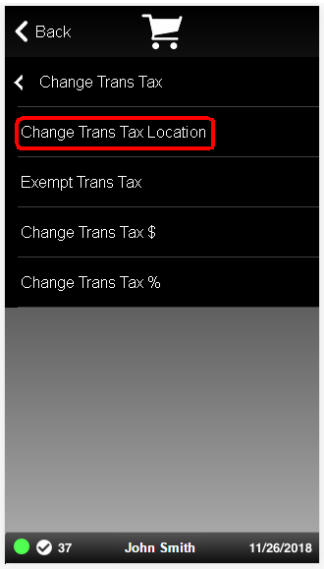
Continue with the proper procedure:

- Changing the Commissioned Associate

Change Transaction Tax Location

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

Figure 9–49 Change Trans Tax Location



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

Figure 9–50 Enter Postal Code



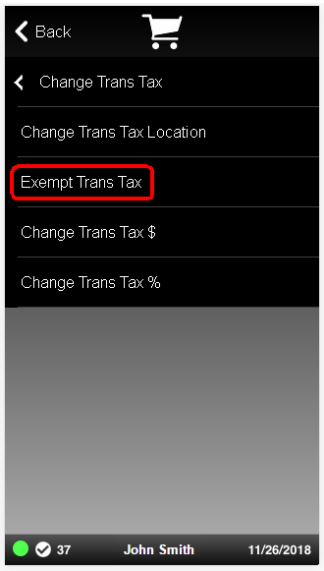
2. Enter the postal/zip code from the new location.
3. Select **OK**.

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

Exempt a Transaction From Tax

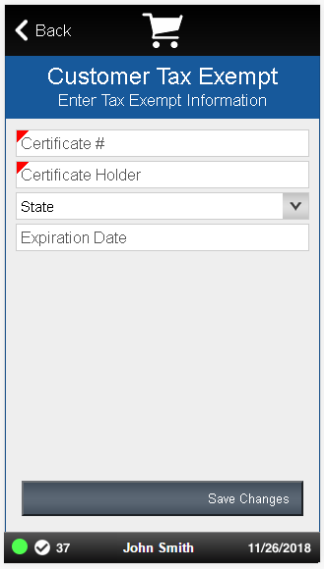
To exempt a transaction from tax:

Figure 9–51 Exempt Trans Tax



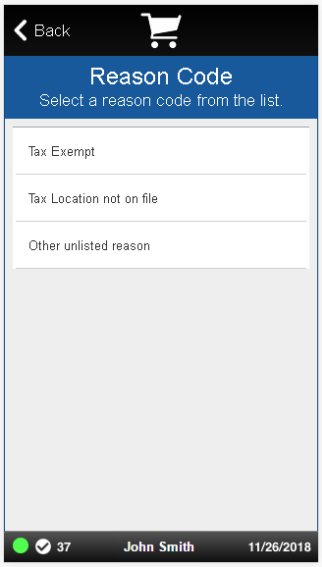
1. Select **Exempt Trans Tax** in the Change Transaction Tax Menu.

Figure 9–52 Change Trans Tax



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

Figure 9–53 Select Reason Code



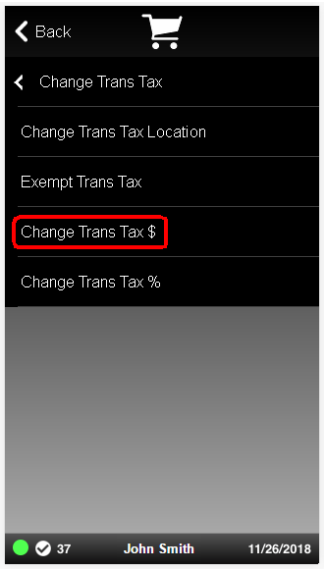
4. Select the reason for the tax change.

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

Change Transaction Tax Amount

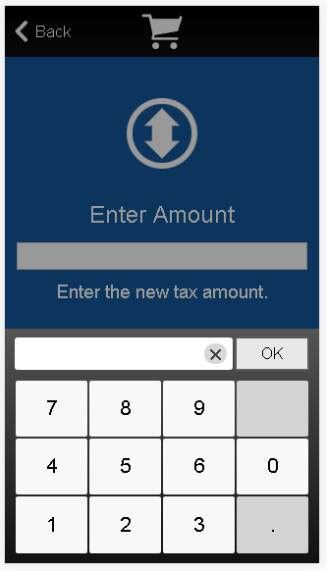
To change the amount of the transaction tax:

Figure 9–54 Change Trans Tax Amount



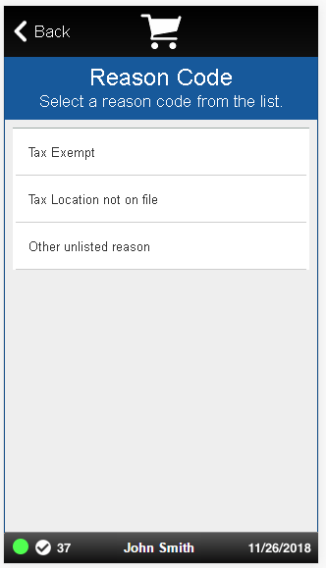
1. Select Change Tax $ in the Change Transaction Tax Menu.

Figure 9–55 Enter Tax Amount



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

Figure 9–56 Select Reason Code

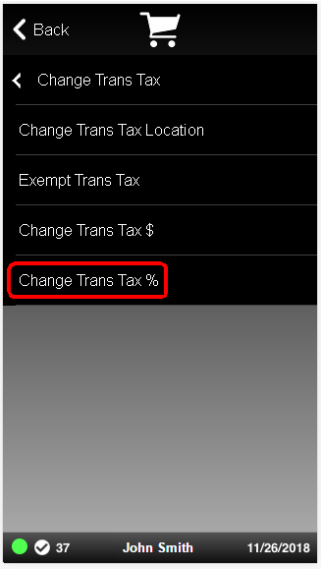


4. Select the reason for the tax change.

Change Transaction Tax Percentage

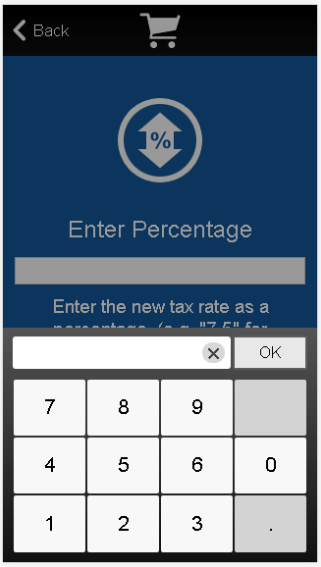
To change the percentage of the transaction tax:

Figure 9–57 Change Trans Tax Percent



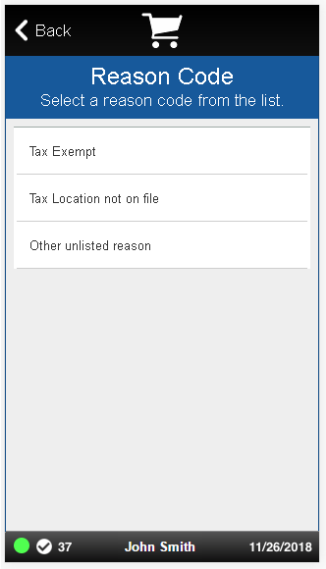
1. Select Change Tax % in the Change Transaction Tax Menu.

Figure 9–58 Enter Tax Rate



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

Figure 9–59 Select Reason Code



4. Select the reason for the tax change.

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

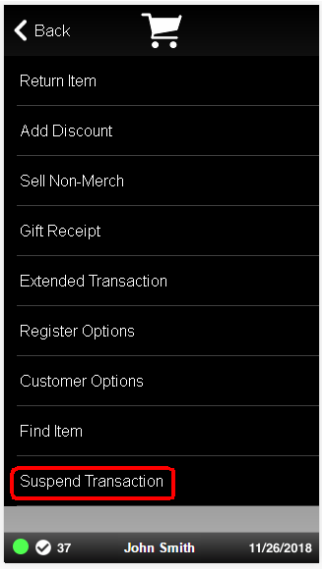
Suspending/Resuming a Transaction

This section describes how to suspend and resume a transaction.

Suspending a Transaction

To suspend a transaction:

Figure 9–60 Suspend Transaction



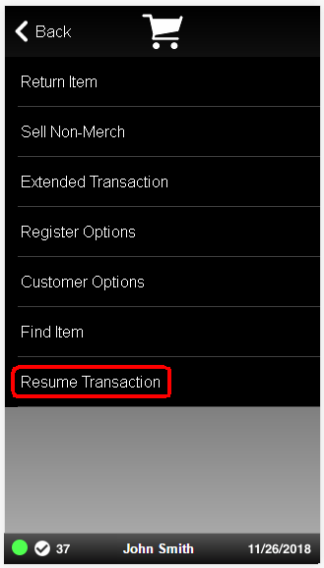
1. Whilst in a sale, select **Suspend Transaction** in the context menu to suspend a transaction. Xstore Mobile returns to the Main Menu.

Resuming a Transaction

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

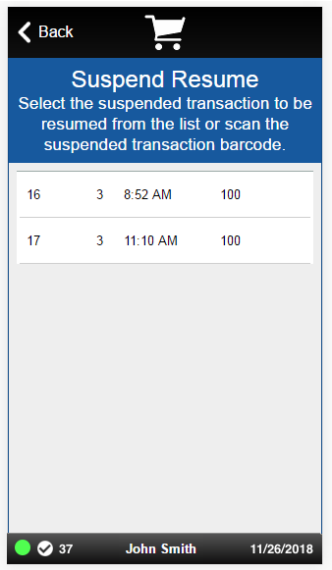
To resume a suspended transaction:

Figure 9–61 Resume Transaction



1. Select **Resume Transaction** in the context menu. Xstore Mobile opens a list of suspended transactions.

Figure 9–62 Suspend Resume



2. Select the proper transaction to resume.
3. If the system is an airside location, scan the customer's boarding pass.

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

Cancel a Transaction

To cancel a transaction:

1. At any point in a transaction, press **Esc** until you return to the initial sale screen.
2. Cancel the sale:
   - Select **Cancel Sale**.
   - Press **Esc**.

     If there are items in the sale, Xstore Point of Service prompts whether to cancel the sale.

10

Send Sale Transaction

A send sale item is an item that must be shipped to a customer-specified offsite location after it is purchased.

Send sales are similar to special orders and orders because each of these transaction types may involve the direct shipment of a purchased item to a customer or third party. A send sale, however, implies that the item is in the store's saleable inventory when the purchase is made and is available at the time of purchase.

> **Note:** A special order can be set up if an item is not available in the store's inventory when the purchase is made. A special order may allow a flexible payment structure between the time of purchase and receipt of the merchandise, but a send sale item must be paid in full when it is purchased.
>
> An order can be set up if an item is not available in the store's inventory when the purchase is made; however, the item must be available at another location within the store chain or warehouse.

Your system may be configured for one-step or two-step send sale processing.

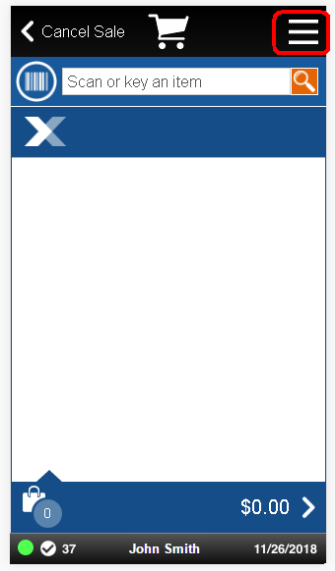
- In one-step processing you enter the ship-to address and select a shipping method (if required) during the sale transaction, and no further action is required in Xstore Mobile once the transaction is completed.
- In two-step processing you enter the ship-to address and select a shipping method (if required) during the sale transaction, just as performed in one-step processing. After the sale is completed, a shipping document is created automatically and must be processed as a separate step in the Back Office Shipping module.

Refer to the *Oracle Retail Xstore Mobile Shipping, Receiving, and Inventory Guide* for more information about completing the shipping document in the Back Office for two-step processing.

Adding Send Sale Items to a Sale

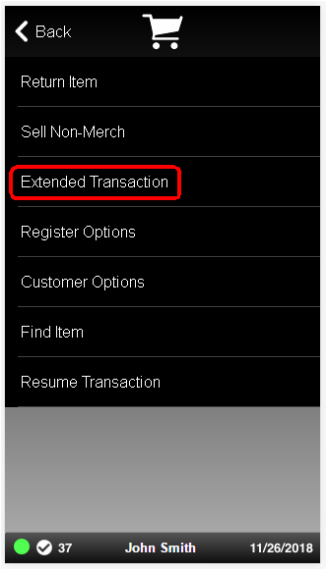
1. At the Sale screen, select the **Context Menu** button.

Figure 10–1 Sale Screen Context Menu Button



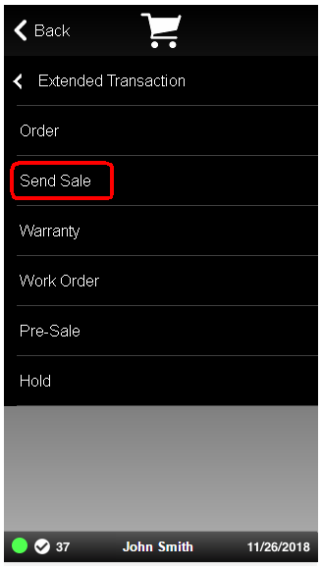
2. Select **Extended Transaction** in the Context Menu.

Figure 10–2 Context Menu



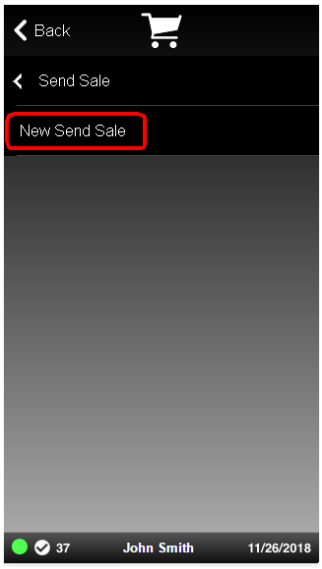
3. From the Extended Transaction menu, select the **Send Sale** option. You must have security privileges to add a send sale to a transaction.

Figure 10–3 Send Sale Option



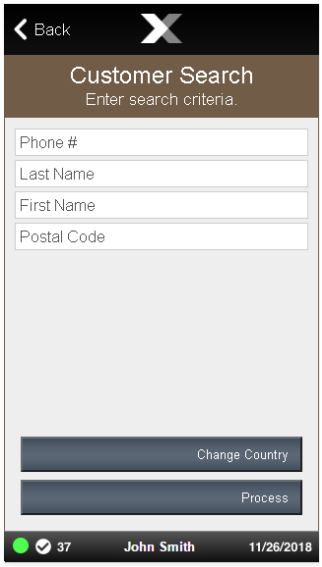
4. Select the **New Send Sale** option.

Figure 10–4 New Send Sale Option



5. Create a new send sale:
   - If a customer is not assigned to the sale, the Customer Search form displays so that you can search for a customer to assign to the transaction.

Figure 10–5 Customer Search Form - Sale Customer

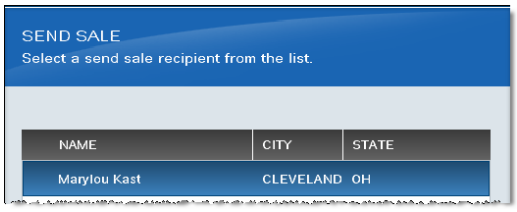


Enter your search criteria on the form and select **Process** to find a customer to associate with the transaction and continue with the send sale process.

This Customer Search information applies to the customer purchasing the items, not necessarily the send sale recipient. However, the customer purchasing the item may also be the recipient. Continue with step 6.

- If a customer is assigned to the sale, the shipping destination prompt is displayed. Continue with step 6.
- If the customer associated with the transaction has shipped items using the send sale process previously, a list of past recipients is displayed.

Figure 10–6 Send Sale - List of Past Recipients

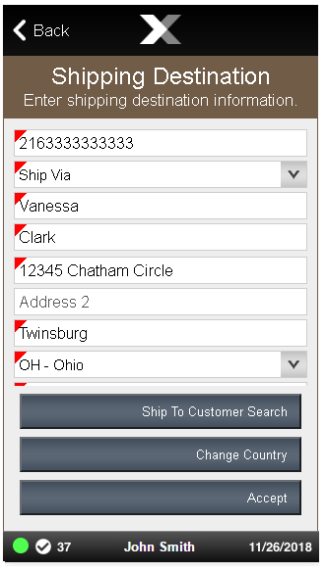


- If the recipient of the items in this new send sale is listed, select the name from the list and press **Enter**.
- If the recipient is not listed, select **Skip**.

  Continue with step 6.

6. By default, the system may display the address information for the customer assigned to the current transaction on the shipping destination form. This allows you to quickly associate the purchasing customer's shipping address with the send sale item. If no customer is associated with the transaction, the shipping destination form fields will be blank.

Figure 10–7 Shipping Destination Information Form - Auto-populated Customer Info



7. You have the following options on this form:
   - You can edit any of the address fields on the shipping destination form and then select the **Accept** option.
   - Depending upon the configuration of your system, you may have a First line of address, or postal code field.
     a. Enter address information into this field to quickly look up an address.
     b. Select the address from a list of results to automatically populate the customer address fields.
   - You can accept the information without making changes by selecting the **Accept** option.
   - You can search for another send sale recipient by selecting the **Ship To Customer Search** option.

     Note: If the **Address Lookup** button is enabled, the **Ship To Customer Search** button will not be displayed.

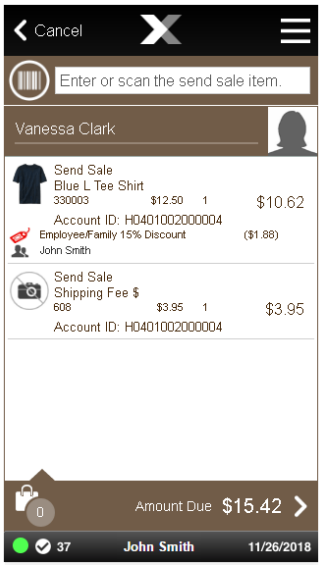
   - Depending upon your store policy, you may be required to enter additional shipping information:
     – If your system is set up for enhanced send sale processing, you are required to select a **Ship Via** shipper.
     – If your system is not set up for enhanced send sale processing, the **Ship Via** field will not be active.

Note: A red triangle in the upper left corner of a field indicates a required entry.

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.

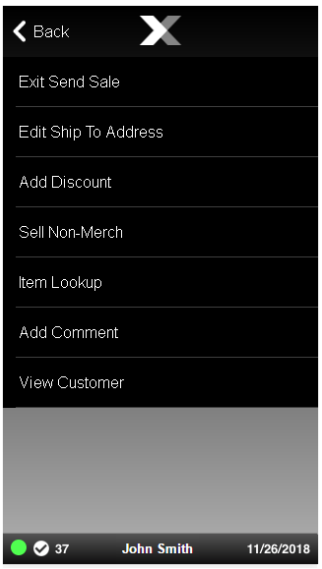
8. When the system returns to the item-entry screen, enter or scan an item ID.

Figure 10–8 Send Sale Item Entry Screen



- The system validates every item to ensure that it meets the requirements for send sale items. Continue until you have added all the send sale items to the transaction.
- Depending on your store policy, you may be prompted for an originating inventory location. If prompted, select the inventory location from which the item originated, or leave the inventory location blank to leave the location pending. Select the **Process** option.

Figure 10–9 Send Sale Item Menu Options



Note: Send Sale Item Menu Options

- Select **Item Lookup** to look up items or styles if you do not know the item ID.
- Select **Edit Ship To Address** to change the shipping address.
- Select the **Add Discount** option to add a discount to an item.
- Select the **Add Comment** option to associate a comment with the send sale account.
- Select the **Sell Non Merch** option to add non merchandise items to the send sale.

Note: Select the item if you want to change any of the information (quantity, price, tax, and so on) about an item after you have added it. The procedures for each send sale menu option shown above can be found in Chapter 9, "Modifying a Transaction".

9. Verify that the information on the screen is correct before proceeding. Check to see that any item comments are associated with the correct item.

   At this point you may still edit the recipient and shipping address information by selecting the **Edit Ship To Address** option.

10. When you are finished adding send sale items, you have the following options to complete the transaction:

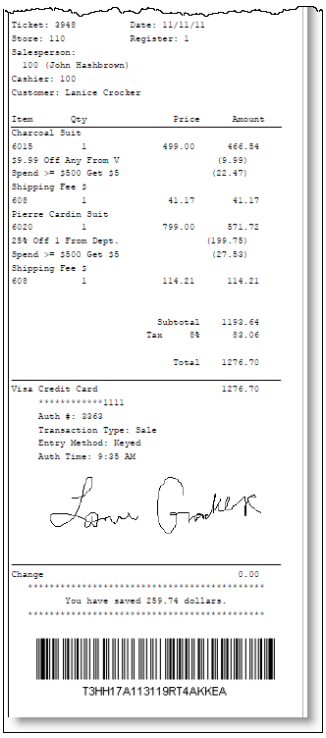
    - Select the **Add Tenders** option or press **Enter** to tender and complete the sale.
    - Select the **Exit Send Sale** option to return to the Register Sale screen where you can continue selling items.

11. The system automatically performs several actions:

- Calculates the tax to apply to each item and add it to the sale.
- Calculates any fees that apply to an item and adds them to the sale.
- Updates the inventory status of the item.

When the transaction is complete, the system creates send sale receipts as determined by your store policy.

Figure 10–10 Customer Receipt Sample


Ticket: 3948 Date: 11/11/11
Store: 110 Register: 1
Salesperson:
100 (John Hashbrown)
Cashier: 100
Customer: Lanice Crocker

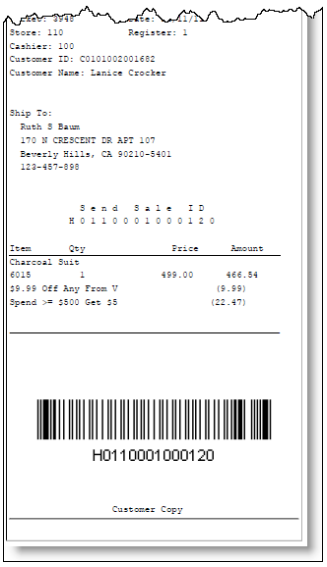
Item	Qty	Price	Amount
Charcoal Suit			
6015	1	499.00	466.54
$9.99 Off Any From V			(9.99)
Spend >= $500 Get $5			(22.47)
Shipping Fee $			
608	1	41.17	41.17
Pierre Cardin Suit			
6020	1	799.00	571.72
25% Off 1 From Dept.			(199.75)
Spend >= $500 Get $5			(27.53)
Shipping Fee $			
608	1	114.21	114.21
		Subtotal	1193.64
		Tax 8%	83.06
		Total	1276.70

Visa Credit Card 1276.70
**********1111
Auth #: 3363
Transaction Type: Sale
Entry Method: Keyed
Auth Time: 9:35 AM

Change 0.00
****
You have saved 259.74 dollars.
****

T3HH17A113119RT4AKKEA

Figure 10–11 Customer Send Sale Receipt Sample

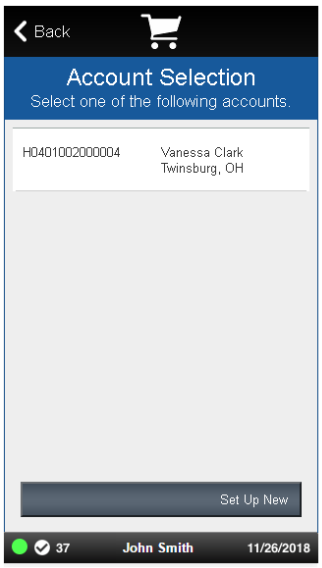


Editing a Send Sale

Before tendering a transaction that includes a send sale, you have the option to edit the send sale information.

1. At the Sale screen, select Extended Transaction, Send Sale and than **Edit Send Sale**.
2. The Account Selection list displays showing the current send sale accounts on the transaction. Select the send sale you want to change and press **Enter**.

Figure 10–12 Send Sale Account List



3. You can add an item to this send sale, edit the address information, and edit item information for the selected account as needed. Refer to step 7.

11

Special Orders (Mobile Tablet Only)

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

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

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

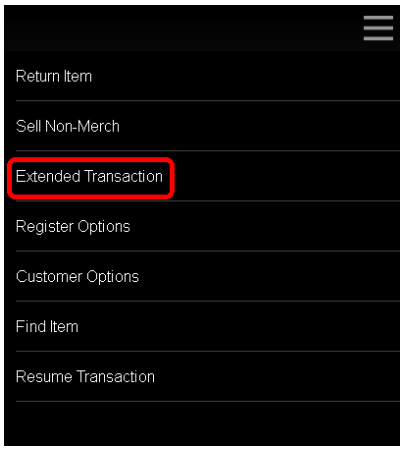
This chapter covers the following topics:

- Create a Special Order
- Open an Existing Special Order
- Modify Special Order Items
- View Special Order History
- Pick Up a Special Order
- Cancel a Special Order

Create a Special Order

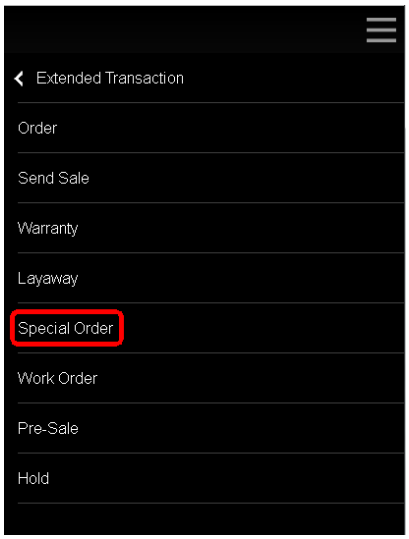
To create a new special order:

Figure 11–1 Sale Context Menu



1. Select **Extended Transactions** in the Register Sale screen Context Menu.
2. Click **Special Order.**

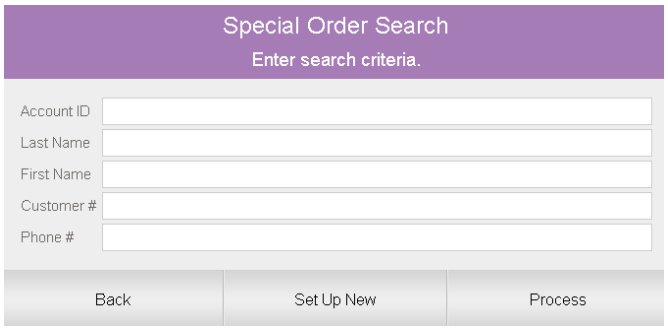
Figure 11–2 Extended Transaction Menu



Xstore will open a prompt listing open special orders for the customer, or an indication that there are no open special orders.

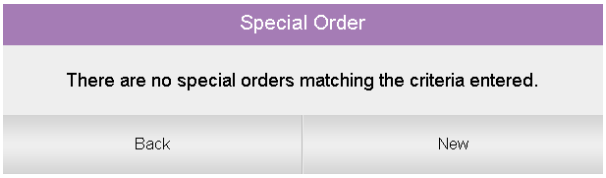
3. Perform the appropriate action:

Figure 11–3 Special Order Search Form



- Select **Set Up** New if no customer is associated with the transaction. Continue with Step 4.

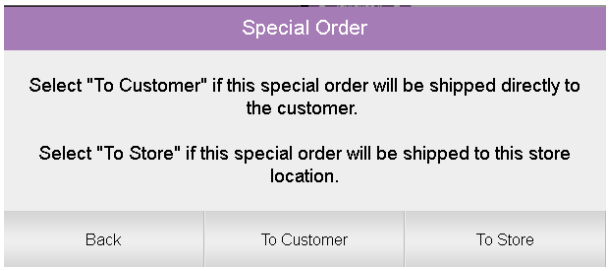
Figure 11–4 No Special Orders Found Prompt



- Select **Set Up** New if no customer is associated with the transaction. Continue with Step4.
- Select **New** if a customer is associated with the transaction. Continue with Step 5.

4. 4. Associate a customer with the transaction. See Associating a Customer with a Transaction.
5. Select the destination for the special order:

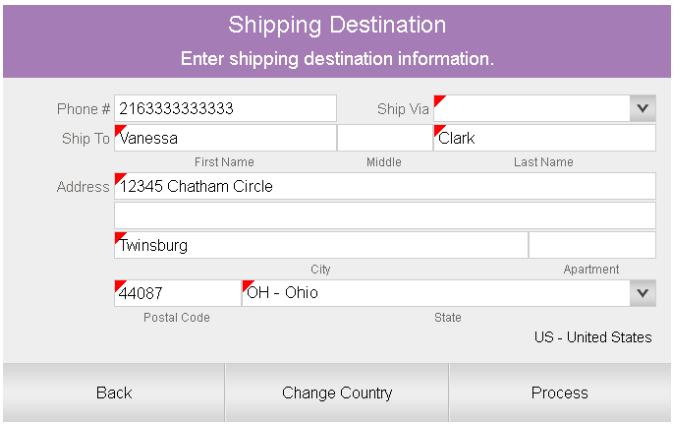
Figure 11–5 Special Order Destination



- **To Customer:** Ship the order directly to the customer. Continue with Step 6
- **To Store:** Ship the order to the local store where the customer will pick it up. Continue with Step 8.

6. If necessary, enter or update the shipping information for the customer:

Figure 11–6 Special Order Shipping Destination - Customer



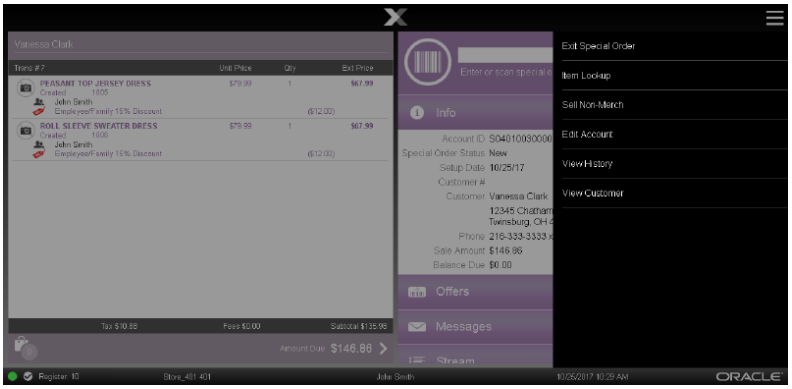
- **Ship To:** Name of the customer.
- **First:** First name.
- **Middle:** Middle initial.
- **Last:** Last name.
- **Address:** Shipping address.

Note: The fields in this section will depend upon configuration and nationality.

- First line of the shipping address.
- Second line of the shipping address.
- **Zip:** Zip or postal code.
- **State:** State or province.
- **City:** City name.
- **Apartment:** Apartment.
- **Country:** Country name.
- **Ship Via:** Name of the shipping company. Click the **Change Country** button to change this value.

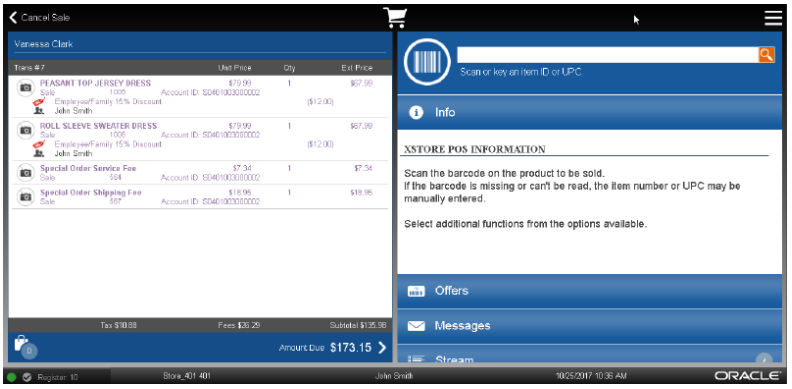
7. Select **Process**.
8. Enter the items for the special order. See Entering Items.
9. If necessary, enter the expected arrival date for the order, then press **Enter**.

Figure 11–7 Exit Special Order Option



10. Select **Exit Special Order** to exit special order mode and perform additional transaction processing and to proceed to tendering after completing the special order.

Figure 11–8 Special Order Sale Screen



11. If necessary, enter the amount of the special order deposit, then press **Enter**.

> **Note:** This option is only available if you clicked To Store in Step 5. Items that are shipped to the customer must be paid in full in the same transaction in which the order is created.

- If you clicked **To Store** in Step 5, special order creation is complete. Continue the transaction.
- If you clicked **To Customer** in Step 5, continue with Step 12.

12. If necessary, click **OK** to confirm that a shipping fee has been added to the special order.

    Continue the transaction.

Open an Existing Special Order

To open an existing special order:

1. Select **Extended Transactions** in the Register Sale screen Context Menu.

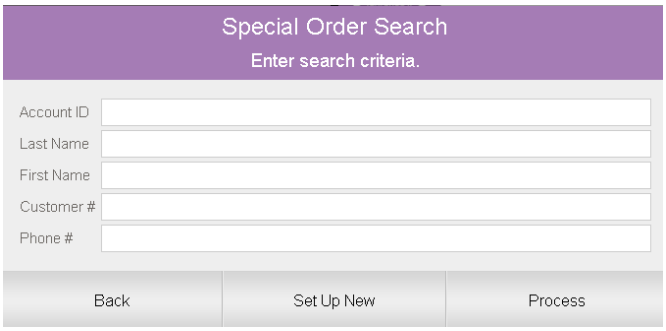
2. Select **Special Order**.

   Xstore will open a prompt listing open special orders for the customer, or an indication that there are no open special orders.

   - To select the special order from the list, continue with Step 6.
   - To search for the special order, continue with Step 3.

3. If necessary, click Special **Order Search**.

Figure 11–9 Special Order Search Form



4. Enter the search information for the special order:

   Note: You can also scan the receipt for the special order to open it.

   - **Account ID:** ID of the special order.
   - **Last Name:** Last name of the customer associated with the special order.
   - **First Name:** First name of the customer associated with the special order.
   - **Customer ID:** ID of the customer associated with the special order.
   - **Phone #:** Phone number of the customer associated with the special order.

5. Select **Process**.

   A list of special orders matching the entered criteria opens.

6. If necessary, select the special order in the list. The special order opens.

Modify Special Order Items

Changes can be made to items in a special order. See Modifying a Transaction for more information about changing line items in a transaction.

To make changes to special order items:

1. If necessary, create a special order. See Create a Special Order.
2. Click **Edit Account**.
3. Perform the appropriate action:
4. Change the Item Expected Date

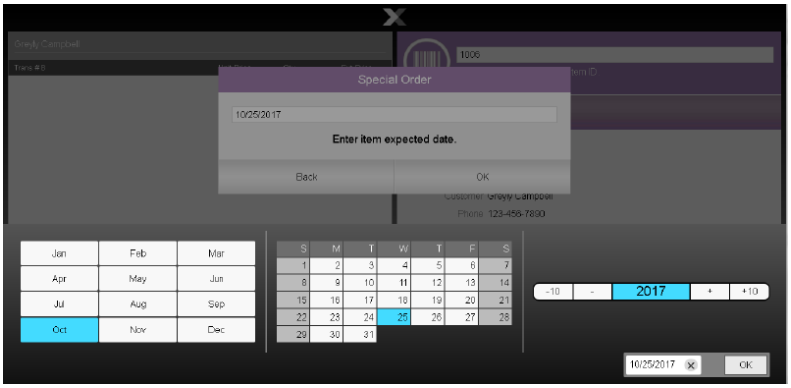
   Make changes to the line items. See Modifying a Transaction for more information about changing items in a transaction.

Change the Item Expected Date

To change the expected date for an item:

1. Click **Change Item**.
2. Click **Change Expected Date**.
3. Select the item in the View Port.
4. Press **Enter**.
5. Enter the expected arrival date for the item.

Figure 11–10 Special Order Expected Date



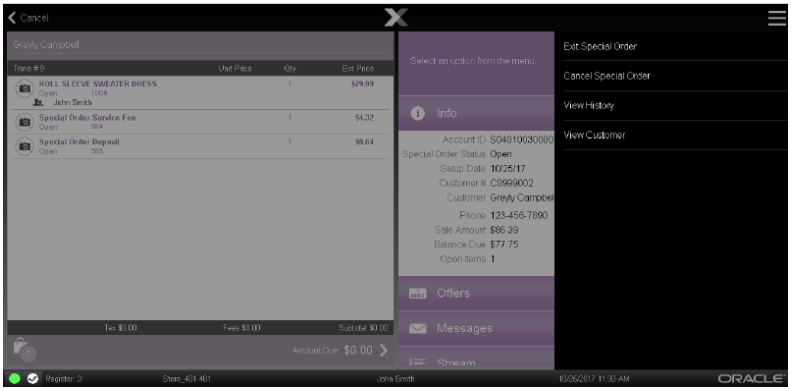
6. Press **Enter**. The expected arrival date for the item is changed.

View Special Order History

To view the customer's special order history:

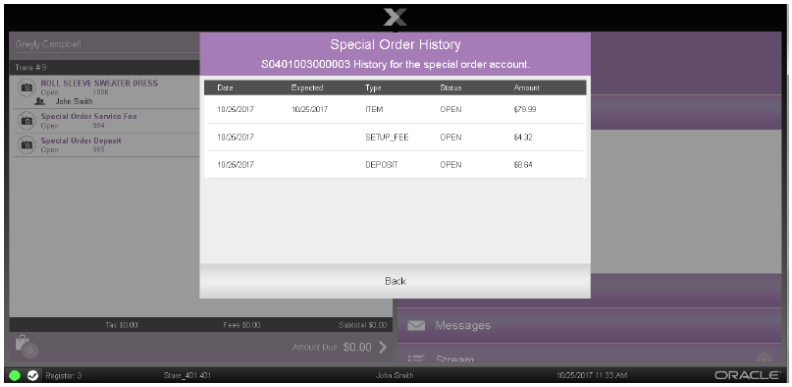
1. Create a Special Orderor Open an Existing Special Order
2. Click **View History** in the special order screen Context Menu.

Figure 11–11 Special Order View History Option



Xstore opens a window displaying the previous special order activities associated with the customer.

Figure 11–12 Special Order History



The following information is shown for each special order:

- **Date:** Date the special order was created.
- **Expected:** Expected delivery date for the special order.
- **Type:** Type of activity.
- **Status:** Status of the special order.
- **Amount:** Amount associated with the activity.

3. Select **Back** to close the window and return to the special order.

Pick Up a Special Order

When a customer arrives at a store to pick up special order items, do the following:

1. Open an existing special oder, see Open an Existing Special Order.
2. Select **Pick Up Item**.
3. Select the items to pick up. Select **Pick Up All** to select all items.
4. Select **Exit Special Order** to exit special order mode and perform additional transaction processing and to proceed to tendering after completing the special order.

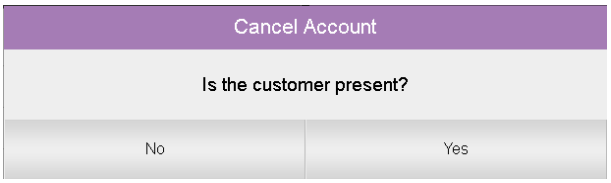
Cancel a Special Order

Special orders to be sent to a store can be canceled at a store. To cancel a special order:

1. Open an existing special order, see Open an Existing Special Order.
2. Click **Cancel Special Order**.

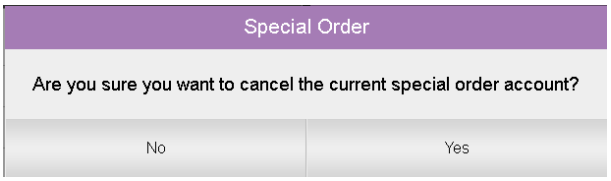
   A confirmation prompt opens.
3. Indicate whether the customer is present:

Figure 11–13 Customer Present Prompt



- Click **Yes** if the customer is present.
- Click **No** if the customer is not present.
  - If the customer is present, a second confirmation prompt opens.

Figure 11–14 Special Order Cancel Confirmation



4. 4. Indicate whether to cancel the special order:

- Click **Yes** to cancel the special order.

  The special order is canceled and the refund amount is applied to the transaction.
- Click **No** to return to the special order without canceling it.

12

Layaway Transactions (Mobile Tablet Only)

A layaway item is a sale item that cannot be taken from a store when it is purchased because the customer does not pay the entire cost of the item at that time. Instead, the store reserves the item for the customer until the customer pays for the item in full.

Usually the customer is required to fully pay for the items in a layaway within a specified time period. Once an item in a layaway has been fully paid, the customer takes possession of it from the store.

A layaway account is a customer account that includes one or more layaway items. A layaway account for which the customer does not pay the requisite amount within a given time frame is considered delinquent; the items in the layaway are restocked as saleable inventory and any non-refundable deposit or setup fees are kept by the store. Any refundable deposits or setup fees are reserved for the customer.

This chapter covers the following topics:

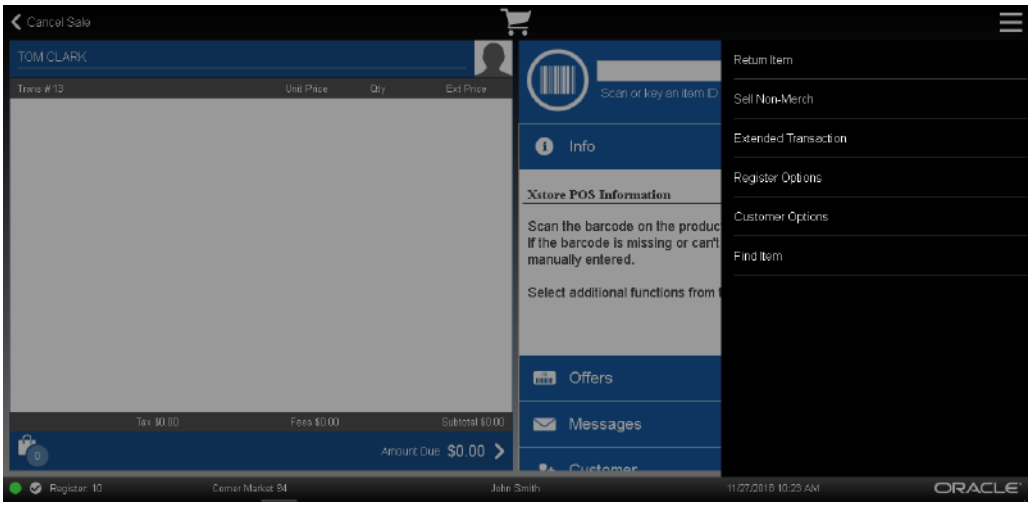
- Create a Layaway
- Open a Layaway
- Layaway Payment
- Pick Up Layaway Items
- Add Items to an Existing Layaway
- Edit Items in a Layaway
- Cancel a Layaway
- Add a Comment
- View Comments
- View Layaway Payment History
- View Layaway Payment Schedule
- View Layaway Activity History
- Automatic Prompts for Accounts Requiring Attention

Create a Layaway

To create a layaway:

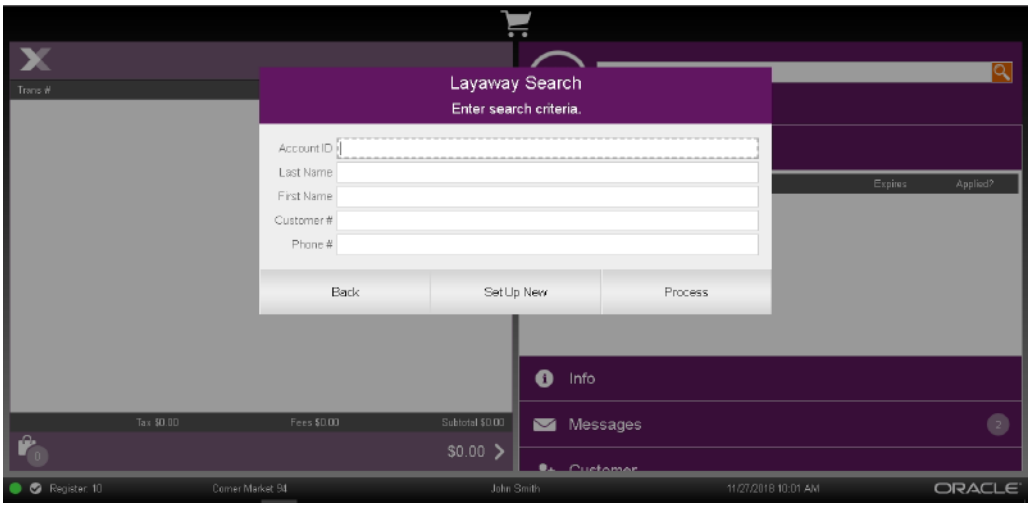
1. Click **Extended Transaction** in the Register Sale Context Menu.

Figure 12–1 Extended Transaction Context Menu



2. Click **Layaway**.

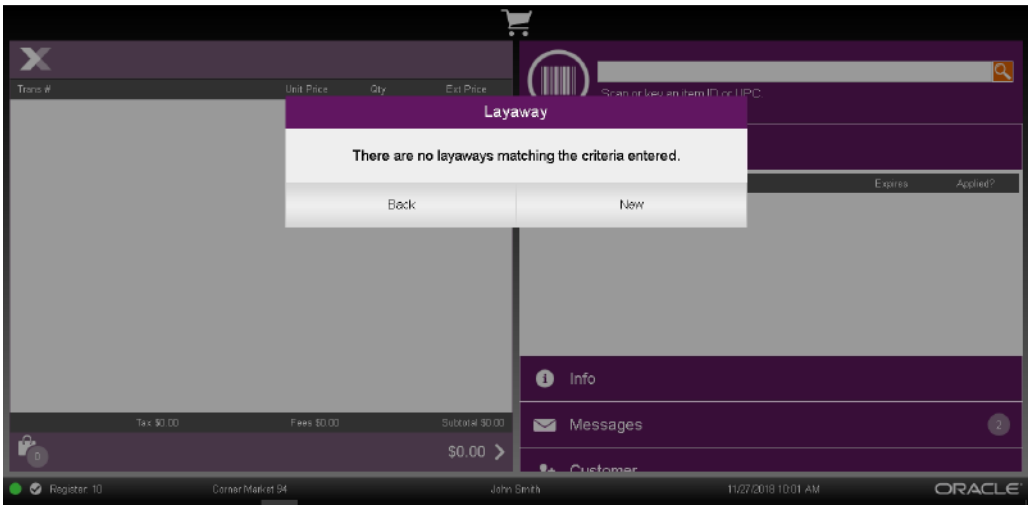
Figure 12–2 Layaway Search



3. Enter criteria to search for an existing layaway.

   Xstore will open a prompt listing open layaways for the customer, or an indication that there are no open layaways.

Figure 12–3 No Matching Layaways



4. Choose the correct option:

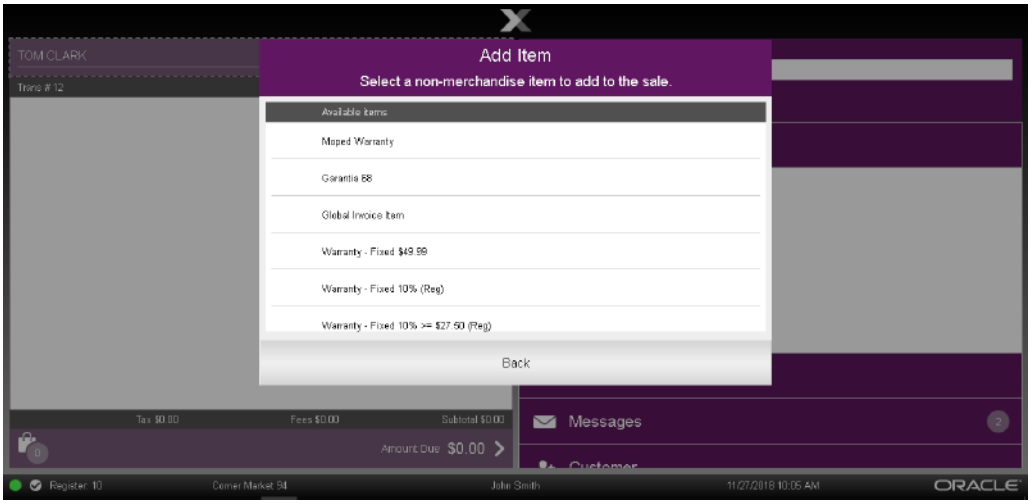
   - Click **Set Up New** if the customer has open layaways.

     Note: If the customer has an existing layaway account and Xstore is configured for a Single layaway account, a new layaway cannot be created.

   - Click **New** if there are no layaways associated with the customer, or no customer has been associated with the transaction.
   - If no customer is associated with the transaction, perform Associating a Customer with a Transaction and associate a customer with the transaction.

5. Add items to the transaction by entering item IDs or scanning an item. Select **Sell Non-Merch** option rom the Context Menu to add non-merch items such as gift cards or gift wrapping:

Figure 12–4 Sell Non-Merch Items



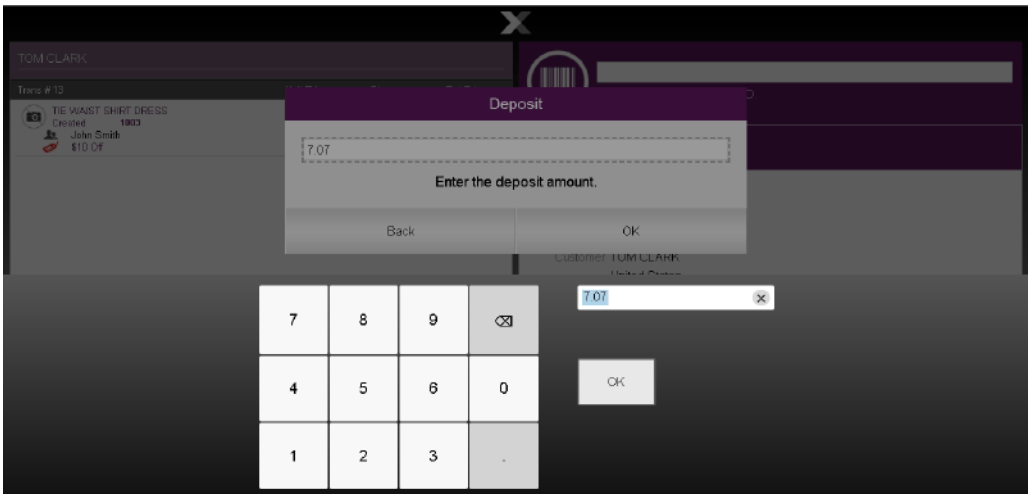
Note: If an item cannot be added to a layaway, the system prompts with a message or reason the item is ineligible.

While Xstore is in layaway mode, all items entered are entered as layaway items. The View Port only shows items and information for the current layaway transaction while in layaway mode.

Note: If adding an item would exceed the total amount or item quantity permitted in a layaway, Xstore displays a warning message. Click **OK** to confirm the message, then either complete the layaway or remove items to add additional items.

6. After entering all the items, do one of the following:
   - Select **Exit Layaway** from the Context Menu to exit layaway mode and perform additional transaction processing.
   - Select **Complete Transaction** to tender the transaction. See Tendering the Transaction.
7. Xstore prompts for a deposit amount.

Figure 12–5 Deposit Amount Prompt



8. If necessary, change the layaway deposit amount.
9. Press **Enter**.
   - If the entered deposit amount is less than the minimum deposit amount, Xstore opens a warning prompt. Click **OK** and return to Step 7 to enter a larger deposit.
   - If you changed the deposit amount was changed in Step 7, Xstore prompts whether to continue with a deposit amount other than the default.
   - Click **Yes** to continue the transaction.
10. Click **No** to return to Step 7 and enter a new amount.
11. If Xstore prompts for the number of days in the payment period:

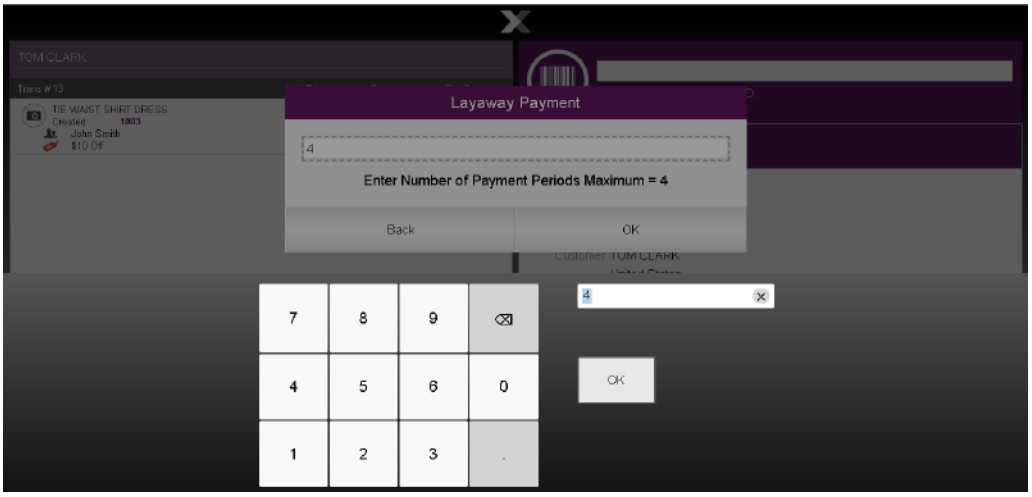
a. Enter the number of days in the payment period.

b. Press **Enter**.

Note: Xstore displays a confirmation prompt if the entered number exceeds to maximum payment period. Click OK and enter a new payment period.

12. If Xstore prompts for the number of payment periods:

Figure 12–6 Layaway Payment Periods



a. Enter the number of payment periods.

b. Press **Enter**.

Note: Xstore displays a confirmation prompt if the entered number exceeds the maximum number of payment periods. Click OK and enter a new payment period.

13. Select an option to continue the transaction:

a. Click **Exit Layaway** from the Context Menu to continue adding non-layaway items to the transaction.

b. Click **Complete Transaction** to proceed to tendering.

Open a Layaway

To open an existing layaway:

1. Click **Extended Transactions** in the Register Sale Context Menu. See Figure 12–1.
2. Click **Layaway**.

   Xstore will open a prompt listing open layaways for the customer, or an indication that there are no open layaways:

   a. Select the layaway:

- Click the layaway.
- Use the up and down arrows to highlight the correct layaway, then press the Spacebar.

  Continue with Step 6.

b. Scan the customer's layaway receipt. Continue with Step 7.

c. Click **Layaway Search** to search for a layaway. Continue with Step 3.

3. Enter the search criteria:
   - Layaway ID - ID of the layaway.
   - Last Name - Last name of the customer associated with the layaway.
   - First Name - First name of the customer associated with the layaway.
   - Customer ID - ID of the customer associated with the layaway.
   - Phone # - Phone number of the customer associated with the layaway.
4. Click **Process**.

   The system displays a list of all layaways that match the entered criteria.
5. Select the layaway.
6. Click **Select and Continue**.
7. Perform the appropriate action.

Layaway Payment

Customers may need to may regular payments to their layaway account between setting up and picking up the layaway. To add a layaway payment to a transaction:

1. Open a Layaway, see Open a Layaway.
2. Click **Make Payment**.
3. If necessary, change the amount of the payment.
4. Press **Enter**.
   - If the entered amount is less than the recommended amount, Xstore prompts whether to continue the transaction.
     - Click **Yes** to continue the transaction.
     - Click **No** to return to Step 3 and enter a new amount.
   - If the entered amount is less than the minimum payment amount, Xstore opens a prompt indicating the amount is too low. Click **OK** to return to Step 3.

   The payment amount is added to the transaction. Continue the transaction.

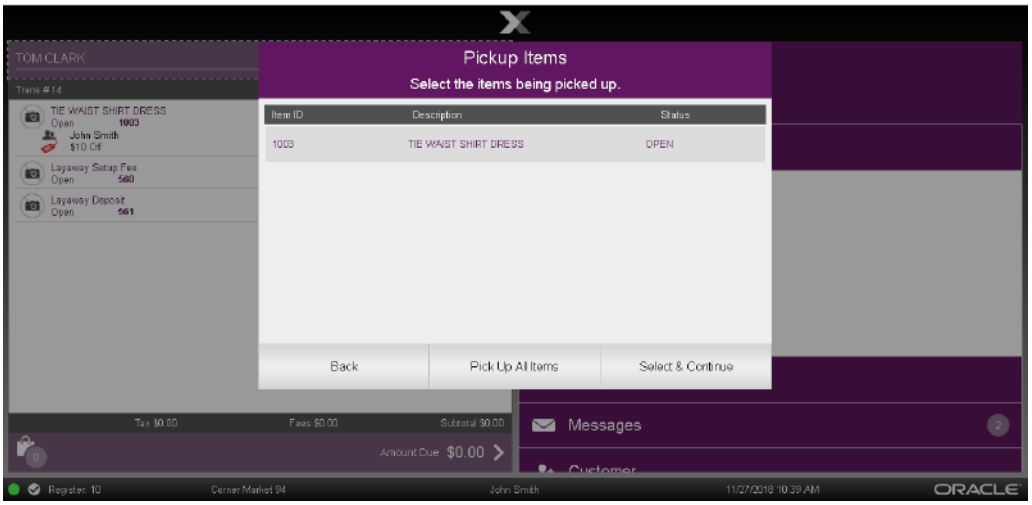
Pick Up Layaway Items

To pick up items in a layaway:

1. Open a Layaway, see Open a Layaway.
2. Click **Pick Up Item**.

   Xstore displays a list of items in the transaction.

Figure 12–7 Pickup Layaway Items



3. Select the items to be picked up:
   a. Click the items.
   b. Use the up and down arrows to highlight each item, then press the Spacebar.
   c. Click **Pick Up All** to select all items.
4. Click **Select and Continue**.

   Each selected item is listed as Picked-Up in the View Port.
5. Select an option to continue the transaction:
   a. Click **Exit Layaway** in the Context Menu to continue adding non-layaway items to the transaction.
   b. Click **Complete Transaction** to proceed to tendering.

Add Items to an Existing Layaway

To add items to a layaway that was created in a previous transaction:

1. Open a Layaway, see Open a Layaway.
2. Enter the items:
   a. Scan each item.
   b. Enter each item ID and press **Enter**.
3. Select an option to continue the transaction:
   a. Click **Exit Layaway** in the Context Menu to continue adding non-layaway items to the transaction.

b. Click **Complete Transaction** to proceed to tendering.

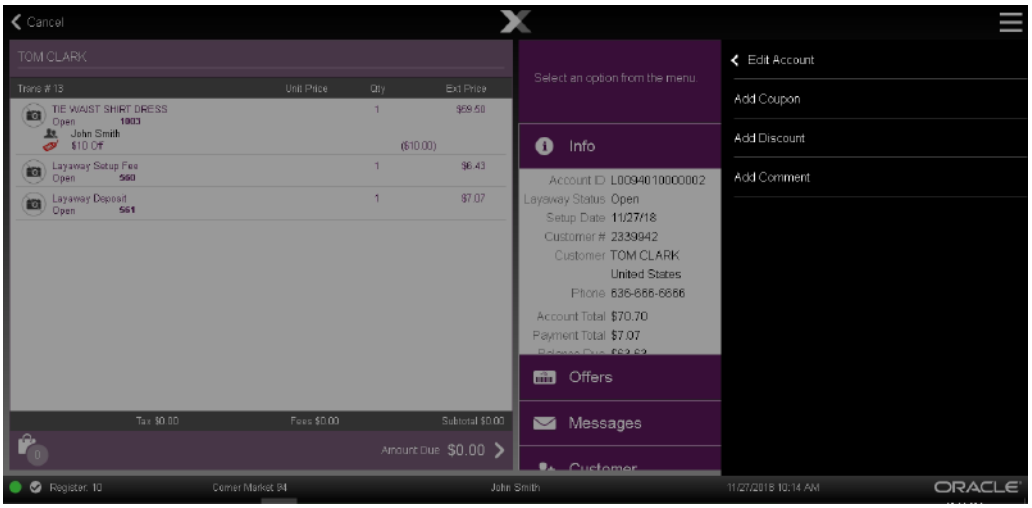
Edit Items in a Layaway

To change the items assigned to a layaway:

1. Open a Layaway, see Open a Layaway.
2. Click **Edit Account**.

   The Edit Account Menu Options window opens.

Figure 12–8 Edit Account Context Menu



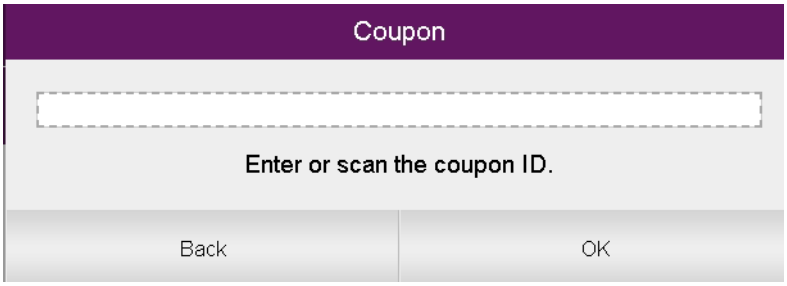
3. Perform the appropriate action:
   - Add Coupon - Add a coupon to a layaway.
   - Add Discount - Add a discount to a layaway.
   - Change Item - Make a change to a layaway item.
4. Repeat Steps 2 to 3 for each action to perform.
5. Select an option to continue the transaction:
   - Click **Exit Layaway** in the Context Menu to continue adding non-layaway items to the transaction.
   - Click **Complete Transaction** to proceed to tendering.

Add Coupon

To add a coupon to a layaway:

1. Click **Add Coupon** in the Edit Account Menu Options window.

Figure 12–9 Layaway Add Coupon



2. Enter the coupon:
   a. Scan the coupon.
   b. Enter the coupon ID and press **Enter.**

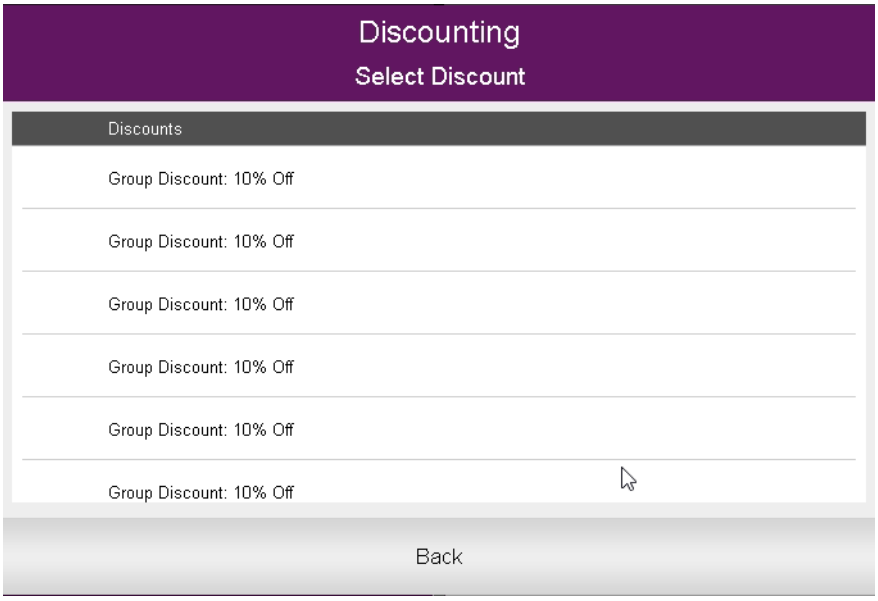
      The coupon is applied to the layaway.

Add Discount

To add a discount to a layaway:

1. Click **Add Discount** in the Edit Account Menu Options window.
2. Select the type of discount to add:
   a. Click **Add Item Discount** to add an item discount.
   b. Click **Add Group Discount** to add a group discount.

Figure 12–10 Layaway Group Discount Menu



3. Perform the appropriate procedure in "Chapter 8, "Discounts":
   - Adding a Discount to an Item or Transaction
   - Group Discounts

Change Item

To change an item in a layaway:

1. Click **Change Item** in the Edit Account Menu Options window. See Figure 12–8.
2. Select the appropriate option in the Menu Buttons. See Modifying Line Items in a Sale for information about the available options and procedures.

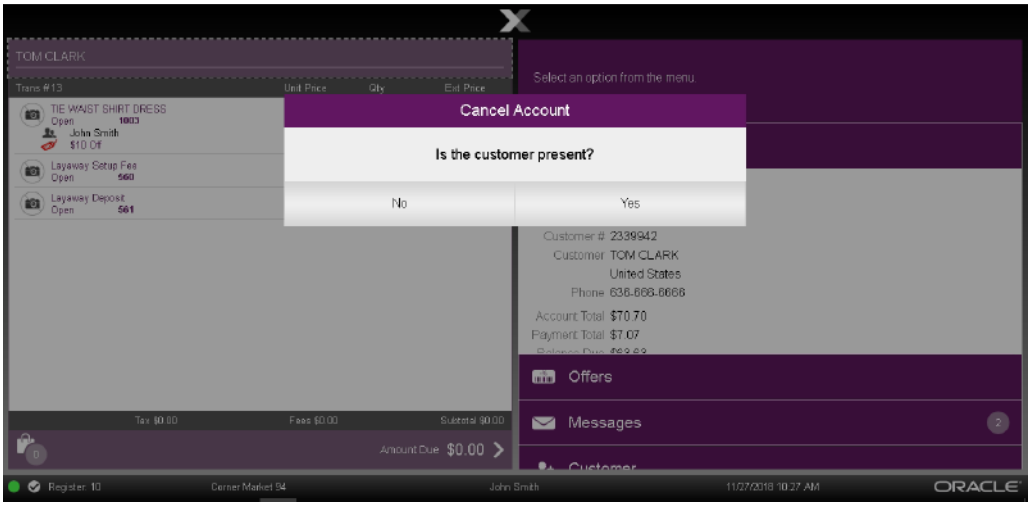
Cancel a Layaway

To cancel a layaway:

1. Open a Layaway, see Open a Layaway.
2. Click **Cancel Layaway**.

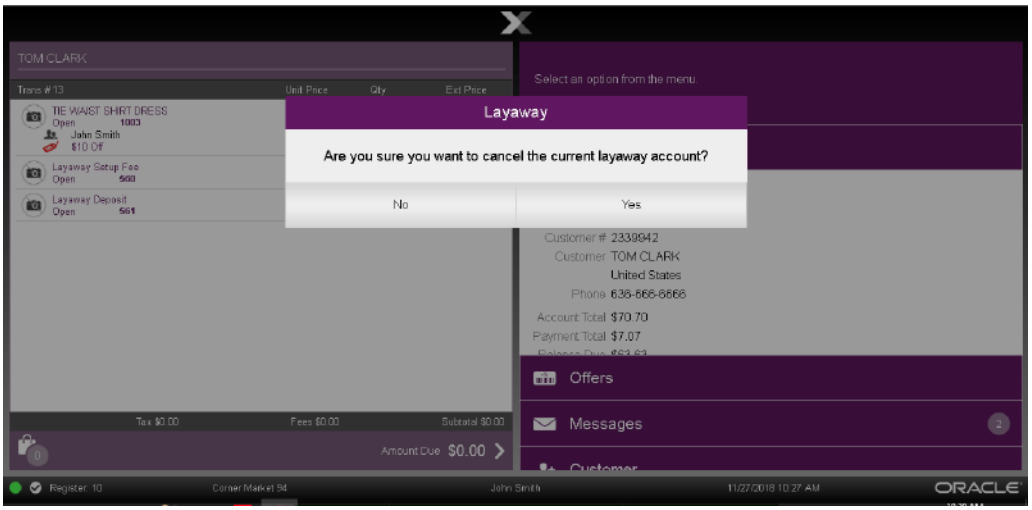
   A confirmation prompt opens.

Figure 12–11 Cancel Layaway



   - Click **Yes** if the customer is present.
   - Click **No** if the customer is not present.
3. Indicate whether the customer is present:
4. If the customer is present, a second confirmation prompt opens.

Figure 12–12 Cancel Layaway Customer Present Prompt



5. Indicate whether to cancel the layaway:
   - Click **Yes** to cancel the layaway.

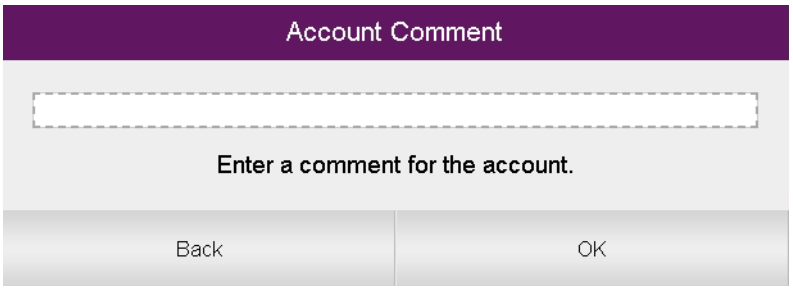
     The layaway is canceled and the refund amount is applied to the transaction.
   - Click **No** to return to the layaway without canceling it.

Add a Comment

To add a comment to a layaway:

1. Open a Layaway, see Open a Layaway.
2. Click **Edit Account**.
3. Click **Add Comment**. A comment entry window opens.

Figure 12–13 Layaway Add Comment



4. Enter the text of the comment.
5. Select **OK**.

   The comment is added to the layaway.

View Comments

To view the comments for a layaway:

1. Open a Layaway, see Open a Layaway.
2. Click **Edit Account**.
3. Click **More**.
4. Click **View Comments**.

   The comments for the layaway are displayed in the Message Window.

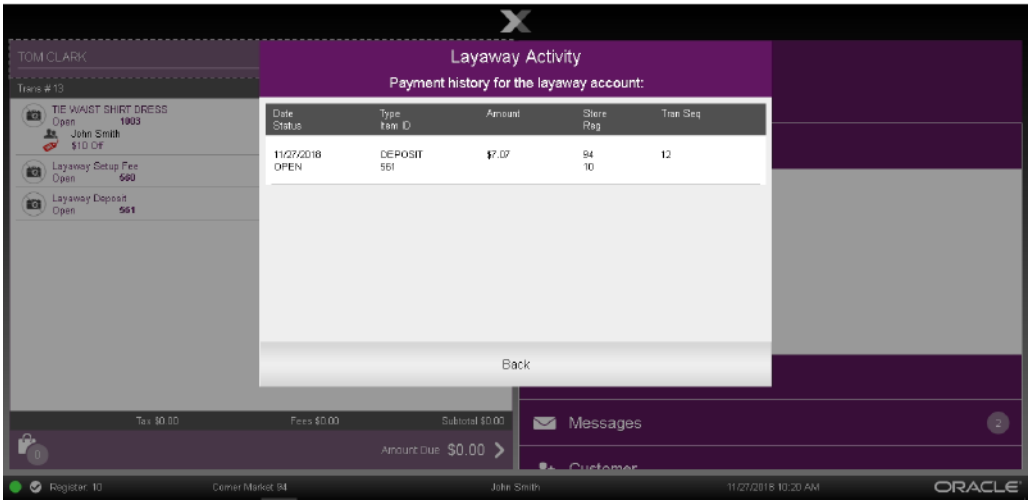
View Layaway Payment History

To view the payment history for a layaway account:

1. Open a Layaway, see Open a Layaway.
2. Click **Layaway Details**.
3. Click **View Payment History**.

   Xstore opens a window showing the payment history for the account:

Figure 12–14 Layaway Payment History



- Date - Date of the payment.
- Status - Status of the account when the payment was made.
- Type - Type of payment.
- Item ID - Item ID for the payment type.
- Amount - Amount of the payment.
- Store - ID of the store.
- Reg - ID of the register.
- Tran Seq - Sequence number of the transaction.

4. Click **Back** to return to the layaway.

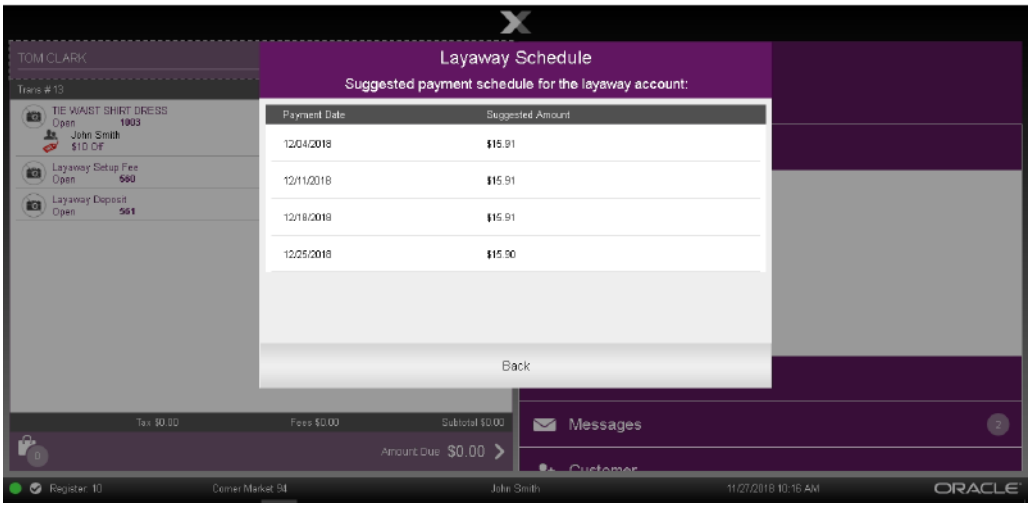
View Layaway Payment Schedule

To view the payment schedule for a layaway account:

1. Open a Layaway, see Open a Layaway.
2. Click **Layaway Details**.
3. Click **View Payment Schedule**.

   Xstore opens a window showing the payment schedule for the account:

Figure 12–15 Layaway Schedule



   - Payment Date - Due date for the payment.
   - Suggested Amount - Suggest amount for the payment.
4. Click **Back** to return to the layaway.

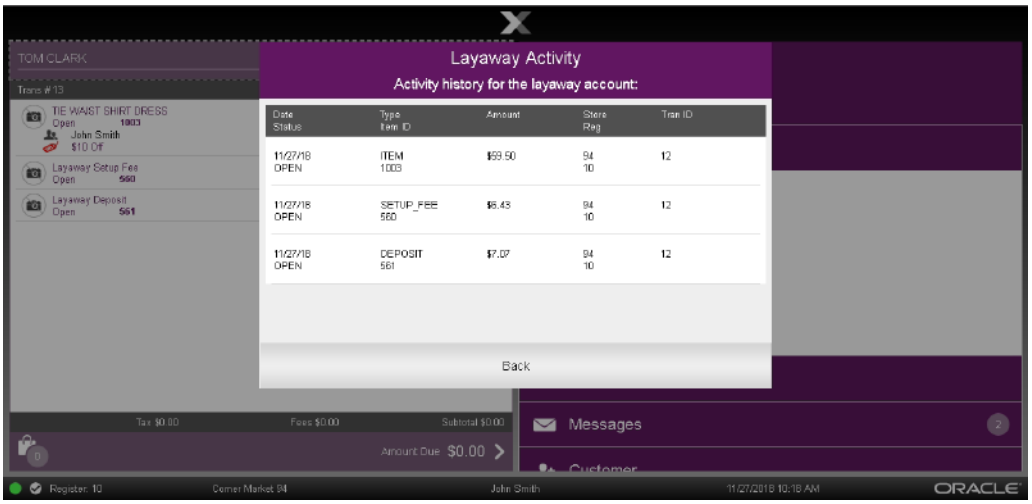
View Layaway Activity History

To view the activity history for a layaway account:

1. Open a Layaway, see Open a Layaway.
2. Click **Layaway Details**.
3. Click **View Activity History**.

   Xstore opens a window showing the history of all actions performed on the account:

Figure 12–16 Layaway Activity History



- Date - Date of the payment.
- Status - Status of the account when the action was performed.
- Type - Type of activity.
- Item ID - Item ID for the action, or the ID of the item used in the action.
- Amount - Amount of the activity.
- Store - ID of the store.
- Reg - ID of the register.
- Tran ID - ID of the transaction.

4. Click **Back** to return to the layaway.

Automatic Prompts for Accounts Requiring Attention

When you associate a customer with a sale transaction, the system may determine that the customer has a layaway account that requires attention. In this case, the system may display a prompt indicating that action is required on the layaway account. These prompts can include:

- A layaway payment is due. If this is the case, indicate whether the layaway payment should be added to the current transaction.
- A layaway payment is overdue. If this is the case, indicate whether the layaway payment should be added to the current transaction.

> **Note:** This may include an overdue payment fee.

- Layaway items are available for pickup. Indicate whether the items should be picked up in the current transaction.

13

Work Order Transactions

Work Orders are labor services requested by a customer and performed by the retailer or an outside contractor. They may be further sub-classified as repairs or alterations.

The system provides Work Order tracking functionality that allows a retailer to take in merchandise from the customer and associate it with a POS tracking record. The record identifies the product, its value, condition, customer information, and the work to be done. The kinds of work that are performed on a product are called Work Order tasks.

- **Repair** service is typically found in retail environments that sell and service watches, athletic equipment, and footwear. Repair services usually focus on the repairing, setting up, or fitting of products for the retail customer. An example of a repair is fixing a flat tire at a bicycle shop. A setup example is a Hot-Tub purchase in which installers are required to connect the filter and heating systems.

  Repairs may vary depending on the service being performed. For instance, a sporting goods outlet may track the service associated with the sizing and drilling of a bowling ball as a repair service. The similarities of this process and their actual repair activities allow retailers to utilize the same POS function to perform multiple activities.

- **Alteration** services are primarily found in clothing retail locations. Retailers provide an important service by altering the garments that they sell to their customers. This service may be a billable activity to the customer or it may be without cost. Some retailers extend this offer to non-customers or even to customers who have a product for alteration that was not purchased through a particular outlet; this is generally performed as a value-added service to loyal customers.

- **Tasks** are the detail operations that are performed on a Work Order item and can be selected from a list. The system also maintains a fixed rate of cost for the task, a description, and a free-form comment field that may be used to describe the task to be performed. For example, a comment may contain the specific text to engrave or embroider on an item.

The following section covers these topics:

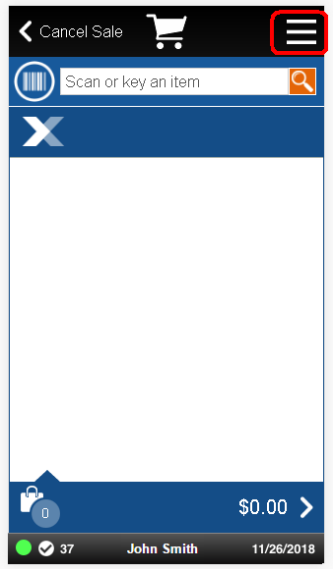
- Creating a New Work Order
- Work Order Categories
- Modifying a Work Order
- Picking Up a Completed Work Order

Creating a New Work Order

Note: Because each Xstore Mobile menu is configurable, the button functions on your system may appear in a different order or have different text than examples shown in this manual.

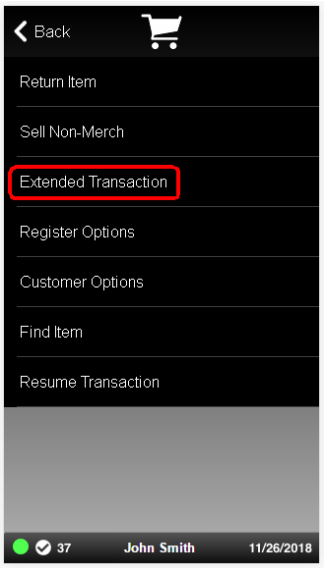
A work order must be associated with a regular sale transaction and a customer name.

Figure 13–1 Sale Screen Context Menu Button



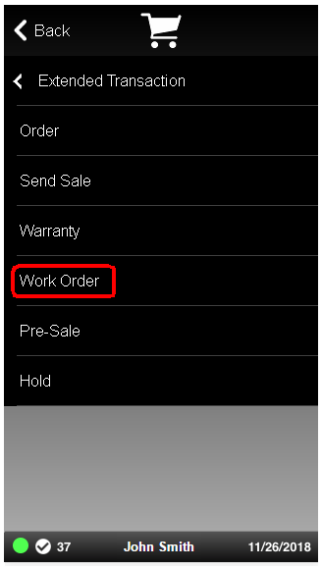
1. At the Sale screen, select the **Context Menu** button.

Figure 13–2 Context Menu



2. Select **Extended Transaction** in the Context Menu.

Figure 13–3 Extended Transaction Menu



3. At the Extended Transaction menu, select the **Work Order** option.

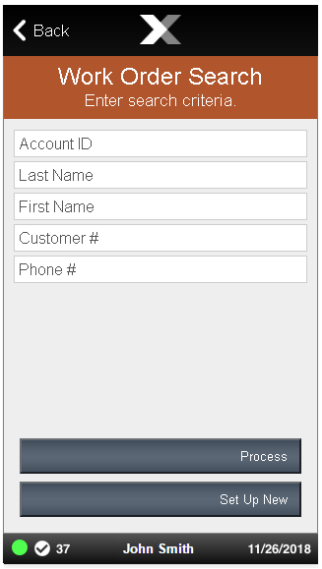
> **Note:** The system does not allow you to create a work order unless you have the required security privileges.

4. The next steps depend upon whether or not a customer has been associated with the sale transaction:

   If no customer is associated with the transaction:

   a. If no customer is associated with the transaction, the system displays the Work Order Search form shown here.

Figure 13–4 Work Order Search Form



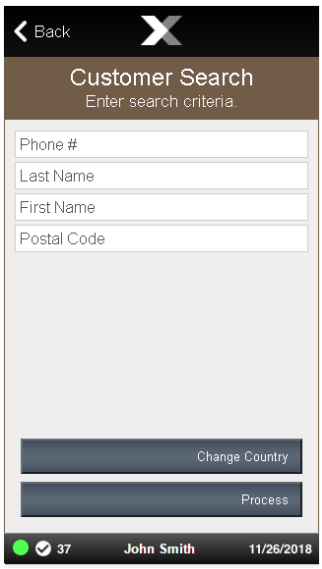
b. Select **Set Up New**.

Note: To search for an existing work order, enter your search criteria and select the **Process** option.

---

c. The system displays the Customer Search form. Enter search criteria and select Process.

Figure 13–5 Customer Search Form



d. Select a customer to associate with the transaction.

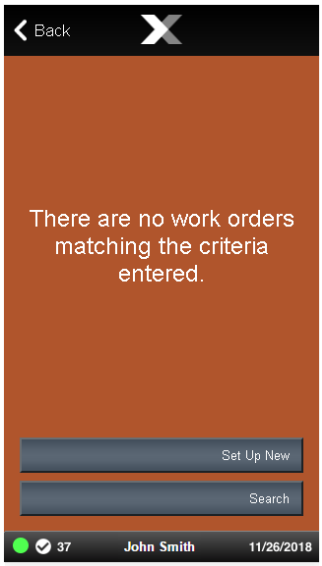
e. When customer association is complete, go to step 5.

If a customer is associated with the transaction:

If a customer is associated with the transaction, the system automatically searches for work orders for the customer.

- If an established work order is not found, the message shown here displays.

Figure 13–6 No Matching Work Orders Message

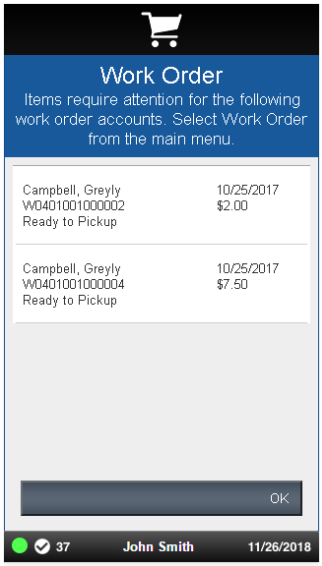


a. Select **Set Up New** to create a new work order.

b. Go to step 6.

- If an established work order is found, the work order accounts are shown in a list.

Figure 13–7 Work Order Accounts List

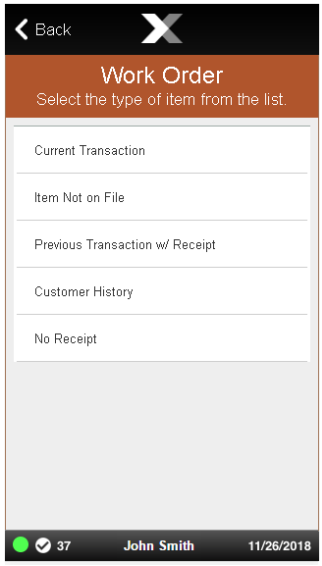


a. Select **Set Up New** to create a new work order.

b. Go to step 5 below.

5. The system prompts for the source of information about the item that is referenced in the work order.

Figure 13–8 Work Order Item Source Prompt



6. Select one of the following options and press **Enter**:

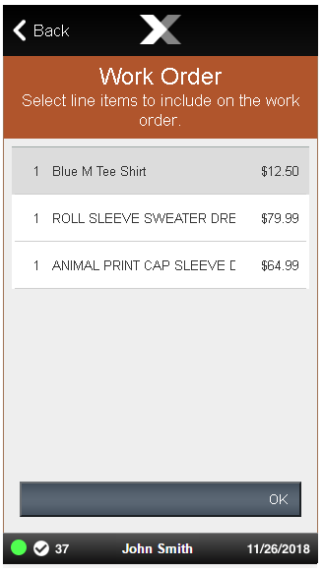
- **Current Transaction:** The item is in the current sale transaction. This option is only available if there is at least one item in the current sale transaction. See Work Order Item - In the Current Sale Transaction.
- **Item Not on File:** The item requiring work is not in the system. See Work Order Item - Item Not on File.
- **Previous Transaction with Receipt:** The item is identified on the receipt from a previous transaction. See Work Order Item - Using Original Transaction Receipt.
- **Customer History:** Find the item by searching the customer's previous purchase transaction history. See Work Order Item - Customer History.
- **No Receipt:** The item has no receipt available or is not referenced on a receipt. See Work Order Item - No Receipt; Manual Item Entry.

Work Order Item - In the Current Sale Transaction.

...continued from step 6

1. The system displays a list of items that are eligible for a work order in the current transaction.

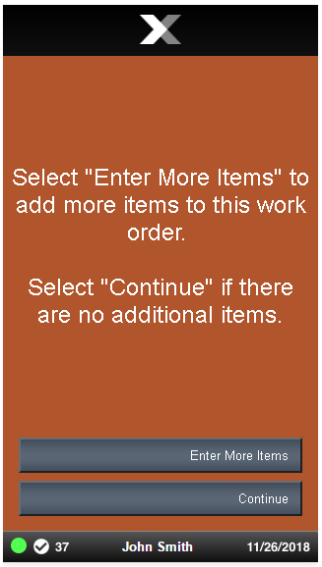
Figure 13–9 Items Eligible For Work Order



Note: Some merchandise or non-merchandise items (for example, loyalty cards, gift cards, gift certificates and warranties) are not included in the list of items eligible for work order processing.

2. Use the up and down arrow keys to highlight an item from the current sale that is to be included in the work order and press **Enter**. You can select multiple items from the list by pressing the **Spacebar** to select and add each item to the work order. The system adds the selected item(s) to the work order.
3. The system prompts you to specify if there is another item to be added to the work order:

Figure 13–10 Prompt for Additional Work Order Items



- If you need to add additional items to this work order, select the Enter More Items option. The system returns to the prompt for work order item source. See Figure 13–8.

  <OR>

- If there are no more items for this work order, select the Continue option. The system displays the work order categories.

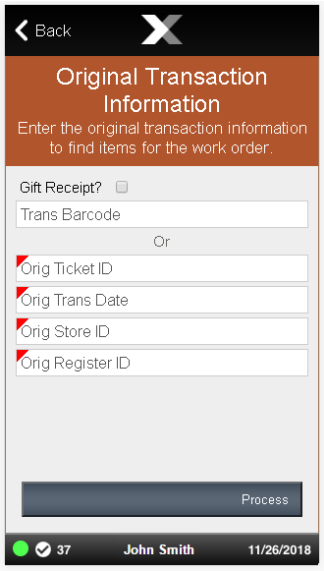
4. The next step in the process is to select a work order category. Continue with Work Order Categories.

Work Order Item - Using Original Transaction Receipt

...continued from step 6

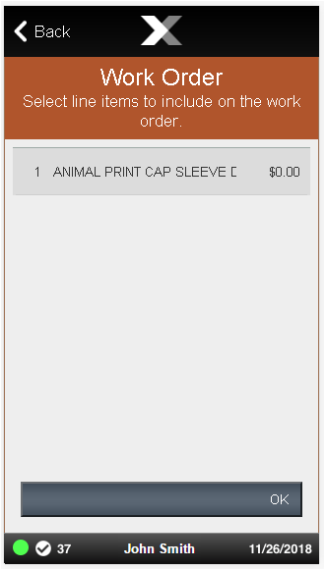
1. The system prompts you to enter information from the original transaction receipt. You may indicate whether or not the receipt is a gift receipt by selecting **Yes** or **No** in the Gift Receipt drop-down list.

Figure 13–11 Original Transaction Search Form



2. Scan the original receipt barcode from the receipt, or enter the receipt information manually and select **Process**.
3. The system displays a list of eligible items from the original transaction and prompts you to select the item(s) for the work order.

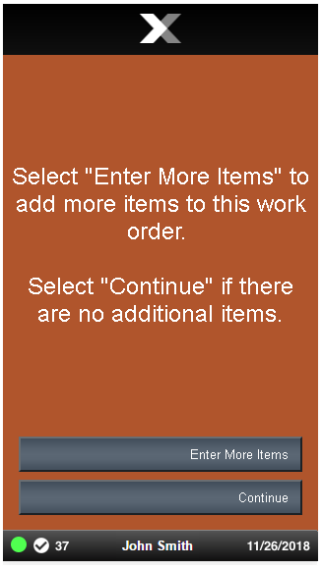
Figure 13–12 Previous Transaction Item List



Note: If applicable, you can select multiple items from the list by pressing the **Spacebar** to select and add each item to the work order. If no items in the original transaction are eligible for a work order, or if the original transaction cannot be found, the system displays a message notifying you that there are no eligible items available for a work order.

4. Select the item and press **Enter**. The system adds the item to the work order.
5. The system prompts you to specify if there is another item to be added to the work order:

Figure 13–13 Additional Work Order Items Prompt



- If you need to add additional items to this work order, select the Enter More Items option. The system returns to the prompt for work order item source. See Figure 13–8.

  <OR>

- If there are no more items for this work order, select the Continue option. The system displays the work order categories.

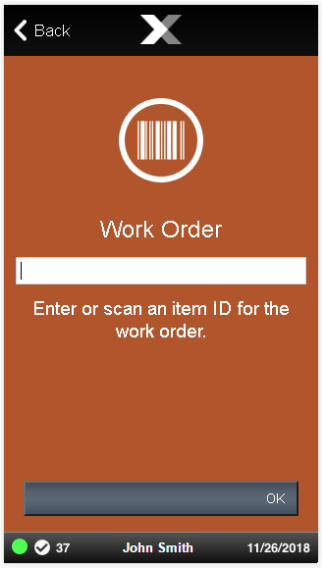
6. The next step in the process is to select a work order category. Continue with Work Order Categories.

Work Order Item - No Receipt; Manual Item Entry

...continued from step 6

1. At the prompt for an item ID, enter the Item ID and press **Enter**, or scan the item.

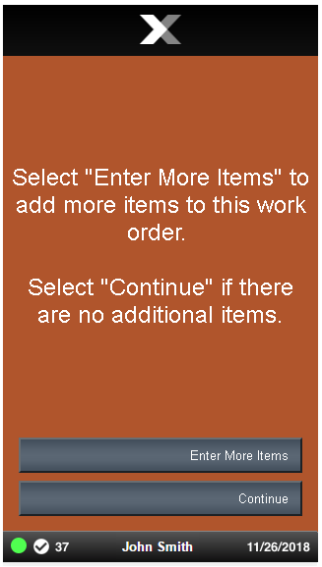
Figure 13–14 Item ID Prompt



Note: If you do not know the item ID but your system has a Work Order SKU, you can enter that instead of the actual item ID. You can also use the **Item Not On File** functionality to capture the item information.

2. If the item's value has not been determined by the item selection (value is zero), enter the value and press **Enter**.
3. If prompted, enter a text description for the item and press **Enter**.
4. The system prompts you to specify if there is another item to be added to the work order:

Figure 13–15 Additional Work Order Items Prompt



- If you need to add additional items to this work order, select the Enter More Items option. The system returns to the prompt for work order item source. See Figure 13–8.

  <OR>

- If there are no more items for this work order, select the Continue option. The system displays the work order categories.

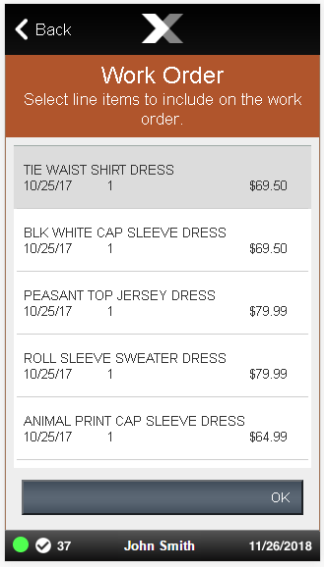
5. The next step in the process is to select a work order category. Continue with Work Order Categories.

Work Order Item - Customer History

...continued from step 6

1. The system displays a list of items the customer has purchased previously.

Figure 13–16 Customer History-Previous Items Purchased

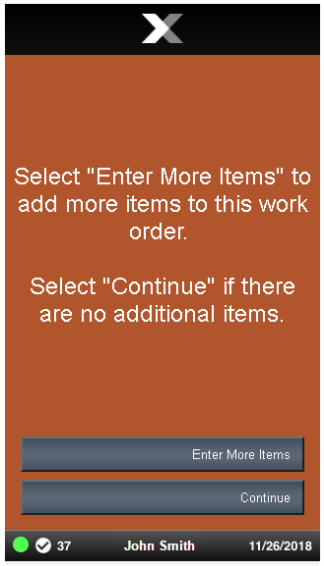


2. Use the up and down arrow keys to scroll through the list and find the item(s) for the work order. Select the item(s) and press **Enter**. The system adds the selected item(s) to the work order.

> **Note:** You can select multiple items from the item by pressin the Spacebar to select and add each item to the work order.

3. The system prompts you to specify if there is another item to be added to the work order:

Figure 13–17 Additional Work Order Items Prompt



- If you need to add additional items to this work order, select the **Enter More Items** option. The system returns to the prompt for work order item source. See Figure 13–8.

  <OR>

- If there are no more items for this work order, select the Continue option. The system displays the work order categories.

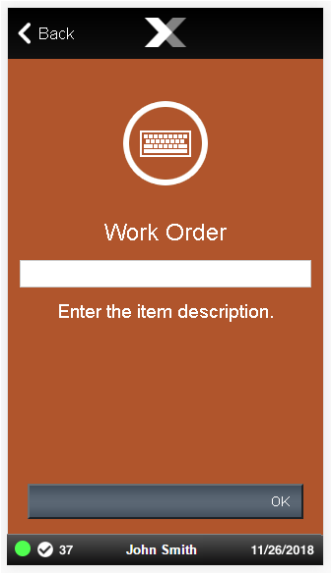
4. The next step in the process is to select a work order category. Continue with Work Order Categories.

Work Order Item - Item Not on File

...continued from step 6

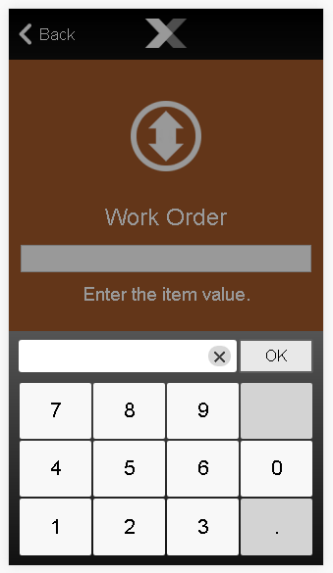
1. At the prompt for an item description, enter a text description for the item and press **Enter**.

Figure 13–18 Item Description Prompt



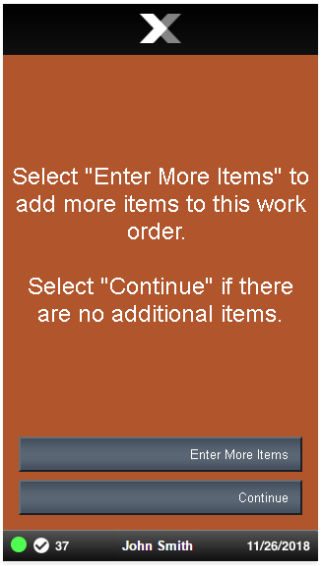
2. At the prompt for item value, enter the item's value and press **Enter**.

Figure 13–19 Item Value Prompt



3. The system prompts you to specify if there is another item to be added to the work order:

Figure 13–20 Additional Work Order Items Prompt



- If you need to add additional items to this work order, select the Enter More Items option. The system returns to the prompt for work order item source. See Figure 13–8.

  <OR>

- If there are no more items for this work order, select the Continue option. The system displays the work order categories.

4. The next step in the process is to select a work order category. Continue with Work Order Categories.

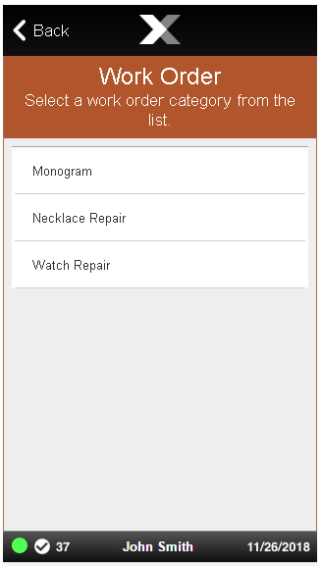
Work Order Categories

Once you have identified the item(s) for the work order, you are prompted to select a work order category. Categories may include repairs, alterations, or any other categories that are determined by your store operations.

For example, repairs may include work order categories such as jewelry and watch repairs. Work order alterations may include categories such as men's clothing and children's clothing.

1. The system displays the list of work order categories. Use the up and down arrow keys to choose a category and press **Enter**.

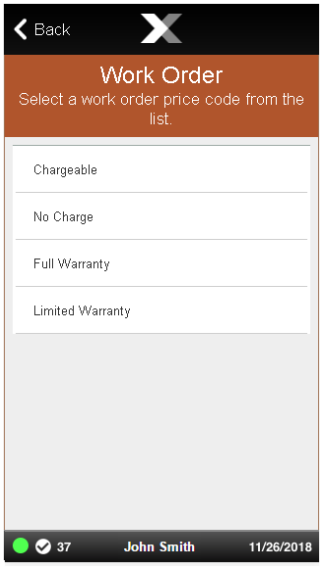
Figure 13–21 Work Order Categories



Note: The Home Office defines the Work Order Alteration and Repair categories.

2. Depending upon your system's configuration, additional prompts for information may be displayed based on the work order category you selected. For example:
   - **Pricing category** - Examples include No Charge, Warranty, and Chargeable.

Figure 13–22 Pricing Category



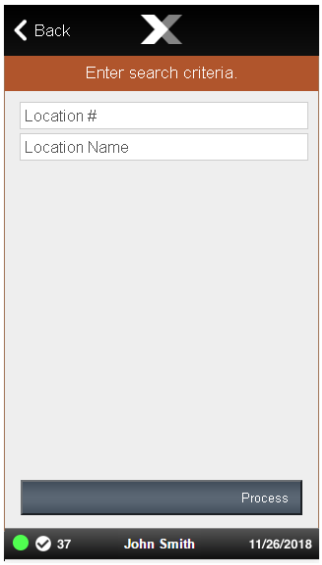
- **Warranty Contract Number** - The system prompts for the Warranty Plan Number.

Figure 13–23 Warranty Contract Number Prompt



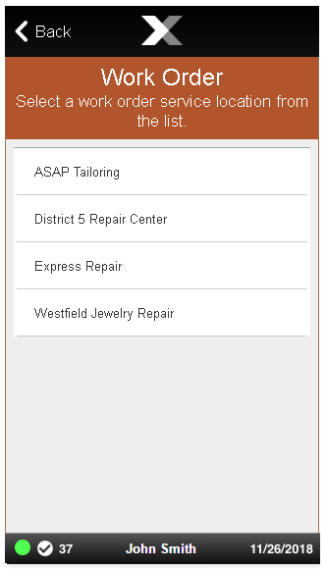
3. You may be prompted to search for a location where the work will be performed. If you do not know a location, leave the fields blank and select Process to show all available vendors.

Figure 13–24 Work Order Location Search Form



4. The system displays a list of service locations. Select a location and press **Enter**.

Figure 13–25 Work Order Vendor List

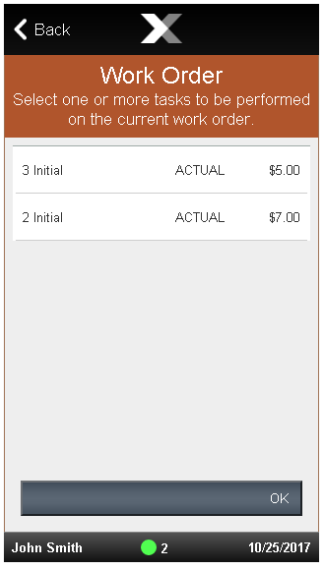


Note: To accommodate in-house work order or single location where work orders are performed, the system my be configured to skip the location selection.

---

5. The system displays the tasks that can be performed on the item, based upon the service location that you selected.

Figure 13–26 Work Order Tasks List

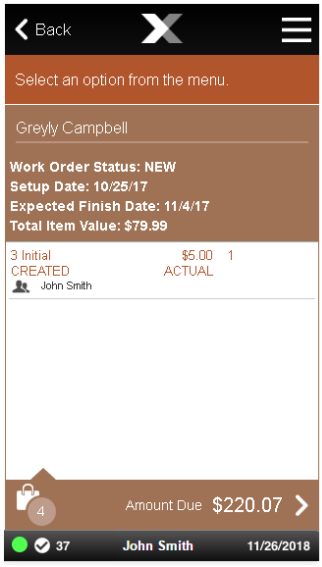


Note: A task may not have a cost associated with it. If it does not have a cost, it may be an estimate. Estimates must be converted to actual amounts before the customer can pick up the item. Price categories such as No Charge and Warranty have zero amounts in the Charge column on the Task List form.

6. Add a task activity to the work order by using the up and down arrow keys to select the task and press **Enter**.

   The system displays the summary information for the work order.

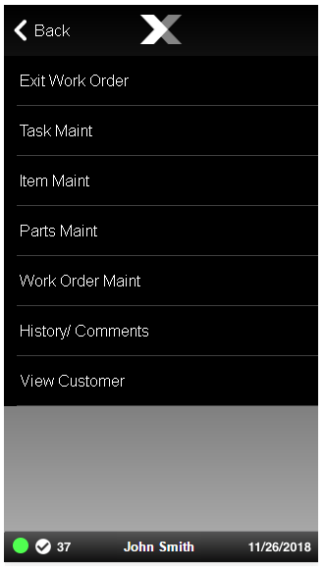
Figure 13–27 Work Order Summary Information



7. You can modify the work order or complete the transaction:

   To modify the work order and add additional information, select from the following options as needed:

Figure 13–28 Work Oder Options



Refer to Modifying a Work Order for detailed information about each of the options shown here.

To complete this work order setup process, select one the following options:

- Select the **Tender** option to complete and tender the transaction. If prompted for a work order deposit, enter a deposit amount or accept the default amount and tender the transaction.

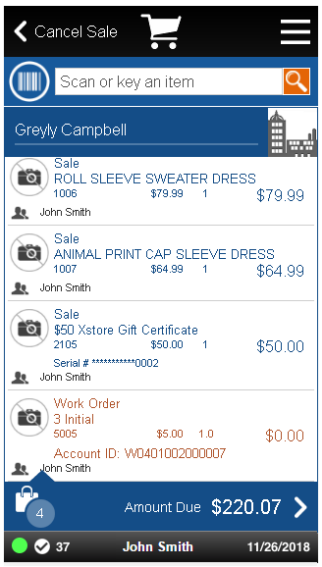
  <OR>

- Select the **Exit Work Order** option to return to the sale if the customer would like to continue purchasing additional items. If prompted for a work order deposit, enter a deposit amount or accept the default amount and continue selling items at the Sale screen.

Note: Your store policy determines if the Work Order transaction can be mixed with the sale of other items on the Sale screen.

The system displays the work order information that you entered during the setup process.

Figure 13–29 Sale Screen - Work Order Setup Account Information

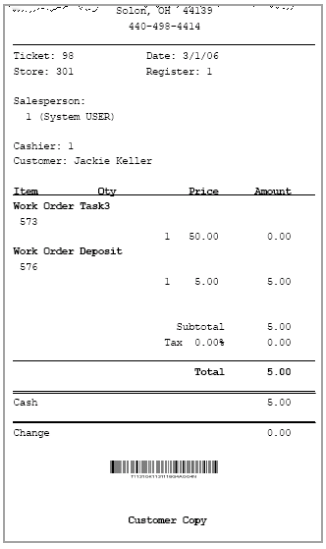


When you tender the transaction, the system creates receipts as required by your store's policy.

Note: If the location requires a shipper or a receiver, the system will create a shipping document. Once the item(s) are shipped, the system will create a receiving document. The documents created for work order shipping and receiving are managed in the Back Office Work Order module. Refer to the *Xstore Mobile Manager's Guide* for more information.

Receipt Samples

Figure 13–30 Customer Sale Receipt Sample



Solon, OH 44139
440-498-4414

Ticket: 98 Date: 3/1/06
Store: 301 Register: 1

Salesperson:
1 (System USER)

Cashier: 1
Customer: Jackie Keller

Item	Qty	Price	Amount
Work Order Task3			
573			
	1	50.00	0.00
Work Order Deposit			
576			
	1	5.00	5.00
		Subtotal	5.00
		Tax 0.00%	0.00
		Total	5.00
Cash			5.00
Change			0.00

Customer Copy

Figure 13–31 Work Order Receipt, Customer Copy Sample



Ticket:98 Date: 3/1/06
Cashier: 1 Register: 1
Customer ID: C03010001000015
Customer Name: Jackie Keller

W o r k O r d e r I D
W 0 3 0 1 0 0 0 1 0 0 0 0 2 9

Expected Completion Date: 3/11/06

Work Item	Value
RED/BLK ANML PRT CARWASH DRESS	500.00
Total Value:	500.00

Work Activity	Type	Amount
Work Order Task3	ACTUAL	50.00

Work Order Total:	50.00
Deposit/Payment:	5.00
Balance Due:	45.00

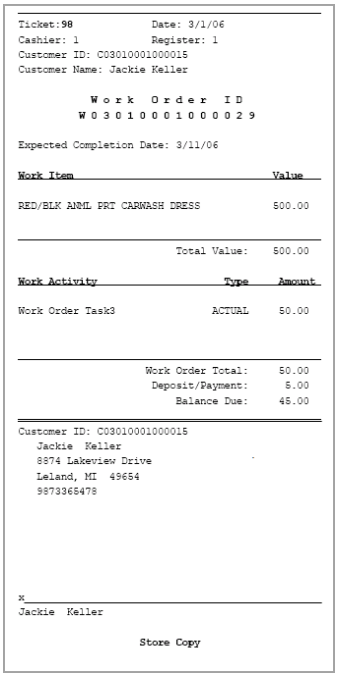
This store is not liable for loss, theft or damage to these item(s) while in our possession.

Customer agrees to pick up merchandise at the prescribed time or within 14 days of being notified the merchandise is available.

Customer agrees to pay in full at the time of pickup.

Customer Copy

Figure 13–32 Work Order Receipt, Store Copy Sample



Ticket:98 Date: 3/1/06
Cashier: 1 Register: 1
Customer ID: C03010001000015
Customer Name: Jackie Keller

W o r k O r d e r I D
W 0 3 0 1 0 0 0 1 0 0 0 0 2 9

Expected Completion Date: 3/11/06

Work Item	Value
RED/BLK ANML PRT CARWASH DRESS	500.00
Total Value:	500.00

Work Activity	Type	Amount
Work Order Task3	ACTUAL	50.00

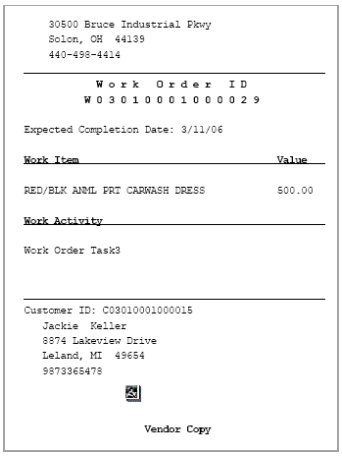
Work Order Total:	50.00
Deposit/Payment:	5.00
Balance Due:	45.00

Customer ID: C03010001000015
Jackie Keller
8874 Lakeview Drive
Leland, MI 49654
9873365478

x_____
Jackie Keller

Store Copy

Figure 13–33 Work Order Receipt - Vendor Copy Sample


30500 Bruce Industrial Pkwy
Solon, OH 44139
440-498-4414

Work Order ID
W030100010000029

Expected Completion Date: 3/11/06

Work Item — Value

RED/BLK ANML PRT CARWASH DRESS 500.00

Work Activity

Work Order Task3

Customer ID: C030100010000015
Jackie Keller
8874 Lakeview Drive
Leland, MI 49654
9873365478

Vendor Copy

Modifying a Work Order

This section covers the following topics:

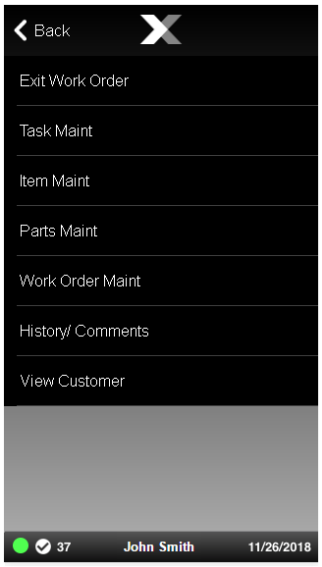
- Task Maintenance
- Item Maintenance
- Parts Maintenance
- Edit Line Item
- Work Order Maintenance
- Work Order History

One or more tasks may be associated with a work order, and they can be modified during or after its creation. If the work order is still being created, select the Task Maint option while in the Work Orders mode.

If the transaction in which the work order was created has been completed:

1. Create a new sale transaction.
2. At the Sale screen Context Menu, select **Extended Transaction**.
3. At the Extended Transaction menu, select **Work Order**. If a customer is associated with the transaction, Xstore Mobile displays a list of work orders for the customer. If a customer is not associated with the transaction, enter the work order search criteria to locate the work order.
4. Select the work order that includes the task you want to edit and the work order is displayed.
5. From the Work Order Context menu, select the **Task Maint** option.

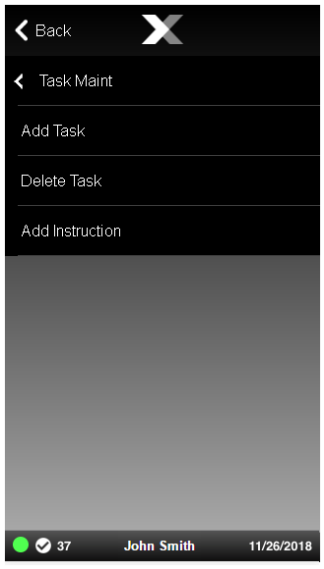
Figure 13–34 Work Order Menu



Task Maintenance

Task maintenance functions allow you to modify the work order tasks by adding new tasks, deleting work order tasks, and adding additional information pertaining to a specific task.

Figure 13–35 Task Maintenance Menu



Note: The status of the work order (shipped, received, and so on.) determines the options available here.

The following Task Maintenance options are available:

- Add Task
- Delete Task
- Convert Estimate
- Add Instruction

Add Task

Select this option to create an additional task on the work order.

1. Select **Add Task**.

   The system displays the work order tasks that are available for the work order service location.

2. Select a task from the list and press **Enter**.

   The system adds the new task to the work order.

Delete Task

Select this option to remove a task from the work order.

1. Select **Delete Task**.

   The system displays a list of tasks on the current work order.

2. Select the task to be deleted from the list and press **Enter**.

   The system removes the task by voiding the line item and any associated information from the work order.

Convert Estimate

Select this option to change an estimated cost amount to an actual cost amount. An estimated cost is a best guess for the final cost of performing the task, and it is assigned when the work order is created. After the task is completed, the actual cost is known, and the estimate can be converted so that the final price can be calculated.

> **Note:** The **Convert Estimate** option is only available when an estimated task is on the work order.

1. Select **Convert Estimate**.

   The system displays a list of the tasks that have estimated costs on the current work order.

2. Select the task to be converted to an actual cost amount and press **Enter**.

   The system displays a list of the tasks with actual costs that are applicable to the work order category (repairs, alterations, and so on).

> **Note:** For each task that has an estimated cost, there is a corresponding task with the actual cost. These were set up by the Home Office during the configuration process for your system.

3. Select the most appropriate task and its actual cost for the work order and press **Enter**.

The system replaces the estimated cost of the task with the converted, actual cost, on the work order.

Add Instruction

Select this option to enter informational text instructions for the work order.

1. Select **Add Instruction**.

   The system displays a list of the tasks on the current work order.

2. Select the task to be associated with the instructions and press **Enter**.

   The system displays a text entry form. You can add new information, change existing information, or delete any existing information. Press **Enter** after you enter your comment or instructions.

   The system associates the comments or instructions with the task.

Item Maintenance

The item maintenance functions allow you to change the work order item information by adding new items, deleting items from the work order, or editing an item's value and description. The items may come from several different sources including the current transaction, a previous transaction (with or without a receipt), customer history, or it may be an item not found in the database. For more information about this, see step 6.

One or more items may be associated with a work order, and they can be modified during or after its creation. If the work order is still being created, select the **Item Maint** option while in the Work Orders mode.

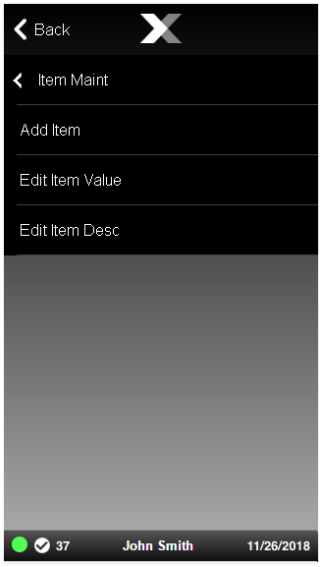
If the transaction in which the work order was created has been completed:

1. Create a new sale transaction.
2. At the Sale screen Context Menu, select **Extended Transaction**.
3. At the Extended Transaction menu, select **Work Order**. If a customer is associated with the transaction, Xstore Mobile displays a list of work orders for the customer. If a customer is not associated with the transaction at this point, enter the work order search criteria to locate the work order.
4. Select the work order that includes the item you want to edit and the work order is displayed.
5. From the Work Order menu, choose the **Item Maint** option (Figure 13-27).

   The following Item Maintenance options are available:

   - Add Item
   - Delete Item
   - Edit Item Value
   - Edit Item Desc

Figure 13–36 Item Maintenance Menu - Delete Not Available



Add Item

Select this option to add additional items to the work order.

1. Select **Add Item**.

   The system prompts for the source of information about the new item to be referenced in the work order.

   Refer to the work order process beginning with step 5 for more information.

2. Enter all information for this new item when prompted. The system adds the item to the current work order.

Delete Item

Select this option to remove an item from the work order.

> **Note:** The **Delete Item** option is only available when there are two or more items on the work order.

1. Select **Delete Item**.

   The system displays a list of the items on the current work order.

2. Select the item to be deleted from the work order and press **Enter**.
3. The system removes the item from the work order.

Edit Item Value

Select this option to change the value of an item on the work order.

1. Select **Edit Item Value**.

   The system displays a list of the items on the current work order.

2. Select the item you want to change and press **Enter**.

The system prompts you to enter a new value for the selected item.

3. Enter the new value and press **Enter**.

   The system updates the value of the item on the work order.

Edit Item Desc

Select this option to change the text description of an item on the work order.

1. Select **Edit Item Desc**.

   The system displays a list of the items on the current work order.

2. Select the item you want to change and press **Enter**.

   The system prompts you to enter a new text description for the selected item.

3. Enter the new description and press **Enter**.

   The system updates the description of the item on the work order.

Parts Maintenance

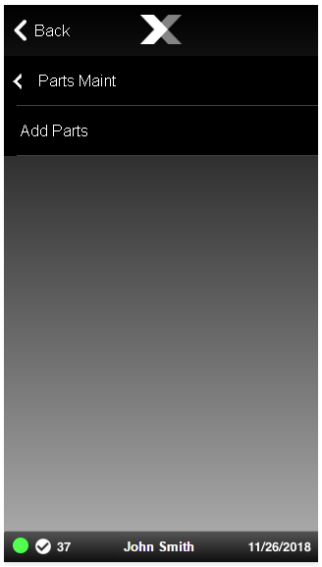
The Parts Maintenance functions allow you to add or delete supplementary parts from a work order. A part may be anything that is required to complete a task. One or more parts may be associated with a work order, and they can be added or deleted during or after its creation. If the work order is still being created, select the Parts Maint option while in Work Order mode. If the transaction in which the work order was created has been completed:

1. Create a new sale transaction.
2. At the Sale screen Context Menu, select **Extended Transaction**.
3. At the Extended Transaction menu, select **Work Order**. If a customer is associated with the transaction, Xstore Mobile displays a list of work orders for the customer. If a customer is not associated with the transaction at this point, enter the work order search criteria to locate the work order.
4. Select the work order that requires the addition or deletion of a part. The system displays the work order.
5. From the Work Order menu (Figure 13-27), choose the **Parts Maint** option.

   The following Parts Maintenance options are available:

   - Add Parts
   - Delete Parts

Figure 13–37 Parts Maintenance Menu



Add Parts

Select this option to enter an item ID that must be purchased to complete the work order. It is included as part of the work order record.

1. Select **Add Parts**.

   The system prompts for the part identifier to be added to the work order.

2. Enter or scan the item ID or UPC and press **Enter**.

   The system updates the work order with the information for the supplementary parts.

Delete Parts

Select this option to remove a supplementary part from a work order.

> **Note:** The **Delete Parts** option is only available when a part has been added to this account.

1. Select **Add Parts**.

   The system displays a list of the supplementary parts on the current work order.

2. Select the supplementary part to be deleted from the work order and press **Enter**.

   The system removes the supplementary part from the work order and updates the work order account information.

Edit Line Item

Edit Line Item functions allow you to change the quantity, price, and tax on a line item in the work order.

A work order may contain one or more line items, and they can be edited during or after its creation. If the work order is still being created, select the Edit Line Item option while in the Work Orders mode.

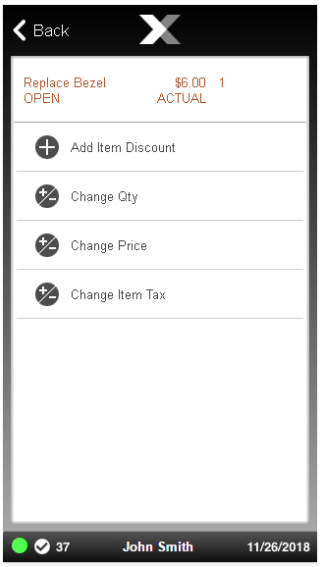
If the transaction in which the work order was created has been completed:

1. Create a new sale transaction.
2. At the Sale screen Context Menu, select **Extended Transaction**.
3. At the Extended Transaction menu, select Work Order. If a customer is associated with the transaction, Xstore Mobile displays a list of work orders for the customer. If a customer is not associated with the transaction at this point, enter the work order search criteria to locate the work order.
4. Select the work order that includes the line item(s) to be edited. The system displays the work order.
5. Select the line item.

   The following Edit Line Item options are available:

   - Add Item Discount
   - Change Quantity
   - Change Price
   - Change Item Tax

Figure 13–38 Edit Line Item Menu



Add Item Discount

Select this option to add a discount to the work order task.

1. Select **Add Item Discount.**

   The system displays a list of discounts that may be applied to the work order task.
2. Select the type of discount to be applied to the work order task and press **Enter**.
3. Select the task to be discounted and press **Enter**.

4. Select the discount from the list of available discounts and press **Enter**.
5. If prompted, select a reason for the discount, and enter any other information as needed when prompted.

   The system applies the discount to the task (if permitted by store policy).

Change Quantity

Select this option to change the quantity of an item.

1. Select **Change Qty**.

   The system displays a list of the line items on the current work order.
2. Select the line item to be changed and press **Enter**.

   The system prompts you to enter a new quantity for the selected item.
3. Enter the new quantity and press **Enter**.

   The system updates the line item quantity on the work order.

> **Note:** If the quantity you entered is not allowed for the line item, the system displays a message indicating the reason the quantity change is not allowed. You must acknowledge this message to continue.

Change Price

Select this option to change the price of an item.

1. Select **Change Price**.

   The system displays a list of the line items on the current work order.
2. Select the line item to be changed and press **Enter**.

   The system prompts you to enter a new price for the selected item.
3. Enter the new price and press **Enter**.

   The system updates the line item price on the work order. If the price you entered is not allowed for the line item, the system displays a message indicating the reason the price change is not allowed. You must acknowledge this message to continue.

Change Item Tax

Select this option to change the tax amount for an item. You can change the item's tax location, change the item to tax exempt, or change the item's tax amount or percent.

1. Select **Change Item Tax**.

   The system displays a list of the line items on the current work order.
2. Select the line item to be changed and press **Enter**.

   The system prompts you for specific information for the type of tax change based upon the tax change option you chose. Refer to Changing Item Taxes for procedural information.
3. Enter the information as required; the system updates the line item tax on the work order.

Work Order Maintenance

Work Order maintenance functions allow you to add, change, and maintain work orders.

A work order may be edited during or after its creation. If the work order is still being created, select the Work Order Maint option while in the Work Orders mode.

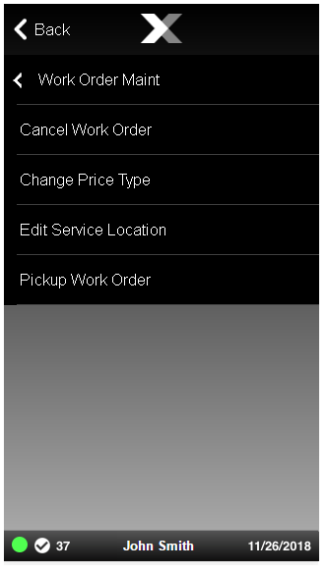
If the transaction in which the work order was created has been completed:

1. Create a new sale transaction.
2. At the Sale screen Context Menu, select **Extended Transaction**.
3. At the Extended Transaction menu, select Work Order. If a customer is associated with the transaction, Xstore Mobile displays a list of work orders for the customer. If a customer is not associated with the transaction at this point, enter the work order search criteria to locate the work order.
4. Select the work order that you want to edit. The system displays the work order.
5. From the Work Order menu, choose the **Work Order Maint** option.

   The following Work Order Maintenance options are available:

   - Cancel Work Order
   - Change Price Type
   - Edit Service Location
   - Pickup Work Order

Figure 13–39 Work Order Maintenance Menu



Cancel Work Order

Select this option from the Work Order Maint menu to cancel an existing work order.

1. With the work order displayed, select **Cancel Work Order**.
2. At the prompt to confirm the work order cancellation, select **Yes**.

The system returns to the Sale screen where you can refund any money due to the customer.

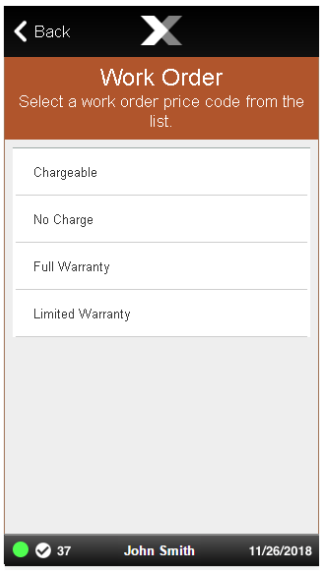
Change Price Type

Select this option from the Work Order Maint menu to change the price from actual to estimated or vice versa, or to change from chargeable to warranty. You may also select no charge. For example, a customer may not have the warranty information in-hand when the work order is set up. If the customer returns at a later date with proof of a valid warranty, you can use this option to change the work order price from chargeable to full warranty or limited warranty.

1. Select **Change Price Type**.

   The system displays the work order price code list.

Figure 13–40 Work Order Price Code List



2. Select a price code from the list and press **Enter**.

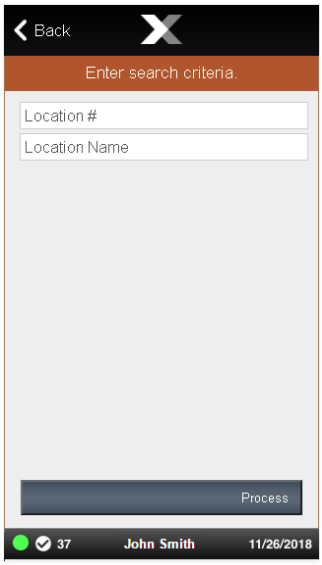
   The system updates the current work order charge to the new price.

Edit Service Location

Select this option to choose a different location where work will be performed.

1. The system prompts for the new service location where the work will be performed. You may enter search criteria and select **Process** or just select **Process** to display all locations.

Figure 13–41 Service Location Search Form



2. When the list of service locations displays, select a location and press **Enter**.
3. The system updates the current work order with the new service location.

Pickup Work Order

Select this option when a completed work order is ready for customer pickup. This option is only available when the work order item is finished and ready for customer pickup. Refer to Picking Up a Completed Work Order for more information.

Work Order History

Work Order History and Comments functions allow you to view the history of the work order and add comments to it. If the work order is still being created, select the History/Comments option while in the Work Order mode.

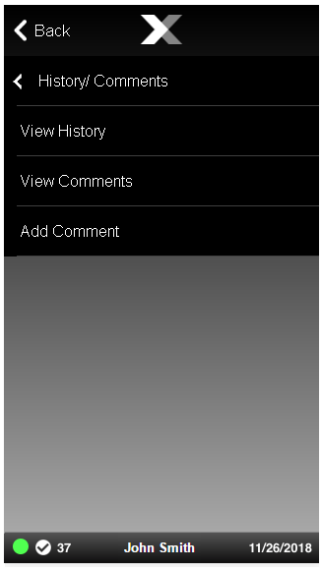
If the transaction in which the work order was created has been completed:

1. Create a new sale transaction.
2. At the Sale screen Context Menu, select **Extended Transaction**.
3. At the Extended Transaction menu, select **Work Order**. If a customer is associated with the transaction, Xstore Mobile displays a list of work orders for the customer. If a customer is not associated with the transaction at this point, enter the work order search criteria to locate the work order.
4. Select the work order that you want to edit. The system displays the work order.
5. From the Work Order menu, choose the **History/Comments** option.

   The following History/Comments functions are available:

   - View History
   - View Comments
   - Add Comment

Figure 13–42 History/Comments Menu



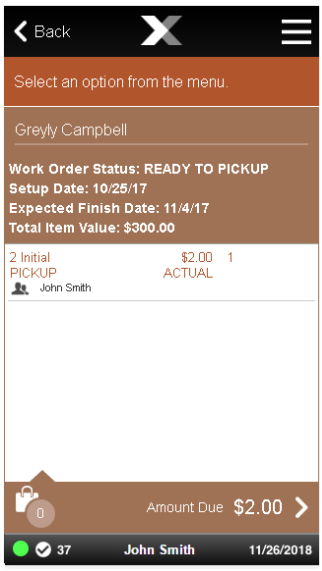
View History

Select this option to see the work order account history. The information shown here includes the account number, setup date, status, and balance due.

1. Select **View History**.

   The system displays a form showing the work order account information. You may use the up and down arrow keys to scroll through the screen if there are more lines than can be displayed at once.

Figure 13–43 Work Order History Screen



2. Press **Enter** to close the form and return to the Work Order Summary screen.

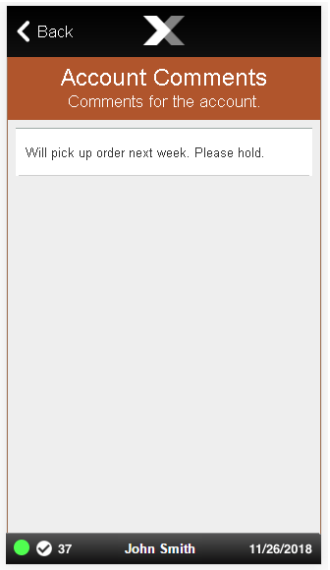
View Comments

Select this option to see any comments associated with the work order.

1. Select **View Comments**.

   The system displays any comments associated with this work order account. You may use the up and down arrow keys to scroll through the screen if there are more comments than can be displayed at once.

Figure 13–44 Work Order Comments Display



2. Press **Enter** to close the comments form and return to the Work Order Summary screen.

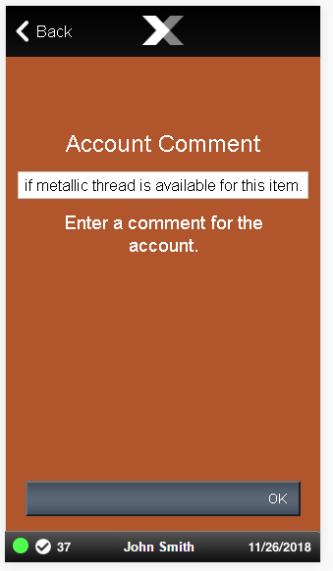
Add Comment

Select this option to add a comment to this work order.

1. Select **Add Comment**.

   The system displays a free-text comment form.

Figure 13–45 Entry Form for Work Order Comments

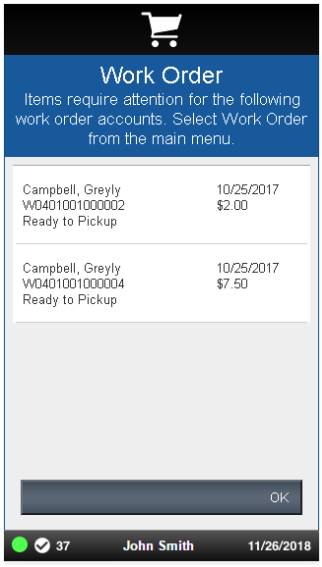


2. Type a comment to be associated with this work order account.
3. Press **Enter** to close the comment entry form and return to the Work Order Summary screen.

Picking Up a Completed Work Order

When a customer is associated with a sale transaction, the system may automatically notify you if the customer has a work order that requires attention. For example, you may be prompted if the customer's work order is ready for pickup. Press **Enter** to acknowledge this prompt.

Figure 13–46 Work Order Requires Attention Prompt



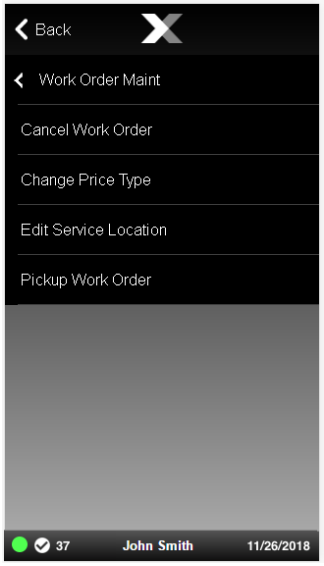
1. At the Sale screen, select **Extended Transaction** and the Work Order option to pick up work order items or to view work order account information.
2. At the Work Order Search form, if prompted, select the work order account from the list and press **Enter**. If the work order is not listed, enter the search criteria for the work order, or scan the customer's work order receipt.
3. With the work order displayed, select the **Work Order Maint** option from the Context Menu.

Figure 13–47 Work Order - Ready For Pickup Status



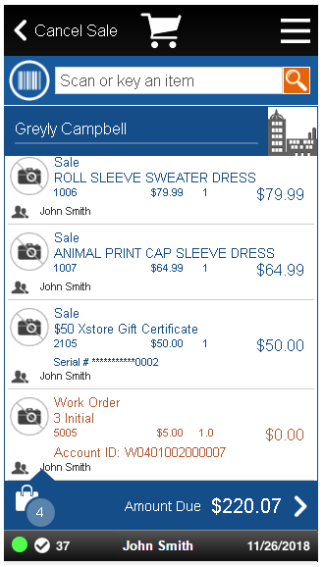
4. From the Work Order Maintenance menu, select the **Pickup Work Order** menu button option.

Figure 13–48 Work Order Ready For Pickup - Work Order Maintenance Menu



5. The system adds the completed work order item to the Sale screen. Tender the transaction to complete the work order.

Figure 13–49 Work Order on the Sale Screen



14

Warranty and Service Plan Transactions

A warranty/service plan is a promise made by a manufacturer or seller to support a product after its purchase. Typically, this involves the purchase of a contract that covers the costs of parts and service on an item beyond the manufacturer's original warranty period.

Additional benefits may be offered during the manufacturer's warranty and throughout the entire coverage period. A warranty/service plan may be offered to a customer during a sales transaction. It may also be used to bring the customer back to the store when the plan includes an option for periodic merchandise inspections.

Warranty/service plan specifications are defined and downloaded from the home office.

> **Note:** The terms warranty/service plan, warranty plan, warranty, and plan are used interchangeably in this guide.

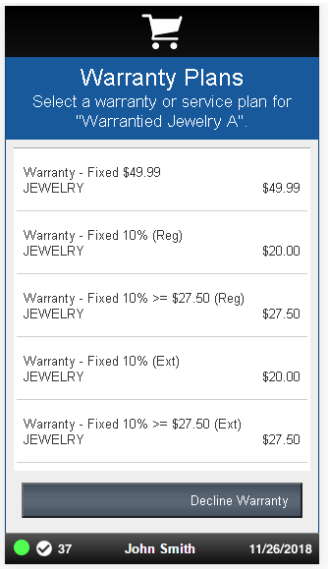
The following topics are covered in this section:

- Selling a Warranty/Service Plan
- Adding a Warranty/Service Plan After a Purchase

Selling a Warranty/Service Plan

1. When you sell an item that is eligible for a warranty or service plan, the system automatically displays a list of plans that are available for the specific item.

Figure 14–1 Warranty Plans



Note: Items that are eligible for warranty plans but have not been associated with any plan show the No Warranty Purchased icon on the View Port.

Only warranty plans that apply to the item are shown in this list.

Table 14–1 Warranty Plans

If the customer...	then...
wants to purchase a warranty/service plan,	▪ select a warranty plan from the list. See Figure 14–1. ▪ select the option to add the warranty item (as a non-merchandise item) to the sale. ▪ go to step 2 below.
does not want to purchase a warranty/service plan,	▪ press **Esc** to return to the sale and continue selling items. **Note:** The "No Warranty Purchased" icon indicates that the warranty for this item was declined. ▪ tender the transaction when the sale is complete.

Note: If the customer decides to purchase the warranty after you escape from the warranty plan screen-but before tendering-you can add the warranty to the item from the Extended Transaction menu. Refer to To Add a Warranty/Service Plan to an Item - In the Current Transaction for the procedure.

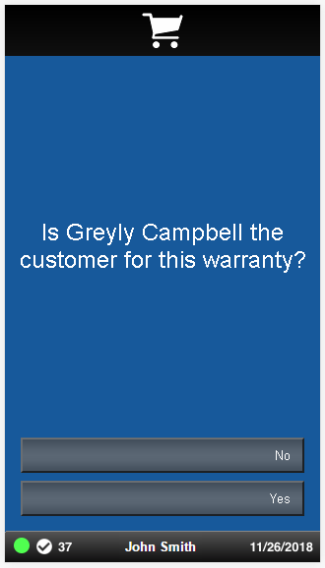
2. After the warranty item is added to the sale as a non-merchandise item, the system prompts for the customer to be associated with this warranty.

Note: Since a warranty/service plan must have an owner, you must associate a customer name with the plan. The plan owner may be a different person than the customer who purchases the item and the warranty/service plan. For example, the customer may purchase an item as a gift and also wants to assign the warranty to the person receiving the gift.

If a customer is associated with this sale:

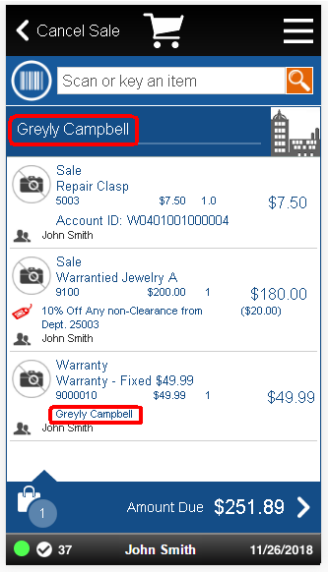
When a customer is associated with this sale, the system prompts you to verify that this current customer owns the warranty/service plan.

Figure 14–2 Warranty Customer Prompt



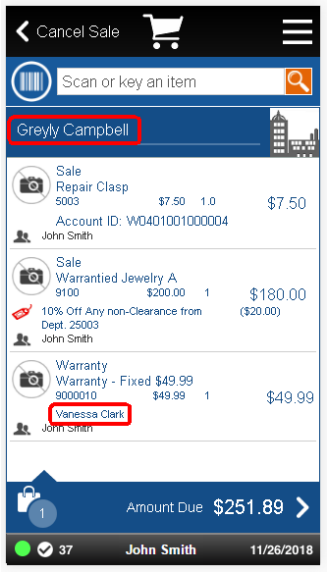
- Select **Yes** if the customer associated with the current sale is also the person to be named on the warranty/service plan. The system adds the warranty customer's name to the warranty plan.

Figure 14–3 Sale Customer Same As Warranty Plan Owner



- Select **No** to associate a different customer with this warranty/service plan. The system prompts for customer information. Enter the **warranty** customer's information as required. The warranty customer's name is added to the warranty plan.

Figure 14–4 Sale Customer Different than the Warranty Plan Owner



If no customer is currently associated with this sale:

When no customer is associated with this sale, the system prompts for warranty customer information.

a. Enter the customer's information as required.

b. The system prompts to confirm that this is the customer who will own the warranty plan.

- Select **Yes** if this is the customer to be named on the warranty/service plan. The system adds the warranty customer's name to the warranty plan.
- Select **No** if this is not the correct warranty customer's name. The system re-prompts for a customer's name for the warranty plan.

3. When the sale transaction is tendered, the system creates receipts as required by your store's policy.

Figure 14–5 Customer Sale Receipt With Warranty Item Example

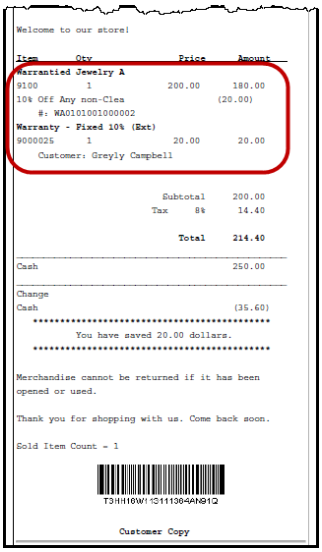
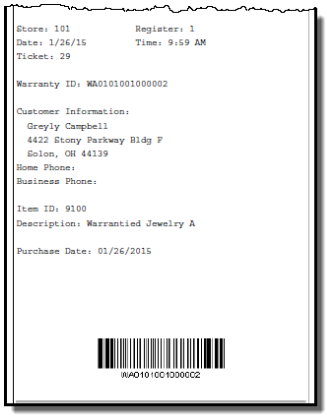


Figure 14–6 Warranty Receipt Example



Adding a Warranty/Service Plan After a Purchase

A customer may decide to purchase a warranty/service plan after purchasing an item. For example, the item may have been purchased as a gift and the recipient would like to purchase a warranty for the item. Perhaps the customer has reconsidered the

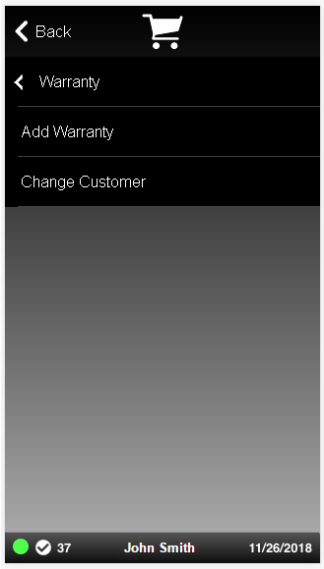
warranty option and returns to the store later to purchase the warranty. You can also add a warranty plan in the current transaction if the customer declines the warranty at first and reconsiders the decision before the transaction is tendered.

Note: Warranty/Service Plans are only available for designated items as determined by the home office.

1. In a sale transaction, select **Extended Transaction** from the Context menu.
2. Select the Warranty option to view the Warranty menu.

   You have the following options on the Warranty menu:

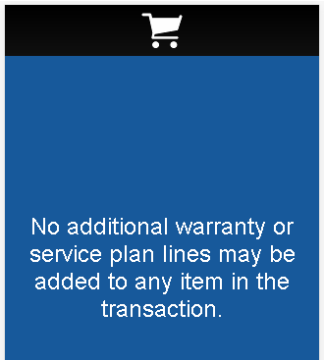
Figure 14–7 Warranty Menu



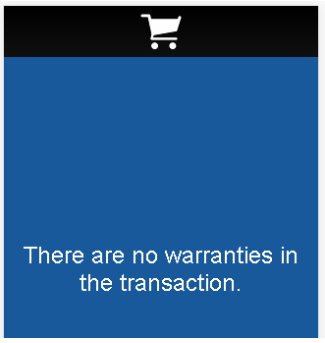
- **Add Warranty** - Select this option to add a warranty to a previously-purchased item. See Adding a Warranty/Service Plan to an Item.
- **Change Customer** - Select this option to change the owner of the warranty when the warranty information is displayed See Changing the Warranty/Service Plan Customer.

Note: Validation prompts you may see:

If you try to add a warranty/service plan to ineligible items, Xstore Mobile displays a message indicating that there are no warranty-eligible items in the transaction. Acknowledge this message by pressing **Enter** or selecting **OK** to continue.



If you try to change warranty customer information in a transaction that does not include any warranties, Xstore Mobile displays a message indicating that there are no warranties in the transaction. Acknowledge this message by pressing **Enter** or selecting **OK** to continue.



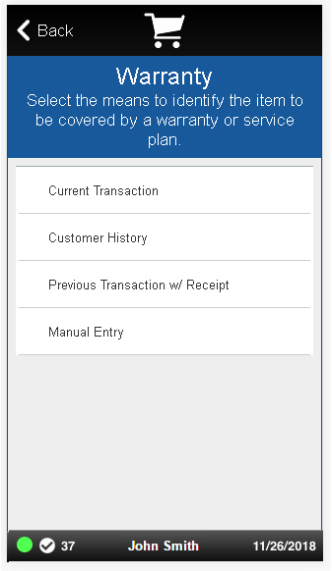
Adding a Warranty/Service Plan to an Item

...continued from step 2

1. Select the Add Warranty option from the Warranty menu. See Figure 14–7.

   The system prompts you to select a source for locating a previously-purchased item that will be covered by a warranty/service plan:

Figure 14–8 Add Item Warranty Options



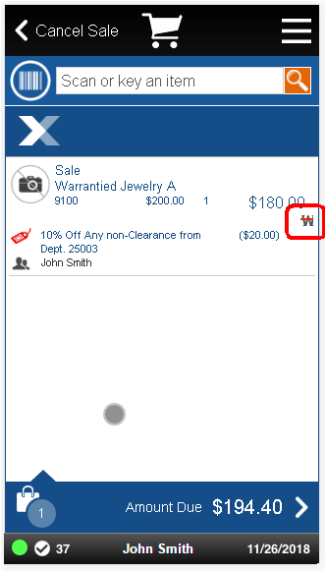
- Select **Current Transaction** if the item is in the current transaction. Use this option for customers who originally decline the warranty/service plan but change their minds before the transaction is tendered. See To Add a Warranty/Service Plan to an Item - In the Current Transaction.
- Select **Customer History** to locate the item in the customer's purchase record. A customer must be associated with the transaction, otherwise, a message displays and indicates that no items are eligible for a warranty. Use this option if the customer does not have the original receipt, but the purchase record can be found in the purchase history for the customer. See To Add a Warranty/Service Plan to an Item- Using Customer History Information.
- Select **Previous Transaction with Receipt** if the customer has the original receipt for the item. The system retrieves the item information from the original receipt. See To Add a Warranty/Service Plan to an Item - Using the Customer's Original Sale Receipt.
- Select **Manual Entry** to enter the item information manually. Use this option if the customer does not have the original receipt and the purchase record cannot be found in the purchase history for the customer. See To Add a Warranty/Service Plan to an Item - Manual Entry.

To Add a Warranty/Service Plan to an Item - In the Current Transaction

Use this option for customers who originally decline the warranty/service plan for an eligible item but change their minds before the transaction is tendered.

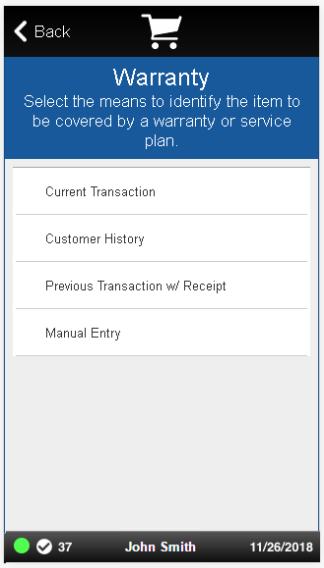
If the customer declined to purchase the warranty for an item in the current sale, the No Warranty Purchased symbol displays next to the item information on the View Port.

Figure 14–9 Sale With Declined Warranty Item



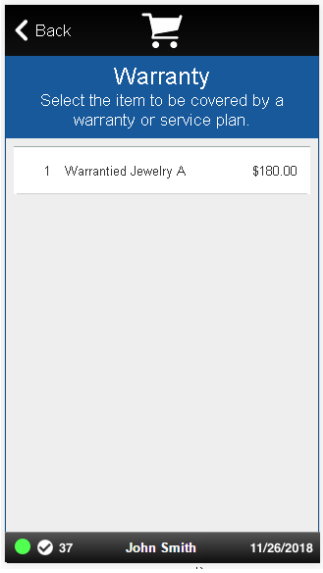
1. To purchase a warranty/service plan for this item, select **Extended Transaction**, **Warranty** and then **Add Warranty**.
2. The system displays a list of sources for the item that will have the warranty. Select **Current Transaction** from the list of item sources.

Figure 14–10 Locate Item for Warranty - Current Transaction Option



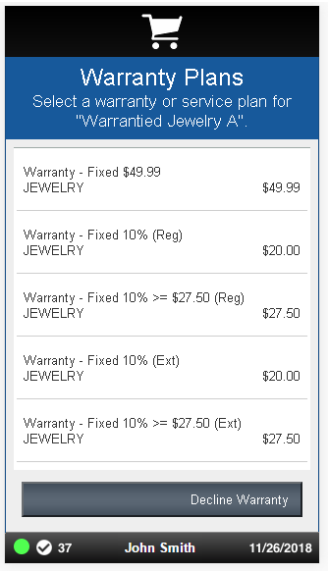
3. The system displays a list of warranty-eligible items in the transaction. Select the item that will be associated with the warranty and press **Enter**.

Figure 14–11 List Of Items Eligible For A Warranty/Service Plan



4. The system displays a list of warranty plans that can be associated with the item. Select the warranty plan option from the list to add the warranty plan (as a non-merchandise item) to the sale.

Figure 14–12 Warranty Plan Options for the Selected Item



5. The system prompts for the customer to be associated with this warranty. Refer to step 2 for more information about associating a customer with a warranty/service plan.

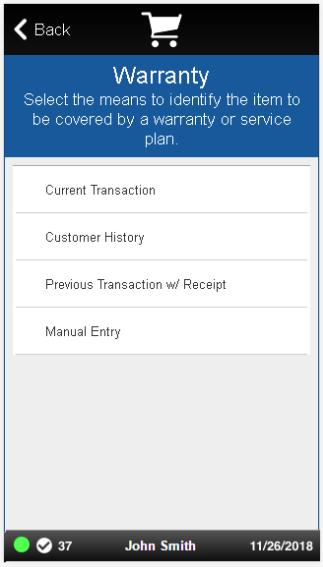
   When you tender the sale transaction, the system creates a receipt with the warranty details.

To Add a Warranty/Service Plan to an Item- Using Customer History Information

Use this option to locate the item in the customer's purchase history record.

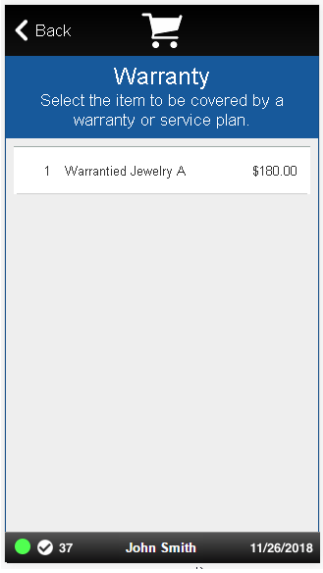
1. In a sale transaction, select **Extended Transaction - Warranty - Add Warranty**.
2. Select the **Customer History** option from the list of sources and press **Enter**.

Figure 14–13 Locate Item - Customer History Option



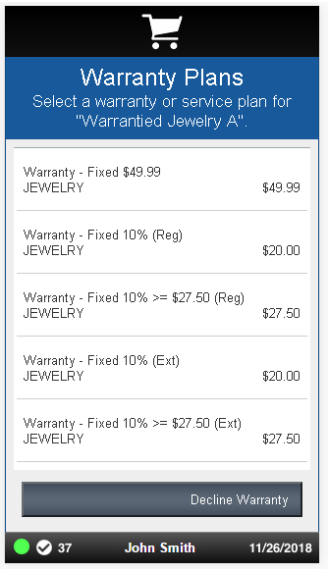
3. The system displays a list of warranty-eligible items the customer has purchased. Select the item the customer would like to purchase a warranty plan for and press **Enter**.

Figure 14–14 Customer History-Previous Items Purchased



4. The system displays a list of warranty plan options associated with this item. Select the warranty plan option from the list to add the warranty plan (as a non-merchandise item) to the sale.

Figure 14–15 Warranty Plan Options for the Selected Item



5. The system prompts for the customer to be associated with this warranty. Refer to step 2 for more information about associating a customer with a warranty/service plan.

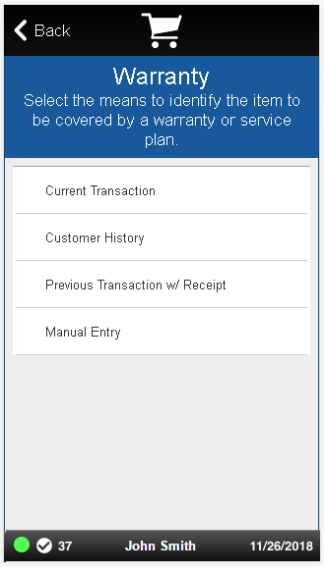
   When you tender the sale transaction, the system creates a receipt with the warranty details.

To Add a Warranty/Service Plan to an Item - Using the Customer's Original Sale Receipt

Use this option when the customer has the original receipt for the item. The system retrieves the item information from the original transaction receipt.

1. In a sale transaction, select **Extended Transaction - Warranty - Add Warranty**.
2. Select the **Previous Transaction With Receipt** option from the list of warranty item source and press **Enter**.

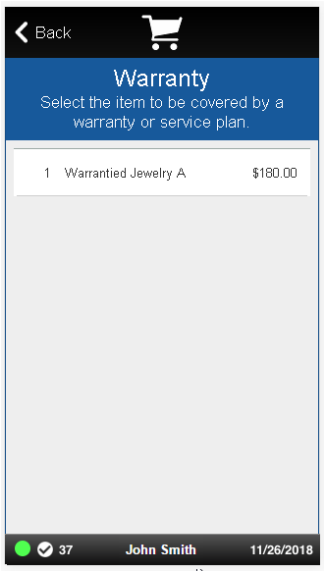
Figure 14–16 Locate Item - Previous Transaction With Receipt Option



3. At the prompt for original transaction information, scan the barcode from the original receipt, or enter the required original transaction information and select Process to continue.

   The system finds the original transaction information in the database and displays a list of items found in the transaction that are eligible for a warranty plan.

Figure 14–17 Original Transaction Item(s) Eligible for a Warranty Plan

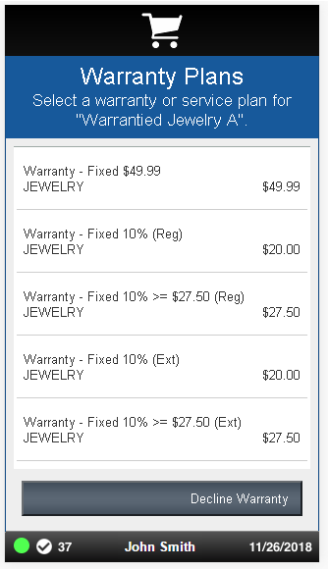


Note: Only warranty-eligible items are shown in this list.

4. Select the item to be covered by a warranty plan and press **Enter** to continue.

The system displays a list of warranty plans that are applicable to this item.

Figure 14–18 Warranty Plan List



5. Select the warranty plan option from the list and select the **Add Plan** option to add the warranty item (as a non-merchandise item) to the sale.
6. The system prompts for the customer to be associated with this warranty. Refer to step 2 for more information about associating a customer with a warranty/service plan.

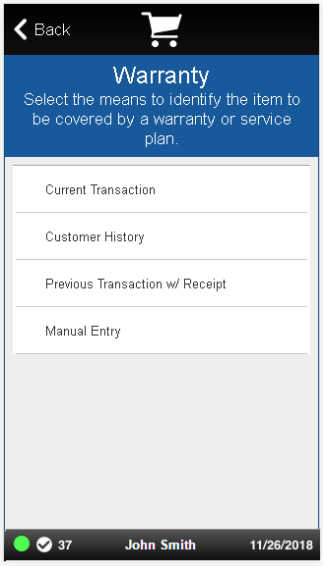
   When you tender the sale transaction, the system creates a receipt with the warranty details.

To Add a Warranty/Service Plan to an Item - Manual Entry

Use this option if the customer does not have the original receipt and the purchase record cannot be found in the purchase history for the customer.

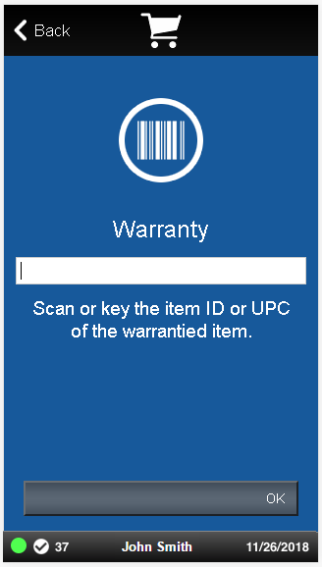
1. In a sale transaction, select **Extended Transaction - Warranty - Add Warranty**.
2. Select the **Manual Entry** option from the list of warranty sources and press **Enter**.

Figure 14–19 Locate Item - Manual Entry Option



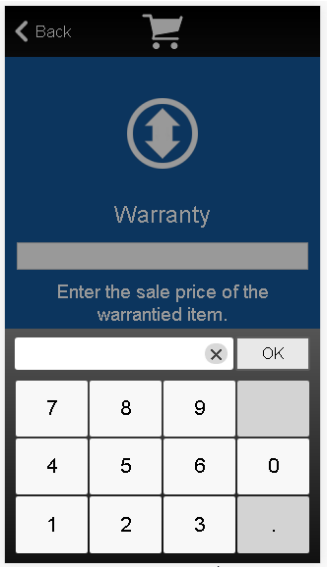
3. The system prompts for the warrantied item. Type the item ID and press **Enter**, or scan the item barcode.

Figure 14–20 Warrantied Item ID Prompt



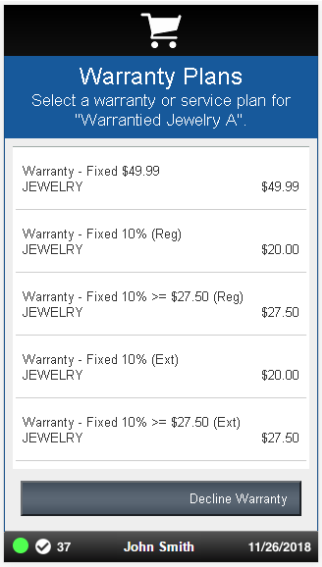
4. If prompted, enter the price of the warrantied item, without a decimal point, and press **Enter** to continue.

Figure 14–21 Warrantied Item Price Prompt



The system displays a list of plan options associated with this item.

Figure 14–22 Warranty Plans Associated with the Item



5. Select a warranty plan from the list to include it (as a non-merchandise item) in the sale.
6. The system prompts for the customer to be associated with this warranty. Refer to step 2 for more information about associating a customer with a warranty/service plan.

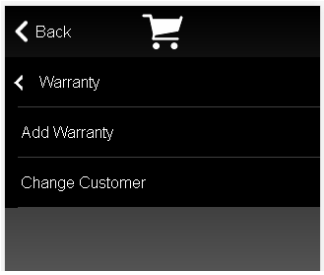
   When you tender the sale transaction, the system creates a receipt with the warranty details.

Changing the Warranty/Service Plan Customer

Use this process to change the owner of the warranty/service plan.

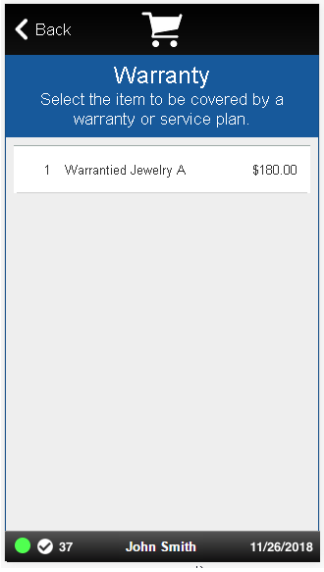
1. 1. At the Sale screen, with the warranty sale transaction displayed in the View Port, select Extended Transaction -- Warranty -- Change Customer.

Figure 14–23 Warranty Menu - Change Customer Option



2. The system displays a list of the warranties on the current transaction. Select the warranty/service plan you want to update and press **Enter**.

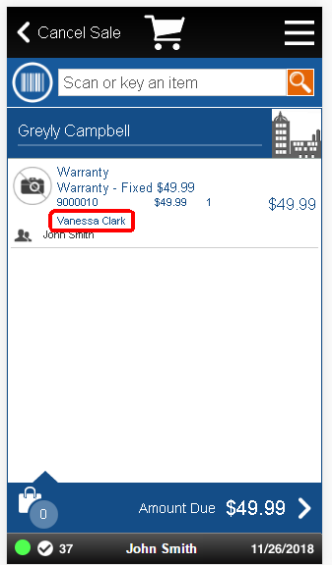
Figure 14–24 List Of Warranties on the Current Transaction



3. The system prompts for customer information. Enter the information for the new warranty/service plan owner as required by your store's policy.

   The system updates the warranty plan information with the new warranty customer's name and information.

Figure 14–25 Updated Warranty Plan Information



When the sale transaction is completed, the system creates a receipt with the warranty details.

15

Order Transactions Through Order Broker Cloud Service

Oracle Retail Order Broker Cloud Service (formerly known as MICROS Retail Locate) is an optional module that can be interfaced with Xstore to provide information about inventory availability across all sales channels.

Using this order functionality, you can sell an item that is not in stock at your store and the Order Broker Cloud Service module automatically selects the best location to fulfill the customer's order across the enterprise.

There are multiple purchasing options available, such as same-store pickup, different store pickup, and delivery to a customer-specified address. You can track and maintain the orders using the Back Office Customer Maintenance function.

This chapter contains the following sections:

- Order Status
- Order Item Status
- Fulfillment Options
- Creating an Order
- Open an Order Broker Order
- Edit Order Items
- Cancel Order Items or an Entire Order
- Pick Up an Order
- Back Office Customer Maintenance
- Shipping an Order
- Maintaining/Viewing an Order
- Allocating an Item

Order Status

Orders can have the following status values:

- **Open:** At least one item in the order has a status of: New, Polled, Accepted, or In Transit.
- **Ready for Pick Up:** All items are in reserved or received status (can also include canceled item).
- **Ready to Ship:** This is applicable only for customer delivery, transfer pickup, or delayed pickup (pickup from this store). All items must be reserved, or some items are reserved and some canceled.
- **Complete:** The order has been completed and the customer is in possession of their items.
- **Canceled:** All items are canceled.
- **Unfulfillable:** All items are unfulfillable or a mix of unfulfillable and canceled. Unfulfillable items are those that have been rejected by the store assigned as the source for the item and Order Broker cannot find another source store.

Order Item Status

Order items can have the following statuses:

- **New:** Indicates the item has been added to the order.
- **Polled:** Indicates the source/fulfilling location got the item request.
- **Accepted:** Indicates the source location has confirmed it can satisfy the order request.
- **Reserved:** Indicates the item has been put aside for the customer at the source/fulfilling location.
- **Pending Reservation:** Only shown if **Enable Pick Slip Scanning** configuration is enabled. After an Order is Accepted, the item is moved to Pending Reservation where it will remain until the item is scanned in the Virtual Pick Slip.

  Note: When a store sets up all registers to **Enable Pick Slip Scanning**, the **Automatically Pick Order Inventory** setting should be set to Yes. When an order is accepted, the order is automatically marked as Pending Reservation.

  The Automatically Pick Order Inventory setting should be set to No for stores that include both registers that enable and registers that do not enable the **Enable Pick Slip Scanning** setting.

- **In Transit:** Indicates the item has been shipped.
- **In Transit Polled:** Indicates the store in which the customer is to pick up the product has acknowledged that the items are in transit and is expecting the order.
- **Received:** Indicates the item has been received in the store.
- **Fulfilled:** Indicates the item has been picked up/delivered.
- **Canceled:** Indicates the item has been canceled.

- **Rejected:** Indicates the source location has rejected the order and the item is sourced from another location. The status of the order becomes unfulfillable.
- **Unfulfillable:** Indicates the item has been rejected and an alternative location could not be determined.

Fulfillment Options

Xstore provides different options for fulfilling an order:

- Pickup This Store
- Pickup Other Store
- Customer Delivery

Pickup This Store

If an item is not available in your store, use this option to have the item shipped to your store for pickup at a later time. In this scenario, order creation and order fulfillment are both handled by the same Xstore store location. Inventory is sourced out of another location and shipped to the Xstore location. In Xstore, this order type is defined as Transfer Pickup.

Pickup Other Store

The process for picking up items at another store depends upon whether legacy order types are enabled or disabled.

Legacy Order Types Disabled

If the inventory exists in the store where the customer wants to pick up, then that store is used and the order type is defined as a pickup. However, if the inventory does not exist in the store where the customer wants to pick it up, then Order Broker will find another location from which to fulfill the order. The order will be shipped from that location to the pickup. In this case, Xstore considers it a Transfer Pickup.

Legacy Order Types Enabled

If an item is not available in your store, use this option to find another store location where the item is currently available. The customer can pick up the item from that store once it is in a status of Ready for Pick Up. In this scenario, both order creation and order fulfillment is being done by the Xstore system. Inventory comes out of the fulfilling store if that store has inventory available; if the store does not have inventory available, Order Broker finds the required inventory. In Xstore, this order type is defined as Pickup.

Customer Delivery

If an item is not available in your store, use this option to have the item shipped directly to the customer's home (or another specified address). Order creation is done by the Xstore system. In this scenario, order fulfillment may be done by another store or a distribution center. Inventory comes out of the fulfilling location. In Xstore, this order type is defined as Delivery.

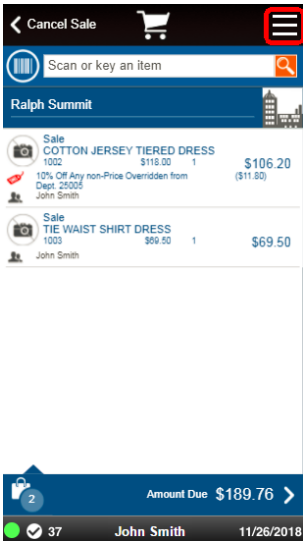
Creating an Order

A customer name and address is required to create an Order Broker order. You must assign a customer to the transaction prior to order creation if you did not do so at the beginning of the transaction. Refer to Associating a Customer with a Transaction for more information about setting up a customer

To create an Order Broker order:

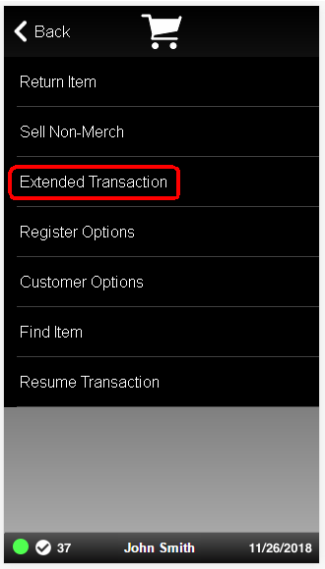
1. At the Sale screen, select the **Context Menu** button.

Figure 15–1 Sale Context Menu



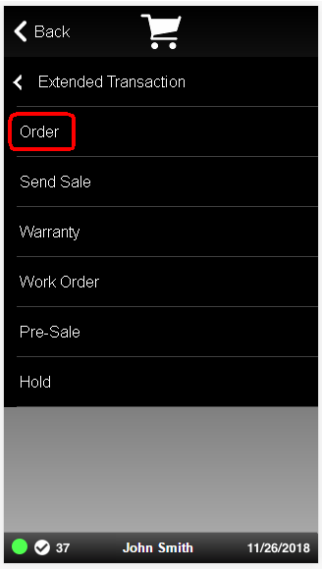
2. Select **Extended Transaction** in the Context Menu.

Figure 15–2 Extended Transaction Option



3. Select **Order** in the Extended Transaction Menu.

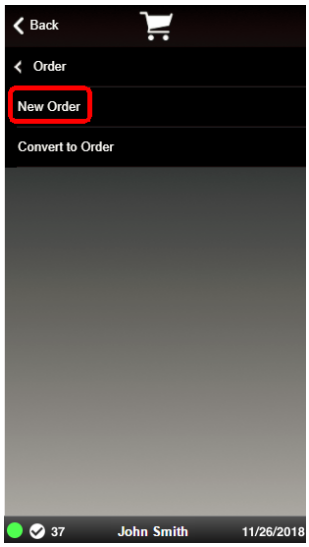
Figure 15–3 Order Option



- If a customer is associated with the transaction:
  - If the customer has one or more open orders, Xstore displays a list of the open orders.
  - If the customer has no open orders, Xstore prompts for order search criteria.
- If no customer is associated with the transaction, Xstore prompts for order search criteria.

4. Click **New Order**.

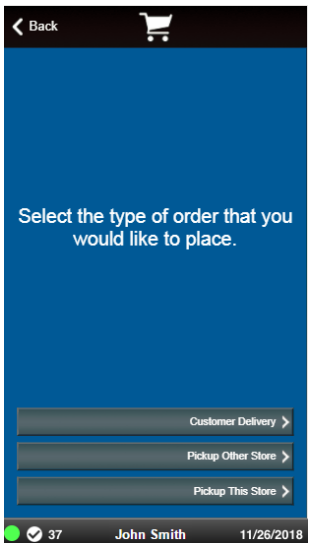
Figure 15–4 New Order Option



- If no customer is associated with the transaction, continue with Step 5.
- If a customer is associated with the transaction, Xstore displays an order search window. Continue with Step 6.

5. Associate a customer with the transaction. See Associating a Customer with a Transaction.

Figure 15–5 Order Type Prompt



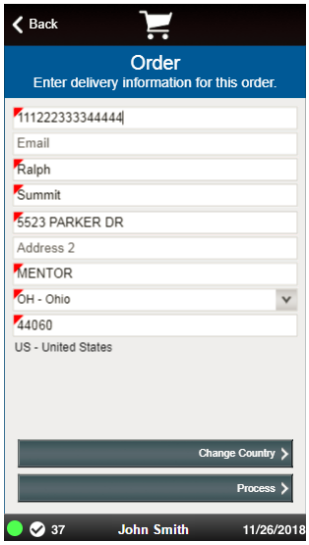
6. Select the type or order:
   - **Customer Delivery**: If an item is not available in your store, use this option to have the item shipped directly to the customer's home (or specified address). This order type is defined as Delivery type in Xstore. Continue with Customer Delivery.
   - **Pickup Other Store**: If an item is not available in the store where the customer wishes to pick it up, the item will be sent to the pickup store from another location. The pickup store will then hold the item until the customer picks it up. This order type is defined as a Pickup if the item is in stock at the pickup store, and a Transfer Pickup if the item is sent to the pickup store from another store. Continue with Pickup Other Store.
   - **Pickup This Store**: If an item is not available in your store, use this option to have the item shipped to your store for pickup at a later time. This order type is defined as Transfer Pickup type in Xstore. Continue with Pickup This Store.

Customer Delivery

To create an order for customer delivery:

1. Click **Customer Delivery**.
2. Enter the delivery information:

Figure 15–6 Order Delivery Details



Note: If your system is configured to provide Address Lookup functionality, an **Address Lookup** button will be available to allow you to quickly look up customer addresses using minimal information.

- **Phone:** Phone number.
- **Email:** E-mail address.
- **Prefix:** Name prefix.
- **First:** First name.
- **M.I.:** Middle initial.
- **Last:** Last name.
- **Company:** Company name.
- **Address:** First and second line of the street address.
- **Apartment:** Apartment number.
- **State/Zip:** Zip Code and state or province.
- **City/Country:** City and country.

Note: The country field can only be changed through the **Change Country** button. See Changing Country.

3. Click **Process**.

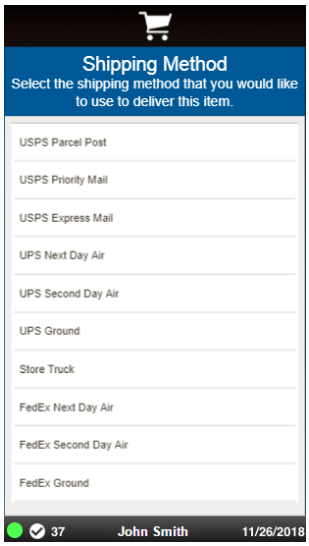
   Item entry opens.

4. Enter an item for the order. See Entering Items.

   After entering each item, Xstore prompts for a delivery method for the item.

5. Select the shipping method:

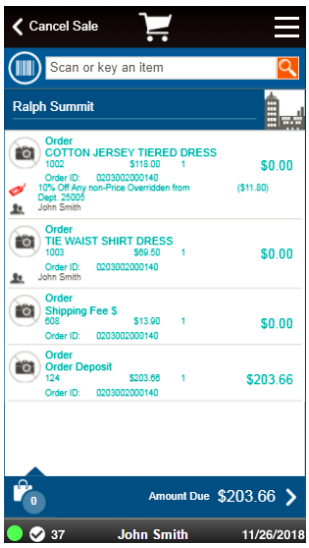
Figure 15–7 Order Shipping Method



6. Repeat Steps 4 to 6 for each item to add to the transaction.

7. When you are finished adding order items:

Figure 15–8 Order Items



   - Click **Add Tenders** to tender and complete the transaction.
   - Click **Exit Order** to exit the order and continue the transaction.

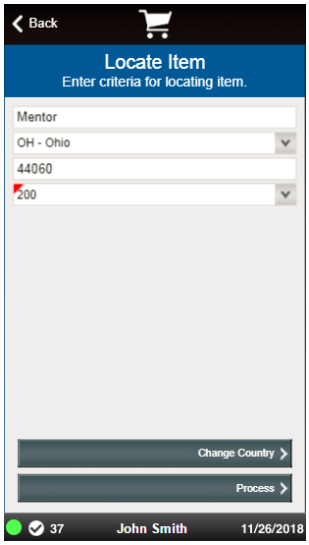
Pickup Other Store

To create an order for pickup at another store:

1. Click **Pickup Other Store**.
2. Enter an item for the order. See Entering Items.

   After entering each item, Xstore prompts for the pickup location for the item.
3. Enter the search criteria for the pickup location:

Figure 15–9 Search Location Form

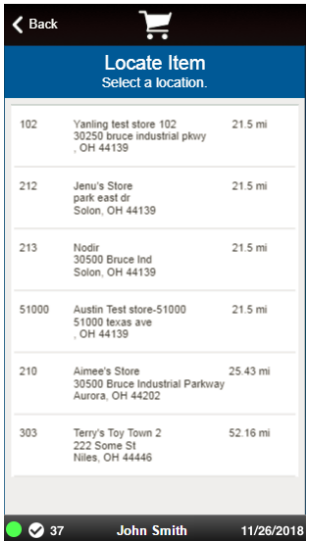


- **City:** City.
- **State:** State.
- **Postal Code:** Postal or zip code.
- **Country:** Country.
- **Miles:** Radius around the city in which to search for a store.

4. Click **Process**.

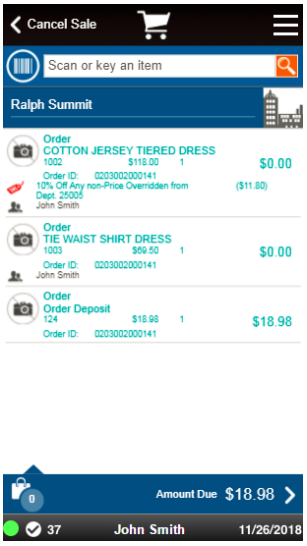
   Xstore displays a list of stores matching the search criteria.

Figure 15–10 Search Location Results List



5. Select the pickup store.
6. Click **OK**. The item is added to the transaction.
7. Repeat steps 2 to 6 for each item to add to the order.
8. When you are finished adding order items:

Figure 15–11 Order Items



- Click **Add Tenders** to tender and complete the transaction.
- Click **Exit Order** to exit the order and continue the transaction.

Pickup This Store

To create an order for pickup at the current store:

1. Click **Pickup This Store**.
2. Enter the items for the order. See Entering Items.
3. When you are finished adding order items:
   - Click **Add Tenders** to tender and complete the transaction.
   - Click **Exit Order** to exit the order and continue the transaction.

Open an Order Broker Order

To search for an Order Broker order:

1. Click **Extended Transaction** in the Context Menu in Register Sale screen.
2. Click **Order**s.
   - If a customer is associated with the transaction:
     - If the customer has one or more open orders, Xstore displays a list of the open orders. Continue with Step 6.
     - If the customer has no open orders, Xstore prompts for order search criteria. Continue with Step 3.
   - If no customer is associated with the transaction, Xstore prompts for order search criteria. Continue with Step 4.
3. Click **Order Search**.

   Xstore displays a search window.
4. Enter the search criteria.
5. Click **Process**.
   - If only one order matches the search criteria, Xstore opens the order. The order is opened and the transaction continues.
   - If more than one order matches the search criteria, Xstore displays a list of orders. Continue with Step 6.
6. Select the order:
   - Click the item.
   - Use the up and down arrows to highlight the correct item and press the Spacebar.
7. Click **OK**.

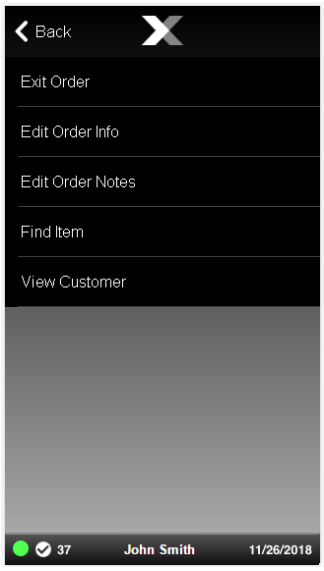
   Xstore opens the order. Continue the transaction.

Edit Order Items

During an order setup transaction you can also perform the following activities before tendering the sale. Order items can only be modified in Order mode.

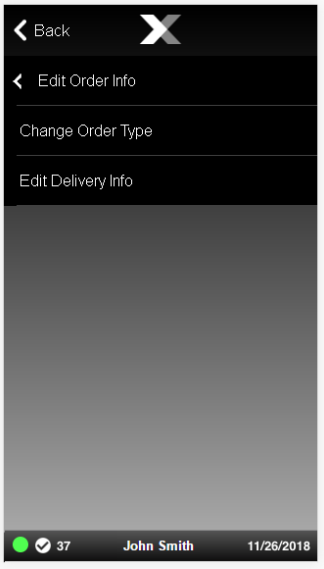
To make changes to Order Broker order items, perform the appropriate action:

Figure 15–12 Edit Order Menu Options



- To add or edit comments associated with this order, select the Edit Order Notes option and type a comment about the order.
- To edit order information, such as the delivery information or to change the order type, select the Edit Order Info option.

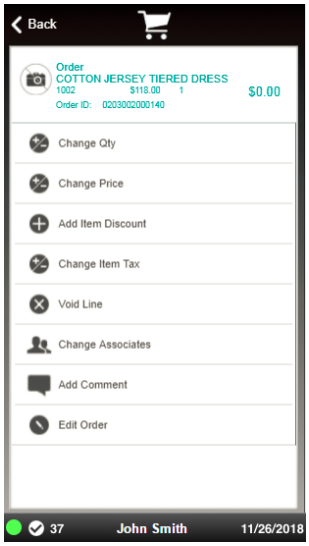
Figure 15–13 Edit Order Info Menu Options



- Back Office Customer Maintenance: To change the order type (Customer Delivery, Pickup Other Store, Pickup This Store), select the **Change Order Type** option.
- Edit Delivery Information. Note that this can only be done for Order Broker orders before tendering. If a delivery address needs to be changed after the order is sent to Order Broker, the order must be canceled and a new order created with the correct address.

- Make changes to the line items. See Modifying Line Items in a Sale for more information about changing items in a transaction.

Figure 15–14 Modify Line Item Options



Edit Delivery Information

To change the delivery information for an order:

> **Note:** This can only be done for Order Broker orders before tendering. If a delivery address needs to be changed after the order is sent to Order Broker, the order must be canceled and a new order created with the correct address.

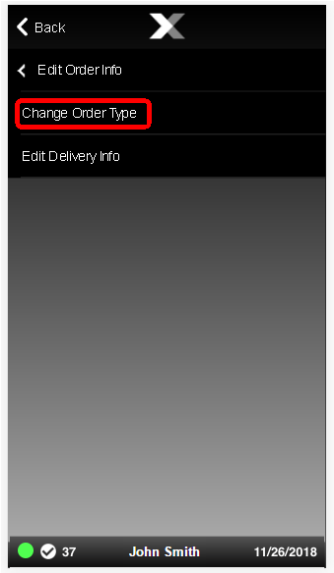
1. Open an Order Broker Order, see Open an Order Broker Order.
2. Click **Edit Delivery Info**.
3. Change the delivery information as necessary:
   - For a Customer Delivery order, enter the customer address. See Step 2 in Customer Delivery for more information.
   - For a Pickup Other Store order, search for the pickup store. See Steps 3 to 6 in Pickup Other Store for more information.

Change Order Type

To change the order type such as Pick Up This Store rather than Customer Delivery:

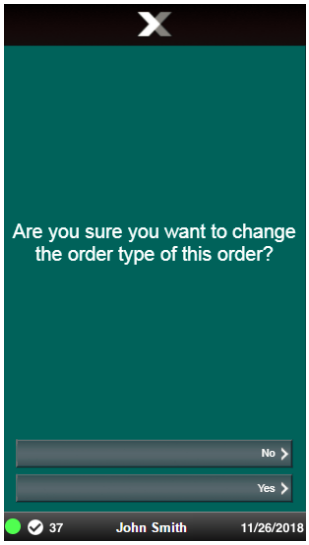
1. Open an Order Broker Order, see Open an Order Broker Order.
2. Click Extended Transaction in the Register Sale screen.
3. Click **Change Order Type**.

Figure 15–15 Change Order Type



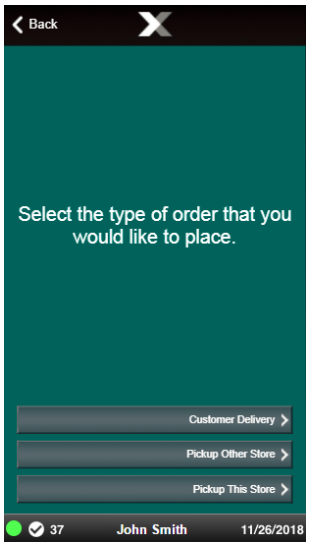
4. Select **Yes** to confirm the change.

Figure 15–16 Change Order Confirmation Prompt



5. Select the required order type.

Figure 15–17 Order Types



Cancel Order Items or an Entire Order

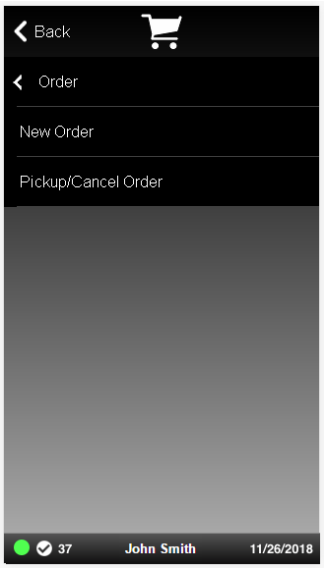
The customer must return to the store where an order was created to cancel that order. If an item has been reserved, a message prompt will display indicating that you must un-reserve the item in the Back Office before cancelling the order.

To cancel an order:

1. Open an Order Broker order, see Open an Order Broker Order.
2. From the Sale screen, select **Extended Transaction** from the Context Menu.
3. At the Extended Transaction menu, select the **Order** option.

   The Order menu appears:

Figure 15–18 Order Menu



4. Click **Pickup/Cancel Order**. Xstore displays a list of items in the order.
5. Select the **Cancel Order** option.
6. Select the items you wish to cancel. If cancelling the entire order, use the **Select All** button.
7. When prompted, select **Yes** to confirm you want to cancel the order.
8. Select a reason for the cancellation and press **Enter**.
9. Process the transaction as required, returning any refund amounts to the customer. See Processing Tenders for more information about processing refund tenders.

   The items are removed and any return amount is applied to the transaction.

Pick Up an Order

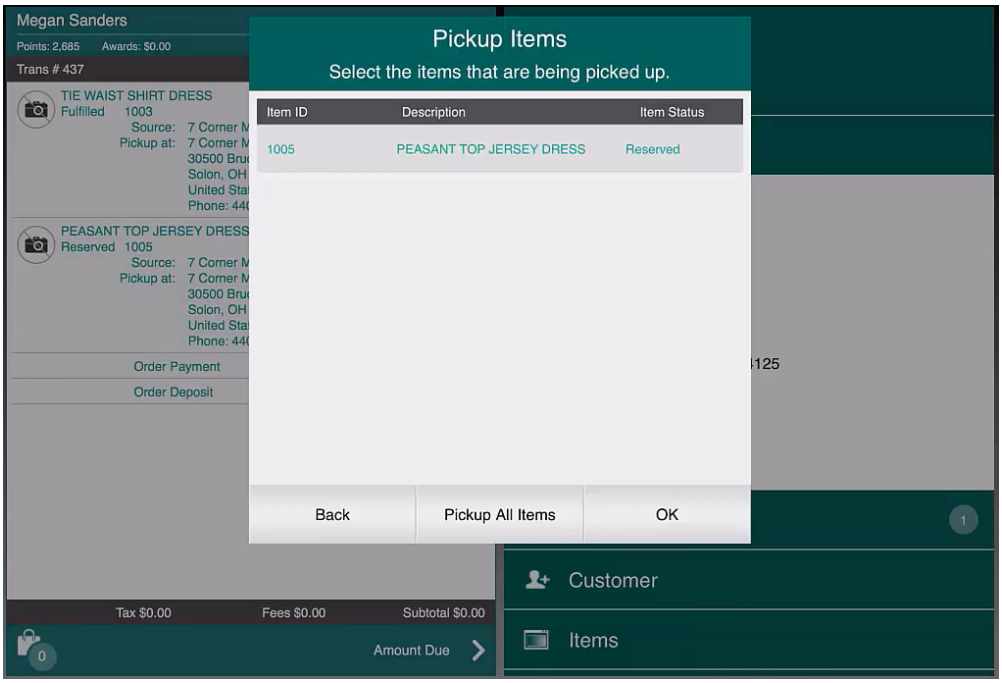
To perform a pickup of an order:

> **Note:** If you enter the customer's information at the beginning of a sale and the customer's order item has been received at the store, a message may display indicating the order has been received and is ready for pickup. Press **Enter** to acknowledge the message and continue with Step 1 below.

1. Open an Order Broker Order, see Open an Order Broker Order.
2. Select **Pickup/Cancel Order**.

   Xstore displays a list of orders for that customer.
3. Select an oder from the list.
4. Select **Pickup Items**.

Figure 15–19 Pick Up Items

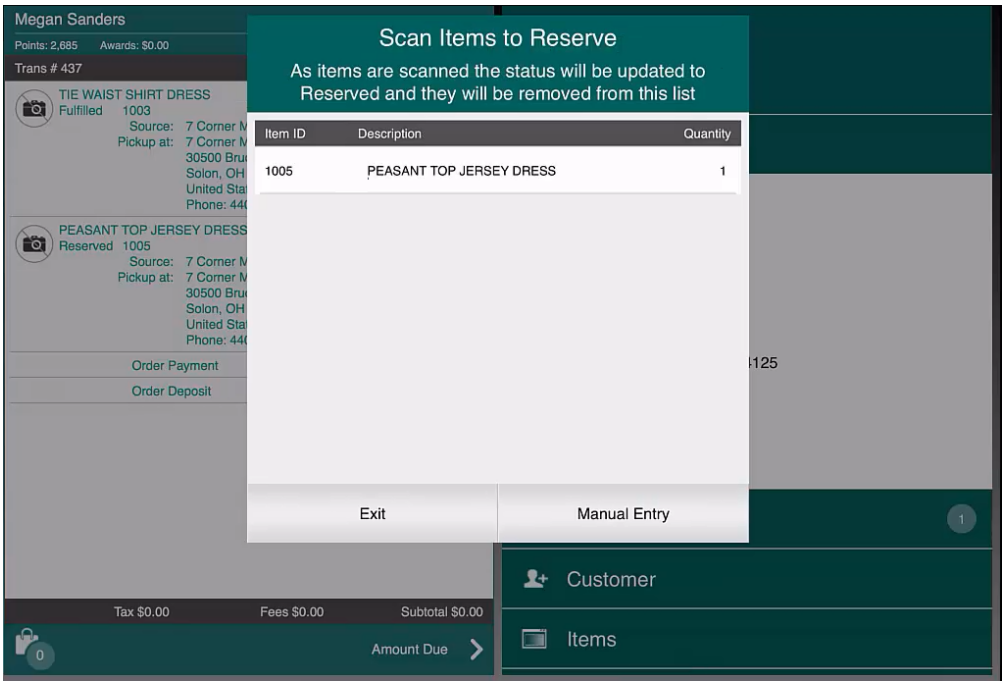


Xstore Point of Service displays a list of items in the order that are ready to be picked up.

5. Select the items to pick up:
   - Click the items.
   - Use the up and down arrows to highlight the correct items and press the Spacebar.
   - Click **Pickup All Items** to pick up the entire order.
6. If your system has the **Scan Items Prior to Adding to Transaction** setting configured, the items display in a list to scan from to confirm they are the correct items.

   If your system does not have the **Scan Items Prior to Adding to Transaction** setting configured, no scanning is required. Continue at step 9.

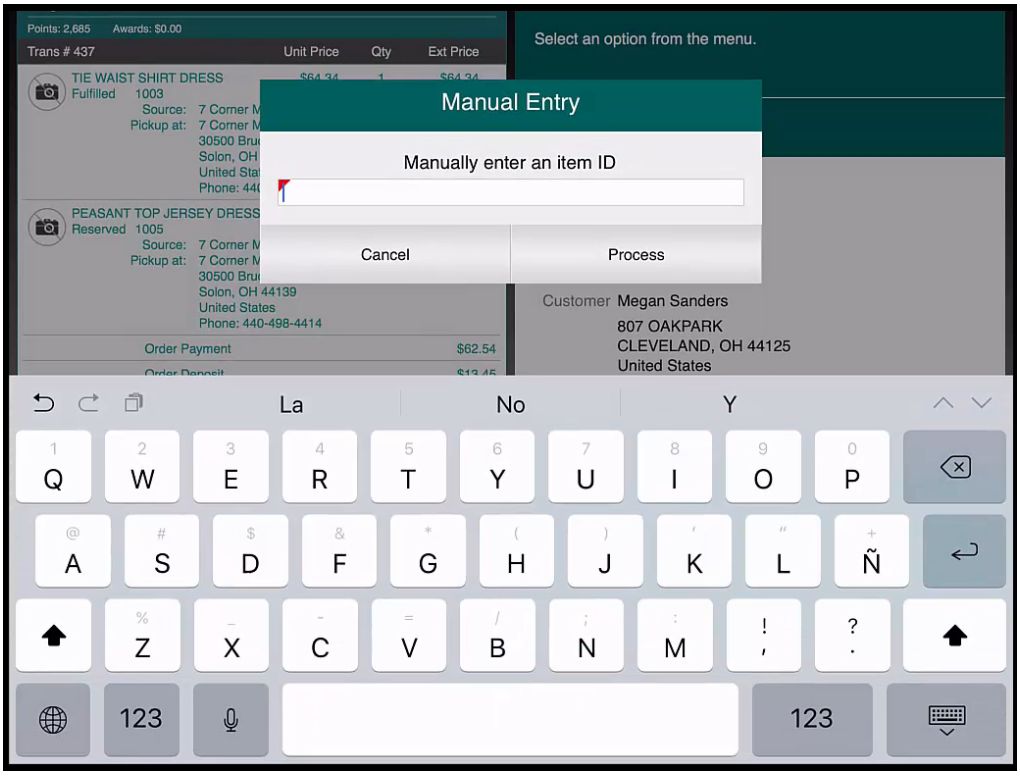
Figure 15–20 Scan Items to Reserve



7. Scan the items from the list. The items will be marked Reserved and removed from the list.

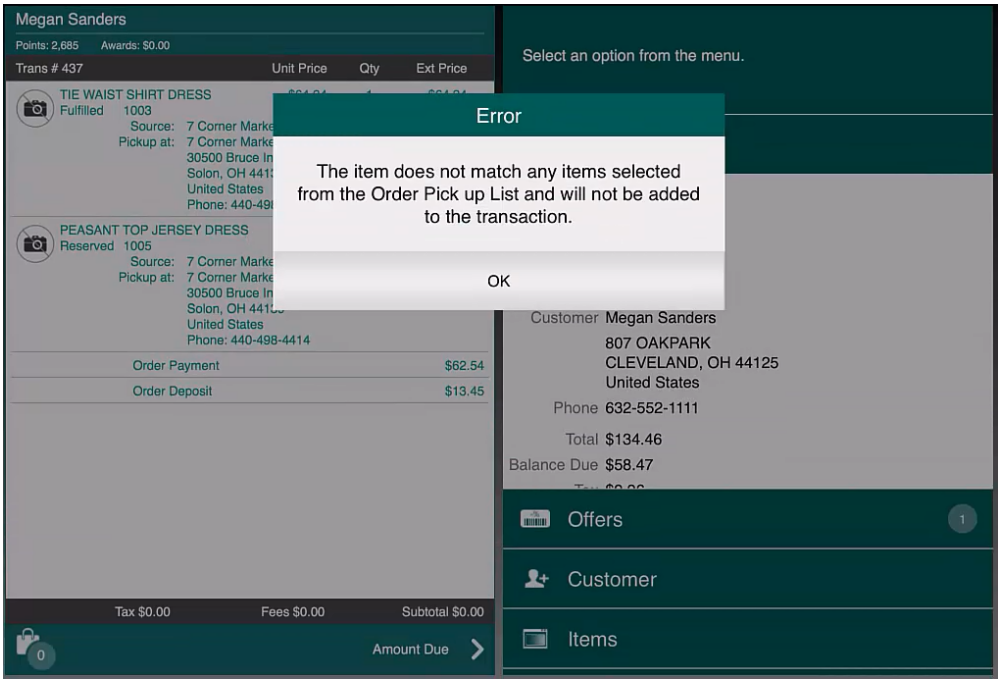
   If the item does not scan, select **Manual Entry** and enter the ID of the item.

Figure 15–21 Manual Entry



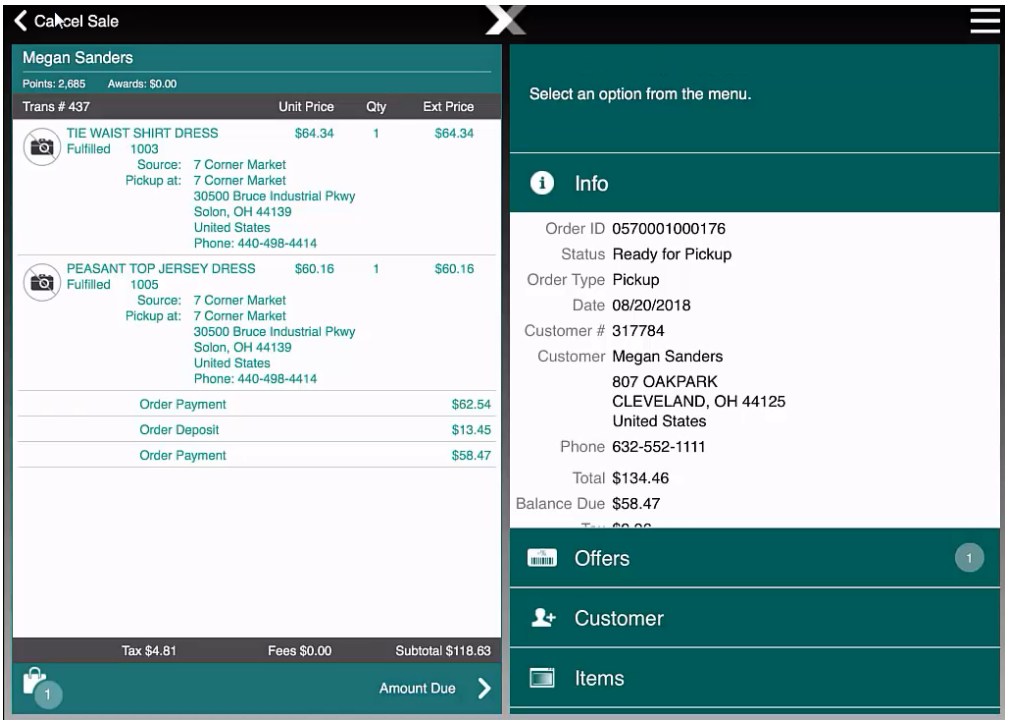
If an item is scanned or entered that does not match any items selected from the order pickup list, a warning message is shown and the item is not added to the transaction. Select **OK** to continue.

Figure 15–22 Reserved Wrong Item Scanned



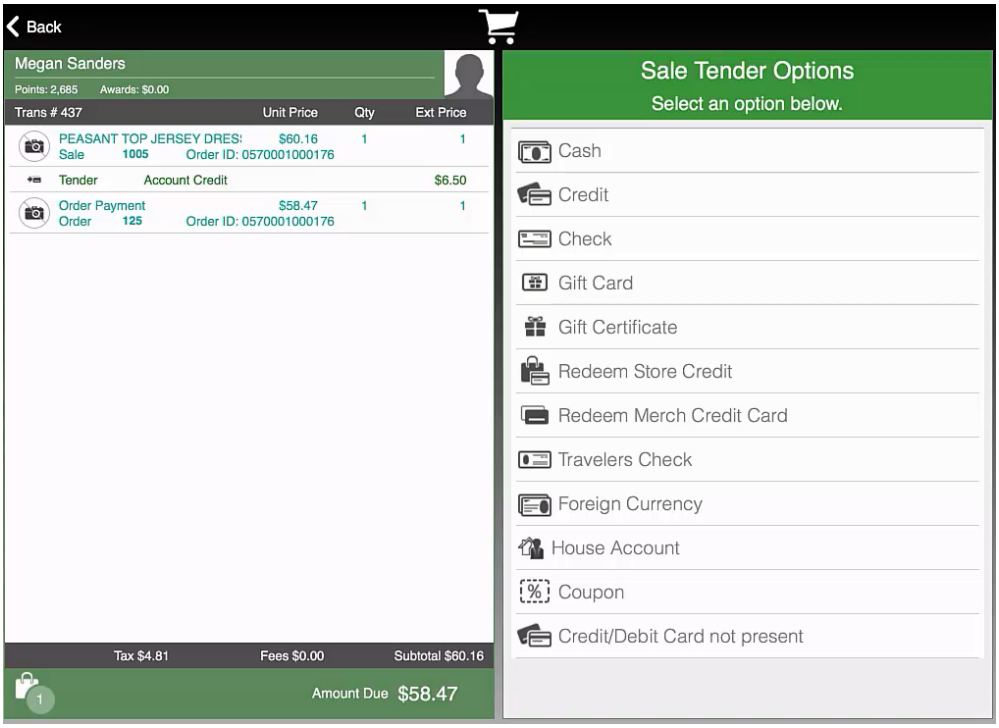
8. After an items has been scanned or manually entered, it is added to the transaction. The item status changes from Reserved to Fulfilled.

Figure 15–23 Scanned Item Added to Transaction



9. Continue the transaction:
   - Click **Amount Due** to tender and complete the transaction.
   - Click **Exit Order** to exit the order and continue the transaction.

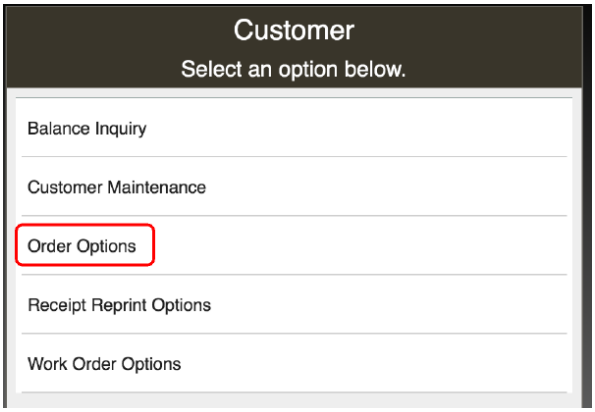
Figure 15–24 Order Tenders



Back Office Customer Maintenance

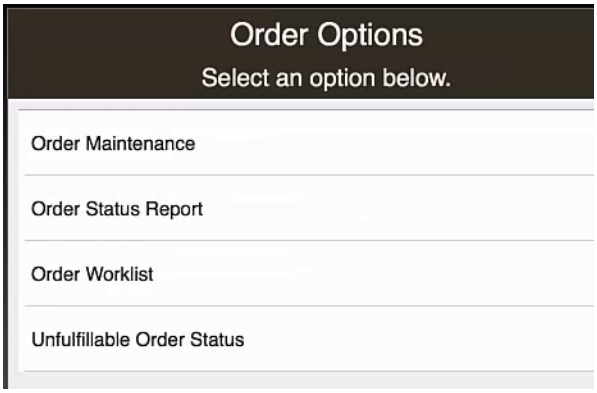
1. Select **Customer** from the Main Menu.

Figure 15–25 Mobile Tablet Customer Menu



2. Select the Order Options option from the Customer menu.

Figure 15–26 Mobile Tablet Order Options Menu



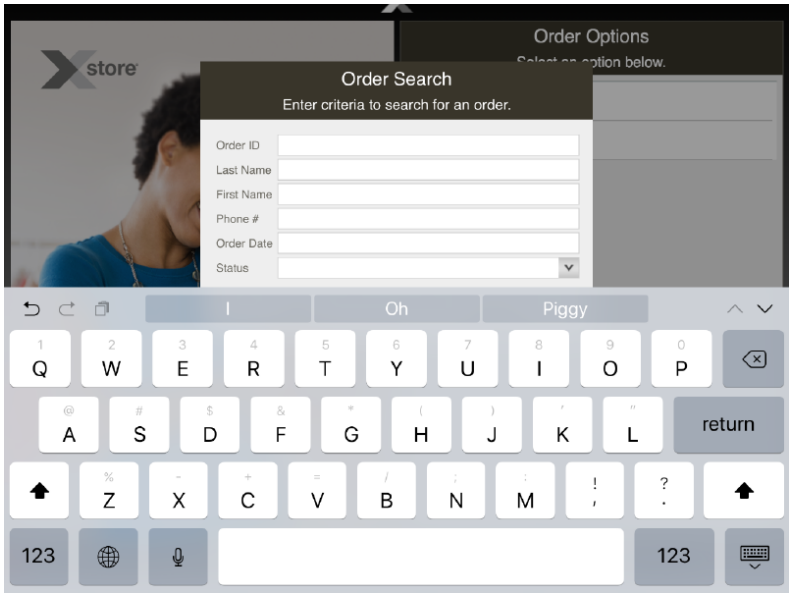
Order Maintenance

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.

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.

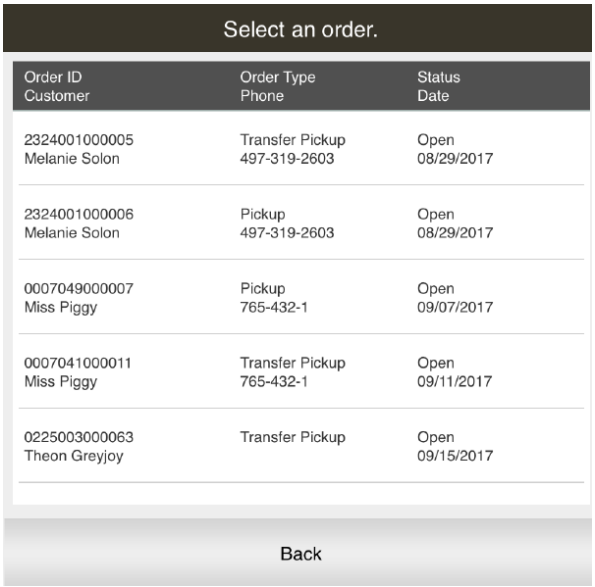
1. Select the **Order Maintenance** option from the Order Options menu.

Figure 15–27 Order Search Form



2. Enter criteria to locate the order.

Figure 15–28 Order Search Example Return List



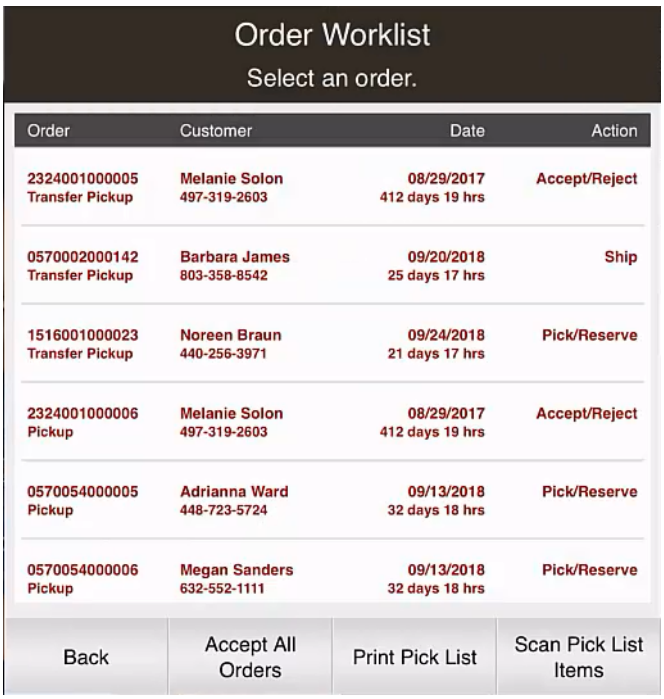
Order Worklist

The Order Worklist shows orders that require action: either fulfillment, or rejection if you cannot fulfill the request.

1. Select the Order Worklist option from the Order Options menu to display a list of orders to be fulfilled by this store.

> **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.

Figure 15–29 Order Worklist with Scan Pick List Items Enabled



2. Select an order from the Order Worklist and then select one of the following:

Table 15–1 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 Order
Accept All Orders	Accept all orders. See Accept Order.
Print Pick List	Prints a single pick list for all accepted orders
Scan Pick List Items	Only shown if **Enable Pick Slip Scanning** configuration is enabled. This option displays a scannable pick list rather than printing a paper pick slip. Items to pick/reserve can be scanned or entered manually.

Note: 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.

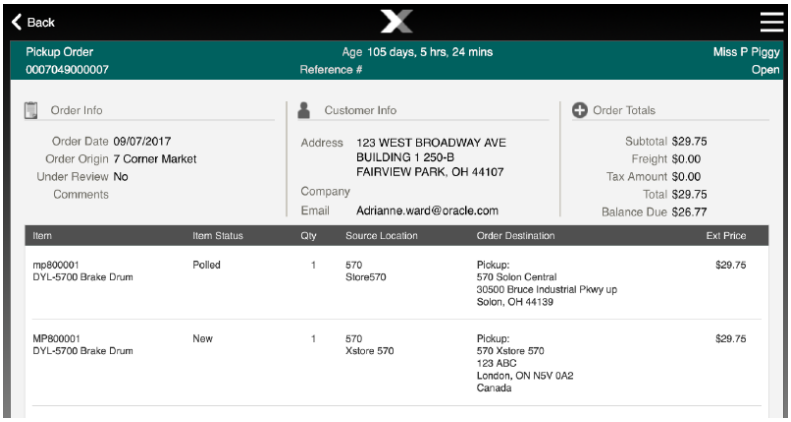
If you select **Accept All Orders** a prompt displays indicating orders under review will not be changed.

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.

Figure 15–30 View Order



The following information is displayed on this screen:

Table 15–2 Order Maintenance Screen

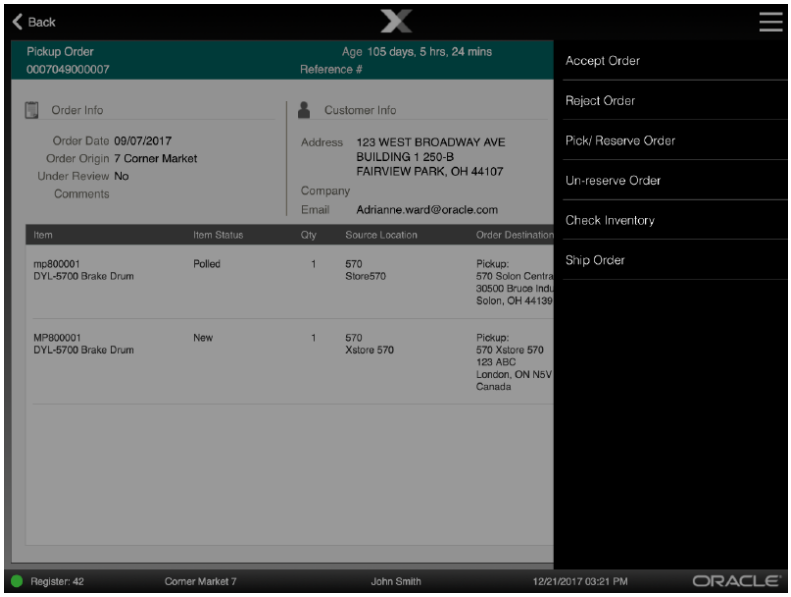
Component	Description
1. Static Area	Contains the type of order, Customer Name, order number, age information, and reference number. The order number is the number provided by the system that requested/originated the order. The reference number is an optional value that identifies the order. It is the order ID appended with last order line sequence number. The status displays on the far right. See Order Status for status definitions. Order Type values include the following: ▪ **Transfer Pickup Order** (Pickup This Store) ▪ **Pickup Order** (Pickup Other Store) ▪ **Delivery Order** (Customer Delivery)

Table 15–2 (Cont.) Order Maintenance Screen

Component	Description
2. Order Information	■ 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	■ 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	■ 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 ee amount is included in the total). ■ Balance due - The amount due for the order.
5. Item Information	■ Status - The item status. See Item Status. ■ 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 Context Menu to process the order: Check Inventory, Accept Order, Pick/Reserve Order or Reject Order.

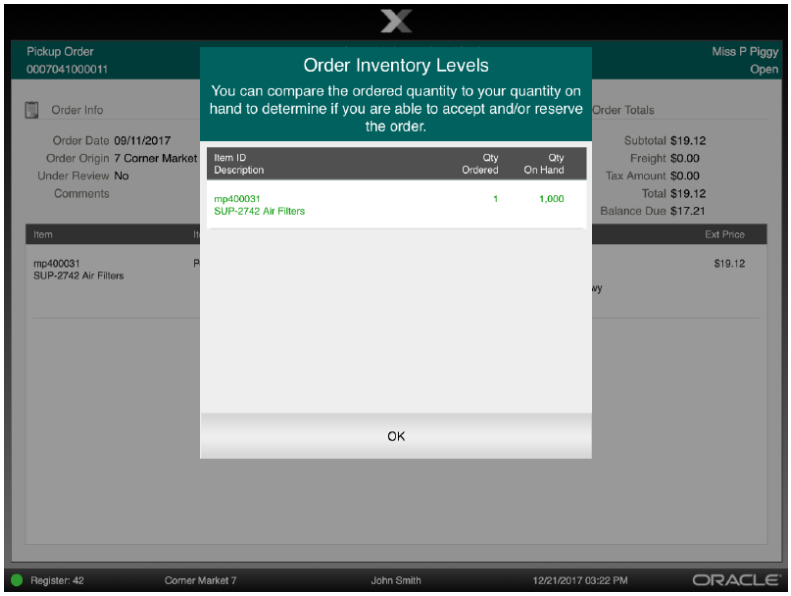
Figure 15–31 Context Menu Options



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.

Figure 15–32 Order Inventory Levels Form

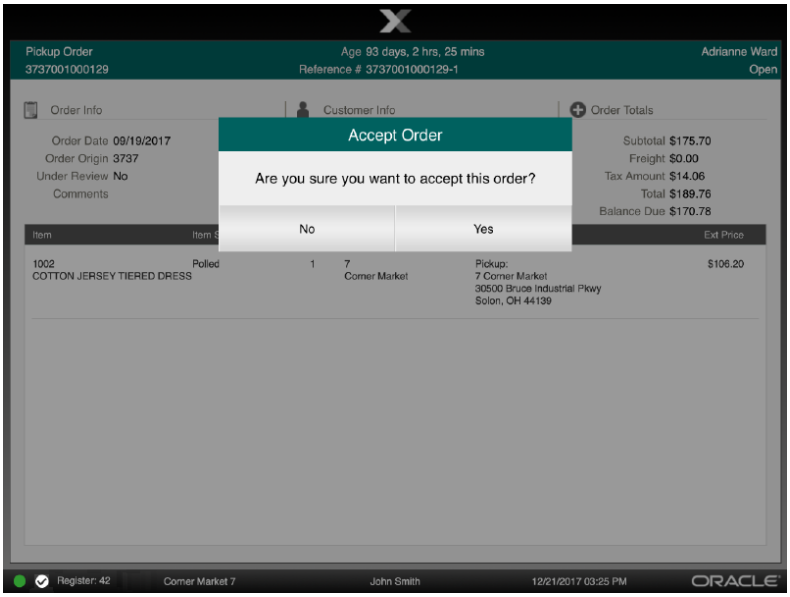


Accept Order

To Accept an order or specific items on an order:

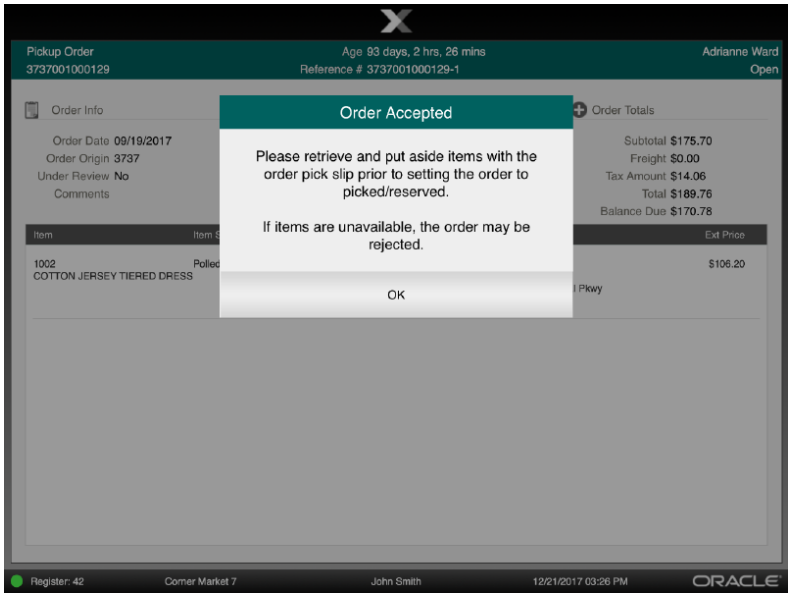
1. At the Order Maintenance screen, select the specific items or for the entire order, select the **Accept Order** menu option. See Figure 15–23.

Figure 15–33 Accept Order Prompt



2. At the confirmation prompt, select **Yes** to accept the order.
3. At the Order Accepted prompt, select **OK** to continue.

Figure 15–34 Order Accepted Prompt



Pick/Reserve Order

After accepting an order, the items need to be retrieved and put aside. When picking/reserving items for an order, the screens shown are dependant on your stores configuration.

To display a scannable pick list rather than printing a paper pick slip, **Enable Pick Slip Scanning** must be enabled and the Scan Pick List Items option is shown at the bottom of the Order Worklist screen. Continue with Scan Pick Slip Items.

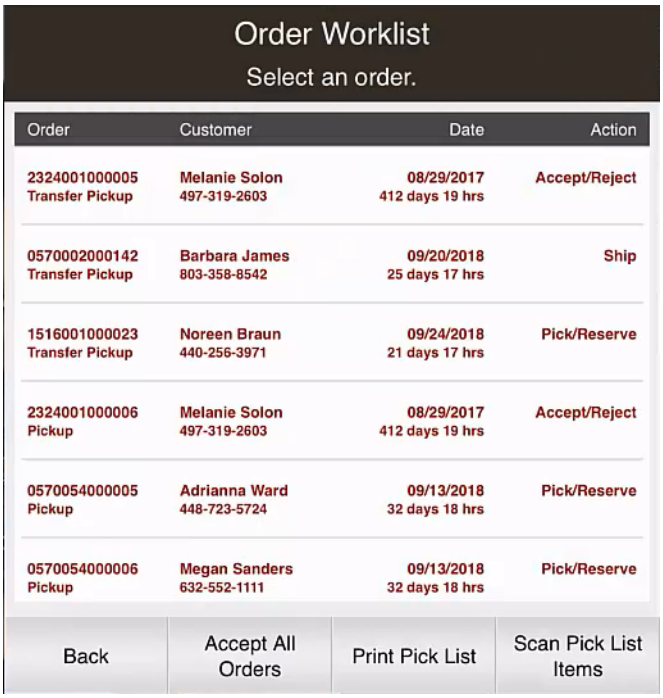
If the **Enable Pick Slip Scanning** setting is not enabled, the pick slip is printable from the Order Worklist screen or automatically printed when the order is accepted. Continue with Picking/Reserving an Order.

Scan Pick Slip Items

Using the virtual pick list, items to pick are scanned from a list on a mobile device. If needed, the items can be entered manually if the barcode is unreadable. Scanning items ensures the items being set aside, for order fulfillment, are the exact items required. This functionality replaces the printed pick list from automatically printing upon Order Acceptance. The option to print a pick list is still available if desired by selecting the **Print Pick List** option from the Order Worklist.

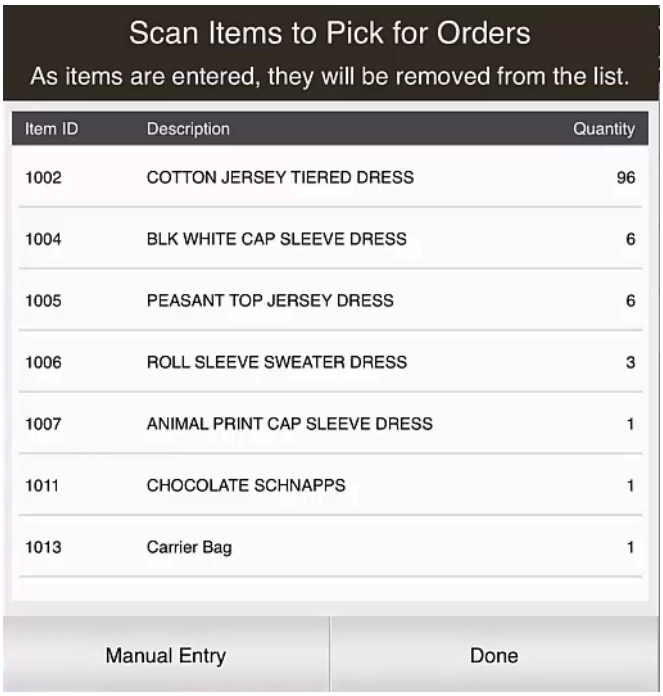
1. At the Order Worklist, select the order and select **Scan Pick List Items**.

Figure 15–35 Order Worklist - Scan Item



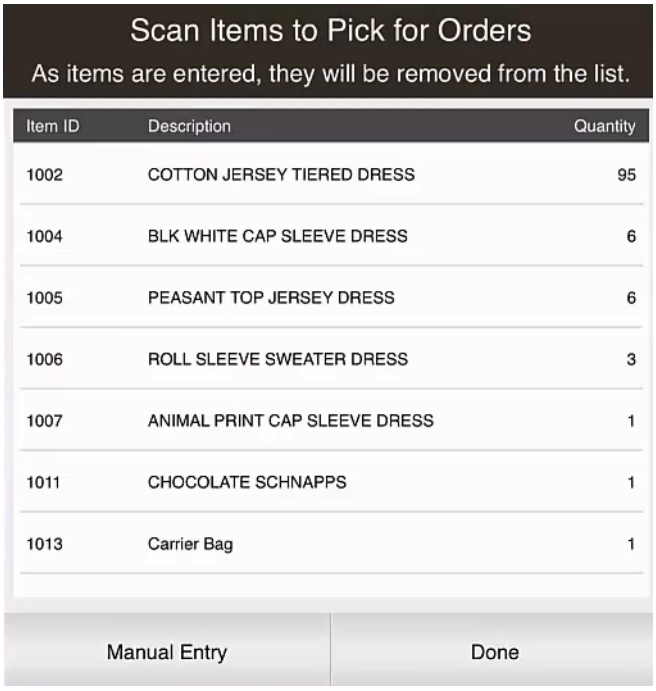
2. If your store is configured to disallow the splitting of an order line where there are multiple quantities into multiple order lines, a warning message that their store does not allow fulfilment of partial line orders. Confirm you have the quantities required for line items before scanning.

Figure 15–36 Scan Items to Pick for Orders



3. On the mobile device scan each item as it is picked. As items are scanned, the Quantity of that item goes down.

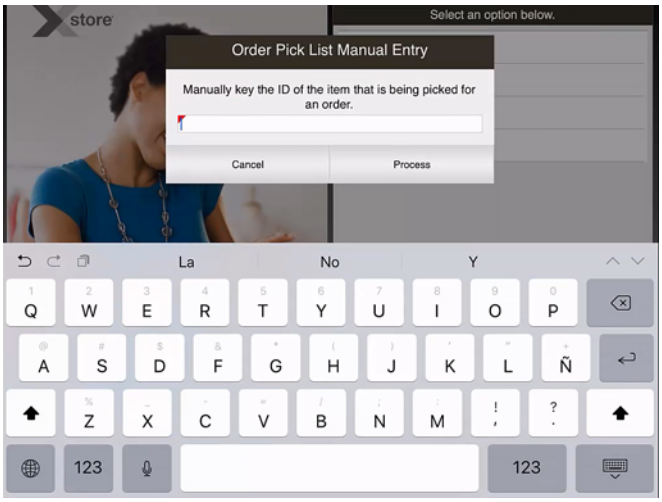
Figure 15–37 Scan Items to Pick for Orders - After Scan



Continue scanning each item until all items have been scanned. When the required quantity of the item has been scanned, the item is removed from the list.

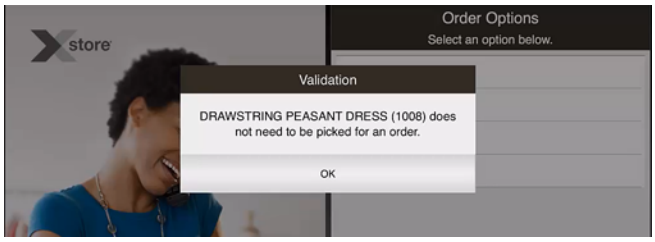
If the item does not scan, select **Manual Entry** and enter the ID of the item.

Figure 15–38 Scan Pick List Manually



If an item is scanned or entered that does not belong to an order, a warning message is shown. Select **OK** to continue.

Figure 15–39 Wrong Item Scanned



Print Pick List The pick slip is printable from the Order Worklist screen (see Figure 15–29) or automatically printed when the order is accepted.

Figure 15–40 Pick Slip

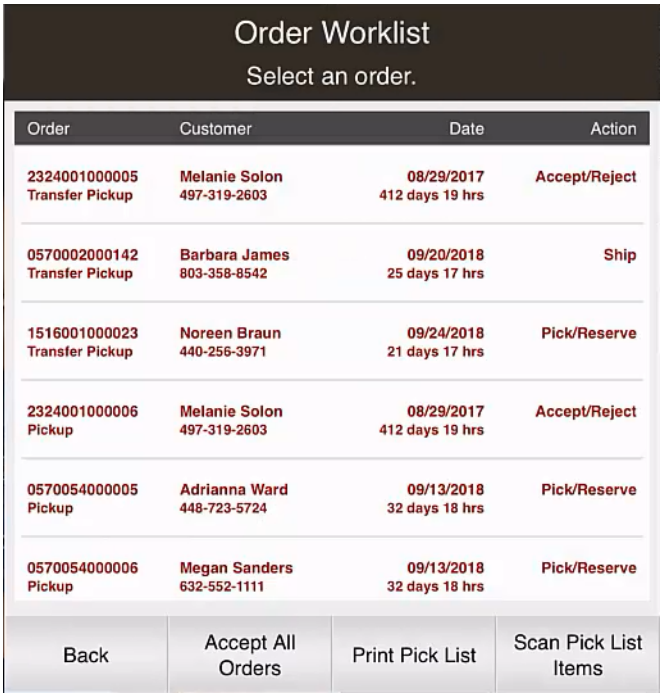


Picking/Reserving an Order

To Pick/Reserve items on an order:

1. At the Order Worklist screen, select the order to pick/reserve.

Figure 15–41 Order Worklist



2. At the Order Maintenance screen, select the specific items or for the entire order, select **Pick/Reserve Order**. 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.

   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.

   If your system has the **Scan Items Prior to Adding to Transaction** setting configured, the items display in a list to scan from to confirm they are the correct items.

   If your system does not have the **Scan Items Prior to Adding to Transaction** setting configured, collect the items and continue at step 5.

3. Scan the items from the list. The items will be marked Reserved and can be shipped or ready for customer pickup.

   If the item does not scan, select **Manual Entry** and enter the ID of the item.

   If an item is scanned or entered that does not belong to an order, a warning message is shown. Select **OK** to continue.

4. After all items for the order have been scanned or manually entered, select **OK** at the prompt.

5. The items will be marked Reserved and can be shipped or ready for customer pickup.

   - For Delivery type orders, use the Ship Order function to complete the order delivery process. See Shipping an Order.
   - For other Order types, the Order status is updated to Ready for Pickup.

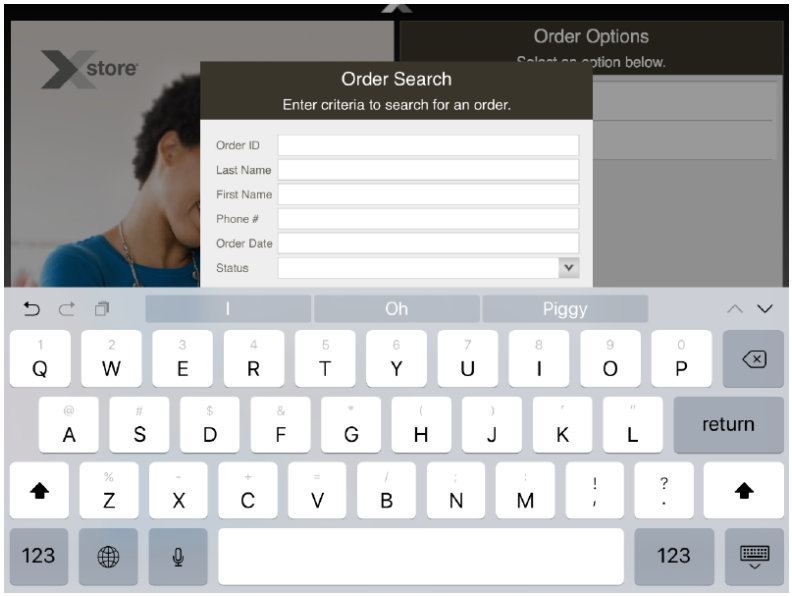
Un-reserve Order

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 - Order Options - Order Maintenance**.

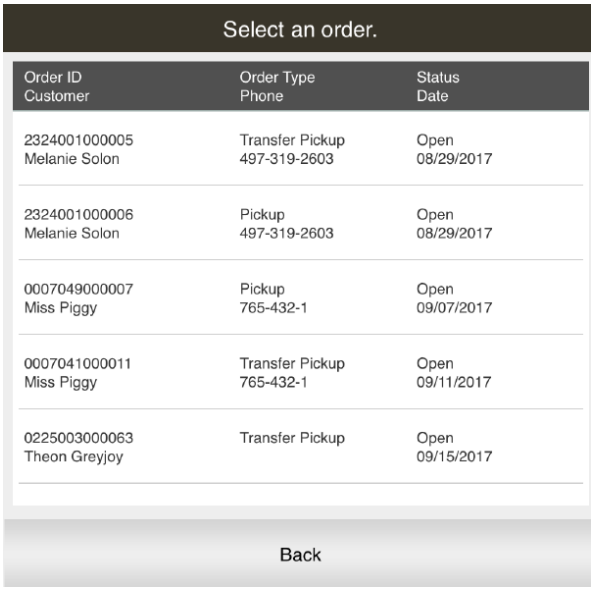
2. Enter the search criteria and select **Process**.

Figure 15–42 Order Search



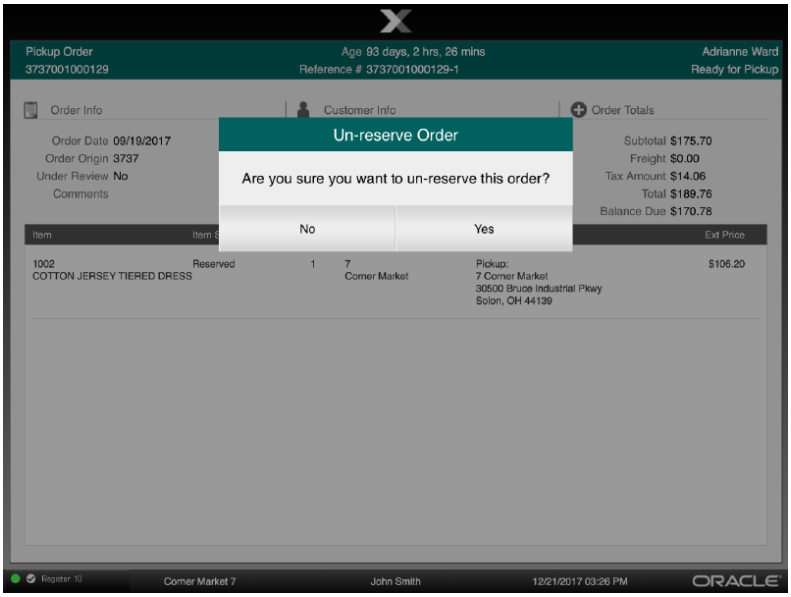
3. If more than one order is returned, select the order you wish to modify and press **Enter**.

Figure 15–43 Order Search Results



4. Select **Un-reserve Order**.

Figure 15–44 Un-reserve Order Menu Option



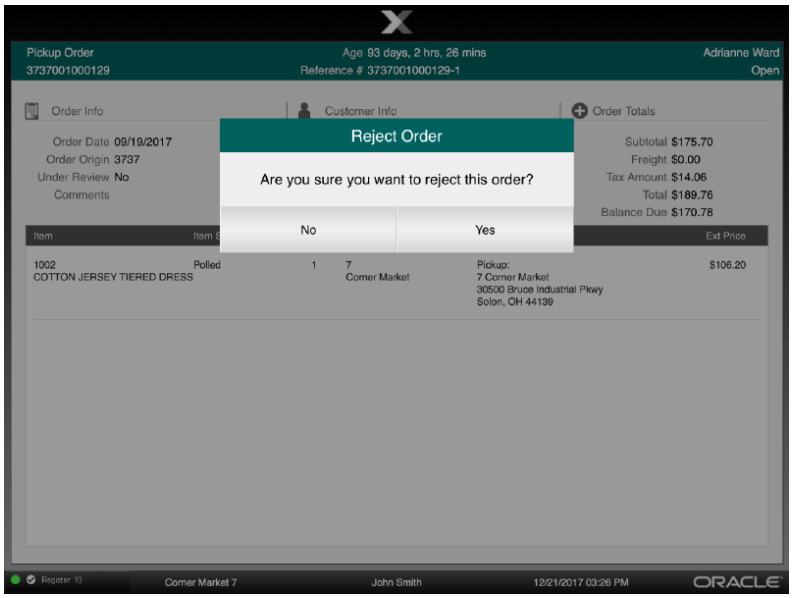
The order status changes to Open and the Item Status changes to Accepted.

Reject Order

When you reject an order or specific item in the 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 specific items or for the entire order, select the Reject Order menu option.
2. At the Reject Order confirmation prompt, select Yes to reject the order.

Figure 15–45 Reject Order Confirmation Prompt



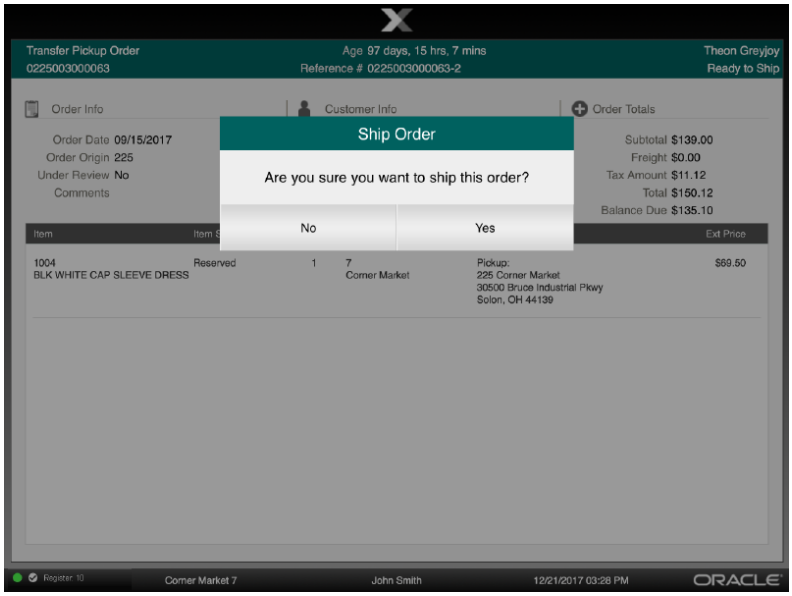
3. If prompted, select a reject reason code.

Shipping an Order

For Delivery type orders, select the Ship Order menu option to ship the items. Xstore Mobile 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.

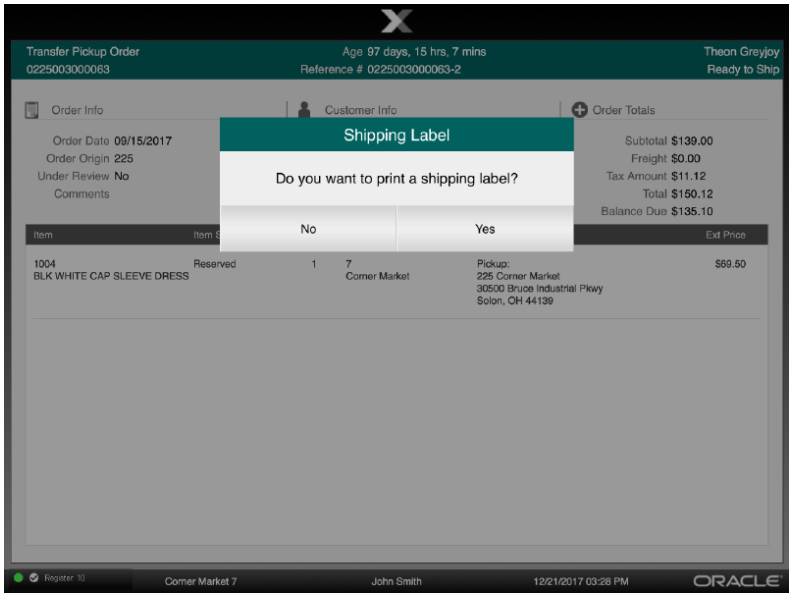
1. At the Order Maintenance screen, select the **Ship Order** menu option.
2. When prompted, select **Yes** to confirm you want to ship the order.

Figure 15–46 Ship Order



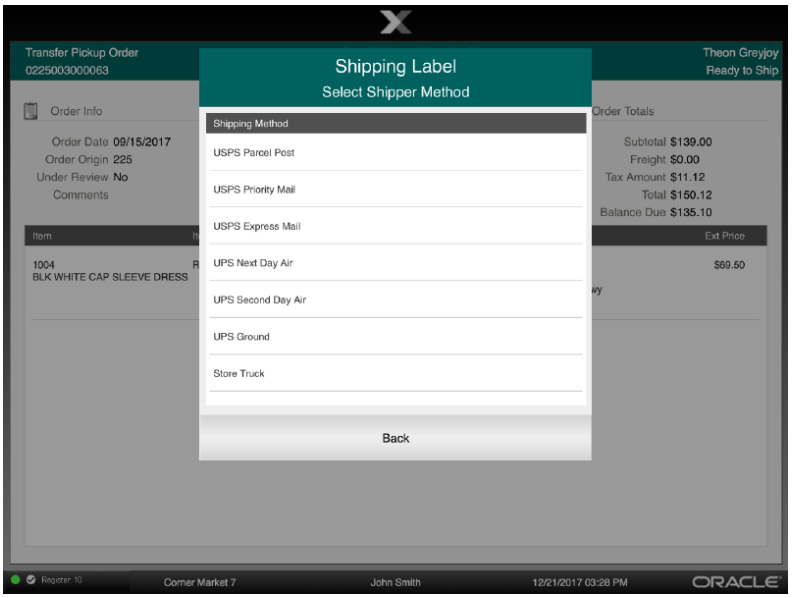
3. When prompted, select **Yes** to print a shipping label.

Figure 15–47 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:
   - To **accept** the shipping method selected during order setup, press **Enter** and go to step 6.
   - To **change** the shipping method selected during order setup, select Override Shipping Method, select a shipping method from the list and press **Enter**.

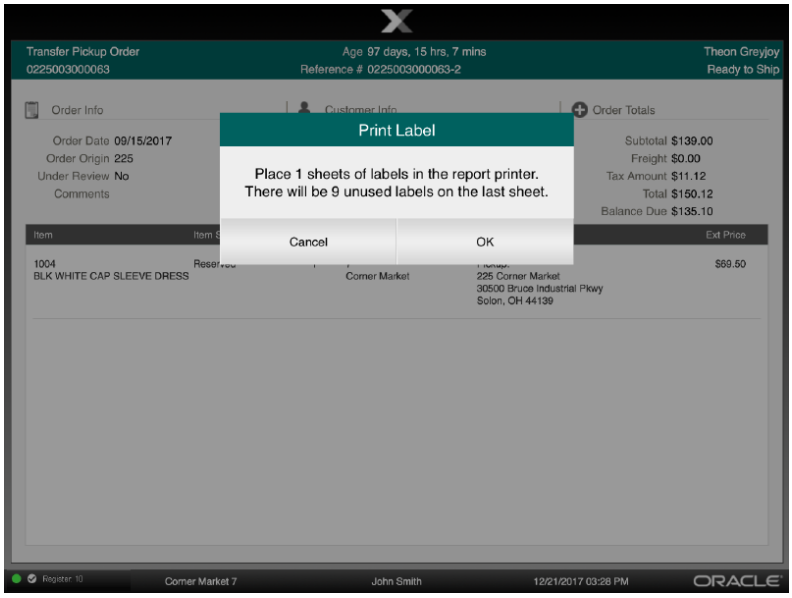
Figure 15–48 Select Shipping Method



Note: The **Override Shipping Method** option is controlled by security.

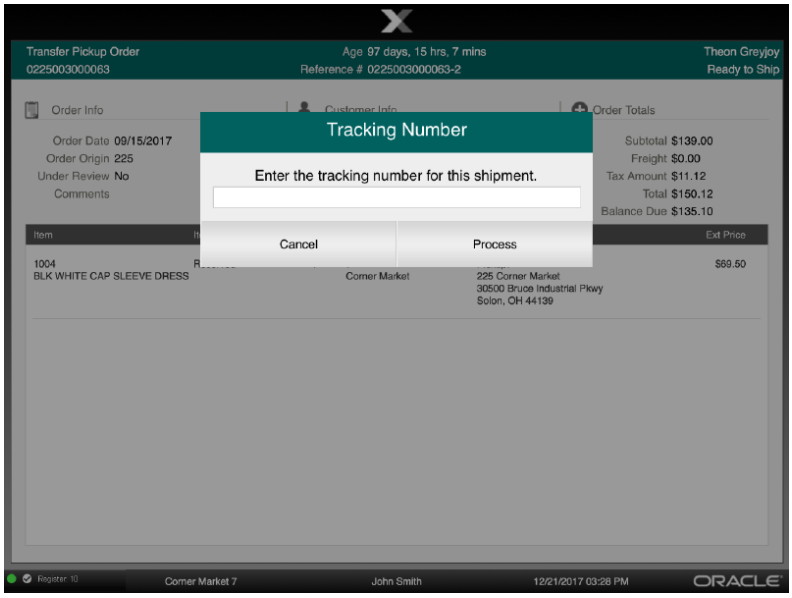
You are prompted for Manager override if you do not have the required level of security to perform this function as indicated by the Security Override icon shown here.

Figure 15–49 Print Label Prompt



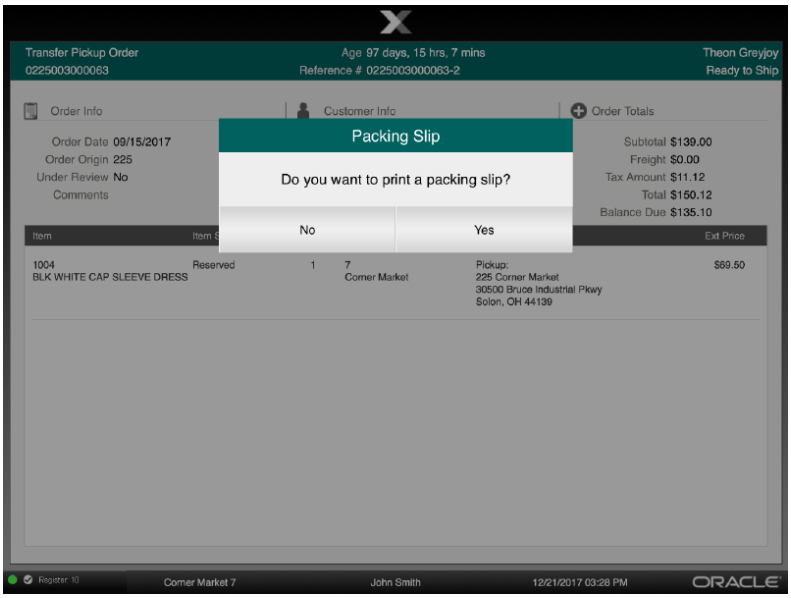
6. Print the shipping label. If the shipping carrier's label cannot be printed for any reason, you can print a label manually by following the prompts for label location selection and printing.

Figure 15–50 Tracking Number Prompt



7. If prompted, enter the tracking number for the shipment and select Process.

Figure 15–51 Packing Slip Prompt



8. If prompted, to print a packing slip for the shipment, select **Yes** to print the packing slip.

   Xstore Mobile 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.

Maintaining/Viewing an Order

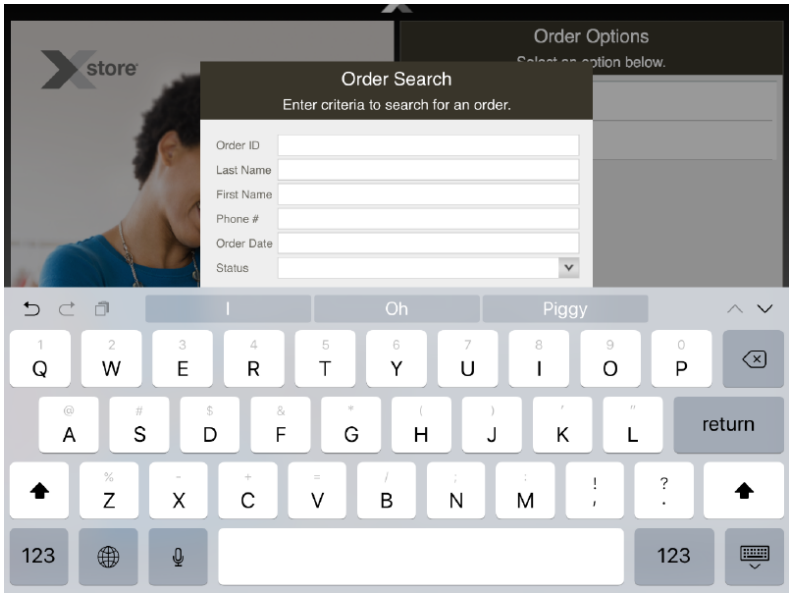
If an Order Broker order was created in your store, you can use the following steps to track the progress of the order as it is processed.

1. To maintain/view an order, select the **Customer** option from the Back Office Main Menu.
2. Select the **Order Options** option from the Customer menu, then select the Order Maintenance option from the Order Options menu. See Figure 15–26.
3. At the Order Search form, enter the search criteria needed to find an order:

   Note: To find all pending orders for fulfillment, select the **Open** Order Status value as the search criterion.

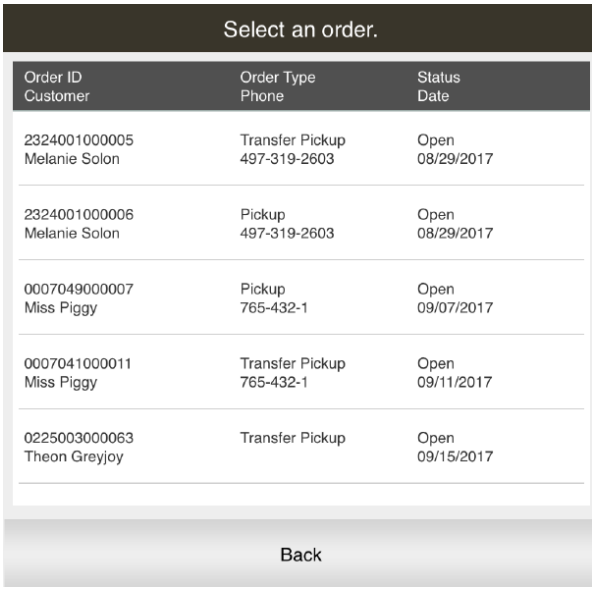
   - **Order ID:** The order identifier number.
   - **Last Name:** The customer's last name.
   - **First Name:** The customer's first name.
   - **Phone:** The customer's phone number.
   - **Order Date:** The date the order was set up.
   - **Order Status:** See Order Status.

Figure 15–52 Order Search Form



4. At the Order Search results list, select an order and press **Enter**.

Figure 15–53 Order Search Results List



The system displays the Order maintenance screen. See View Order for details.

Allocating an Item

If you do not use the Xstore Mobile 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 Xstore Mobile 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.

16

Pre-Sale Transactions

A Pre-Sale Transaction is typically performed when a customer wants to purchase an item that is not currently available for sale in the store. Pre-sale transactions have the following requirements:

- The transaction must be associated with a customer.
- The transaction must be paid in full at setup.
- Only items on file can be added to the transaction.
- All Pre-Sale items must be picked up at the same time, partial pickups are not allowed.
- Pre-Sale accounts cannot be canceled if the customer is not present.

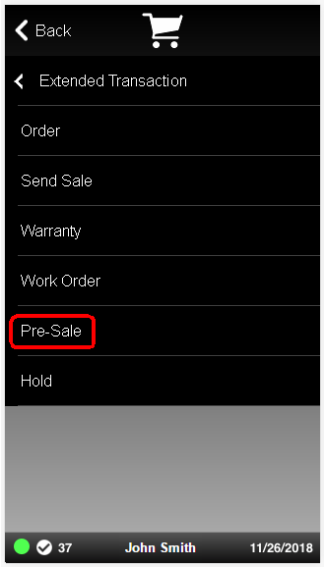
This chapter describes the following topics:

- Pre-Sale Account Transactions
- Creating a Pre-Sale Transaction
- Picking Up Pre-Sale Items
- Canceling a Pre-Sale Account

Pre-Sale Account Transactions

1. From the Sale screen Context Menu, select **Extended Transaction**.

Figure 16–1 Extended Transaction Menu



2. Click **Pre-Sale**.

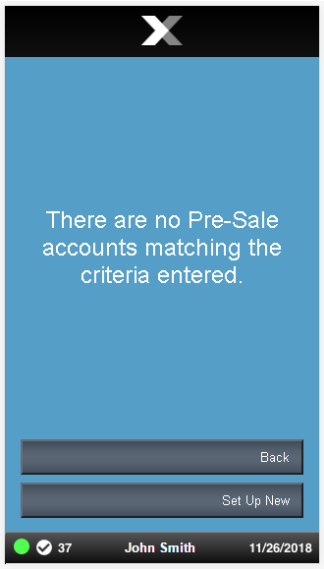
   The window that opens will depend upon whether a customer is associated with the transaction and, if so, whether that customer has any existing pre-sales accounts.

If a customer is associated with the transaction

When a customer has been associated with the current transaction, the system automatically searches the database to locate any open Pre-Sale accounts for this customer.

- If no Pre-Sale accounts are found, you have the following options:

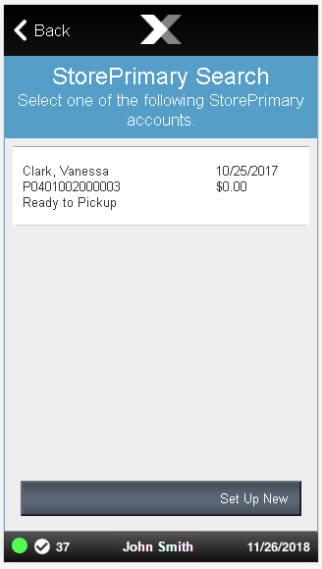
Figure 16–2 No Pre-Sale Accounts Found



– Select **Set Up New** to create a new Pre-Sale transaction. Continue with Creating a Pre-Sale Transaction.

- If a Pre-Sale account is found, you have the following options:

Figure 16–3 Pre-Sale Account Found

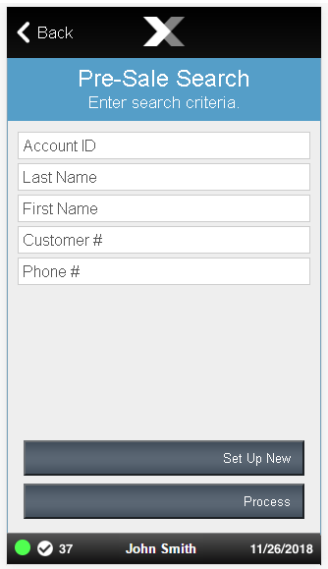


- Select **Set Up New** to create a new Pre-Sale account. Continue with Creating a Pre-Sale Transaction.
- Select the Pre-Sale account.

If a customer has not been associated with the transaction

When there is no customer associated with the current transaction, the Pre-Sale Search form displays. You have the following options:

Figure 16–4 Pre-Sale Search Form



- Select Set Up New to create a new Pre-Sale account. After associating a customer with the transaction, continue with Creating a Pre-Sale Transaction.
- To search for a Pre-Sale account, enter search criteria.
  - Account ID - The Pre-Sale account identifier.
  - Last Name - The Pre-Sale account owner's last name.
  - First Name - The Pre-Sale account owner's first name.
  - Customer ID - The Pre-Sale account owner's customer Id.
  - Phone # - The Pre-Sale account owner's phone number.
- Select **Process**.
  - If there are no Pre-Sale accounts matching your search criteria, you will see a message indicating no accounts were found. See Figure 16–2.
  - If at least one Pre-Sale account matches your search criteria, the account or accounts are listed in the Pre-Sale Account Search Results Form. See Figure 16–3.
    - Select **Back** to return to the Sale screen.
- Add items to the transaction.
- When you are done creating the pre-sale:
  - Click **Exit Pre-Sale** to perform other actions in the transaction.
  - Click **Amount Due** to tender the transaction. Xstore prompts for the deposit amount.
- Press **Enter** to confirm the deposit amount.

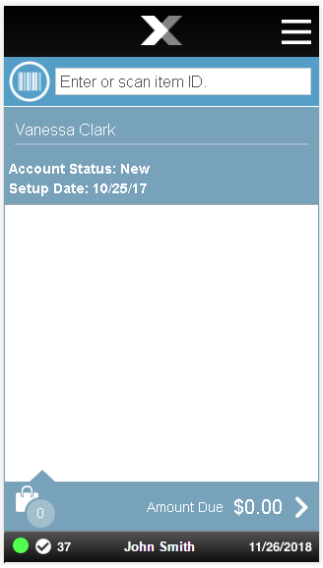
Note: Pre-sale items must be paid in full at setup. You cannot change the deposit amount.

Continue the transaction.

Creating a Pre-Sale Transaction

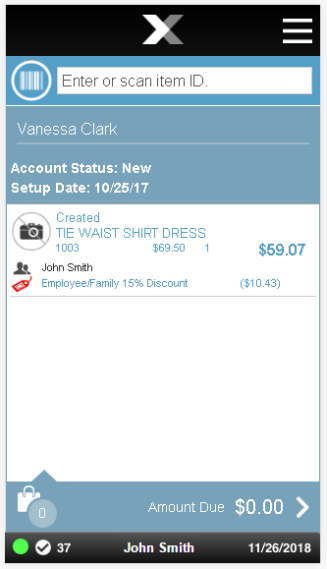
1. After a customer is associated with the transaction, scan or enter the Pre-Sale item ID.

Figure 16–5 Pre-Sale Item ID Prompt



2. You have the following options at the Pre-Sale screen before tendering:

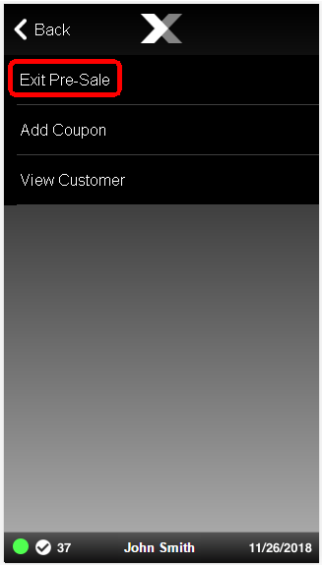
Figure 16–6 Pre-Sale Screen



- You can scan another Pre-Sale item.
- You can change an item by:
  - Adding a discount (See Adding a Discount to an Item or Transaction).
  - Changing the item price (Changing the Item Price).
  - Voiding a line item (Voiding an Item).
  - Voiding a discount (this is only available for items with a discount applied, and uses the same process as voiding an item).

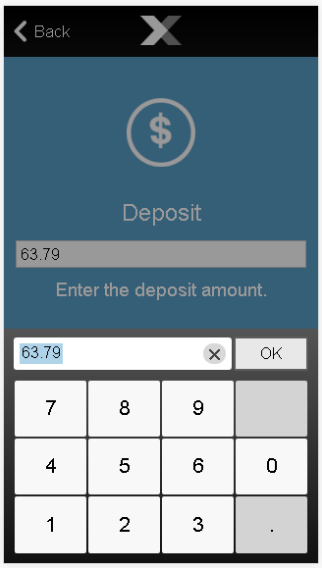
3. After adding items to the Pre-Sale, select **Exit Pre-Sale** to exit Pre-Sale mode and return to sale mode before tendering the sale.

Figure 16–7 Exit Pre-Sale Option



4. When prompted, press **Enter** to accept the deposit amount. Pre-Sale items must be paid in full at setup.

Figure 16–8 Pre-Sale Deposit Amount Prompt



Note: You cannot over tender a Pre-Sale.

You cannot override the deposit amount. Pre-Sale items must be paid in full at setup.

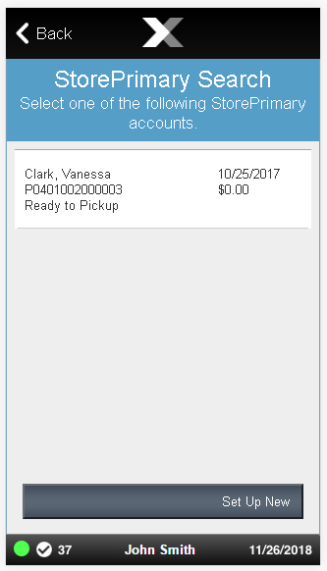
Pre-Sale items may only be modified in the Pre-Sale screen.

You cannot change the Pre-Sale item quantity.

Picking Up Pre-Sale Items

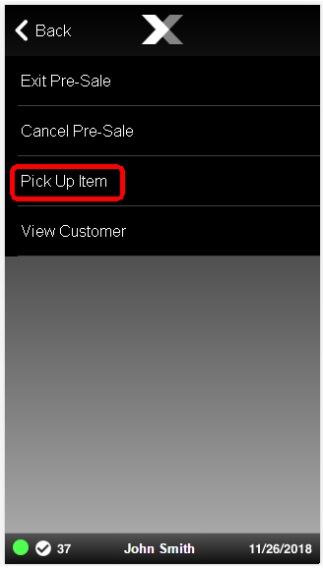
1. From the Sale screen Context Menu, select **Extended Transaction**.
2. Click **Pre-Sale**.
3. Find the Pre-Sale Account:
   - If prompted, enter search criteria to find the Pre-Sale Account.
   - If a customer has been associated with the transaction, Xstore Mobile returns a list of Pre-Sale accounts for the customer.
4. Select a Pre-Sale account from the list.

Figure 16–9 Pre-Sale Account List



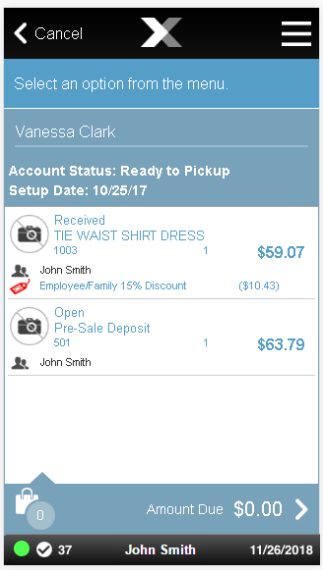
5. At the Pre-Sale Account screen, select the Context Menu.
6. Select **Pick Up Item**.

Figure 16–10 Pick up Item



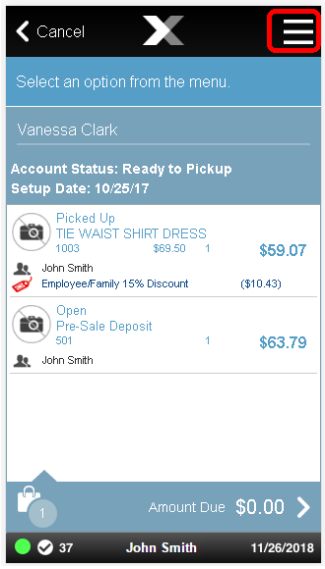
Note: Partial pickups are not permitted for pre-sales.

Figure 16–11 Pre-Sale Account Screen - Item Received



The system returns to the Pre-Sale Account screen and all items are marked as Picked Up.

Figure 16–12 Pre-Sale Account Screen - Item Picked Up Example

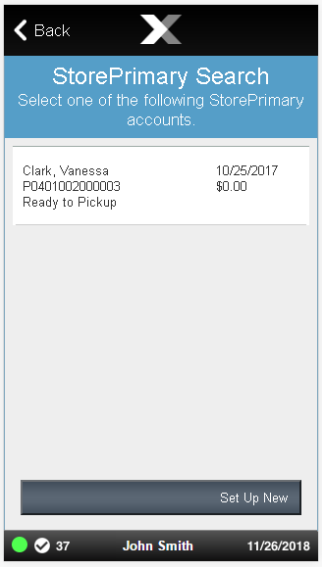


7. Complete the transaction. Select **Exit Pre-Sale** to return to the Sale screen before tendering the sale.

Canceling a Pre-Sale Account

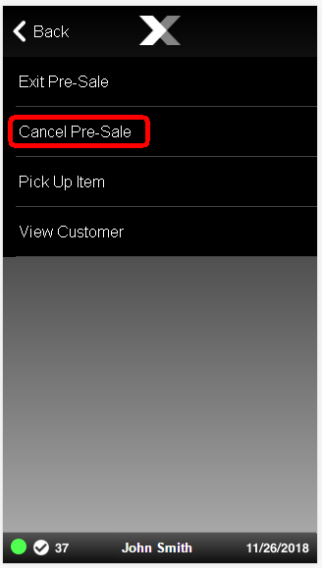
1. From the Sale screen Context Menu, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Pre-Sale** option.
3. Find the Pre-Sale Account:
   - If prompted, enter search criteria to find the Pre-Sale Account.
   - If a customer has been associated with the transaction, Xstore Mobile returns a list of Pre-Sale accounts for the customer.
4. Select a Pre-Sale account from the list.

Figure 16–13 Pre-Sale Account List



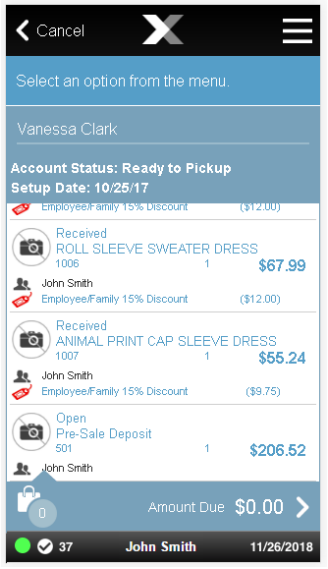
5. At the Pre-Sale Account screen, select the Context Menu.

Figure 16–14 Cancel Pre-Sale Option



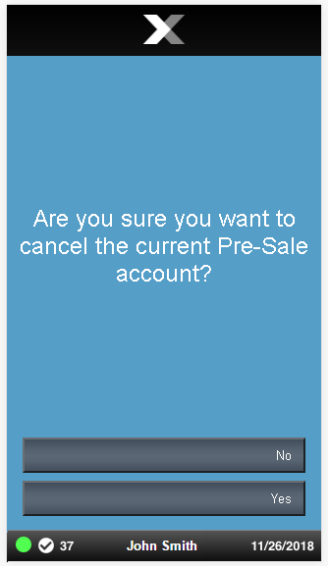
6. Select **Cancel Pre-Sale**.

Figure 16–15 Pre-Sale Account Screen



7. When prompted, select **Yes** to confirm you want to cancel this Pre-Sale account. Selecting **No** returns to the Pre-Sale Account screen.

Figure 16–16 Cancel Pre-Sale Account Confirmation Prompt



8. When prompted, select **Yes** to confirm the customer is present.

Figure 16–17 Customer Is Present Confirmation Prompt

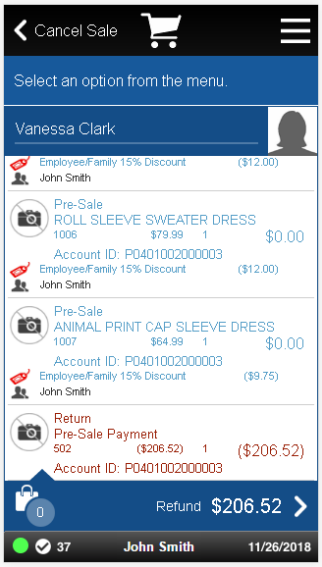


Note: If the customer is not present, select No. Pre-Sale Accounts cannot be canceled if the customer is not present.

Press **Enter** to close the prompt and return to the Pre-Sale Account screen.

9. The system returns to Sale mode where you can refund the customer's deposit.

Figure 16–18 Sale Screen - Refund Deposit



17

Hold Account Transactions

A Hold Account transaction is typically performed when customers plan to purchase merchandise, but would like the store to hold the item(s) for a short period of time so they can return to the store later to complete the purchase and pick up the reserved items. You must associate a customer with the transaction to ensure they receive the reserved items once they return.

The following topics are described in this section:

- Hold Account Transactions
- Creating a New Hold Account
- Searching for a Hold Account
- Picking Up Hold Items
- Canceling a Hold Account

Hold Account Transactions

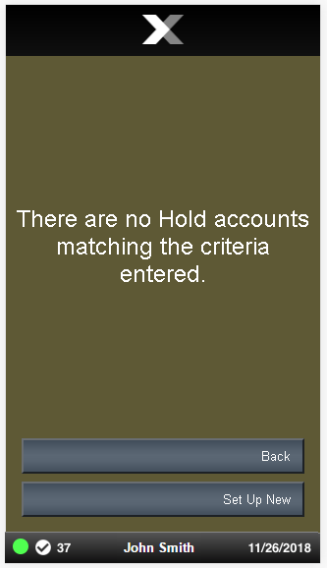
1. From the Sale screen Context Menu, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Hold** option.
3. The next steps depend on whether or not a customer is associated with the current transaction:
   - If you have assigned a customer, see If a customer is associated with the transaction.
   - If you have not assigned a customer, see If a customer has not been associated with the transaction.

If a customer is associated with the transaction

When a customer has been associated with the current transaction, the system automatically searches the database to locate any open Hold accounts for this customer.

- If no Hold accounts are found, you have the following options:

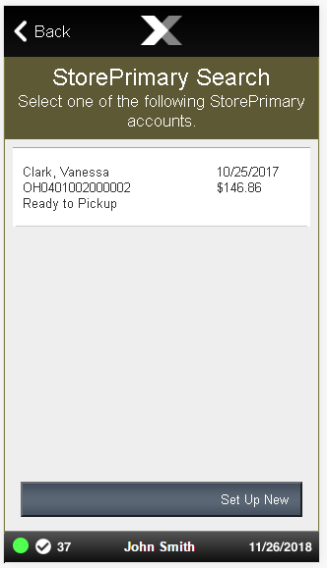
Figure 17–1 No Hold Accounts Found



- Select **Set Up New** to create a Hold account for this customer. Continue with Creating a New Hold Account.
- Select **Back** to enter new search criteria.

- If a Hold account is found, you have the following options:

Figure 17–2 Hold Account Found

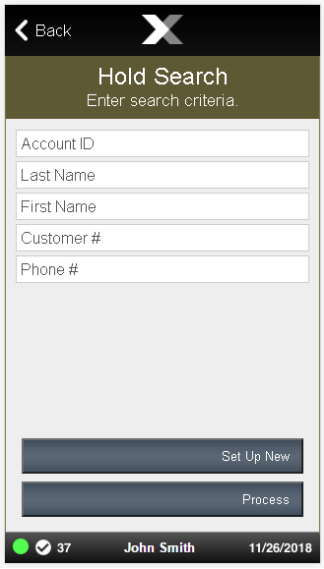


- Select **Set Up New** to create a new Hold account. Continue with Creating a New Hold Account.
- Press **Enter** to view the selected Hold account.

If a customer has not been associated with the transaction

When there is no customer associated with the current transaction, the Hold Search form displays. You have the following options:

Figure 17–3 Hold Account Search Form



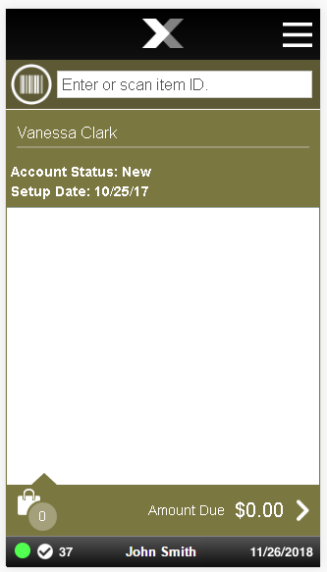
- Select **Set Up New** to create a new Hold account. After associating a customer with the transaction, continue with Creating a New Hold Account.
- To search for a Hold account, enter search criteria and select **Process**. See Searching for a Hold Account.
- Select Back to return to the Sale screen.

Creating a New Hold Account

...continued from step 3

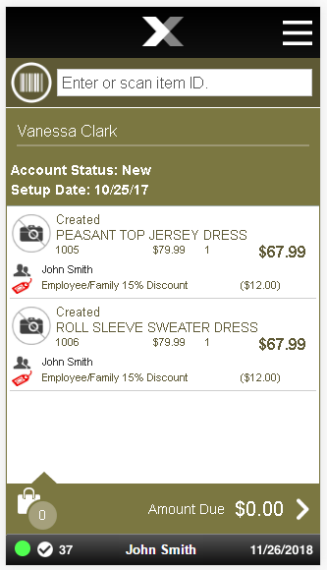
1. After a customer is associated with the transaction, scan or enter the Hold item ID.

Figure 17–4 Hold Item ID Prompt



2. You have the following options at the Hold screen before tendering:

Figure 17–5 Hold Account Screen - Item Added



You can scan another Hold item.

You can change an item by:

- Adding a discount (See Adding a Discount to an Item or Transaction).
- Changing the item price (Changing the Item Price).
- Voiding a line item (Voiding an Item).
- Voiding a discount (this is only available for items with a discount applied, and uses the same process as voiding an item).

3. After adding items to the Hold account, select **Exit Hold** to exit Hold mode and return to sale mode before completing the Hold account setup.

Note: Hold items may only be modified in the Hold screen.

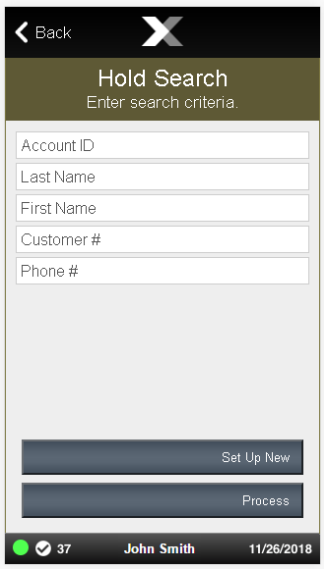
You cannot change the Hold item quantity.

Searching for a Hold Account

...continued from step 3

1. To search for a Hold account, enter search criteria in the Hold Search form.

Figure 17–6 Hold Account Search Form



- **Account ID:** The Hold account identifier.
- **Last Name:** The Hold account owner's last name.
- **First Name:** The Hold account owner's first name.
- **Customer ID:** The Hold account owner's customer ID.
- **Phone #:** The Hold account owner's phone number.

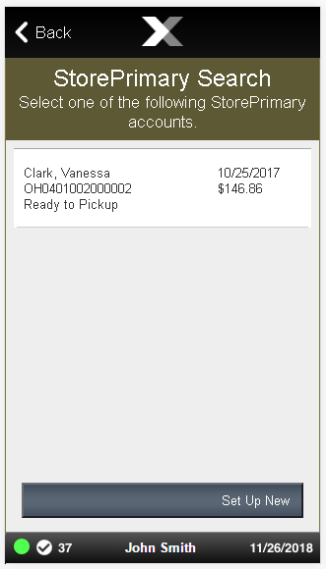
2. Select **Process**.
   - If there are no Hold accounts matching your search criteria, a message displays indicating no accounts were found. See Figure 17–1.
   - If at least one Hold account matches your search criteria, the account or accounts are listed in the Hold Account Search Results Form. See Figure 17–7.

Picking Up Hold Items

1. From the Sale screen Context Menu, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Hold** option.

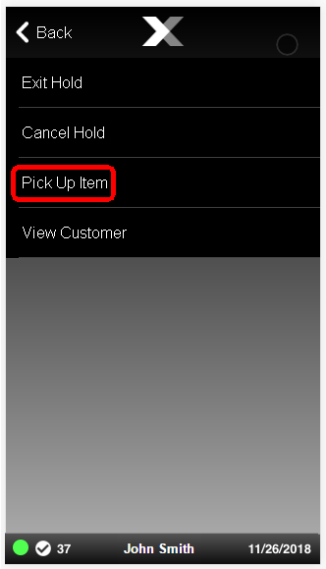
3. Find the Hold Account:
   - If prompted, enter search criteria to find the Hold Account.
   - If a customer has been associated with the transaction, Xstore Mobile returns a list of Hold accounts for the customer.
4. Select a Hold account from the list.

Figure 17–7 Hold Account Search Form List



5. At the Hold Account screen context menu, select **Pick Up Item**.

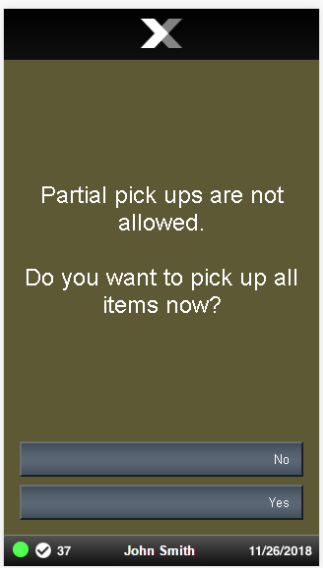
Figure 17–8 Hold Account Screen Context Menu Options



6. If prompted, select **Yes** to pick up all the Hold items. Selecting **No** returns to the Hold Account screen.

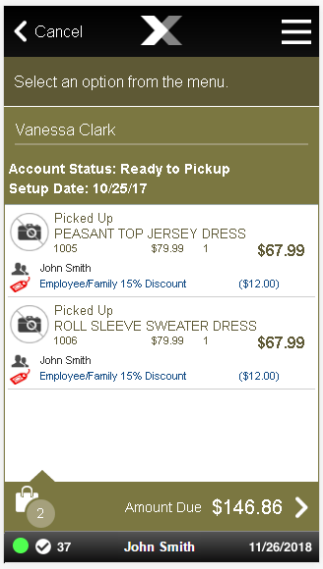
Note: This prompt only displays when there are multiple Hold items on the account.

Figure 17–9 Pick Up Items Confirmation Prompt



7. The system returns to the Hold Account screen and all items are marked as Picked Up.

Figure 17–10 Hold Account Screen - Items Picked Up



8. Complete the transaction:

   - Select **Amount Due** to complete the transaction. See Email Receipt Optionsfor more information about receipts.

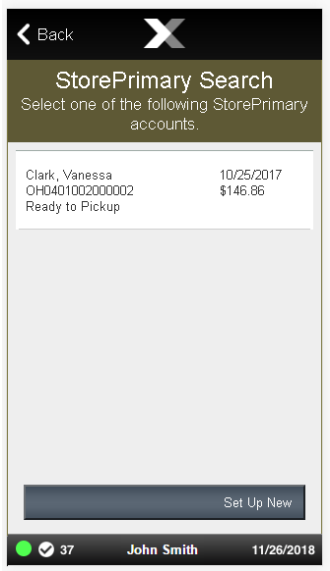
<OR>

- Select **Exit Hold** to return to the Sale screen before completing the transaction.

Canceling a Hold Account

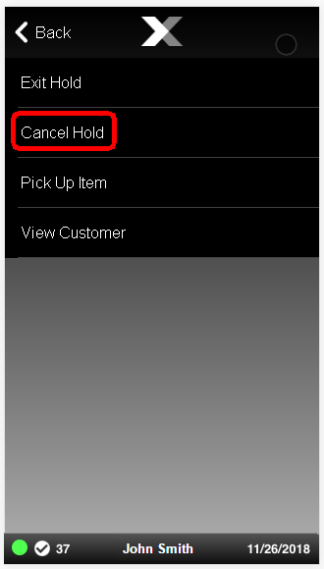
1. From the Sale screen Context Menu, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Hold** option.
3. Find the Hold Account:
   - If prompted, enter search criteria to find the Hold Account.
   - If a customer has been associated with the transaction, Xstore Mobile returns a list of Hold accounts for the customer.
4. Select a Hold account from the list.

Figure 17–11 Hold Account Search Form List



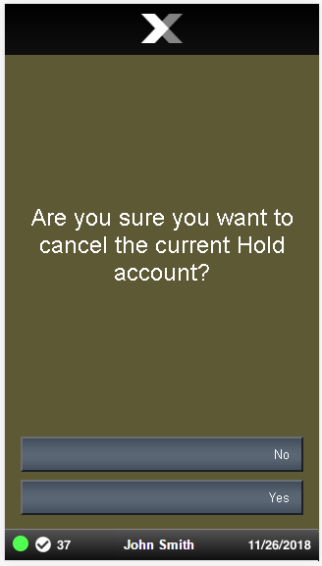
5. At the Hold Account screen context menu, select **Cancel Hold**.

Figure 17–12 Hold Account Screen Context Menu Options



6. When prompted, select Yes to confirm you want to cancel this Hold account. Selecting No returns to the Hold Account screen.

Figure 17–13 Cancel Hold Account Confirmation Prompt



7. The system returns to Sale mode where you can complete the cancel process.

18

Xcommerce

Xstore Xcommerce provides the ability to pull items from a guided selling website and sell in the store or create an Omni-Channel order. You must associate a customer with the transaction.

Create an Xcommerce Transaction

To create an Xcommerce transaction:

1. Click **Extended Transaction**.
2. Click **Xcommerce**.

   The browser launches in Xstore.
3. Click **Xcommerce**.

   The browser launches in Xstore.
4. Add items to the shopping cart in the Xcommerce site.
5. When all items have been added select Retrieve Items. Xstore displays the items as a list with the options to Mark for Sale, or Mark for Order.
6. Mark each of the items or remove items. When done select **Complete**.

   The transaction proceeds with the standard order flow (See Creating an Order or sale transaction process.
7. If necessary, associate a customer with the transaction. See Associating a Customer with a Transaction.
8. Add additional items to the transaction. See Entering Items.
9. Click Complete Transaction to tender the transaction. See Tendering the Transaction for more information.

   Continue the transaction.

Remove Item

To delete one or more items from the Xcommerce list:

1. Select **Remove Item** to delete from the list.
2. Select **Yes** to confirm the removal of items.

No Items

If the customer cannot find any items they would like to purchase from the guided selling shopping site:

1. Select **Return to POS** to return to Xstore.
2. Click **OK** at the prompt stating no items were returned.

19

Gift Registry

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 (formerly MICROS Retail Relate). The following can be done in the Register mode of Xstore Mobile:

- Selling Gift Registry Items
- Returning/Cancelling Gift Registry Items

Selling Gift Registry Items

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 (formerly MICROS Retail Locate) orders.

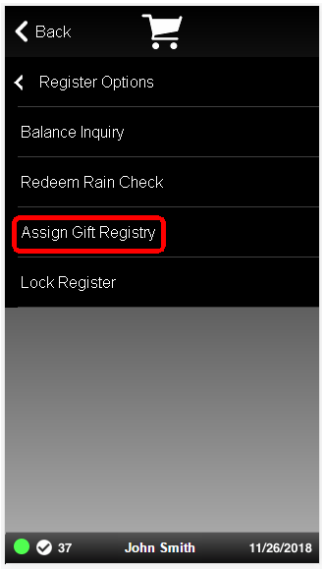
Assign the Gift Registry

Note: If your system is offline, you cannot access the gift registry from Customer Engagement. However, if you've already accessed the gift registry and are making modifications, the registry updates once your system is back on line.

Note: If the printed gift registry is available, scan the bar code to assign the gift registry to the sale.

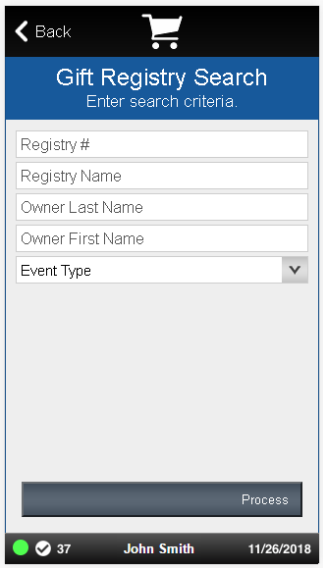
1. From the Sale screen Context Menu, select the **Register Options** menu button.
2. From the Register Options menu, select the **Assign Gift Registry** menu button.

Figure 19–1 Register Options Menu - Assign Gift Registry



3. Enter the search criteria and select **Process**.

Figure 19–2 Gift Registry Search



4. Select the desired registry from the returned list and press **Enter**.
5. The Sale screen displays. Enter an item from the gift registry to purchase. The view port displays a gift registry number and gift receipt icon.
6. Complete the Sale. See Entering Items and Tendering the Transaction.

Note: Xstore automatically prints a gift receipt for Gift Registry items based on your store's configuration.



XSTORE™

Datavantage Home Office
30500 Bruce Industrial Pkwy
Solon, OH 44139
440-498-4414

Ticket: 561 Date: 9/1/13
Store: 1973 Register: 1
Salesperson:
100 (John Miller)
Cashier: 100

A Gift For You

Item	Qty	Price
COTTON JERSEY TIERED DRESS		
1002	1	N/A

T3HH4WW113111RK4AM11A

Gift Receipt

Returning/Cancelling Gift Registry Items

If an item is purchased in a regular sale transaction, assigned to a gift registry, and then a **verified** return is done on that transaction later, Xstore automatically updates the purchase quantity on the registry as a result of the return.

For Order Broker orders you must assign the gift registry **manually prior** to entering the return or cancelling the order.

1. Assign the customer to a sale.

   Note: For Order Broker orders, assign the gift registry. Select **Register Options - Assign Gift Registry** (see Assign the Gift Registry).

2. Return the item or cancel the order:
   - Return the item (see Chapter 4, "Return Transactions").
   - Cancel the order (see Cancel Order Items or an Entire Order).

20

Task Management (Mobile Tablet Only)

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.

For Oracle Retail Customer Engagement Cloud Services users, this section also includes instructions on how to use the Black Book feature to focus on your primary customers.

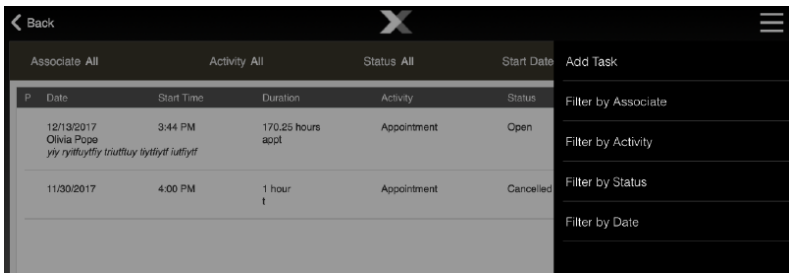
This section covers the following topics:

- My Tasks Screen
- Viewing Your Tasks
- Creating a Task
- Updating Task Status

My Tasks Screen

The My Tasks screen displays all tasks visible to you. The menu options available are based on the task status and the associated workflow.

Figure 20–1 My Tasks Screen



The Task Filters along the top of the screen allow you to limit the tasks displayed in the My Tasks screen.

The following information is displayed for each task:

- P (Priority): Task priority. This can be High, Medium, or Low.
- Date: Start date for the task.
- Start Time: Start time for the task.

- Duration: Length of time for the task.
- Activity: Type of task.
- Description: Description of the task.
- Customer: The customer associated with the task.

> **Note:** If a customer is associated with the task, the task can also be viewed from the Task tab in Customer Maintenance.

- Status: Status of the task. This can be Open, In Progress, Cancelled, or Closed.
- Associate: Employee or employee group assigned to the task.

Task Filters

Use the filter bar to view specific information. Search by Associate, Activity, Start Date, End Date, or Status. Your security privileges determine which Associates you can view.

You can filter tasks on the following criteria:

- Assigned Associate
- Activity
- Status
- Start Date
- End Date

Assigned Associate

To filter tasks by assigned associate:

1. Select the Associate name.

   Xstore displays a list of employee and employee groups.

2. Select the correct employee or employee group.
3. Select **OK**.

   The task list will only display tasks associated with the selected employee or employee group.

Activity

To filter tasks by activity type:

1. Select **Activity**.

   Xstore displays a list of activity types.

2. Select the correct activity type.
3. Select **OK**.

   The task list will only display tasks of the selected activity type.

Status

To filter tasks by task status:

1. Select **Status**.

   Xstore displays a list of task status.

2. Select the correct task status.

3. Select **OK**.

   The task list will only display tasks of the selected task status.

Start Date

To filter tasks by start date:

1. Select the Start Date field.

2. Enter the new start date.

3. Press **Enter**.

   The task list will only display tasks with a start date on or after the entered date.

End Date

To filter tasks by end date:

1. Select the End Date field.

2. Enter the new end date.

3. Press **Enter**.

   The task list will only display tasks with a start date on or before the entered date.

Sort Tasks

Select a column name in the task list to sort the list by that column. Click the column again to alternate between sorting ascending or descending.

Task Notes

The most recent note associated with the task displays beneath the task row.

To view all the notes for a task:

1. Select the task.

2. Select View Notes.

   A window opens displaying all the notes for the task. Select Back to close the window.

Open Customer Record

To open a customer record in Customer Maintenance from a task:

1. Select a task associated with a customer:

2. Select **View Customer**.

   The customer record opens in Customer Maintenance, see Chapter 6, "Customer Maintenance".

Viewing Your Tasks

Your tasks can be viewed through the register or through the Back Office:

- View Your Tasks from the Register
- View Your Tasks from the Back Office

View Your Tasks from the Register

To view your tasks from the Register Sale screen:

1. Select **My Tasks**.

   Xstore prompts for your user ID.

2. Enter your user ID and press Enter.

   Xstore prompts for your password.

3. Enter your password and press Enter.

   Xstore opens the My Tasks Screen.

View Your Tasks from the Back Office

To view your tasks from the Back Office:

1. Select **Associate** from the Context Menu. See Figure 1–8.
2. Enter Employee ID and Password.
3. Select **My Tasks**.

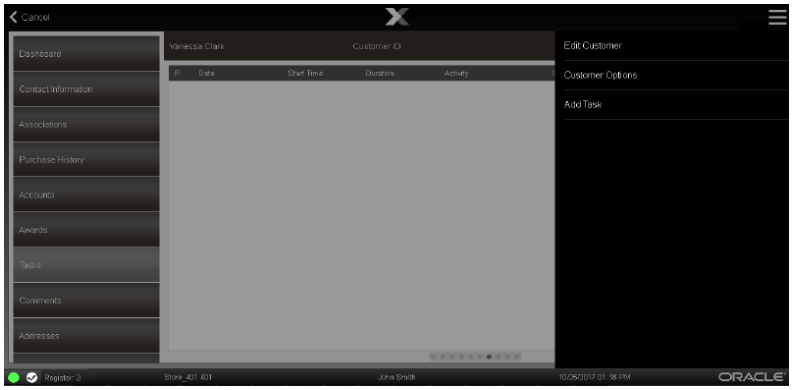
   Xstore opens the My Tasks Screen.

Creating a Task

To create a task:

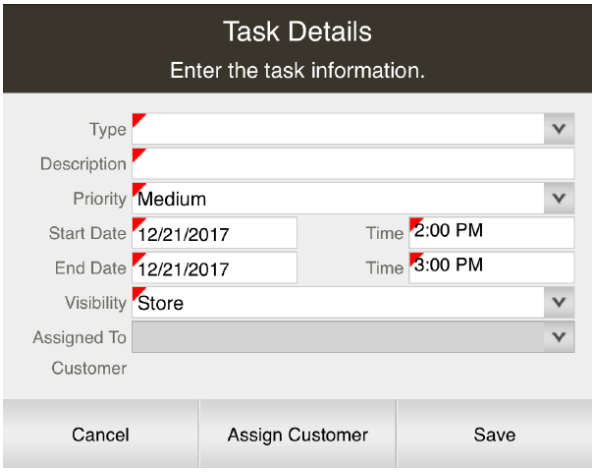
1. Select **Add Task** in the Task List or the context menu of the Tasks tab in Customer Maintenance.

Figure 20–2 Customer Context Menu Options



2. Enter the task information:

Figure 20–3 Task Details



- Type: Type of task.
- Description: Description of the task.
- Priority: Priority of the task.
- Start Date: Date on which the task will begin.
- End Date: Date by which the task must be finished.
- Start Time: Time at which the task will begin.
- End Time: Time at which the task must be finished.
- Visibility: The group that can view the task (Store, Employee Group, or Employee).

Note: Employee Group visibility is not an option if you are using Customer Engagement to manage your tasks.

- Assigned To: The employee group or employee to assign to the task. This field is not editable for tasks with Store visibility.

Note: Xstore indicates the employee is not a valid Customer Engagement user, the employee does not exist in Customer Engagement.

3. If necessary, assign a customer to the task by performing the following:

   Select **Assign Customer**. Xstore opens a window prompting for customer search criteria.

   Associating a Customer with a Transaction. The customer is assigned to the task.

4. Select **Save**.

   This task is created and added to the Task List.

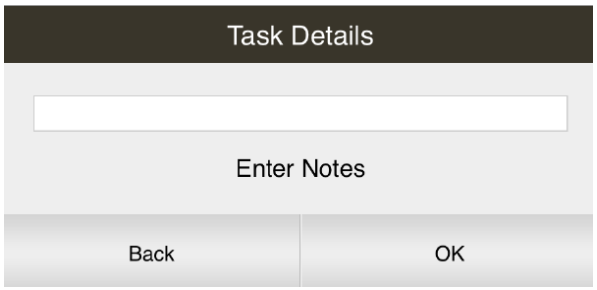
Add a Note

To add a note to a task:

1. Select the task in the Task List or the Tasks tab in Customer Maintenance.
2. Click **Add Note**.

   A note entry window opens.

Figure 20–4 Task Notes



3. Enter the note text.
4. Click **OK**.

   The note is added to the task

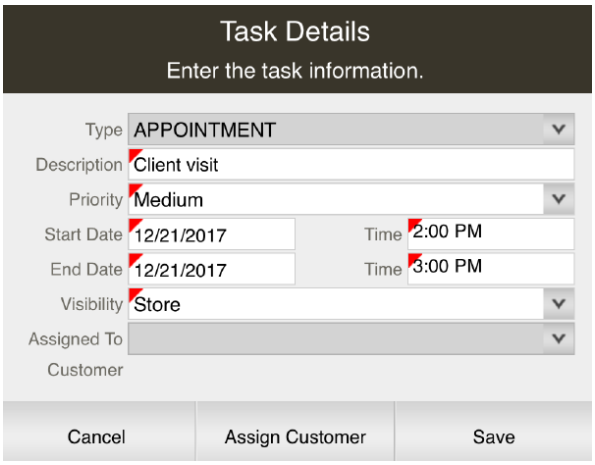
Edit a Task

To edit a task:

1. Select the task in the Task List or the Tasks tab in Customer Maintenance:
2. Select **Edit Task**.

   A task details window opens.

Figure 20–5 Task Details Screen



3. Make the necessary changes to the task:
   - Description: Description of the task.
   - Priority: Priority of the task.
   - Start Date: Date on which the task will begin.
   - End Date: Date by which the task must be finished.
   - Start Time: Time at which the task will begin.
   - End Time: Time at which the task must be finished.
4. If necessary, assign a customer to the task:
   - Select **Assign Customer**.

     Xstore opens a window prompting for customer search criteria.
   - Associating a Customer with a Transaction.

     The customer is assigned to the task.
5. Click **Save**.

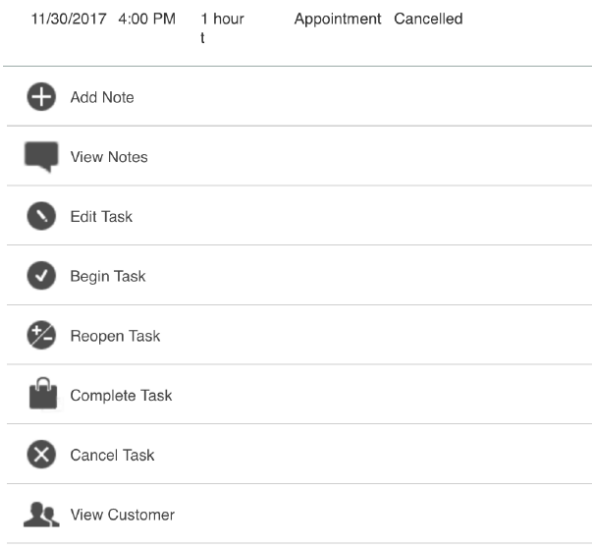
   The note is added to the task.

Updating Task Status

To update the status of a task:

1. Select the task in the task list:

Figure 20–6 Task Status



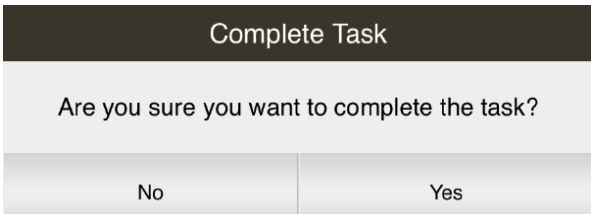
2. Click the new status. Menu options include:

Note: All status menu options may not be visible depending on the current status of the task. Xstore displays the next status options in the workflow.

- Begin Task: Sets the status to In progress.
- Reopen Task: Sets the status to Open.
- Complete Task: Sets the status to Closed. The task cannot be re-opened or edited after it is completed.

  A verification prompt opens.

Figure 20–7 Complete Task Confirmation Prompt



- Cancel Task: Sets the status to Cancelled. The task cannot be re-opened or edited after it is cancelled.

  A verification prompt opens.

3. If necessary, click **Yes** to confirm the status change.

21

Register Open and Close

The Register Open and Close procedures explain the steps you must perform to open and close a register.

> **Note:** Xstore Mobile only supports Register Accountability.
>
> Till Accountability is only supported on Thin Client with an attached drawer.

Select a link for more information:

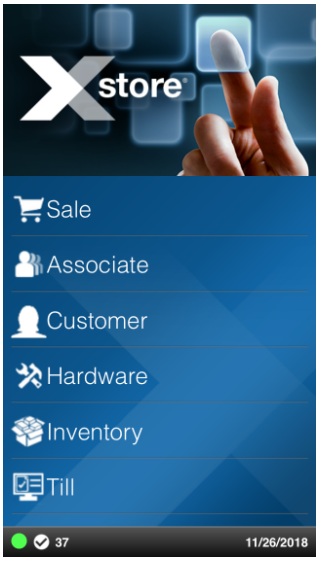
- Open Register
- Close Register
- Locking a Register
- Unlocking a Register

Register Open

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.

The Xstore Mobile register is opened and closed through the **Till** menu on the Main menu. The following procedures describe the method for opening and closing the register.

Figure 21–1 Main Menu

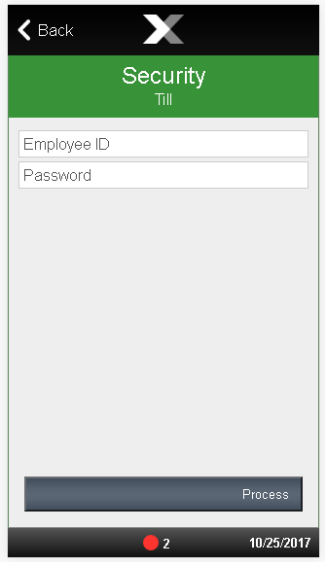


Open Register

To open a closed Xstore Mobile register:

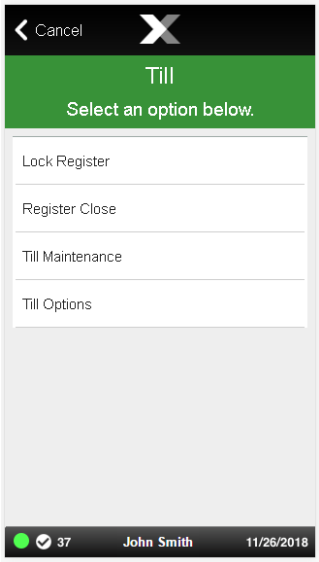
1. Select the **Till** option from the Main menu.

Figure 21–2 Login Screen



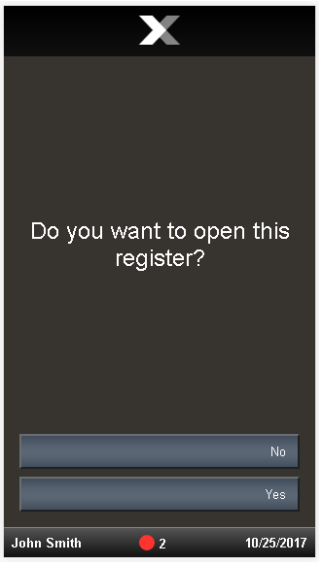
2. Enter **Employee ID** and **Password**.

Figure 21–3 Register Open



3. Select **Register Open**.

Figure 21–4 Open Register Prompt



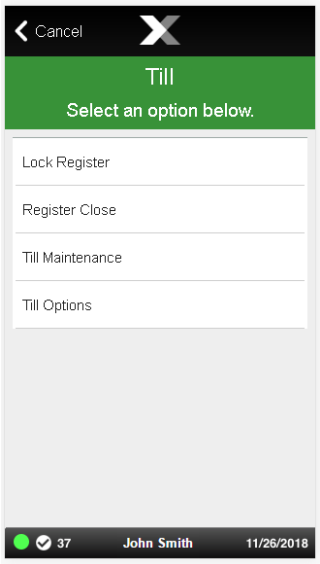
4. Select **Yes** to confirm that you want to open the register.

   The register opens and Xstore Mobile returns to the **Till** menu.

Close Register

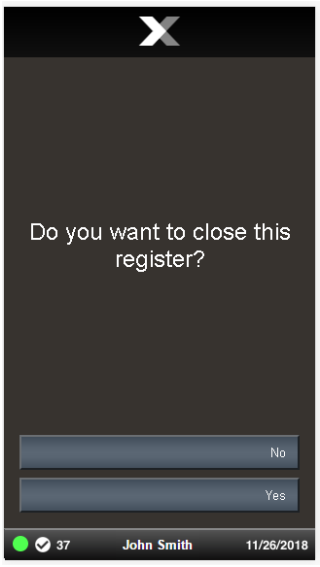
To close an open Xstore Mobile register:

Figure 21–5 Register Close



1. Select **Register Close**.

Figure 21–6 Register Close Prompt



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

   The register closes and Xstore Mobile returns to the **Till** menu.

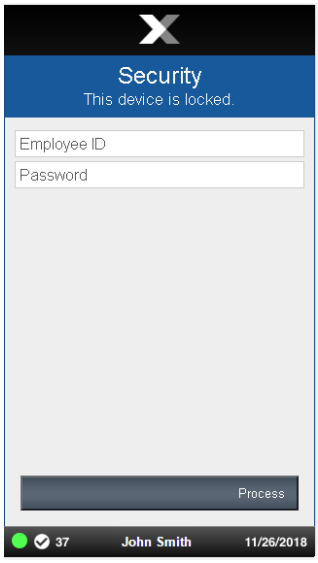
Lock/Unlock a Register

Your system may be configured to automatically log out an associate after a specified period of time if there is no system activity. However, you may need to temporarily leave a register before that occurs. In that case, you can lock the register to prevent another person from using the system while you are away.

Locking a Register

1. At the Register Login screen, select Till and log in to display the Till menu, and then select Lock Register. The system displays a message indicating that the system is now locked.

Figure 21–7 Register Locked Screen



Note: Any functions that may still be available are determined by your store policy.

Note: The register may be unlocked only by the associate who locked it or someone who has sufficient privileges to unlock the register, such as a manager.

Unlocking a Register

1. Enter your employee ID and press **Enter** to unlock the register.

Note: If you use a biometric device for employee authentication, you are not prompted for a password.

2. Enter your employee password and press **Enter** to complete the unlock process.

   The system is now unlocked and available for point-of-sale functions.

22

Airside Store Transactions

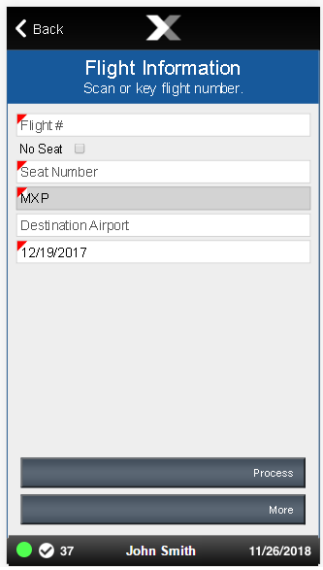
This chapter covers the following functions:

- Associate Flight Information
- Make an Airside Sale on Arrivals
- Make an Airside Sale to Staff

Associate Flight Information

Airside stores scan or manually enter boarding pass information into Xstore Mobile to determine the tax of the transaction based on flight destination.

Figure 22–1 Flight Information



1. Scan the boarding pass barcode or enter the flight information and click **Process**.
   - **Flight #:** Flight number.

     Note: The Flight Number can include spaces but not special characters.

   - **Seat Number:** Seat number for the customer.

- **Origin Airport:** Airport to which the customer is flying from.
- **Destination Airport:** Airport to which the customer is flying.
- **Scheduled:** Date of the flight.

  If the information is valid, a confirmation prompt indicates that the flight information was added to the transaction.

2. Click **Process** to confirm that the flight information was added to the transaction and return to the transaction.
3. If the destination flight is not eligible for tax free, the system asks for a second flight (if configured):
   - If the customer does not have a second boarding pass, click **Complete**.
   - If the customer does have a second boarding pass, scan the boarding pass barcode or enter the flight information and click **Process**.
     - **Flight #:** Flight number.

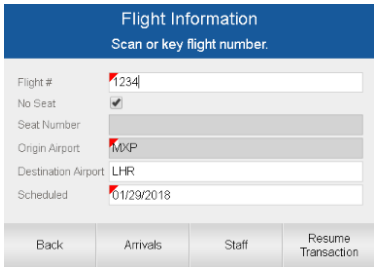
     Note: The Flight Number can include spaces but not special characters.

     - **Seat Number:** Seat number for the customer.
     - **Destination Airport:** Airport to which the customer is flying.
     - **Scheduled:** Date of the flight.
4. A confirmation prompt opens:
   - If the flight is found and eligible for tax-free shopping, click **OK** to finish associating flight information and continue the transaction.
   - If the flight is not eligible for tax-free shopping, a notification opens. Click **OK** to continue the transaction.

Make an Airside Sale on Arrivals

In some airports, arriving passengers are allowed to purchase goods at airside stores. In this case, the passengers must pay taxes.

Figure 22–2 Flight Information - Arrivals



Click **Arrivals** to perform a sale to an arriving passenger.

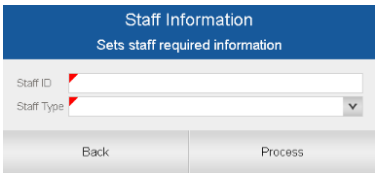
Note: No further information is necessary. The screen displays that the passenger is an arriving passenger.

Make an Airside Sale to Staff

In some airports, it is permitted to sell goods to staff (for example, crew members or employees). In this case, the customers are not eligible for tax free shopping. To sell to staff:

1. Click **Staff**.
2. Enter information about the staff member:

Figure 22–3 Staff Information



- **StaffId:** Enter the ID for the staff member.
- **Staff Type:** Select the type of staff member: Airport Staff, Flying Crew Members, Concessionaires Employee.

3. Click **Process**.

   A notification is displayed that indicates the sale is for a staff member. The transaction continues.

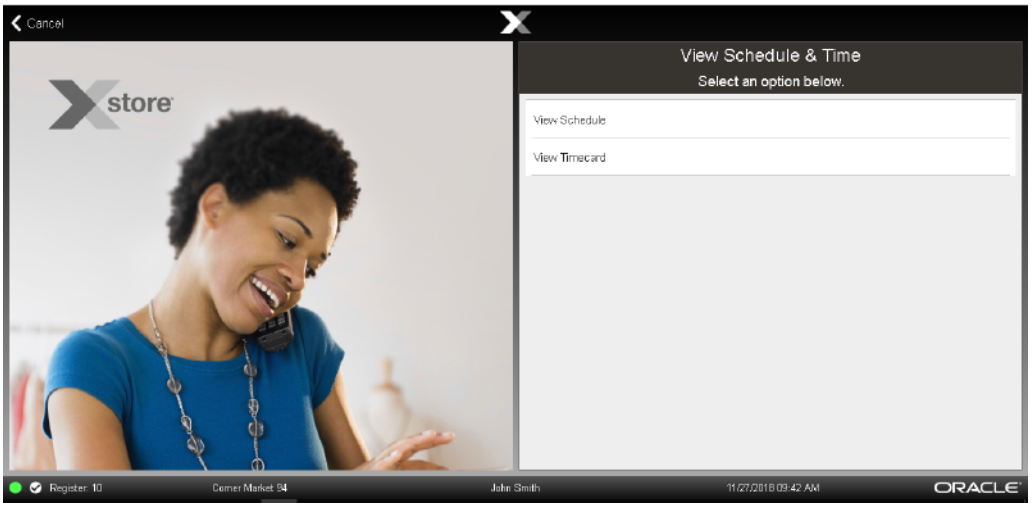
23

View Schedule and Time (Mobile Tablet Only)

Use the following procedures to review your timecard and schedule.

- View Your Timecard
- View All Work Schedules

Figure 23–1 View Schedule and Time Menu



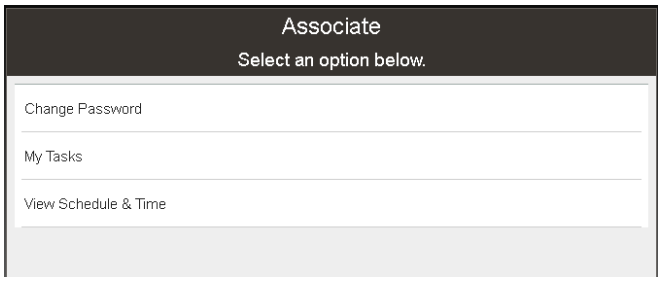
View Your Timecard

The option to view your timecard is only available from the Register Login screen or the Back Office Login screen before you log in.

To view your timecard:

1. Select **View Schedule & Time** in the Register Login screen or the Back Office Associate menu.

Figure 23–2 Associate Menu



2. Click **View Timecard**. See Figure 23–1.
3. Enter your user ID and press **Enter.**
4. Enter your password and press **Enter**.

   Xstore displays your timecard for the week.

Timecard Information

Figure 23–3 Timecard Information Screen



Xstore displays the following information for each timecard:

- Begin Date: Start date for the timecard.
- End Date: End date for the timecard.
- Employee Name: Name of the employee.
- Employee ID: ID for the employee.

Xstore has the following tabs for each timecard:

- Timecard Maintenance
- Timecard Comment

Timecard Maintenance

Xstore displays the following information in the Timecard Maintenance tab for each day of the week:

- Work code used for the time clocked in.
- Clock in time.
- Clock out time.
- Scheduled: Number of hours you were scheduled to work.
- Actual: Number of hours actually worked.

The Timecard Maintenance also displays the following information about the week:

- Total Hours: Total hours for the week.
- See Comment: Indicates that a comment is associated with the timecard.

Timecard Comment

Xstore displays the following information for each comment on a timecard:

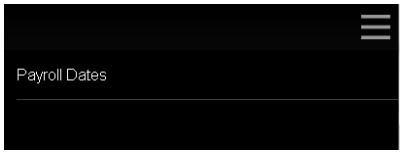
- Business Date: Business date for which the comment was made.
- Created On: Date the comment was created.
- Created By: Employee ID of the person who created the comment.
- Text of the comment.

View Another Timecard

To change the timecard you are viewing:

1. Select **Payroll Dates** from the Context Menu.

Figure 23–4 Payroll Dates



   Xstore opens a window with a list of timecard dates.

2. Select the week to view:

Figure 23–5 Payroll Week



- Select the date.
- Use the up and down arrows to highlight the correct date, then press the Spacebar.

  The timecard for the selected dates is displayed.

View All Work Schedules

The option to view the work schedule is only available from the Register Login screen or the Back Office Login screen before you log in.

To view the work schedule:

1. Select **View Schedule & Time** in the Register Login screen or the Back Office Associate menu.
2. Click **View Schedule**.
3. Enter your user ID and press **Enter**.
4. Enter your password and press **Enter**.

   Xstore displays your schedule for the week.

Schedule Information

Xstore displays the following information for each timecard:

Figure 23–6 Employee Schedule



- Sched. Hrs.: Total number of hours scheduled for the week.
- Sched. Amt.: Pay amount scheduled for the week.
- From: Start date for the timecard.
- To: End date for the timecard.

Xstore displays the following information for the week:

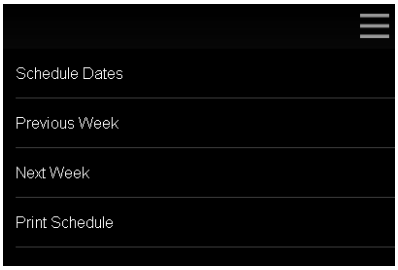
- Employee name.
- Working: Total number of working hours.
- Break: Total number of break hours.

Xstore displays the following schedule information for each day of the week:

- Clock in time.
- Clock out time.
- Work code used for the time clocked in.

View Another Schedule Week

Figure 23–7 Schedule Context Menu



To change the schedule week you are viewing:

- Select **Previous Week** to view the previous week.
- Select **Next Week** to view the next week.

- Select the Schedule Week

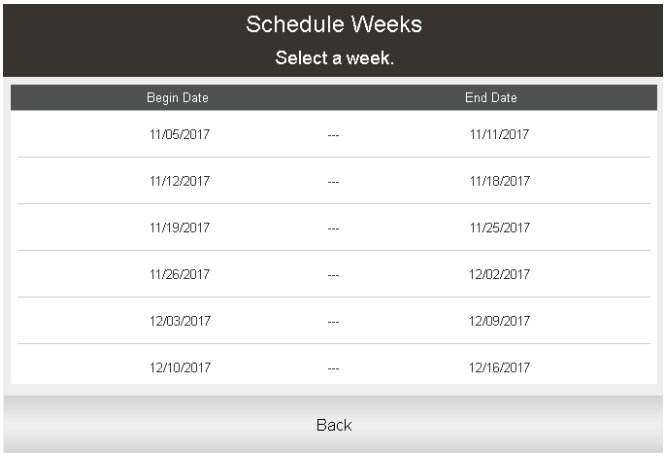
Select the Schedule Week

To select the schedule week to view:

1. Select **Schedule Dates**.

   A Schedule Weeks window opens.

Figure 23–8 Schedule Weeks



2. Select the week to view:
   - Click the date.
   - Use the up and down arrows to highlight the correct date, then press the Spacebar.

     The schedule for the selected dates is displayed.

Print Your Schedule

Select **Print Schedule** to print the currently displayed schedule.

24

Actions Menu

This chapter provides information about the following procedures:

- Balance Inquiry - Check the balance of a gift card, gift certificate, or gift receipt.
- Change Password - Change the password you use to log in.
- Clock In/Out - Clocking in, clocking out, and changing work codes.
- Item Lookup - Look up an item.
- Price Inquiry - Look up the price of an item.

Balance Inquiry

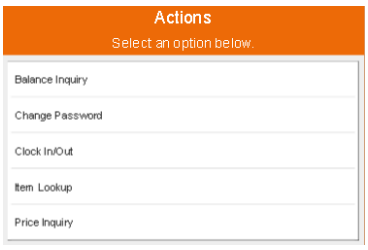
Gift cards and store credit vouchers may be used as a tender until the total value of the account has been used. Since the amount left on a card or voucher cannot be visibly seen, this function electronically checks the account record and tells you the remaining value on the account. You can also use Balance Inquiry to look up an encoded item's price on a gift receipt.

Use the balance inquiry process to check the amount remaining on a customer's store credit voucher, gift card or gift certificate, and an item's price from a gift receipt.

> **Note:** Depending upon the configuration of your system, this option may be available from several different locations.

1. Select **Actions** from the Context Menu.

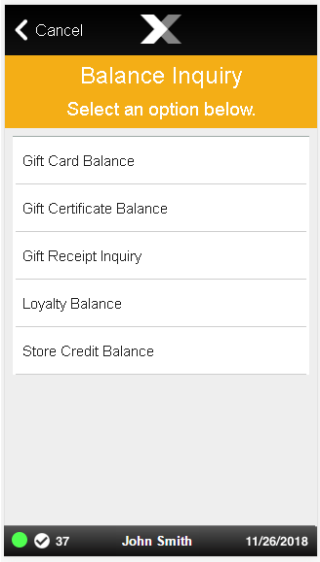
Figure 24–1 Actions Menu



2. Select **Balance Inquiry** in the Actions menu to view the inquiry functions available in your store.

3. Select the type of inquiry you want to perform by selecting the appropriate option from the Balance Inquiry menu.

Figure 24–2 Balance Inquiry Menu Options



- **Gift Card Balance**: Remaining balance on a gift card.
- **Gift Certificate Balance**: Remaining balance on a gift certificate.
- **Gift Receipt Inquiry**: Redemption amount of a gift certificate.
- **Loyalty Balance**: Loyalty point balance.
- **Store Credit Balance**: Remaining store credit balance.

4. At the prompt, enter the information as prompted: a card number, account number, or gift receipt information.

Figure 24–3 Store Credit Number Prompt

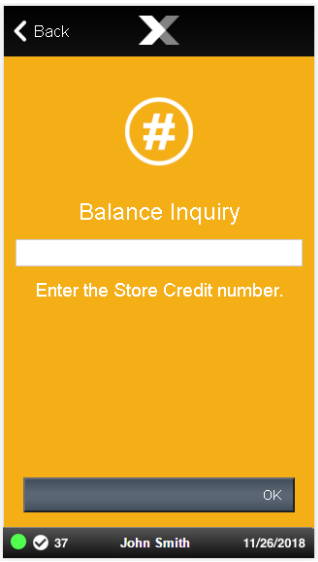
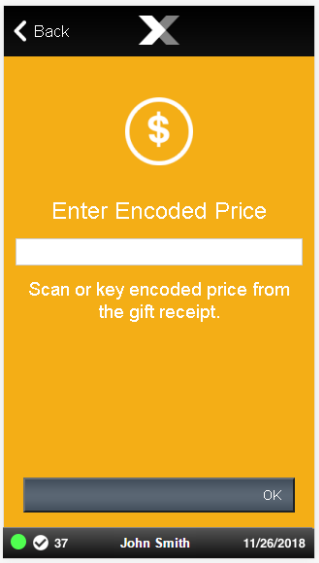


Figure 24–4 Gift Receipt Prompt



Note: The information required here varies according to the type of balance inquiry you are performing. Enter the applicable information and press **OK** to continue.

5. The system retrieves the account balance/gift receipt information and displays the information on the screen.

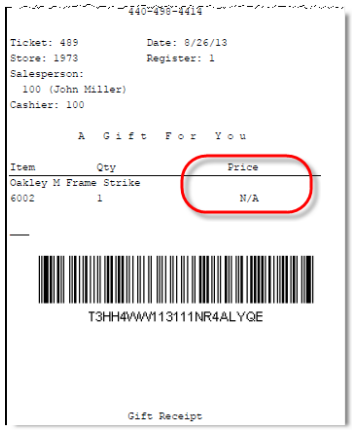
   - If applicable, press **Yes** to print a receipt for this balance information.

     <OR>

- If applicable, press **No** if you do not need a printed receipt for this balance information.
- If the option to print a receipt is not available, press **OK** to close the prompt.

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 code is printed on the receipt.

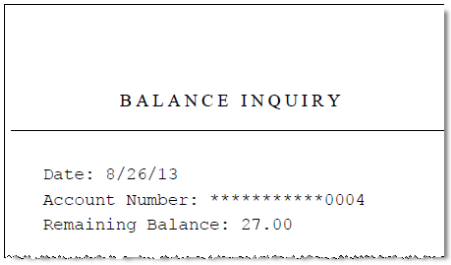


When a balance inquiry for a store credit or gift certificate is performed, Xstore Mobile first determines which currency the store credit or gift certificate is in. If this currency is different than your store's local currency, then the foreign tender amount of the store credit or gift certificate 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.

---

6. 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.

Figure 24–5 Sample Balance Inquiry Receipt



Change Password

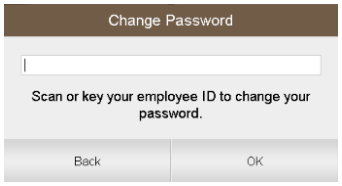
The Change Password option is available before you log in.

To change your password:

1. Select **Actions** from the Context Menu.
2. Click **Change Password** in the Action menu.

   Xstore prompts for your user ID.

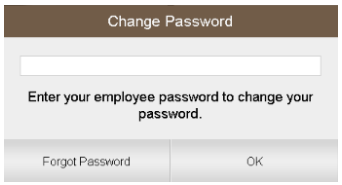
Figure 24–6 Change Password - Employee ID Prompt



3. Enter your user ID and press **Enter**.

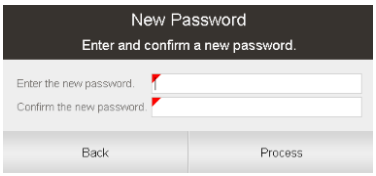
   Xstore prompts for your password.

Figure 24–7 Change Password - Password Prompt



4. Enter your current password and press **Enter**.

Figure 24–8 Change Password - New Password Prompt



5. Enter your new password in the Enter the new password and Confirm the new password fields.
6. Click **Process**.

   The new password is saved.

Note: Xstore may enforce certain rules regarding passwords, such as the minimum number of characters required or whether you can reuse an old password.

Change your Password with Challenge Questions

If Xstore is configured to use password challenge questions, you can re-set your password without knowing your current password by answering a set of questions whose answers should only be known to you.

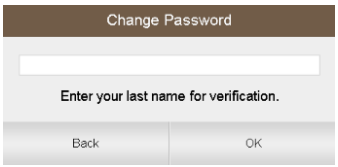
To change your password using challenge questions:

1. Select **Actions** from the Context Menu.
2. Click **Change Password** in the Action menu.
3. Enter your user ID and press **Enter**.

   Xstore prompts for your password.
4. Click **Forgot Password**.

   Xstore prompts for your last name.

Figure 24–9 Change Password - Last Name Prompt



5. Enter your last name and press **Enter**.

   Xstore asks the challenge questions.
6. Answer each challenge question:

   Enter the answer.

   After you have entered the correct answer for each question, Xstore prompts for your new password.
7. Enter your new password in the Enter the new password and Confirm the new password fields.
8. Click **Process**.

   The new password is saved.

Note: Xstore may enforce certain rules regarding passwords, such as the minimum number of characters required or whether you can reuse an old password.

Clock In/Out

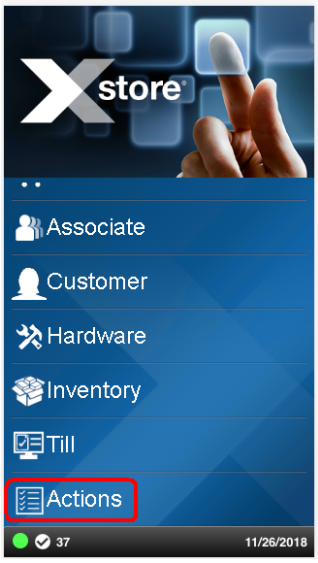
This section describes the Clock In and Out function.

Overview

Depending upon your store policy, you may be required to clock in before logging in. You may also be required to clock in and out for meal breaks. If meal break clock-out and clock-in is enforced, you cannot clock back in after a meal break until a specified period of time has elapsed.

The time clock area in Xstore Mobile provides users with the ability to clock in, clock out, and change the work code used for logging their time. All time clock options are accessed through the **Clock In/Out** button on the Actions menu.

Figure 24–10 Main Menu - Actions Option



The following procedures are covered:

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

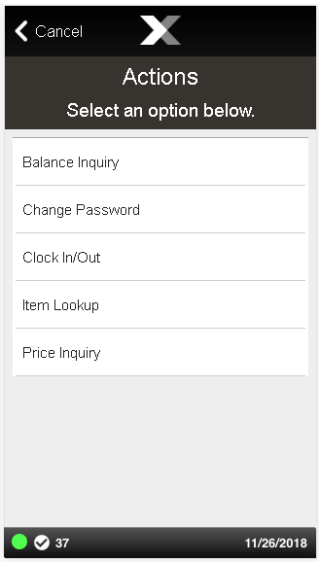
Clock In

Note: You must be clocked out to clock in.

In order for your timecard to accurately reflect the number of hours worked, you must clock in and out by performing the following steps.

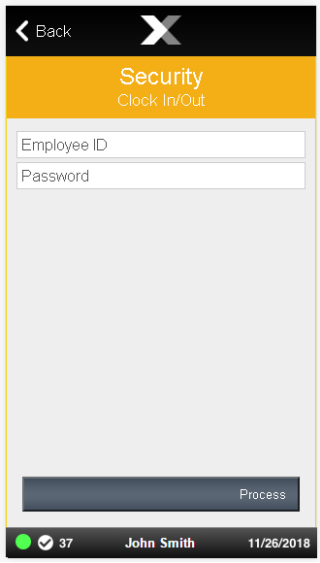
To clock in:

Figure 24–11 Time Clock



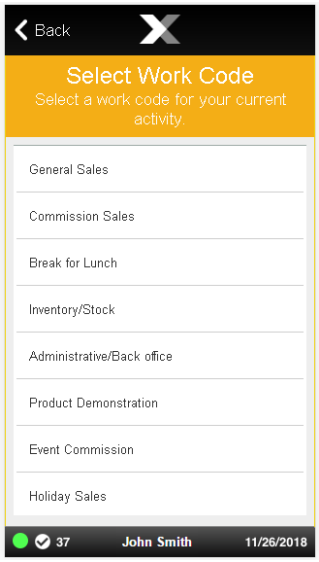
1. Select **Clock In/Out** in the Actions menu.

Figure 24–12 Login Screen



2. Enter **Employee ID** and **Password**.
3. Select **Process**.

Figure 24–13 Select Work Code



4. Select the proper work code.

   You are now clocked in. Xstore Mobile returns to the **Actions** menu.

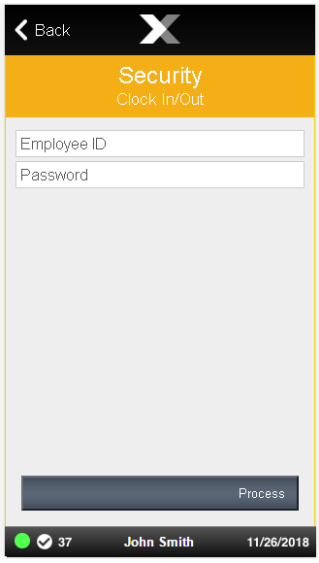
Clock Out

Note: You must be clocked in to clock out.

To clock out:

1. Select **Clock In/Out** in the Actions menu.

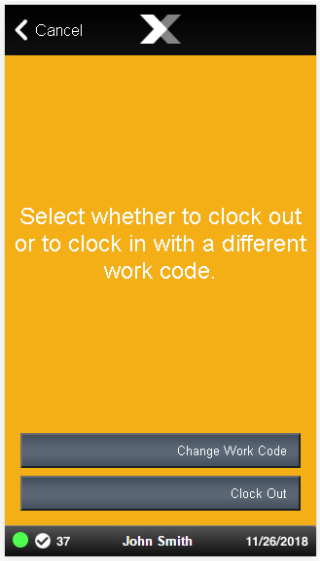
Figure 24–14 Login Screen



2. Enter Employee ID and Password.

3. Select **Process**.

Figure 24–15 Change Work Code or Clock Out



4. Select **Clock Out**.

   You are now clocked out. Xstore Mobile returns to the **Actions** menu.

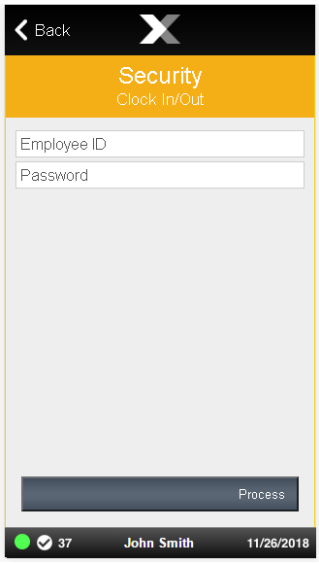
Change Work Code

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

To change your work code:

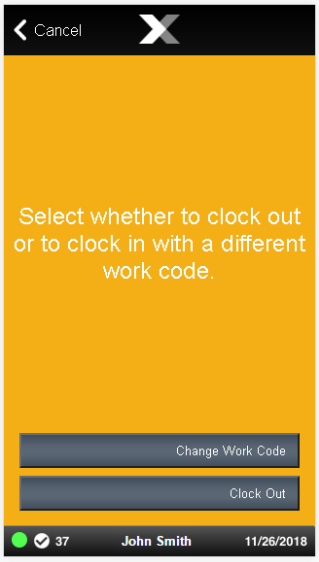
1. 1. Select Clock In/Out in the Actions menu.

Figure 24–16 Login Screen



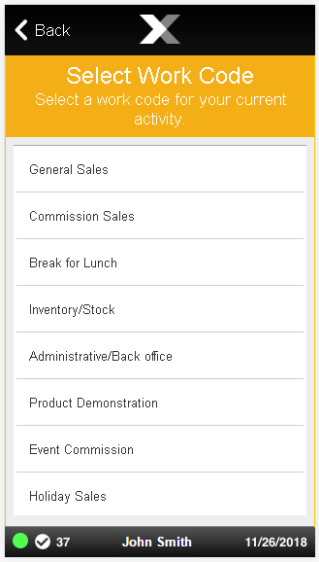
2. Enter Employee ID and Password.
3. Select **Process**.

Figure 24–17 Change Work Code or Clock Out



4. Select **Change Work Code**.

Figure 24–18 Select Work Code



5. Select the proper work code.

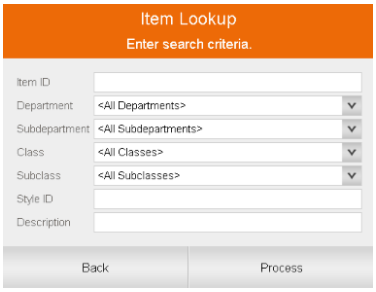
   Your work code has been changed. Xstore Mobile returns to the Actions menu.

Item Lookup

Use the item lookup function to search for an item based on many criteria (SKU, style, department, and so on) and retrieve detailed information about the item.

1. Select **Actions** from the Context Menu.
2. Select **Item Lookup** in the Actions menu.

Figure 24–19 Item Lookup Form



3. Enter the search criteria for the item:
   - **Item ID**: ID of the item.
   - **Department**: Department to which the item belongs.
   - **Subdepartment**: Subdepartment to which the item belongs.
   - **Class**: Class to which the item belongs.
   - **Subclass**: Subclass to which the item belongs.

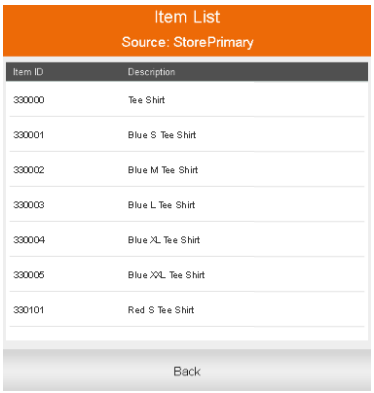
- **Style ID**: ID of the style assigned to the item.
- **Description**: Content in the description of the item.

If advanced search options are configured on your systems, use the advanced options to further refine the search:

- Select the value for any search criteria you are using.
- Click **Exclude** for any unused search criteria.

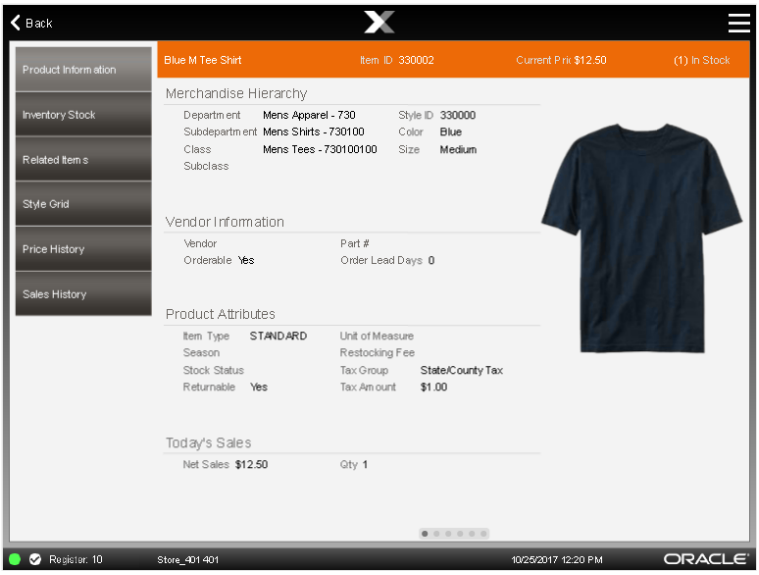
4. Click **Process**.
   - If more than one item matches the search criteria, continue with Step 5.
   - If only one item matches the search criteria, the item opens in the Item Viewer.
5. If necessary, select an item in the Item List window:

Figure 24–20 Item List



6. Select the item. The item opens in the Item Viewer:

Figure 24–21 Item Viewer - Product Information



Item Viewer

The Item Viewer provides information about an item. The Item Viewer displays the following information along the top of the screen:

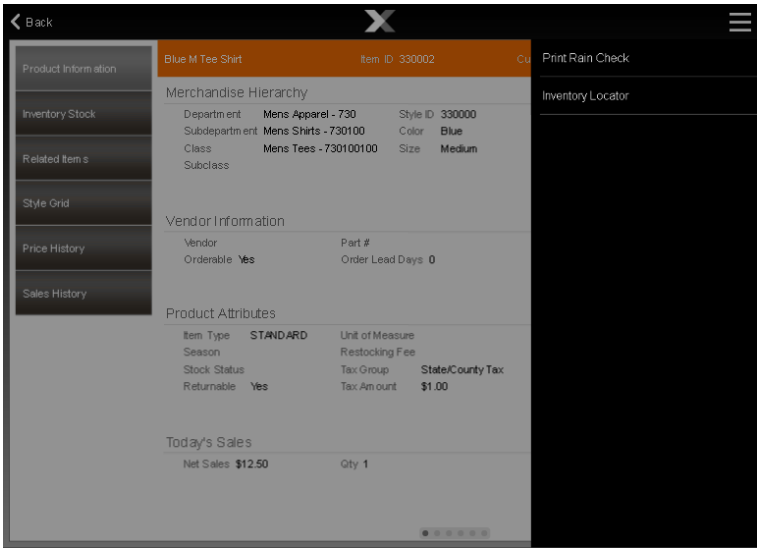
- Name of the item.
- **Item ID**: ID of the item.
- **Current Price**: Current price of the item.
- Quantity of the item currently in stock.

The Item Viewer has the following tabs:

- Product Information: Information about the item.
- Inventory Stock: Current inventory information for the item.
- Related Items: Information about items related to the selected item.
- Style Grid: Grid showing on-hand quantities of the item with on dimension cross-referenced with another dimension.
- Price History: Past prices for the item.
- Sales History: Past sales data for the item.

You can also Print a Rain Check from the Item Viewer Context Menu.

Figure 24–22 Item Viewer Context Menu



If available, you can print a rain check to purchase out of stock items for the same price at a later date. See Print a Rain Check.

Product Information

The Product Information tab, (see Figure 24–21), displays the sections that display information about an item:

- A picture of the item (if available).
- Merchandise Hierarchy: Merchandise hierarchy to which the item is assigned.
- Vendor Information: Vendor that provides the item.

- Product Attributes: Attributes of the item.
- Today's Sales: Sales information for the item on the current day.

Merchandise Hierarchy

The Merchandise Hierarchy section displays the following information:

- **Department**: Item department.
- **Subdepartment**: Item subdepartment.
- **Class**: Item class.
- **Subclass**: Item subclass.
- **Style ID**: ID of the style for the item (if available).
- Dimension information for the item.

Vendor Information

The Vendor Information section displays the following information about the items:

- **Vendor**: Name of the vendor.
- **Orderable**: Indicates whether the item can be ordered.
- **Part #**: Part number used by the vendor.
- **Order Lead Days**: Number of lead days required when ordering the item.

Product Attributes

The Product Attributes section displays the following information:

- **Item Type**: Type of item.
- **Season**: Season for the item.Inventory Stock
- **Stock Status**: Current stock status.
- **Returnable**: Indicates whether the item can be returned.
- **Unit of Measure**: Unit used to measure the item (if applicable).
- **Restocking Fee**: Restocking fee applied to the item when it is returned (if applicable).
- **Tax Group**: Tax group for the item.
- **Tax Amount**: Amount of tax applied to the item.

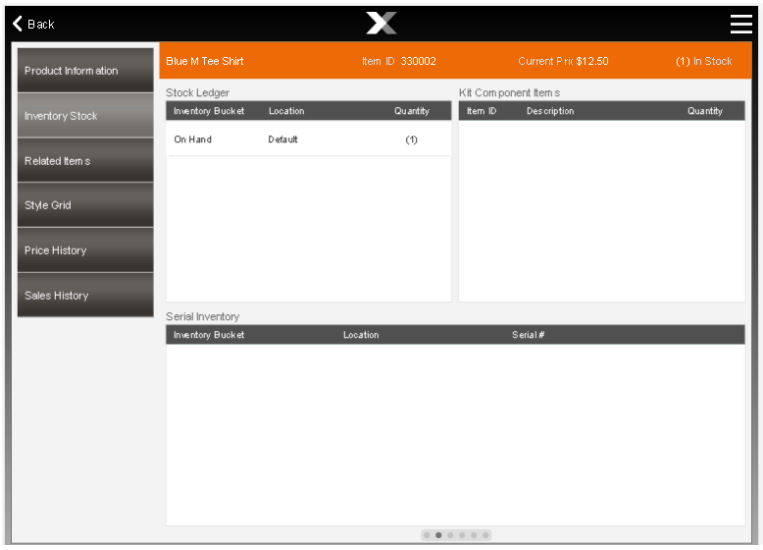
Today's Sales

The Today's Sales section displays the following information:

- **Net Sales**: Net amount of sales minus returns for the item on the current day.
- **Qty**: Number of items sales of the item on the current day.

Inventory Stock

Figure 24–23 Item Viewer - Inventory Stock



The Inventory Stock tab contains the following areas:

Stock Ledger

The Stock Ledger table displays the following information for each inventory bucket in which the item is located:

- **Inventory Bucket**: Inventory bucket in which the item is located.
- **Location**: Location of the item.
- **Quantity**: Quantity of the item in the inventory bucket.

Kit Component Items

If the item is a kit, this table displays information about each item in the kit:

- **Item ID**: ID of the kit item.
- **Description**: Description of the kit item.
- **Quantity**: Quantity of the item included in one kit.

Serial Inventory

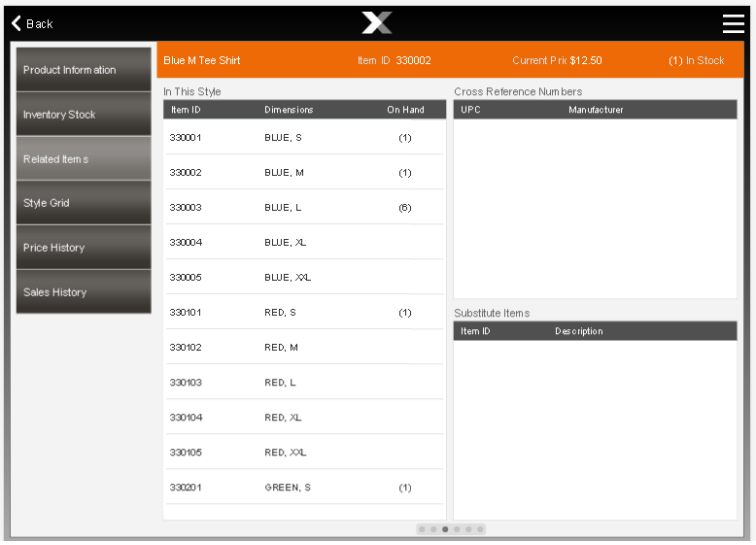
If the item is a serialized item, the Serial Inventory table displays the following information about each serial number:

- **Inventory Bucket**: Inventory bucket in which the serialized item is located.
- **Location**: Location of the item.
- **Serial #**: Serial number.

> **Note:** No item quantity is displayed. For all items with one item ID, only one of those items will be assigned an individual serial number.

Related Items

Figure 24–24 Item Viewer - Related Items



The Related Items tab includes information about items similar to the selected item.

The following tables display information about related items:

- In This Style: Displays information about items assigned to the same style as the selected item.
- Cross Reference Numbers: Displays information about items cross-referenced with the selected item.
- Substitute Items: Displays information about items indicated to be substitutes for the selected item.

In This Style

The In This Style table displays the following information about each item that has the same style ID as the selected item:

- **Item ID**: ID of the item.
- **Dimensions**: Values of the dimension attributes configured for the item.
- **On Hand**: Count of the item on-hand.

Cross Reference Numbers

The Cross Reference Numbers table displays the following information about items cross-referenced with the selected item.:

- **UPC**: UPC for the item.
- **Manufacturer**: Manufacturer that produces the item.

Substitute Items

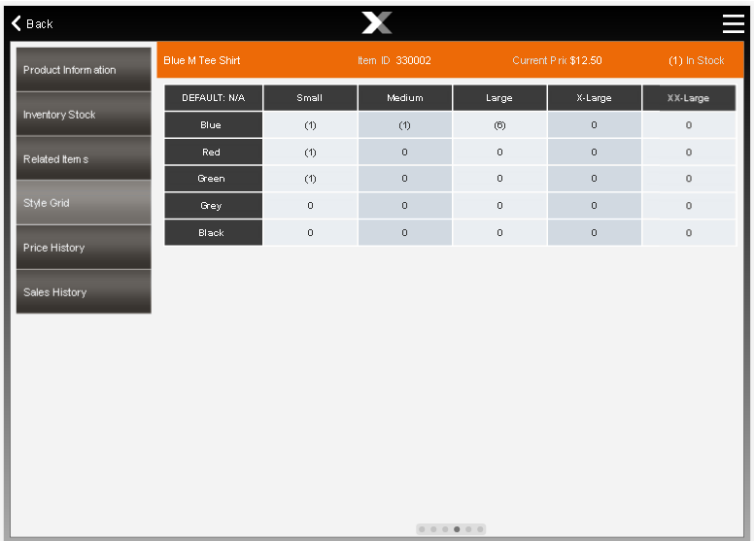
The Substitute Items table displays the following information about items that are indicated to be substitutes for the selected item:

- **Item ID**: ID of the substitute item.

- **Description**: Description of the item.

Style Grid

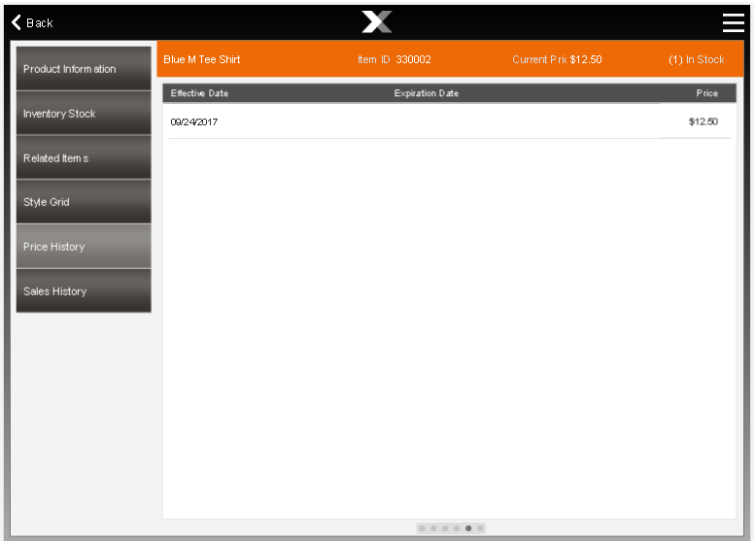
Figure 24–25 Item Viewer - Style Grid



The Style Grid displays a grid showing the grid that shows the on-hand quantity of items with one dimension cross-referenced with another dimension.

Price History

Figure 24–26 Item Viewer - Price History



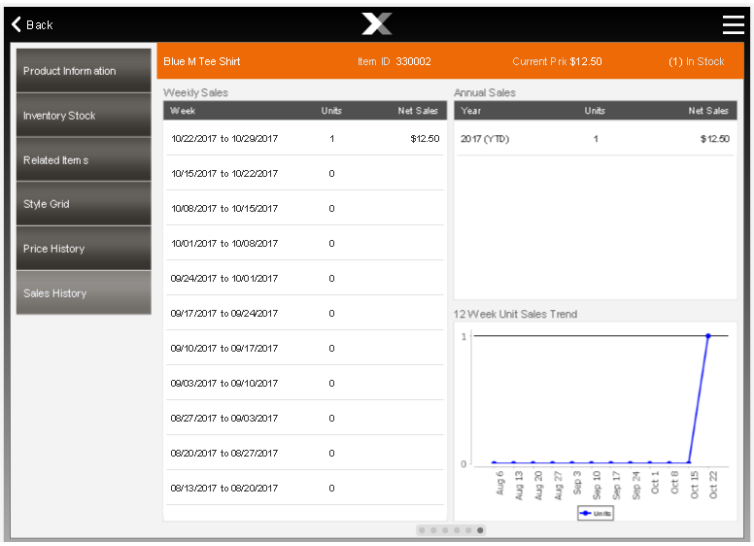
The Price History tab shows the past history of all prices that have been assigned to an item. The Price History shows the following information for each of the past prices:

- **Effective Date**: Date on which the price first became effective.
- **Expiration Date**: Date on which the price was not longer valid. This field will be blank for the current price.

- **Price**: Price for the item from the Effective Date up to the Expiration Date.

Sales History

Figure 24–27 Item Viewer - Sales History



The Sales History tab displays sales data for the item. The Sales History tab displays he following information:

- Weekly Sales: Table of weekly sales data for the item.
- Annual Sales: Table of annual sales data for the item.
- 12 Week Unit Sales Trend: Graph of weekly sales data over the past twelve weeks.

Weekly Sales

Displays sales data for the item by week. This table displays the following sales information for each week:

- **Week**: Date range for the week.
- **Units**: Net quantity of the item sold.
- **Net Sales**: Net amount of all sales and returns of the item.

Annual Sales

Displays sales data for the item by year. This table displays the following sales information for each year:

- **Year**: Year of the data.
- **Units**: Net quantity of the item sold.
- **Net Sales**: Net amount of all sales and returns of the item.

12 Week Unit Sales Trend

Graph displaying week-by-week net sales data for the item over the past twelve weeks. This graph has the following axes:

- Start date for the week.

- Number of items sold.

Print a Rain Check

A Rain check is an optional feature that allows customers to purchase out of stock items for the same price at a later date. To print a rain check:

1. Select **Print Rain Check** in the Item Viewer Context Menu. See Figure 24–22.

   A confirmation prompt opens.

Figure 24–28 Item Viewer - Print Rain Check Prompt



2. Select **Yes** to print the rain check.

   Xstore Point of Service prints a rain check for the item.

Inventory Locator Lookup

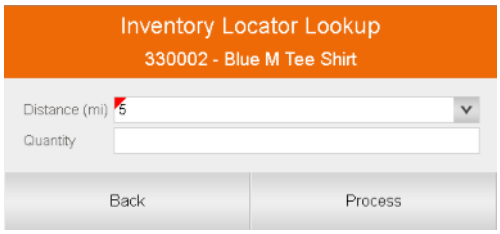
Occasionally an item may not be available in your store inventory, but the customer would like to see which stores in your chain have the item in stock. You can use the Inventory lookup process to search a centralized database to locate these items within a set parameter range. For example, you could locate a specified item at a store within 25 miles of your location that has at least three of the specified item on hand.

To perform an inventory lookup:

1. Select **Inventory Locator** in the Item Viewer Context Menu. See Figure 24–22

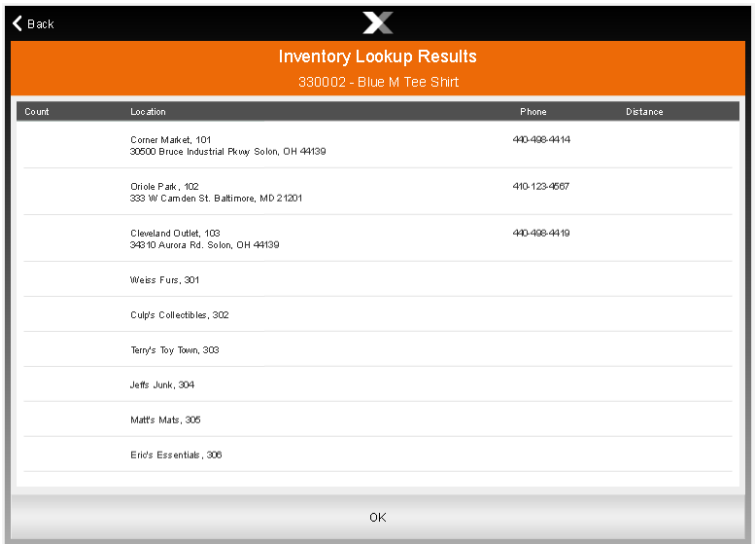
   The Inventory Locator Lookup window opens:

Figure 24–29 Item Viewer - Inventory Locator Lookup Prompt



2. Enter the lookup information for the item:
   - **Distance**: Distance from the local store.
   - **Quantity**: Minimum quantity of the item that the store must have on hand. For example, if the customer needs three of the item, enter 3.
3. Select **Process**.

Figure 24–30 Item Viewer - Inventory Locator Lookup Results



Xstore Point of Service returns a list of stores with the item. The following information will be displayed for each location:

- **Count**: On-hand quantity of the item at the store.
- **Location**: Address for the store.
- **Phone**: Phone number for the store.
- **Distance**: Distance of the store from the local store.

4. Select **OK** to close the window.

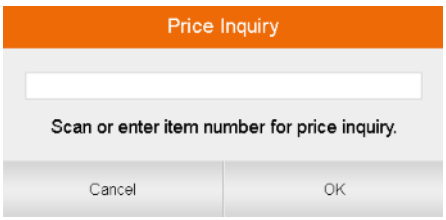
Price Inquiry

If you want to look up the price of an item, use the function Price Inquiry. You can look up the price for an item when you are logged out as well as when you are logged on to the application. To look up the price of an item, follow the steps below.

1. Select **Actions** from the Context Menu.
2. Select **Price Inquiry** in the Actions menu.

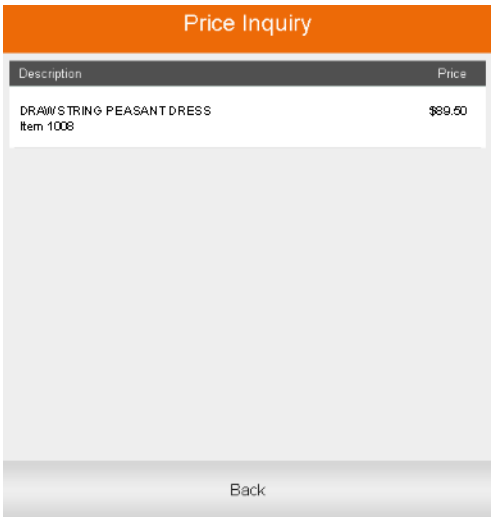
   Your are prompted for the item. Scan, or enter the item and press **OK**.

Figure 24–31 Price Inquiry Item Prompt



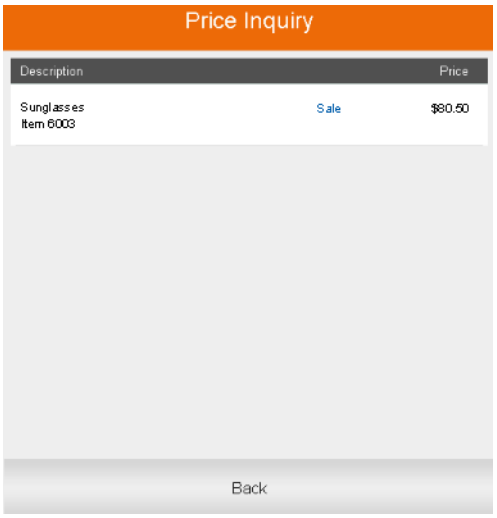
The item description, item ID and the corresponding price are displayed.

Figure 24–32 Price Inquiry Result



Note: If the displayed price is a deal price, the system marks the price with the text Sale.

Figure 24–33 Price Inquiry- Deal Price



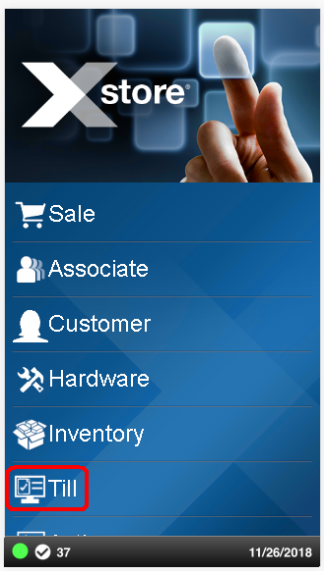
3. Select **Back** to close the screen.

25

Till Management

Till options and maintenance functions are primarily related to the movement of money into and out of a till (a cash drawer). Till options include No Sale, Post Void, Attach and Remove Cash Drawer. Additional options such as Change Float, Paid In and Paid Out transactions and Tender Exchange are available on the Mobile Tablet. Several other till maintenance options deal with the control of funds in the till. They include Cash Pickup, Cash Transfer. Finally, the Lock Register option provides physical security for the till. All till options are accessed through the **Till** button on the Main Menu.

Figure 25–1 Main Menu - Till Option



About This Chapter

This chapter contains the following procedures:

- Till Maintenance
  - Cash Pickup
  - Cash Transfer (From Store Bank To Till)
  - Remove Cash Drawer
  - Attach Cash Drawer

- Till Options
  - No Sale
  - Post Void
  - Change Float (Mobile Tablet Only)
  - Paid In and Paid Out Transactions (Mobile Tablet Only)
  - Tender Exchange (Mobile Tablet Only)

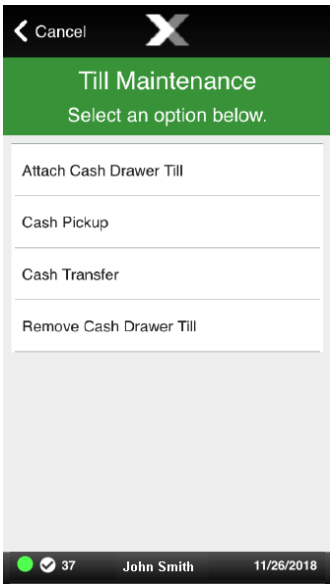
Note: Many Till Maintenance options are controlled by user security and may not be available to all associates.

Till Maintenance

Till Maintenance options control the funds in the till. Select from the following options:

- Cash Pickup
- Cash Transfer (From Store Bank To Till)
- Attach Cash Drawer
- Remove Cash Drawer

Figure 25–2 Till Maintenance Menu



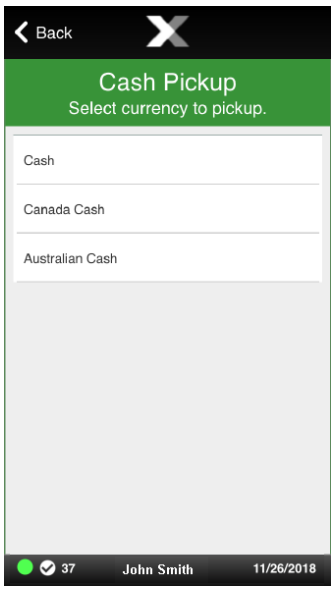
Cash Pickup

Cash Pickup is a till feature that allows an associate to take cash from a till so that the amount does not exceed a specified threshold amount. The system may be configured to prompt for an associate to make a cash pickup when the amount in the till is greater than the threshold amount.

Note: Your system's configuration may specify the maximum amount that should be kept in a till. If that amount is exceeded after completing the tendering process for a transaction, the system may display a prompt indicating that a cash pickup should be made. However, you do not have to wait for this prompt to make a cash pickup. After you have assigned a customer to a transaction or added items to a sale, you cannot perform a cash pickup.

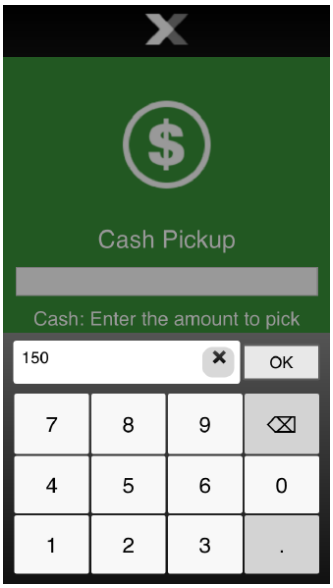
1. At the Main Menu screen, select and log in to display the **Till** menu, then select **Till Maintenance** to display the Till Maintenance menu. See Figure 25–2.
2. Select **Cash Pickup** from the menu.
3. If necessary, scan the cash drawer on which to perform the cash pickup.
4. If your store is configured for foreign cash currency tenders to be given as change, select the type of tender from the list.

Figure 25–3 Cash Pickup Currency List



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

Figure 25–4 Cash Pickup Amount

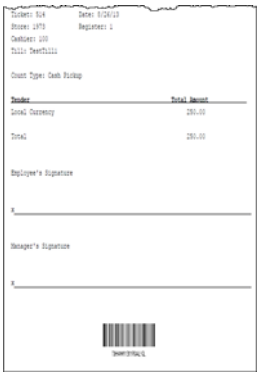


Note: Your system's configuration may specify the minimum amount that should be kept in a till. If you try to remove an amount that results in the till amount going below this level, the system displays a prompt indicating the amount that must remain in the till after a pickup. Press **Enter** to return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

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

   The system prints a receipt for this cash pickup transaction.

Figure 25–5 Cash Pickup Transaction Receipt



Cash Transfer (From Store Bank To Till)

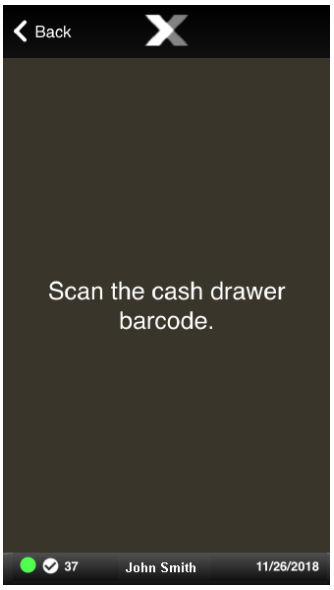
To perform a Cash Transfer from the store bank to a till, do the following:

1. 1. At the Main Menu screen, select **Till** and log in to display the **Till** menu, then select **Till Maintenance** to display the Till Maintenance menu. In the Till Maintenance menu, select the **Cash Transfer** option. See Figure 25–2.

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

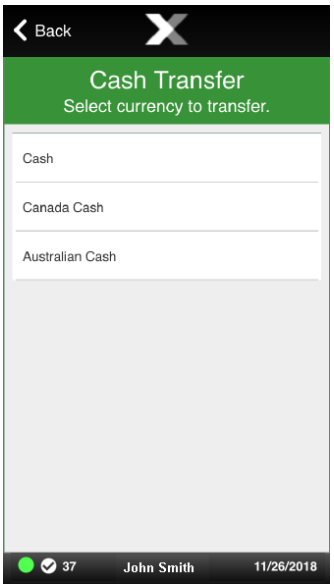
2. If necessary, scan the cash drawer on which to perform the cash transfer.

Figure 25–6 Scan Cash Drawer Prompt



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

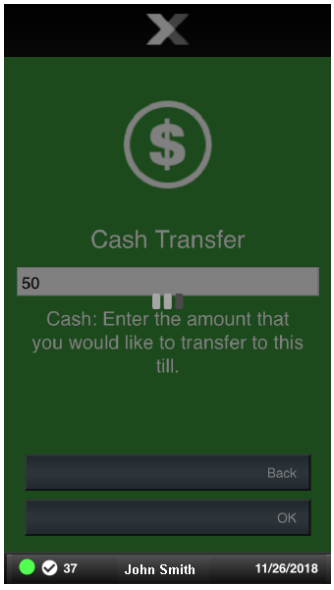
Figure 25–7 Cash Transfer Currency List



The cash drawer is popped open.

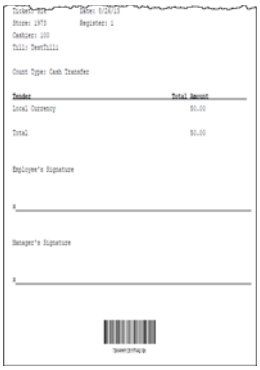
4. Enter the amount of cash you would like to transfer and then press **Enter**.

Figure 25–8 Cash Transfer Amount Prompt



5. A receipt prints for the cash transfer and Xstore Mobile returns to the Till Maintenance menu. The cash transfer is complete.

Figure 25–9 Cash Transfer Receipt



Attach Cash Drawer

1. Select **Attach Cash Drawer Till** from the Till Maintenance menu. See Figure 25–2.

   A list of tills opens.

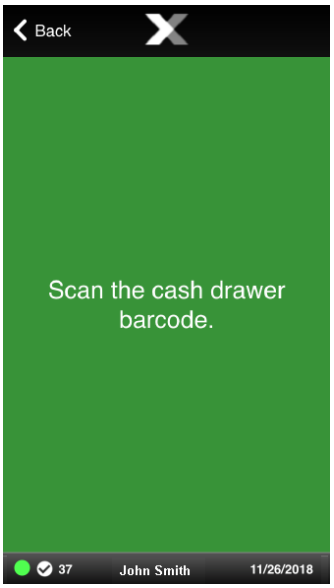
2. Select the till to open from the list.

Figure 25–10 Cash Drawer List



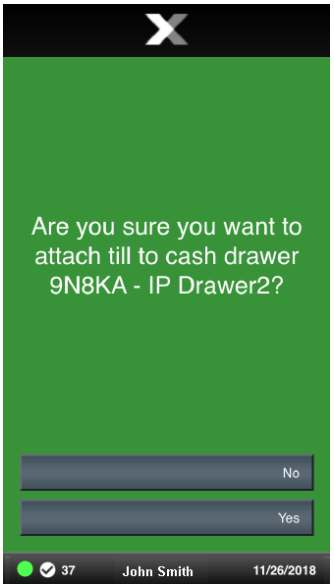
3. Scan the drawer to which the till will be attached.

Figure 25–11 Scan Cash Drawer Barcode



A confirmation prompt opens.

Figure 25–12 Cash Drawer Confirmation Prompt

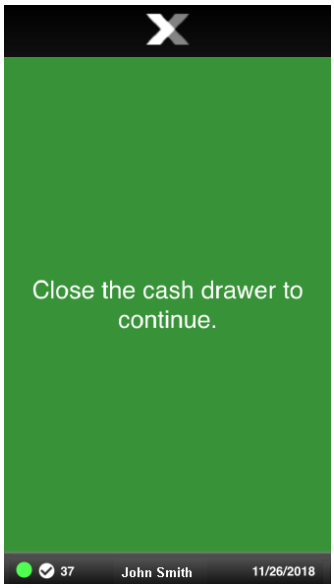


4. Select **Yes**.

   The cash drawer opens.

5. Insert the till into the cash drawer.

Figure 25–13 Close Cash Drawer Prompt



6. Close the cash drawer.
7. Select **OK** at the confirmation prompt.

Figure 25–14 Cash Drawer Confirmation Message

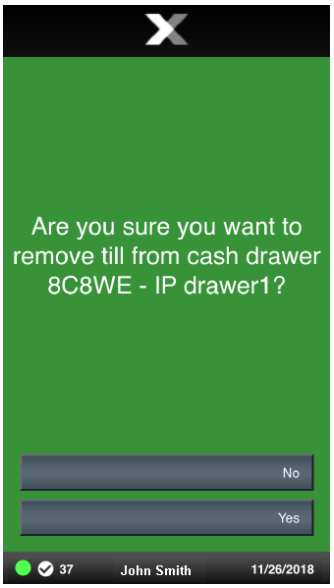


Remove Cash Drawer

This option allows a cashier to physically remove a till from a register so that it can be temporarily stored or reconciled at a different register. When a till is removed, reconciliation is not required. Another till may be attached to the register immediately.

1. Select **Remove Cash Drawer Till** from the Till Maintenance menu. See Figure 25–2.
2. Depending upon the configuration of your system, you may be prompted with a list of cash drawers:
   a. Select the cash drawer from which to remove the till.
   b. Scan the cash drawer when prompted.
3. When prompted, Select Yes to confirm you want to remove the till.

Figure 25–15 Remove Cash Drawer Confirmation Message



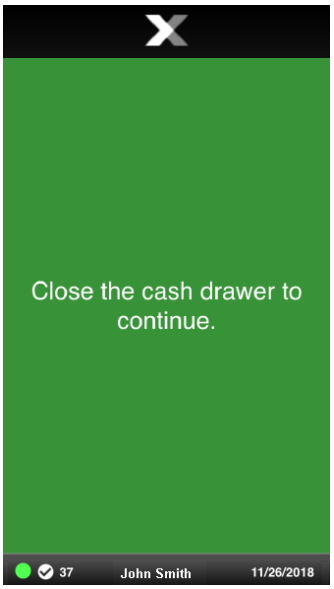
4. Remove the till.
5. When prompted, press **OK** to confirm you have removed the till from the register.

Figure 25–16 IP Cash Drawer Removed



6. Close the register drawer.

Figure 25–17 Close Cash Drawer Prompt



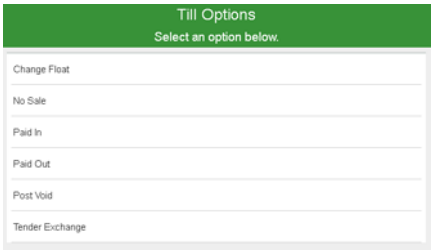
The till may now be stored or reconciled at a different register.

Till Options

Select from the following options:

- No Sale
- Post Void
- Change Float (Mobile Tablet Only)
- Paid In and Paid Out Transactions (Mobile Tablet Only)
- Tender Exchange (Mobile Tablet Only)

Figure 25–18 Mobile Tablet Till Options Menu



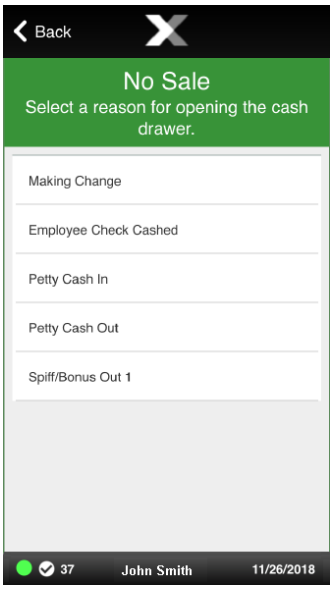
No Sale

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

1. At the Main Menu screen, select **Till** and log in to display the **Till** menu, then select **Till Options** to display the Till Options menu. In the Till Options menu, select the **No Sale** option.

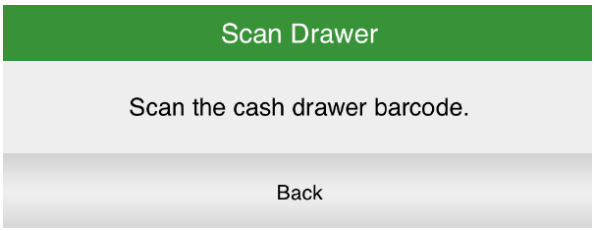
   The system prompts you to select the reason you are opening the cash drawer.

Figure 25–19 No Sale Reason List



2. Select a reason from the list.
3. If necessary, scan the cash drawer on which to perform the no sale.

Figure 25–20 Scan Cash Drawer Prompt



4. The system may prompt you to enter a comment about the reason for opening the cash drawer. If it is required, enter the pertinent information in the comment entry form and press **Enter**.

   The system prints a No Sale receipt for your records.

Post Void

Performing a Post Void transaction changes the status of a sale transaction to Void. All records in the system are reset as if they had never occurred during the original transaction. For example, a post void adjusts the tender totals for the till involved in the transaction.

A transaction may be post voided only on the day it is created. Post Voids may be performed on a different register from the one where the original transaction was executed.

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

A Post Void transaction may be performed from the Register or from the Back Office, depending upon your system's configuration and store policy. In the Back Office it is available on the Main Menu and also from the Electronic Journal.

Performing a Post Void from the Register

1. At the Main Menu screen, select **Till** and log in to display the Till menu, then select **Till Options** to display the Till Options menu. In the Till Options menu, select the **Post Void** option.
2. When the system prompts for the transaction barcode, scan the receipt barcode or enter the information manually and select **Process**.

Figure 25–21 Mobile Handheld Prompt for Transaction Barcode

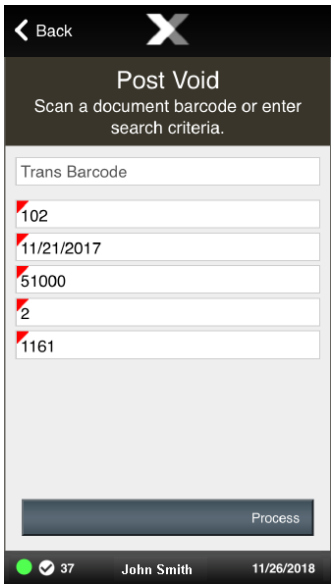
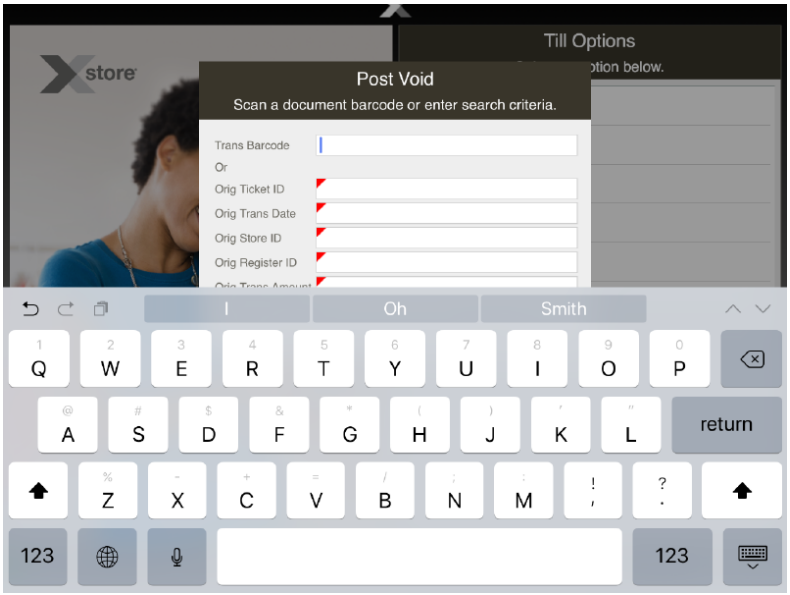


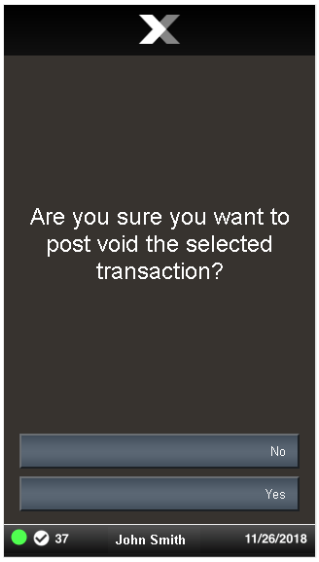
Figure 25–22 Mobile Tablet Prompt for Transaction Barcode



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

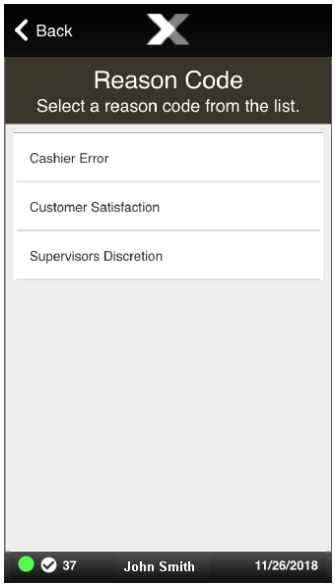
3. The system displays a message that prompts you to confirm that you want to post void the transaction. Select **Yes** to continue or **No** if you have changed your mind.

Figure 25–23 Prompt to Confirm Post Void



4. The system may require that you select a reason for post-voiding a transaction, depending upon your store policy. If prompted, select a reason from the list and select **OK**. Use the up and down arrow keys to scroll through the list.

Figure 25–24 List of Post Void Reasons

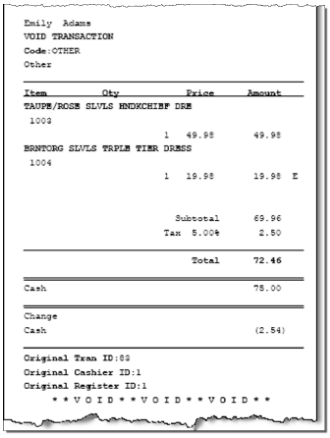


5. If necessary, scan the cash drawer with which to perform the post void.
6. Your system may also be configured to require a comment entry about the Post Void transaction. If it does, a free-form text screen displays where you can type a comment. The kind of information you enter may be determined by your store policy. After entering a comment, select **OK**.

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

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

Figure 25–25 Void Receipt Example

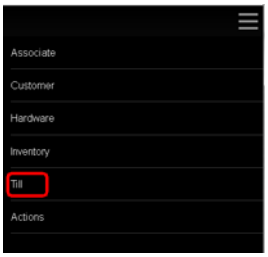


Open the Till Options Menu (Mobile Tablet Only)

To open the **Till Options** menu from the Register Login Screen:

1. Select **Till** in the Register Login screen Context Menu.

Figure 25–26 Login Screen Context Menu



2. Do one of the following, depending upon the configuration of your system:

   Enter your user ID and press **Enter**.

   Xstore prompts for your password.

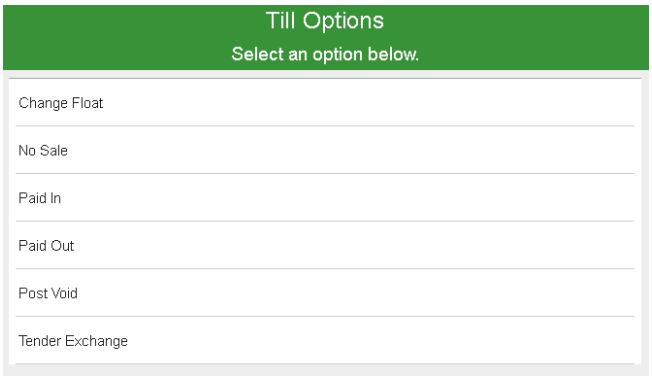
3. Enter your password and press **Enter**.

   The Back Office Main Menu opens.

4. Click **Till Options**.

   The Till Options menu opens.

Figure 25–27 Mobile Tablet Till Options Menu



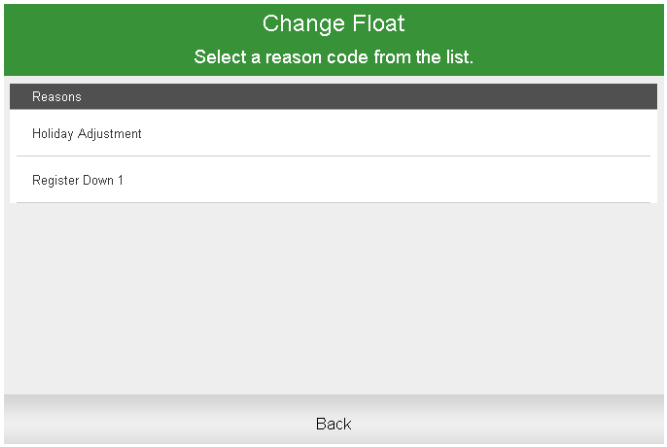
Change Float (Mobile Tablet Only)

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 holiday shopping season to plan for increased sale activity.

To change the float:

1. Open the Till Options Menu, see Open the Till Options Menu (Mobile Tablet Only).
2. Click **Change Float**.
3. Select the reason for changing the float:

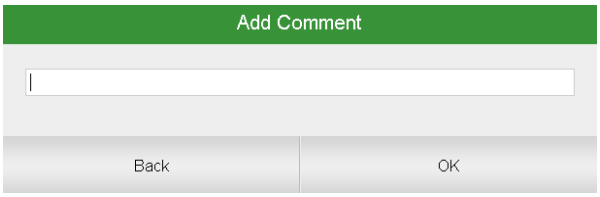
Figure 25–28 Change Float Reason



- If you are prompted to enter more information, continue with Step.4
- If you are prompted for the amount of the float change, continue with Step 6.

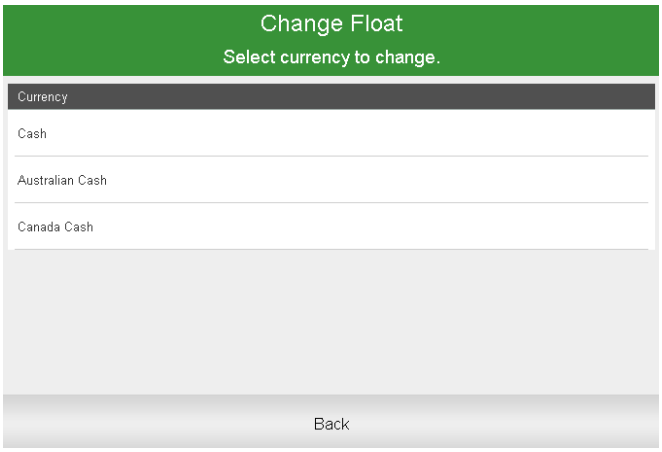
4. Enter more information about the reason for the float change transaction.

Figure 25–29 Change Float Add Comment Prompt



5. Select **OK**.
6. If you are prompted for a currency, select the currency:

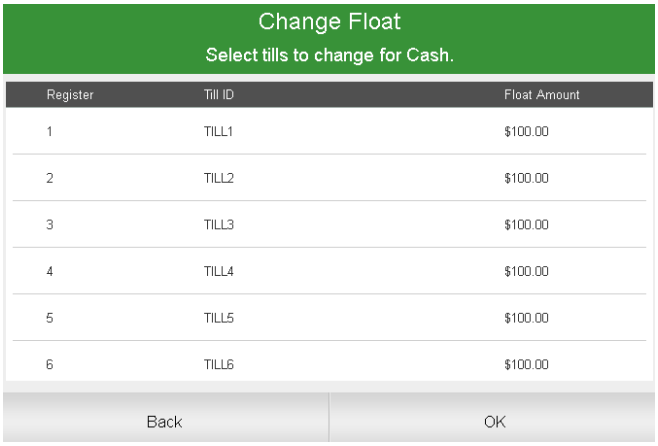
Figure 25–30 Change Float Select Currency Prompt



Xstore prompts for the tills.

7. Select the tills:

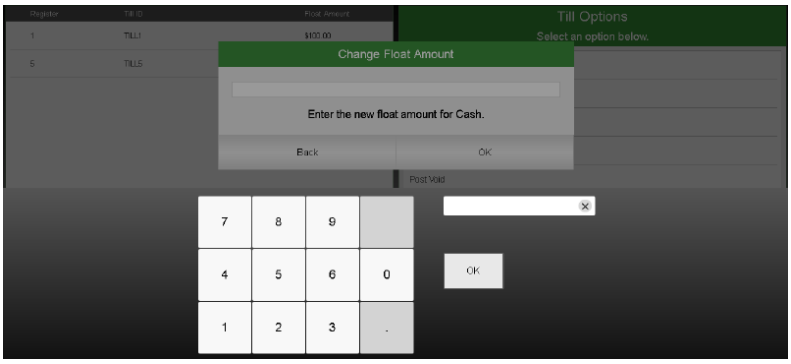
Figure 25–31 Change Float Select Tills



8. Click **OK**.

Xstore prompts for the new float amount for the selected tills.

Figure 25–32 Change Float New Amount



9. Enter the new float amount, then select **OK**.

   A confirmation prompt opens.

10. Select **Yes**.

    The float is changed and the change float process completes.

Paid In and Paid Out Transactions (Mobile Tablet Only)

A paid in transaction allows you to move funds into a till from non-sale sources. A paid out transaction moves funds out of a till for non-refund purposes. The system's configuration controls which associates are allowed to move funds in or out of the till. It also specifies the list of valid reasons that an associate can select when performing a paid in or paid out transaction. In addition, the system's configuration controls whether or not receipts are produced by these two transaction types.

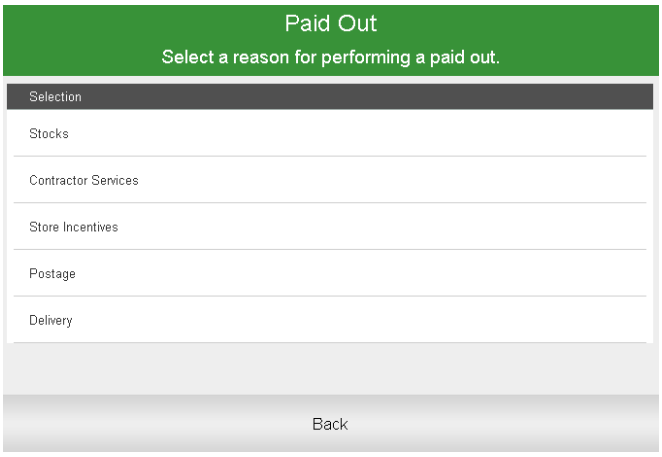
Paid Out

To perform a paid-out transaction:

1. Open the Till Options Menu, see Open the Till Options Menu (Mobile Tablet Only).
2. Click **Paid Out**.
   - If you are prompted to scan a cash drawer, continue with Step 3.
   - If you are prompted to select a reason for the paid out, continue with Step 4.
3. If necessary, scan the cash drawer to use for the paid out transaction.

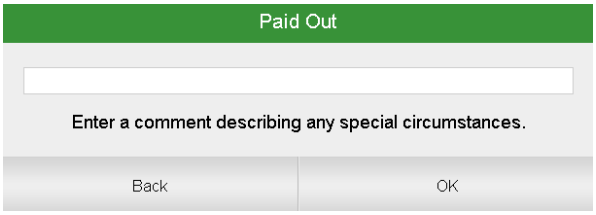
   A reason code selection window opens.

Figure 25–33 Paid Out Reason List



4. Select the reason for the paid out transaction:
   - If you are prompted to enter more information, continue with Step 5.
   - If you are prompted for the amount of the paid out, continue with Step 7.
5. Enter more information about the reason for the paid out transaction.

Figure 25–34 Paid Out Comment Prompt



6. Click **OK**.
7. Enter the amount of the paid out, then press **Enter**.

   Note: If you exceed your store's maximum amount allowed for a paid out transactions a notification window opens. Click OK to close the prompt and reenter a new paid out amount.

   The cash drawer opens.
8. Remove the entered amount of the paid out from the cash drawer, then close the cash drawer.

   The paid out transaction is complete.

Paid In

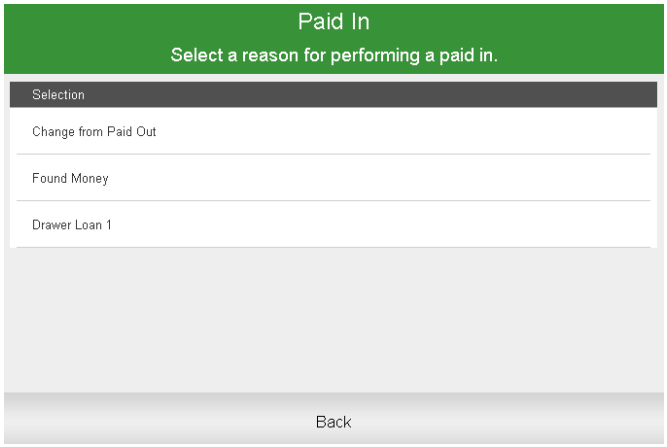
To perform a paid-in transaction:

1. Open the Till Options Menu, see Open the Till Options Menu (Mobile Tablet Only).
2. Click **Paid In**.
   - If you are prompted to scan a cash drawer, continue with Step 3.
   - If you are prompted for a tracking number for the paid in, continue with Step 4.
3. If necessary, scan the cash drawer to use for the paid in transaction.

   Xstore prompts for a paid in tracking number.
4. Do one of the following:
   - Enter a tracking number for a previous paid-out transaction from which you are returning funds:
     - Scan the paid-out transaction receipt barcode and select **OK**.
     - Enter tracking number for the paid-out transaction and select **OK**.
   - Press Enter to skip entering a tracking number.

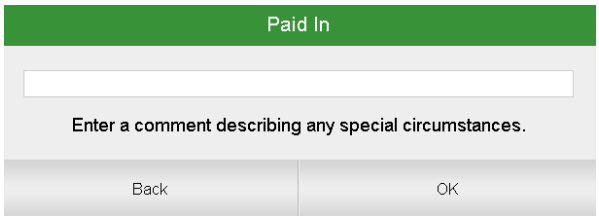
   A reason code selection window opens.

Figure 25–35 Paid In Reason List



5. Select the reason for the paid in transaction:
   - If you are prompted to enter more information, continue with Step 6.
   - If you are prompted for the amount of the paid in, continue with Step 8.
6. Enter more information about the reason for the paid in transaction.

Figure 25–36 Paid In Reason Comment Prompt



7. Click **OK**.
8. Enter the amount of the paid in, then select **OK**.

   The cash drawer opens.
9. Put the paid-in money in the cash drawer, then close the cash drawer.

   The paid in transaction is complete.

Tender Exchange (Mobile Tablet Only)

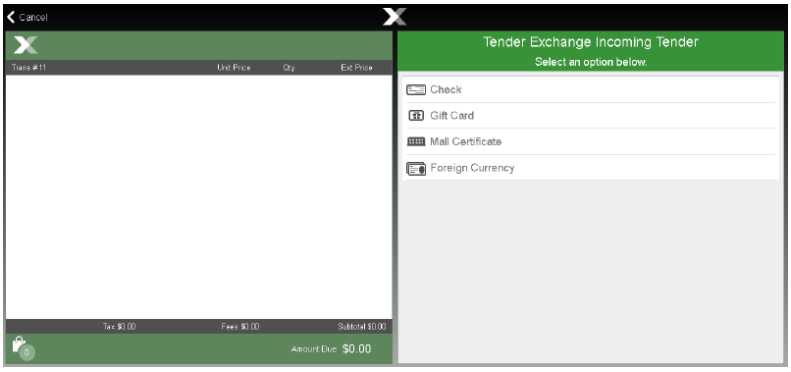
The Tender Exchange function permits an associate to exchange one form of tender for another. The types of tender that may be exchanged and the threshold exchange amounts are determined by your store policy.

To perform a Tender Exchange:

1. Open the Till Options Menu, see Open the Till Options Menu (Mobile Tablet Only).
2. Click **Tender Exchange**.

   A Tender Exchange Incoming Tender window opens.

Figure 25–37 Tender Exchange Incoming Tender Screen



3. Select the incoming tender type from the tender exchange list.
4. If a check tender was selected in Step 3, enter information about the check:
   - Enter the check MICR number, then press **Enter**.
   - Enter the state or province that issued the ID being used to verify the customer's identity, then press Enter.
   - Enter the ID number, then press Enter.

- Enter the birthdate on the ID, then press Enter.

5. Enter the amount of the incoming tender.
6. If necessary, select whether to add another incoming tender to the exchange:
   - Click **Yes** to add another tender. Return to Step 3.
   - Click **No** to continue with the current tenders.
   - A Tender Exchange Outgoing Tender window opens. Continue with Step 8.
7. Select the outgoing tender.
8. Click **OK**.

   Xstore prompts for the amount of the outgoing tender.

   Note: The default value is equal to the maximum amount that can be redeemed in the selected tender.

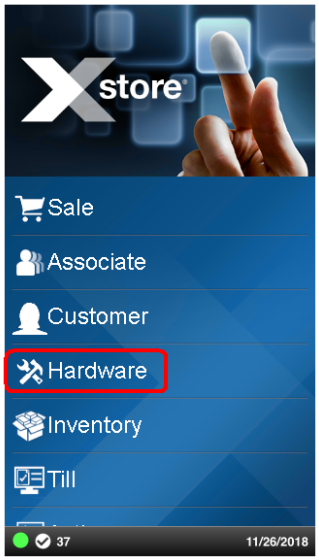
9. If necessary, change the amount to return to the customer.
10. Press **Enter**.
11. If necessary, scan the cash drawer with which to perform the tender exchange.
    - If the entered outgoing amount was less than the maximum, a Tender Exchange Outgoing Tender window opens. Return to Step 8.
    - If the outgoing amount was the maximum amount, Xstore prompts whether the tender exchange is complete. Continue with Step 13.
12. Indicate whether the tender exchange is complete:
    - Click **Yes** to complete the transaction.
    - Receipts will print.
    - Click No a Tender Exchange Incoming Tender window opens. Return to Step 3.
13. Indicate whether the tender exchange is complete:
    - Click Yes to complete the transaction.
    - Receipts will print.
    - Click No a Tender Exchange Incoming Tender window opens. Return to Step 3.

26

Hardware

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

Figure 26–1 Hardware Option



About This Chapter

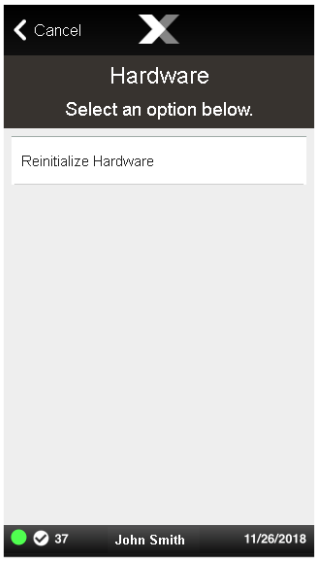
This chapter provides information about the following procedure:

- Reinitialize Hardware

Reinitialize Hardware

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

Figure 26–2 Reinitialize Hardware

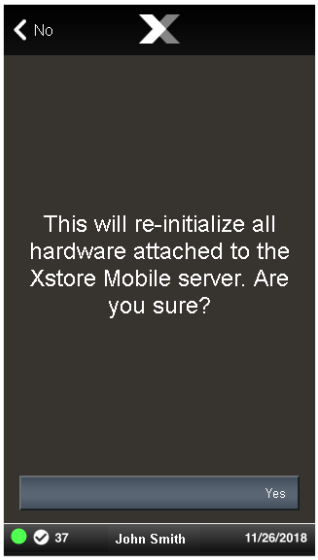


The system performs the following process for the hardware devices:

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

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

Figure 26–3 Reinitialize Hardware Prompt



27

Receiving

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

About This Chapter

This chapter includes the following procedures:

Figure 27–1 Inventory Option



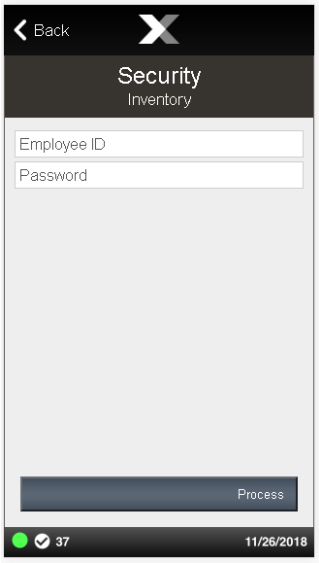
- Start Receiving
- Search for a Receiving Document
- Create a New Receiving Document
- Select or Add a Carton
- Item Entry Screen
- Add a Comment to a Document
- Receive Document in Total
- Save Document

Start Receiving

The receiving process is started through either the Inventory option of the Main Menu.

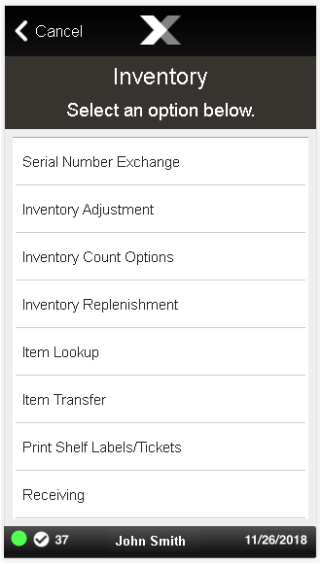
1. Select **Inventory** in the Main Menu.

Figure 27–2 Login Screen



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

Figure 27–3 Inventory Menu



4. Select **Receiving**.

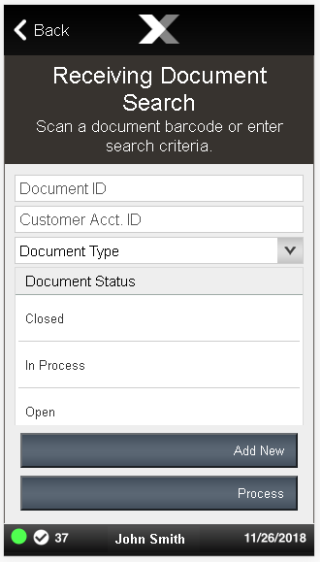
   The Receiving Document Search screen opens.

Continue with Search for a Receiving Document or Create a New Receiving Document.

Search for a Receiving Document

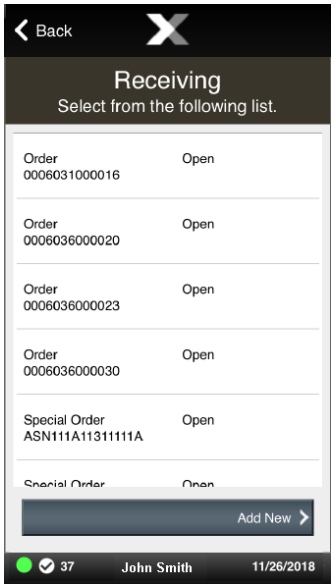
To search for and select a receiving document:

Figure 27–4 Receiving Document Search



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

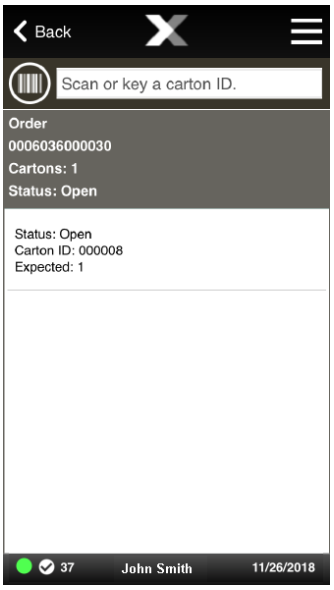
Figure 27–5 Receiving Document Search Results



2. Select the correct receiving document in the list.

The carton list opens.

Figure 27–6 Carton List



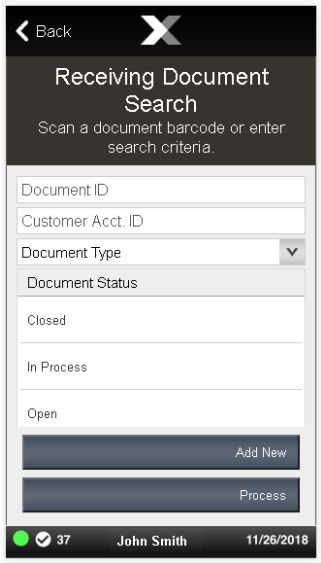
Continue with the appropriate procedure:

- Select or Add a Carton
- Add a Comment to a Carton
- Save Document

Create a New Receiving Document

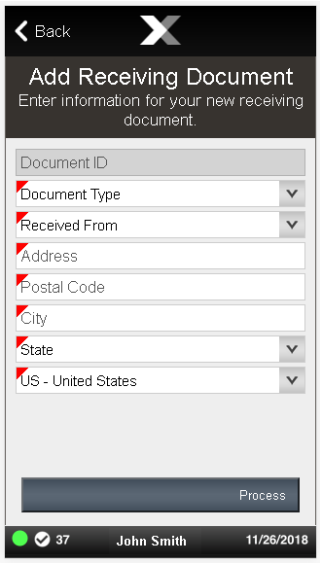
To add a new receiving document:

Figure 27–7 Receiving Document Search Criteria



1. Select **Add New**.

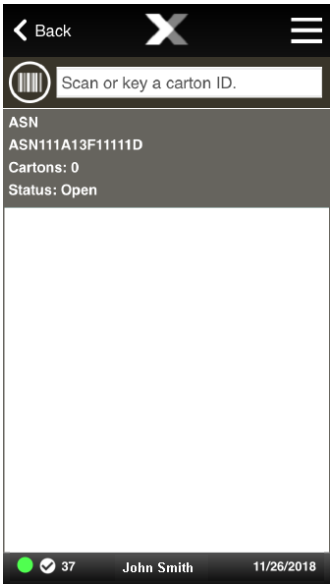
Figure 27–8 Add Receiving Document Entry Form



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

   The new receiving document opens.

Figure 27–9 New Receiving Document



Continue with Select or Add a Carton

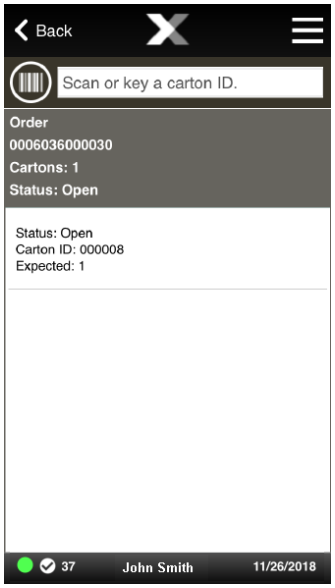
After adding one or more cartons:

- Add a Comment to a Carton
- Save Document

Select or Add a Carton

To select or add a carton for a receiving shipment:

Figure 27–10 Select or Add a Carton



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

   The Item Entry Screen opens.

Figure 27–11 Item Entry Screen

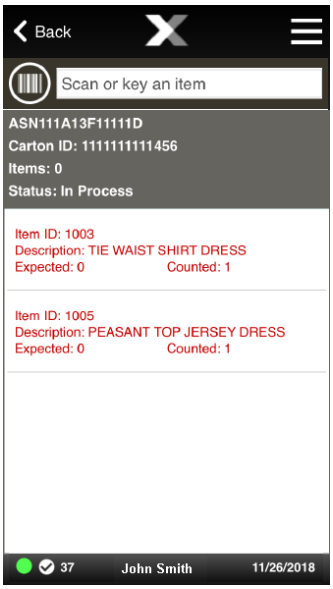
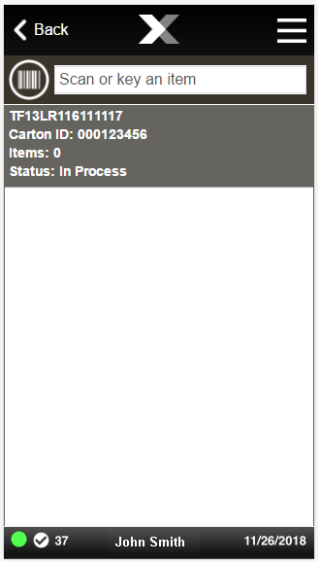


Figure 27–12 Item Entry Screen - New

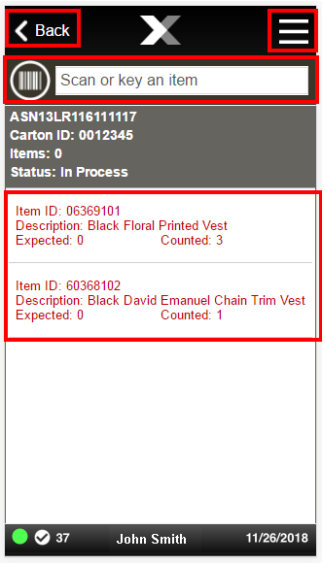


If you added a new carton, the Item Entry Screen will not have any items listed.

Item Entry Screen

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

Figure 27–13 Item Entry Screen



1. **Back** button. Select this Back Button to return to the carton selection screen.
2. Item entry field. See Enter Items.
3. Context Menu Button. Select the Context Menu Button for access to:
   - Add a Comment to a Carton

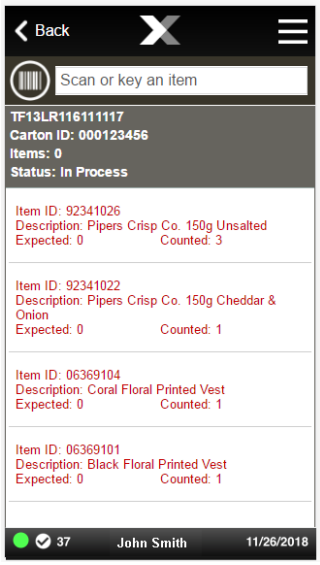
- View Exceptions

4. Receiving Items. Each item displays information about an item in the receiving document. Select an item for access to:
   - Change Item Quantity
   - Void a Line Item

Enter Items

To enter items into a received shipment:

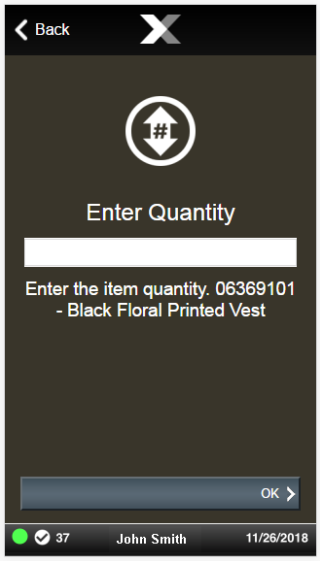
Figure 27–14 Item Entry Screen - Scan



1. Scan an item or enter an Item ID.

   If prompted for an item quantity:

Figure 27–15 Item Entry Screen - Enter Quantity



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

   Xstore Mobile returns to the item entry screen.

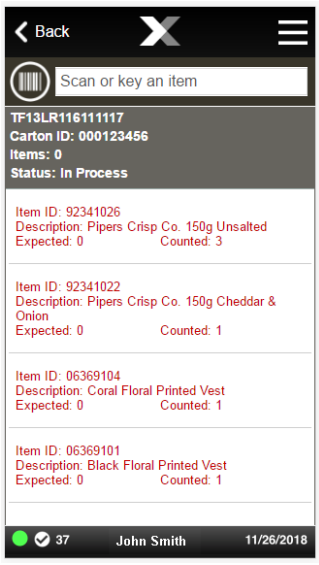
   Repeat these steps for each item in the carton.

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

Change Item Quantity

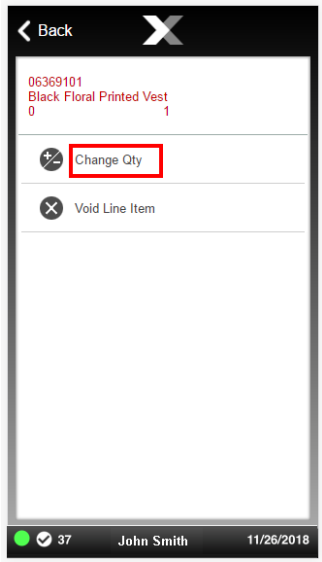
To change the number of an item in a carton:

Figure 27–16 Item List



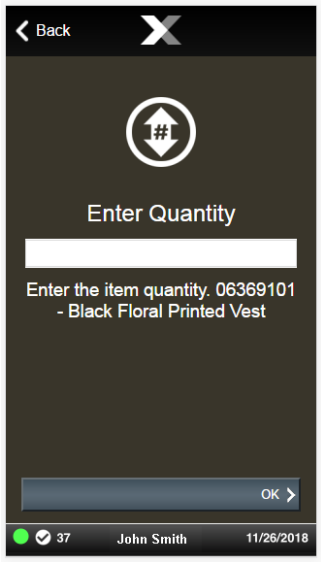
1. Select the item in the item list.

Figure 27–17 Change Quantity Option



2. Select **Change Qty**.

Figure 27–18 Enter Quantity Prompt



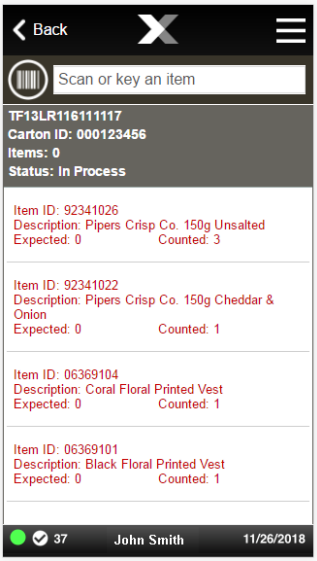
3. Enter the new quantity.
4. Select **OK**.

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

Void a Line Item

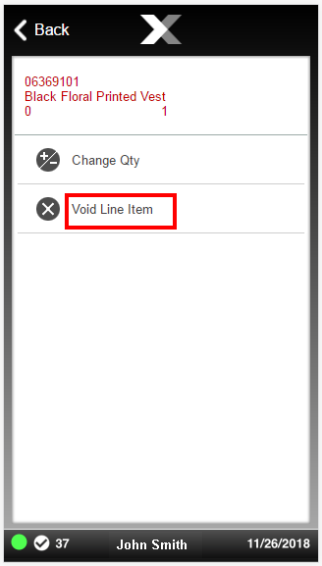
To remove a line item from a carton:

Figure 27–19 Item List



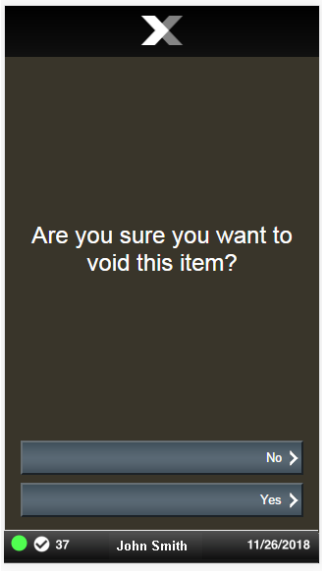
1. Select the item in the item list.

Figure 27–20 Void Line Item



2. Select **Void Line Item**.

Figure 27–21 Void Line Item Confirmation Prompt



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

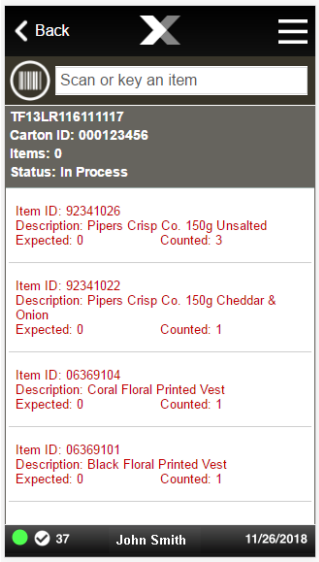
   The item is removed and Xstore Mobile returns to the item entry screen.

Change Item Cost

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

To change the cost of an item for Stock Valuation:

Figure 27–22 Item List



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

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

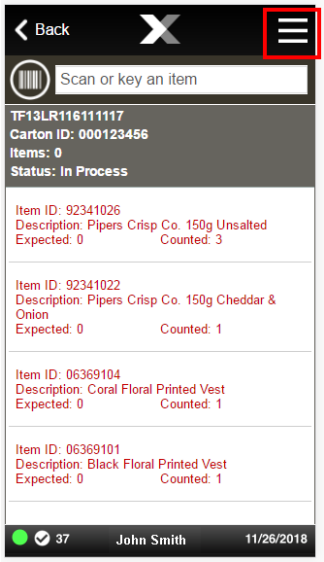
Receive Carton in Total

To receive all items within a carton:

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

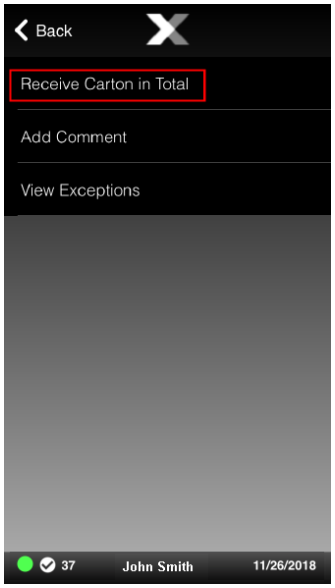
1. Select the Context Menu Button in the Item Entry Screen.

Figure 27–23 Item List - Context Menu



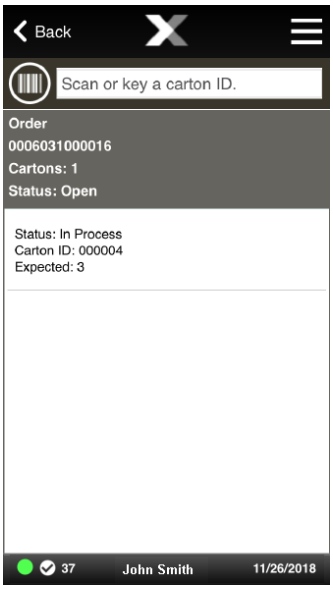
2. Select **Receive Carton in Total**.

Figure 27–24 Receive Carton in Total



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

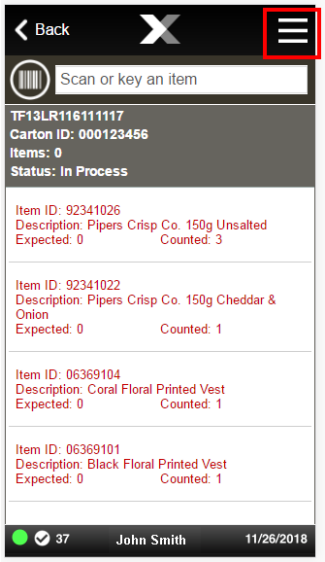
Figure 27–25 Expected Quantities



Add a Comment to a Carton

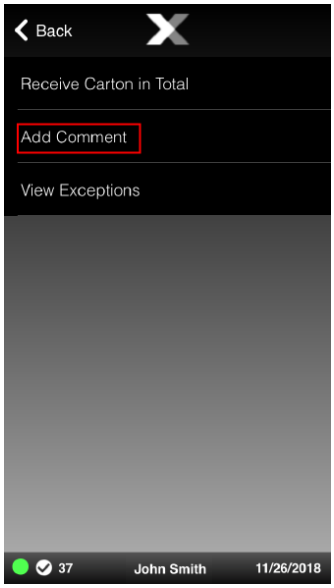
To add a comment to a carton:

Figure 27–26 Item List - Context Menu



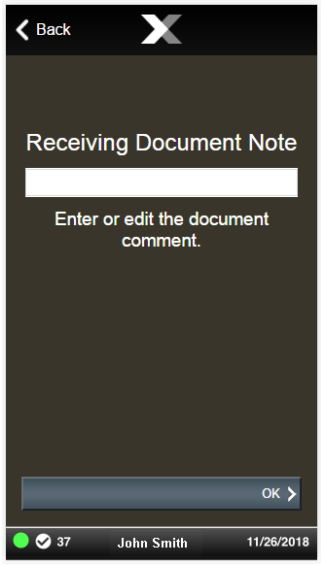
1. Select the Context Menu Button in the Item Entry Screen.

Figure 27–27 Add Comment



2. Select **Add Comment**.

Figure 27–28 Receiving Document Note - Add Comment



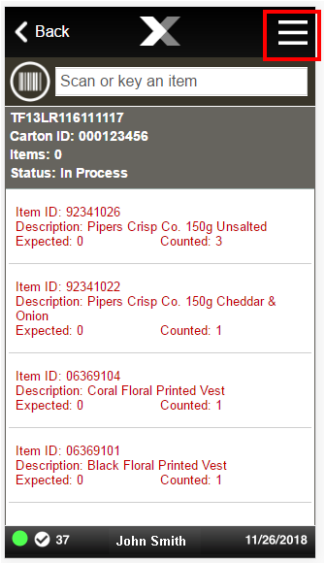
3. Enter the comment.
4. Select **OK**.

   The note is added and Xstore Mobile returns to the Item Entry Screen.

View Exceptions

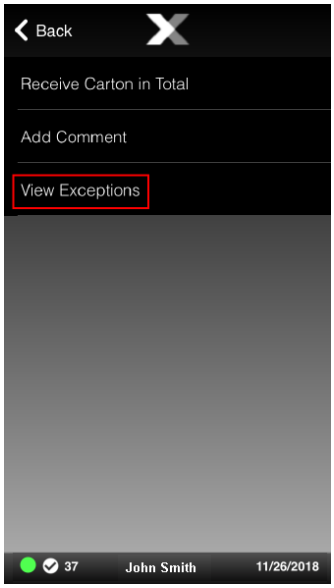
To search for items with differences between their expected and received quantities:

Figure 27–29 Item List - Context Menu



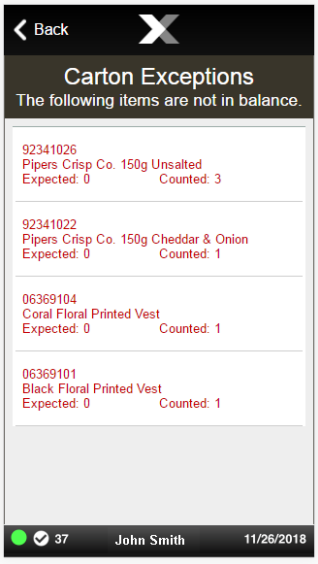
1. Select the Context Menu Button in the Item Entry Screen.

Figure 27–30 View Exceptions



2. Select **View Exceptions**.

Figure 27–31 Carton Exceptions List



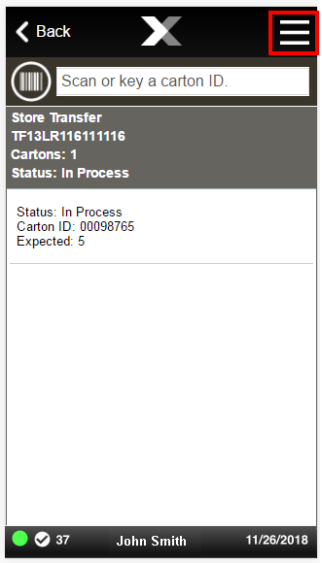
Xstore Mobile displays a list of the items in the carton with differences between their expected and received quantities.

When you are finished viewing the item exceptions select Back to return to the Item Entry Screen.

Add a Comment to a Document

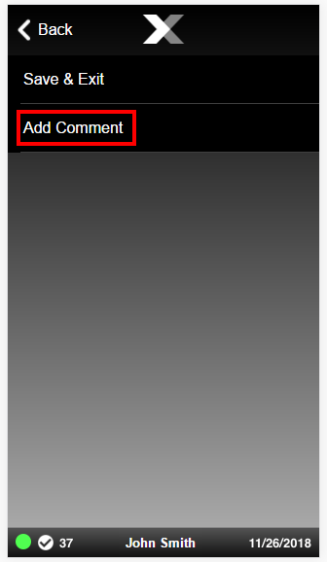
To add a comment to a receiving document:

Figure 27–32 Carton List - Context Menu



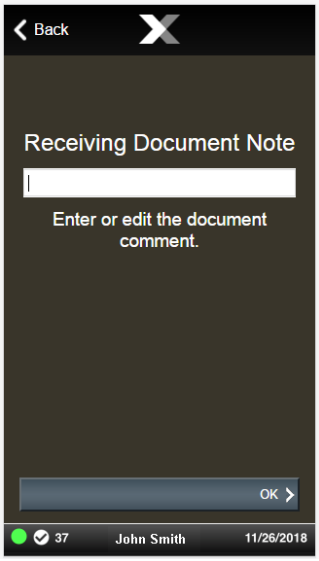
1. Select the Context Menu Button in the carton list.

Figure 27–33 Add Comment



2. Select **Add Comment**.

Figure 27–34 Receiving Document Note - Add Comment



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

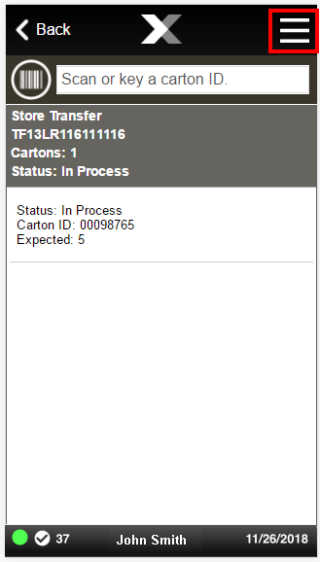
   The note is added and Xstore Mobile returns to the carton list.

Receive Document in Total

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

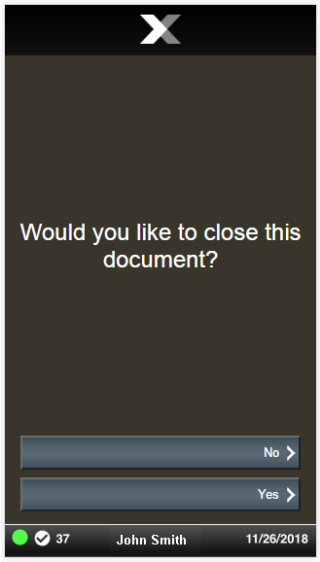
To receive all items within a document:

Figure 27–35 Carton List - Context Menu



1. Select the Context Menu Button in the carton list.
2. Select **Receive Document in Total**.

Figure 27–36 Close Document Prompt



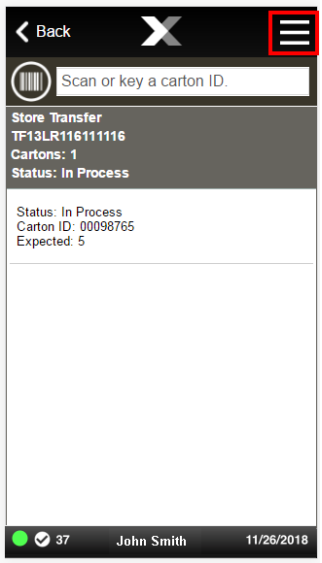
3. Select **Yes** to close the document or select **No** to keep the document open.

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

Save Document

To save changes to a receiving document:

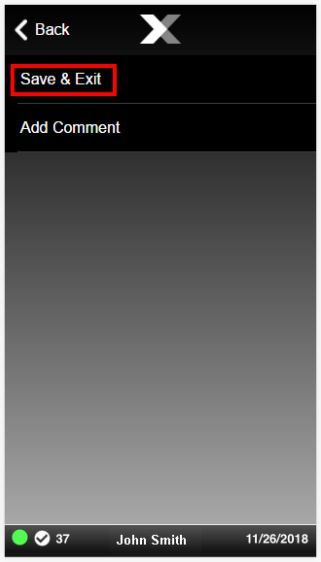
Figure 27–37 Carton List - Context Menu



1. Select the Context Menu Button in the carton list.

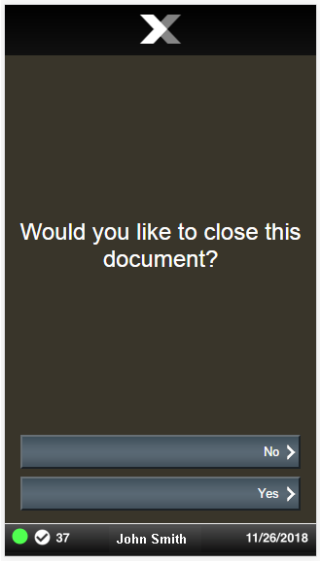
   You must be in the carton list. If you are in the Item Entry Screen, select **Back** to return to the carton list.

Figure 27–38 Save & Exit



2. Select **Save & Exit**.

Figure 27–39 Close Document Prompt



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

   Xstore Mobile returns to the document search screen.

28

Shipping

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

About This Chapter

Figure 28–1 Inventory Option



This chapter includes the following procedures:

- Start Shipping
- Search for a Shipping Document
- Create a New Shipping Document
- Edit a Shipping Document
- Enter Shipping Items
- Change Item Quantity
- Void a Line Item
- Add a Comment to a Shipping Document

- Look Up an Item
- View Exceptions
- Save Document

Start Shipping

The shipping process can be performed through either the Main Menu, or the Admin menu.

Main Menu

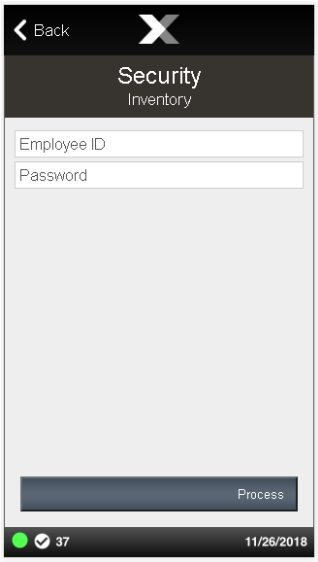
To start the shipping process through the Main Menu:

Figure 28–2 Inventory Option



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

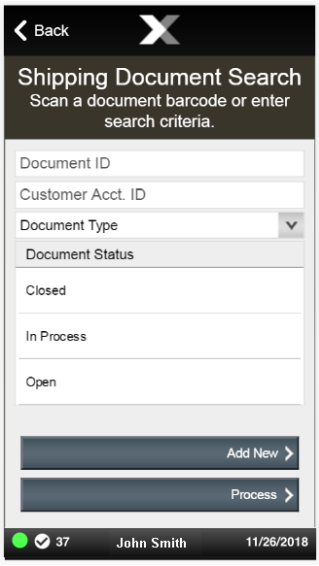
Figure 28–3 Login Screen



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

   The Shipping document search screen opens.

Figure 28–4 Shipping Document Search



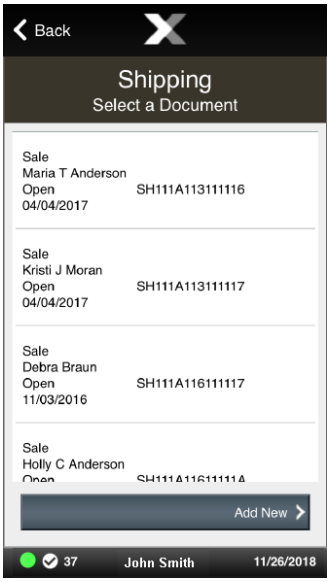
Continue with Search for a Shipping Document or Create a New Shipping Document.

Search for a Shipping Document

To search for and select a shipping document:

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

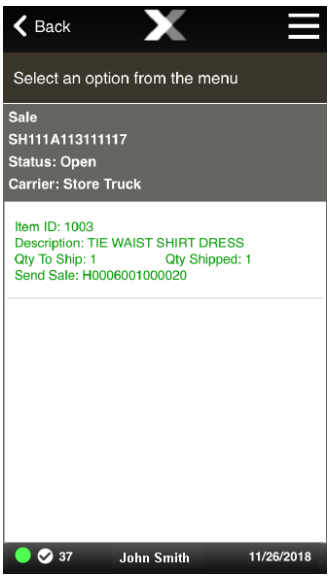
Figure 28–5 Shipping Document Search Results



2. Select the proper shipping document in the list.

   The shipping document opens.

Figure 28–6 Shipping Document



Continue with the appropriate procedure:

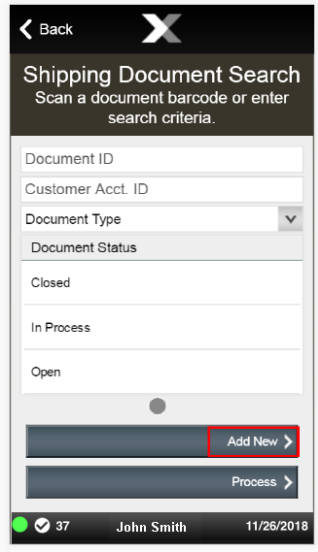
- Enter Shipping Items

- Change Item Quantity
- Void a Line Item
- Add a Comment to a Shipping Document
- Look Up an Item
- View Exceptions
- Save Document

Create a New Shipping Document

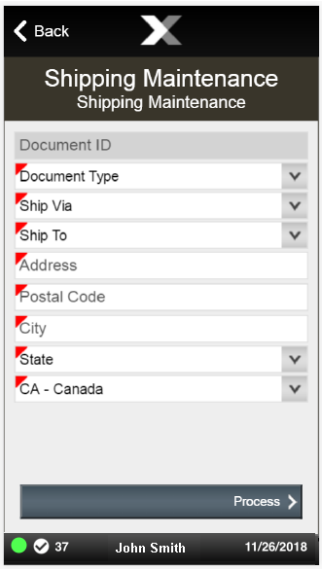
To create a new shipping document:

Figure 28–7 Shipping Document - Add New



1. Select **Add New**.

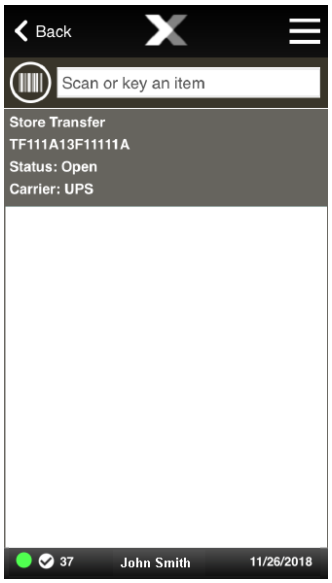
Figure 28–8 Shipping Document Search Criteria



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

   The new shipping document opens.

Figure 28–9 New Shipping Document



Continue with:

- Enter Shipping Items

After adding one or more items:

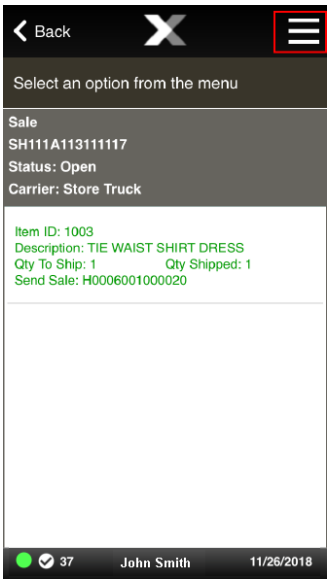
- Change Item Quantity
- Void a Line Item

- Add a Comment to a Shipping Document
- Look Up an Item
- View Exceptions
- Save Document

Edit a Shipping Document

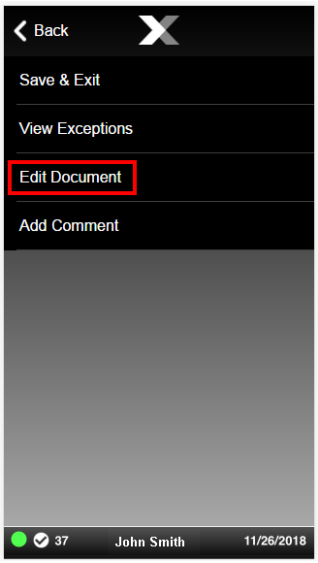
To edit a shipping document:

Figure 28–10 Shipping Document - Context Menu



1. Select the Context Menu Button in the item entry screen.

Figure 28–11 Edit Document



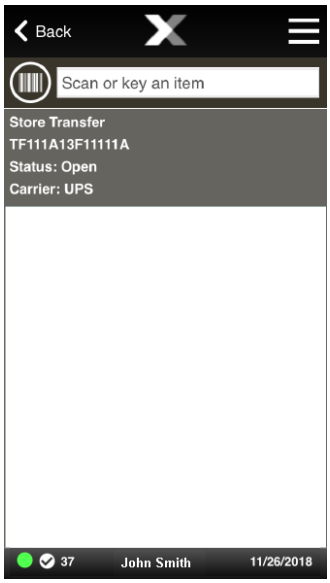
2. Select **Edit Document**.
3. Make changes to the document.
4. Select **Process**.

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

Enter Shipping Items

To enter shipping items:

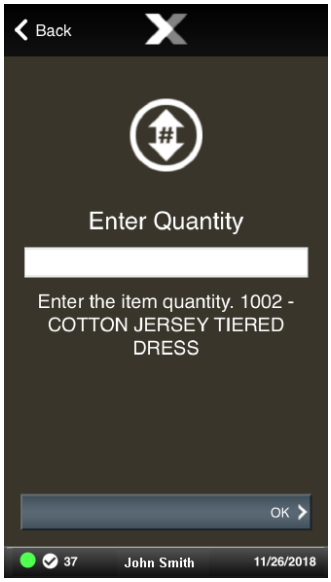
Figure 28–12 Scan or Enter an Item ID



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

   If prompted for an item quantity:

Figure 28–13 Enter Item Quantity



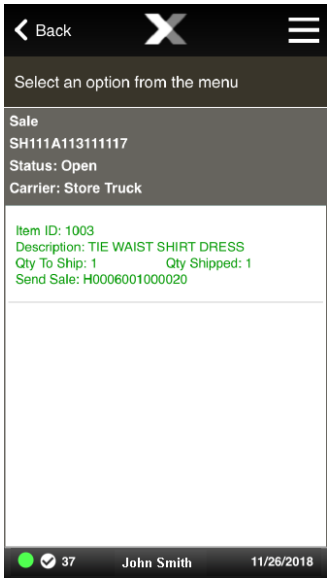
2. Enter the item quantity.
3. Select **OK**.

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

Change Item Quantity

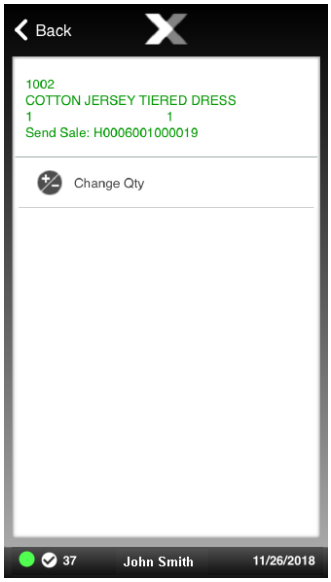
To change the quantity of an item in a shipment:

Figure 28–14 Select Item



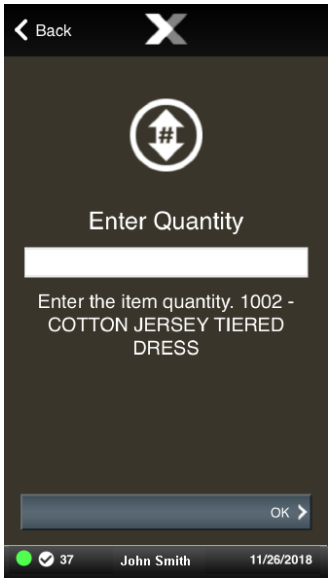
1. Select the item in the item list.

Figure 28–15 Change Quantity



2. Select **Change Qty**.

Figure 28–16 Enter Item Quantity



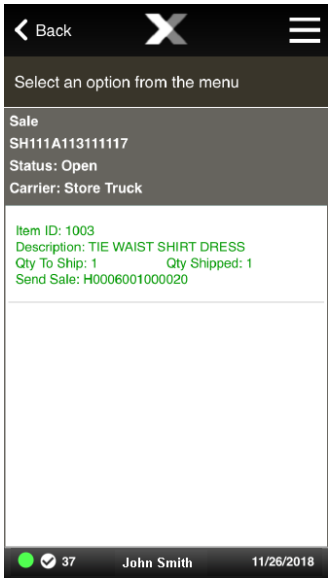
3. Enter the new quantity.
4. Select **OK**.

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

Void a Line Item

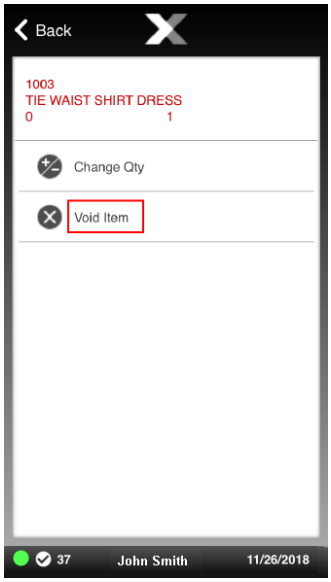
To remove a line item from a shipment:

Figure 28–17 Select Item



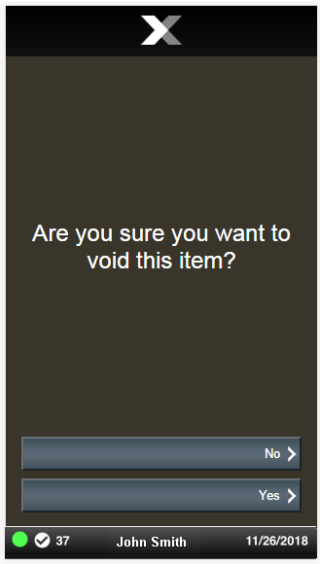
1. Select the item in the item list.

Figure 28–18 Void Item



2. Select **Void Item**.

Figure 28–19 Void Item - Confirmation Prompt



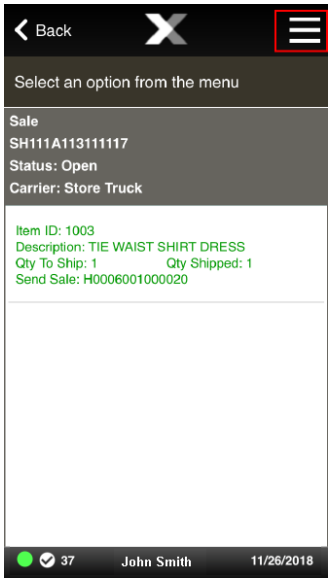
3. Select **Yes** to confirm the void.

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

Add a Comment to a Shipping Document

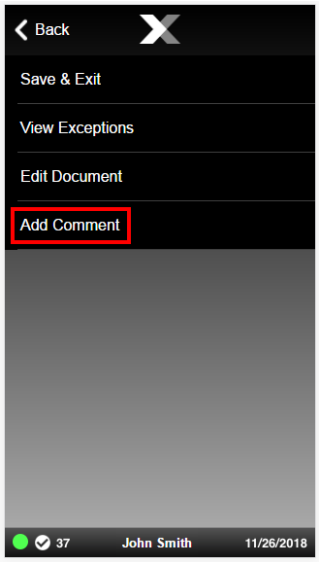
To add a comment to a shipping document:

Figure 28–20 Item Entry Screen - Context Menu Button



1. Select the Context Menu Button in the item entry screen.

Figure 28–21 Add Comment Option



2. Select **Add Comment**.

Figure 28–22 Enter Comment



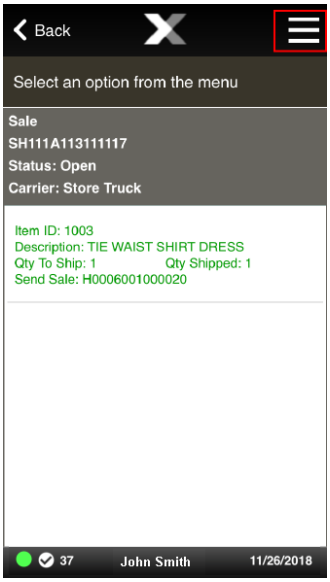
3. Enter the comment.
4. Select **OK**.

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

Look Up an Item

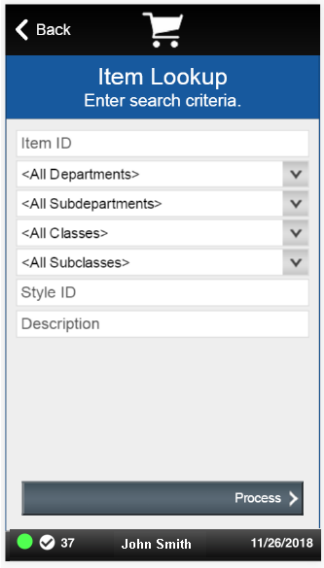
To look up an item:

Figure 28–23 Item Entry Screen - Context Menu Button



1. Select the Context Menu Button in the item entry screen.
2. Select **Item Lookup**.

Figure 28–24 Item Lookup Search Criteria



3. Enter the search criteria.
4. Select **Process**.

   A list of items matching the search criteria is displayed.

Figure 28–25 Item List - Search Results



5. Select the proper item.

   The item is displayed.

Figure 28–26 Item Details



Do one of the following:

Select **Back** to return to the item search criteria screen.

Add the item to the shipment. See Add the Search Item.

Add the Search Item

To add an item that has been located through the Look Up an Item procedure:

Figure 28–27 Item Details Screen - Context Menu Button



1. Select the Context Menu Button in the item detail screen.
2. Select **Add Item**.

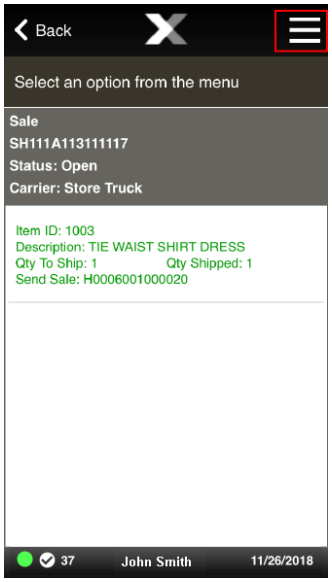
   If prompted for an item quantity:
3. Enter the item quantity.
4. Select **OK**.

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

View Exceptions

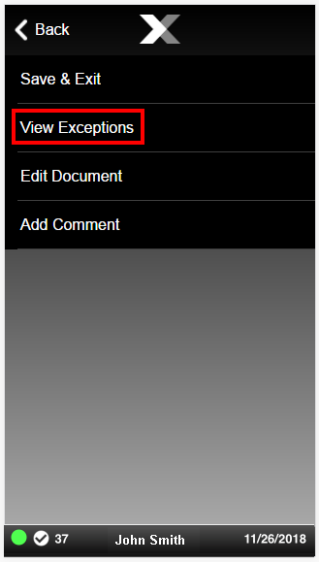
To search for items with differences between their expected and shipped quantities:

Figure 28–28 Item Entry Screen - Context Menu Button



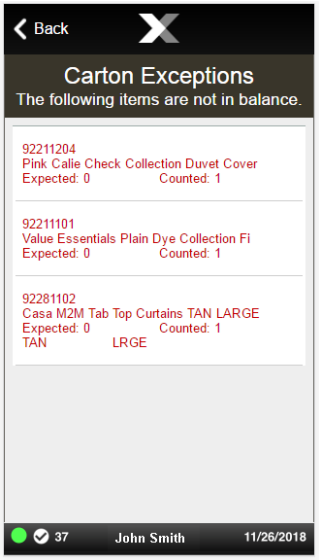
1. Select the Context Menu Button in the item entry screen.

Figure 28–29 View Exceptions Option



2. Select **View Exceptions**.

Figure 28–30 Exceptions List



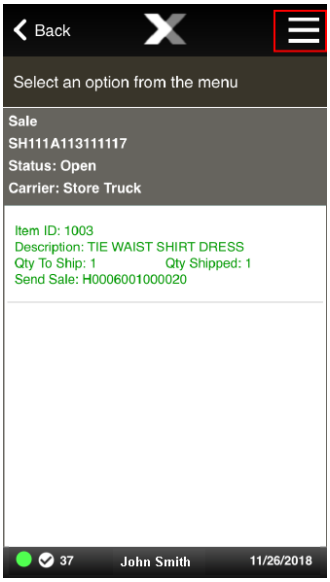
3. Xstore Mobile displays a list of the items in the shipment with differences between their expected and shipped amounts.

   Select **Back** to return to the item entry screen.

Save Document

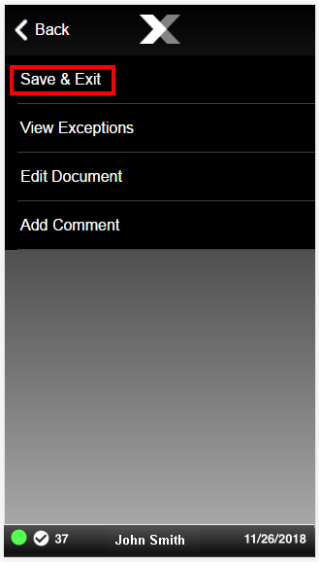
To save changes to a shipping document:

Figure 28–31 Item Entry Screen - Context Menu Button



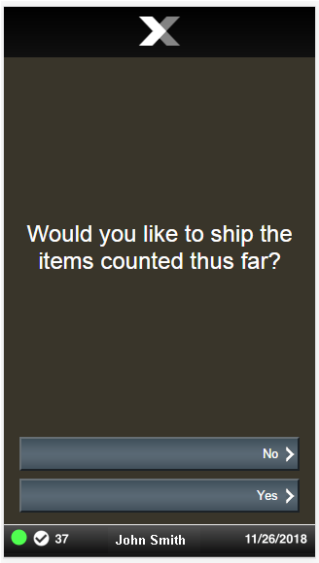
1. Select the Context Menu Button in the item entry screen.

Figure 28–32 Save & Exit Option



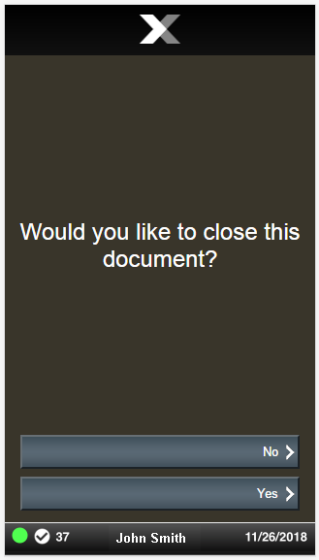
2. Select **Save & Exit**.

Figure 28–33 Ship Counted Items Prompt



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

Figure 28–34 Close Document Prompt



If you selected Yes in the previous step:

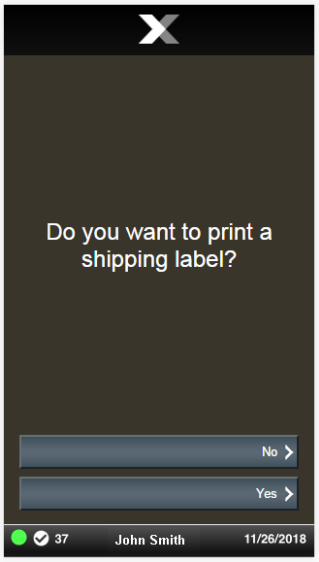
4. Select **Yes** to close the document or select **No** to keep the document open.

   Continue with Shipping Label and Packing Slip.

Shipping Label and Packing Slip

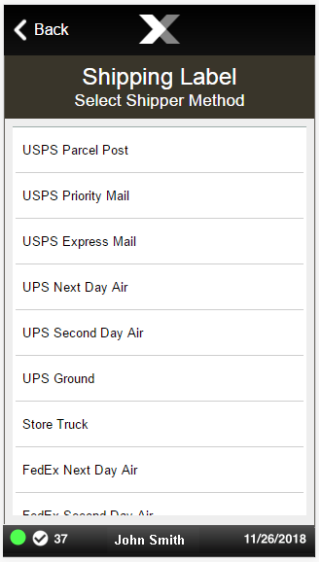
To determine the printing options for the label and packing slip:

Figure 28–35 Print Shipping Label Prompt



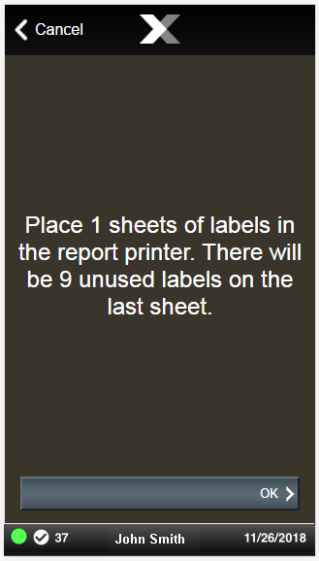
1. Select **Yes** to print a shipping label or select **No** to continue with Shipping Label and Packing Slip.

Figure 28–36 Shipping Method



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

Figure 28–37 Place Labels Prompt

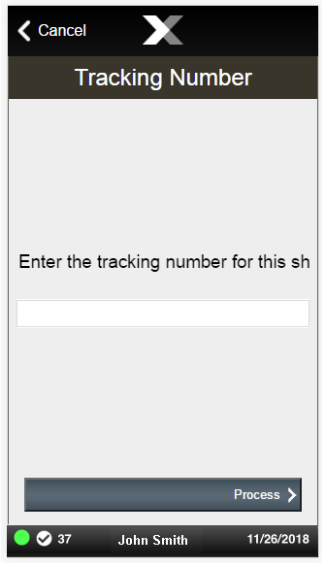


3. Select **OK** when you are ready to print.

   Continue with Shipping Label and Packing Slip.

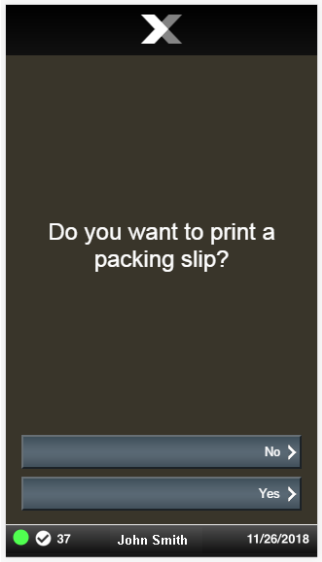
   If prompted for a tracking number:

Figure 28–38 Enter Tracking Number Prompt



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

Figure 28–39 Print Packing Slip Prompt



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

   Xstore Mobile returns to the shipping document search criteria page.

29

Physical Inventory Counting

All merchandise items, whether entering the store through receiving and return functions or leaving the store through sales and shipping functions, are tracked using an inventory process. This inventory tracking occurs at the item level, resulting in an audit trail from the time the item enters the store and continuing until the item leaves the store.

The inventory process allows you to enter item inventory counts and make adjustments to the inventory quantity of items. The Xstore Physical Inventory function allows you to accurately and efficiently count on-hand merchandise. After a count takes place, the local inventory is updated and accurate counts are posted to the home office. Physical Inventory can be conducted through Xstore Mobile.

- Real-time inventory is adjusted automatically during normal POS activity. This normal activity includes-but is not limited to-sales, returns, shipping, and receiving of physical, saleable store merchandise. Real-time inventory does not require any additional interaction by the user during normal transaction processing.
- The physical inventory method uses counting as the means by which store personnel manually count merchandise items in the retail store. A store associate using a mobile device to scan the count, and then adds the count values into the system where they are stored. The system applies the adjustments to each item's inventory.

Xstore provides three different types of inventory counts to meet your specific requirements:

- Physical Count: Counting all in-stock items.

  To perform a physical count, a layout must be set up for the store using the Store Layout functionality in Xstore Desktop or Mobile Tablet POS. The layout cannot be created on the Handheld. Multiple count sheets are created to allow several associates to count different sections of the store. Count sheets are not printed as scanning is the preferred method.

  Additional cycles of counting can be performed if there are variances from the expected values and from previous counts. See Physical Count Process for more information.

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

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

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

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

About this Chapter

The following processes described in this section are used to create and find the count documents, create count sheets, and count the on-hand merchandise.

- Inventory Counting Steps - Overview
- Inventory Count Documents
- Cycle Count Process
- Supply Count Process
- Physical Count Process
- Automatic Variance Processing
- Variance Report
- Store Layout Maintenance (Mobile Tablet Only)
- Inventory Adjustment
- Inventory Count Technical Limitations

Inventory Counting Steps - Overview

The following steps describe the generalized process that conforms to the system-enforced steps for conducting inventory counts. Submitting and initiating counts can be done while the store is open (can be configured on or off). However, a warning message is displayed if you are performing an inventory count while the store is open. Xstore will automatically adjust for inventory changes during the count process. Sales and returns are calculated into the counts. It is recommended that all inventory movements are suspended while an inventory count is underway if the store is open.

The initial step is to find an existing Inventory Count document, or to create a new document if allowed by your store policy. Once the Inventory Count document is located, perform the following steps:

1. Generate Count Sheets for the Inventory Count document. This step applies to a Physical Count type only. Skip this step for Cycle Count and Supply Count sheets since they are generated automatically for the Inventory Count document.
2. Initiate the count for the selected Inventory Count document BASED ON SECURITY PRIVILEGE. This step is usually performed on the day of the count, and takes a snapshot of the current inventory ledger. It is only performed when the store is online. The count must be initiated before the count quantities can be submitted (posted). This step allows your count to be compared to the system-expected quantity. Any variances between your count and the system-expected quantity is reported, allowing you to resolve any discrepancies through additional counting cycles.
3. Perform the actual count of the items (scan items). Depending on your store policy, you may be able to perform this step before initiating the count. However, even though you may be able to enter your counts into the system, you cannot submit the count until the initiation step is performed.
4. Submit the count. Your count is compared to the system-expected quantity captured during the initialization process (step 3).
5. Perform a recount if there is a variance between the system-expected quantity and the count quantity:
    - If your system is set up for automatic variance processing, Xstore automatically creates a second count cycle for you, with only the items you must recount. If the second count results in any variances, the system creates another count cycle automatically, and continues to create as many cycles as needed to resolve any discrepancies, up to the maximum number of cycles allowed by your store policy.
    - If your system is set up for manual variance processing, the system will not create additional cycle counts automatically. However, you can mark individual sheets to be moved to the next cycle for recounting until the maximum number of cycles is reached, or the count is completed.
6. Complete and post the final counted quantities to update your inventory BASED ON SECURITY PRIVILEGE

Inventory Count Documents

An Inventory Count document can be created at the home office and downloaded to a store, or a store can create its own Inventory Count documents, if allowed by store policy. An Inventory Count document contains the summary information for the count, specifies the date the count should be started, and identifies the items for the count.

- If an Inventory Count document exists for the count you want to perform, see Finding an Existing Inventory Count Document below.
- If an Inventory Count document does not exist for the count you want to perform, see Creating a New Inventory Count Document. This option will only be available if your store policy allows store-created Inventory Count documents.

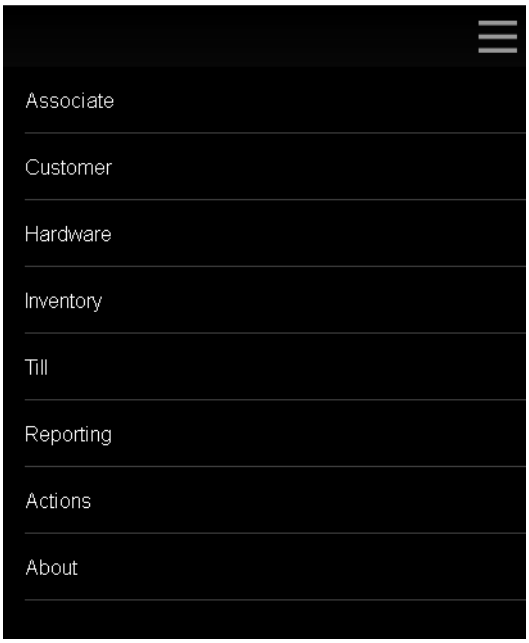
Finding an Existing Inventory Count Document

1. Select the **Inventory** option from the Main Menu on the Mobile Handheld or Context Menu on the Mobile Tablet.

Figure 29–1 Inventory Option - Mobile Handheld



Figure 29–2 Context Menu - Mobile Tablet



2. Enter **Employee ID** and **Password**.
3. Select **Process**.

Figure 29–3 Inventory Menu - Mobile Handheld

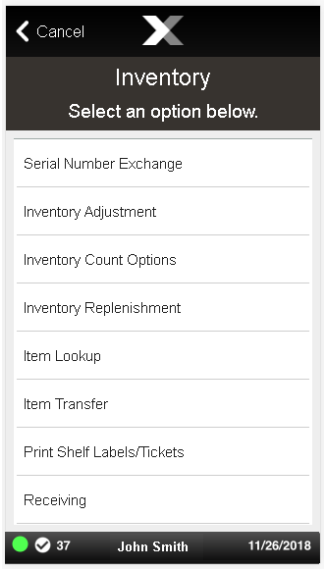
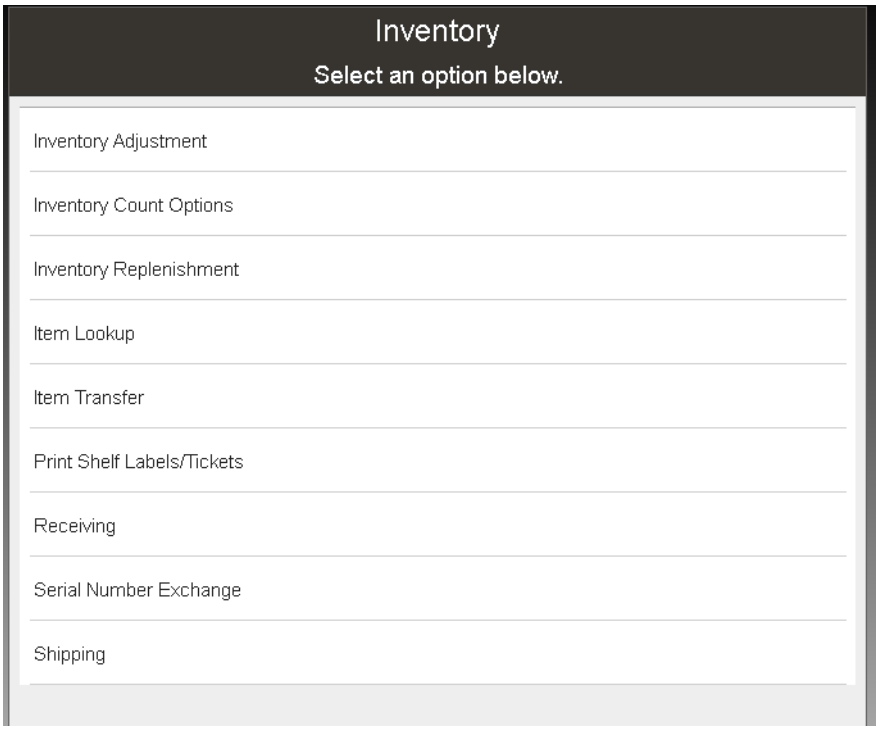


Figure 29–4 Inventory Menu - Mobile Tablet



4. At the Inventory menu, select **Inventory Count Options**.
5. Select **Inventory Count**.
6. At the Inventory Count search form, enter search criteria to find the Inventory Count document, then select **Process** to initiate the search.

Important: This form is based on security privilege. If the logged in user does not have the search privilege, the search form will not display. Instead, Xstore displays a list of Initiated and Submitted counts.

Figure 29–5 Inventory Count Criteria - Mobile Handheld

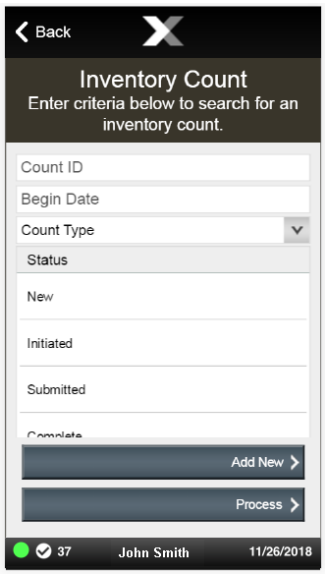
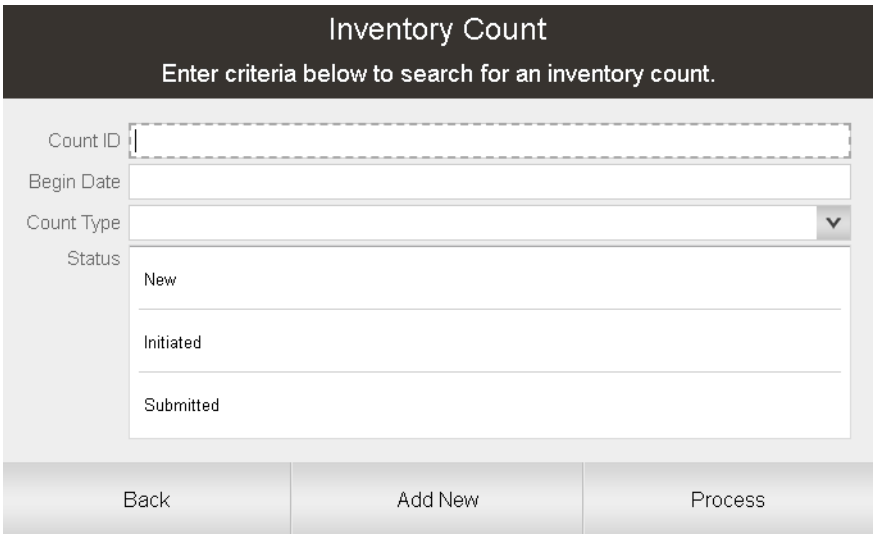


Figure 29–6 Inventory Count Criteria - Mobile Tablet



Note: Leave all fields blank and select **Process** to list all Inventory Count documents.

The Inventory Count search form contains the following fields:

- **Count ID:** This is the auto-generated count identifier associated with the Inventory Count document. Type or scan the count identifier in this field.
- **Begin Date:** This is the date the count is to be performed.
- **Count Type:** Select the type of count from the list: Physical Count, Cycle Count, or Supply Count. See the chapter summary Physical Inventory Counting for more information about these three different types of inventory counts.

- **Status:** Select the count document status from the list:
  - New: No action has been taken on this Inventory Count document.
  - Initiated: A snapshot of the database has been taken for this Inventory Count document.
  - Submitted: All count sheet status for this Inventory Count are submitted.
  - Complete: Items on this Inventory Count document have been counted, submitted, and completed.

Note: If an Inventory Count document matching your search criteria is not found, or you want to create a new inventory count, select the **Add New** option. See Creating a New Inventory Count Document for a step-by-step procedure describing how to create a new Inventory Count document.

---

7. Xstore displays a list of Inventory Count documents based on your search criteria. Scroll up and down the list as required and select the document you want.

Figure 29–7 Inventory Count Document List - Mobile Handheld

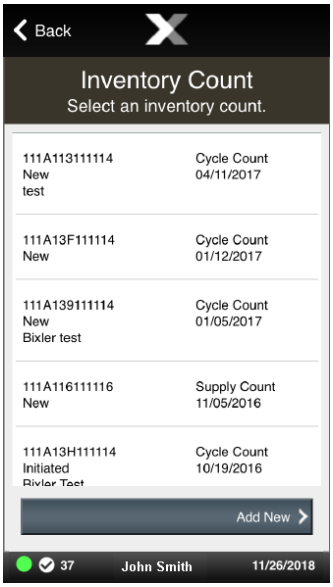
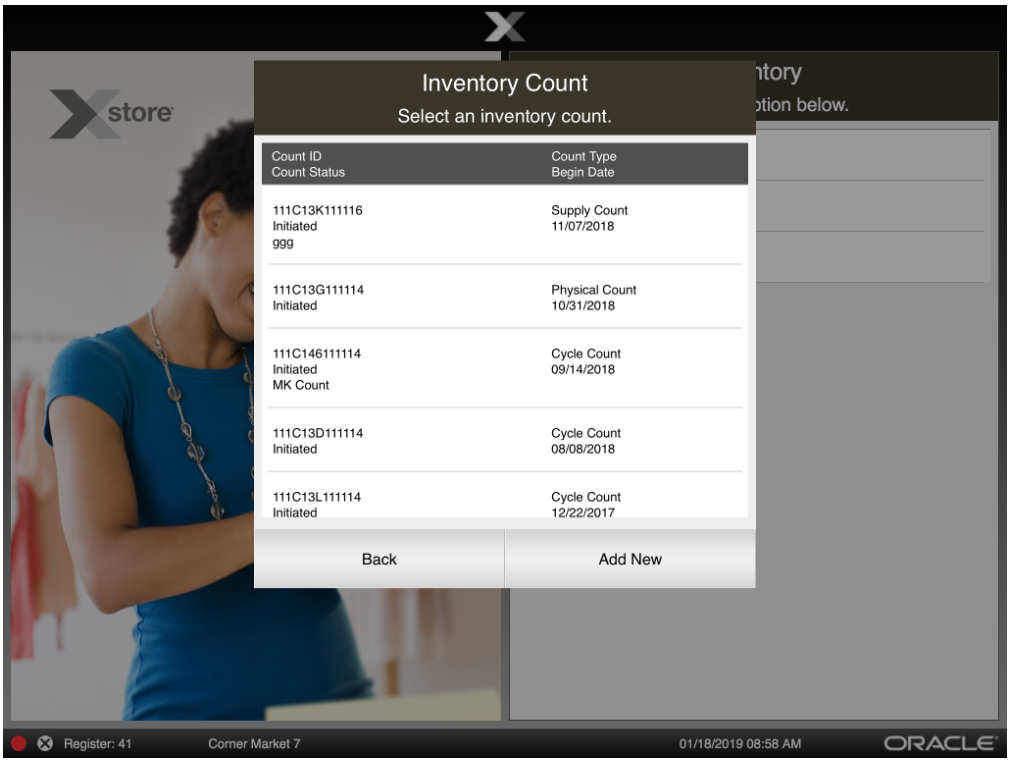


Figure 29–8 Inventory Count Document List - Mobile Tablet



- **Count ID:** The inventory count identifier.
- **Count Status:** The current status of the count: New, Initiated, Submitted, or Complete.
- **Description:** The brief description of the Inventory Count.
- **Count Type:** The type of count: Physical Count, Cycle Count, or Supply Count.
- **Begin Date:** The date the count is scheduled to begin.

Note: Inventory Count documents created by the Home Office cannot be cancelled or edited.

---

8. Select **Process**.
9. Xstore displays the count screen for the selected Inventory Count document:
   - If you are performing a Cycle Count, continue with Cycle Count Process for step-by-step instructions.
   - If you are performing a Supply Count, continue with Supply Count Process for step-by-step instructions.
   - If you are performing a Physical Count, continue with Physical Count Process for step-by-step instructions.

Creating a New Inventory Count Document

The following steps describe how to create a new Inventory Count document. Any Inventory Count documents you create will be flagged as Store Created for tracking purposes.

> **Important:** Inventory Counts cannot be created or initiated in offline mode. Creating a new Inventory Count document is based on security privilege.

1. After selecting the **Add New** option at the Inventory Count Search form (refer to Figure 29–5 and Figure 29–6), Xstore displays the Inventory Count document form. Enter the information in the fields as required to create a new Inventory Count document for the type of count you want to perform, and select **Process**.

Figure 29–9 New Inventory Count



- **Begin Date:** Enter the date on which the counting should be started.
- **Count Type:** Select the type of count for this Inventory Count document. The following count types are available in Xstore:
  - Cycle Count - Counts a subset of the entire stock. See Cycle Count Type Setup for setup instructions.
  - Supply Count - Counts internally-used supplies, rather than saleable items. See Supply Count Type Setup for setup instructions.
  - Physical Count - Counts all in-stock items. See Physical Count Type Setup for setup instructions.
- **Description:** Mobile Tablet only, type a brief description of the Inventory Count. The description does not need to be unique. The Mobile Handheld does not have a Description field.

Refer to the count types below for the specific information required for each type of count.

Cycle Count Type Setup

Note: You can create multiple initiated Cycle Count documents. Xstore will not check for overlap of inventory so be sure to create counts for different areas of the store.

...continued from step 1

Figure 29–10 Cycle Count Setup Screen - Mobile Handheld

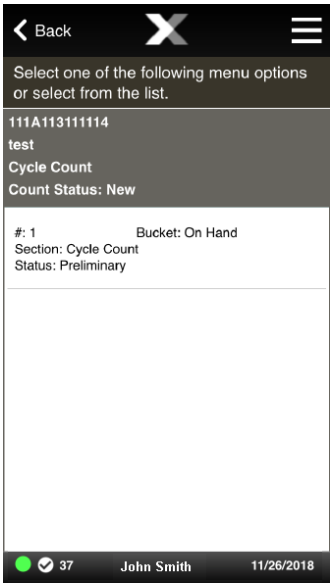
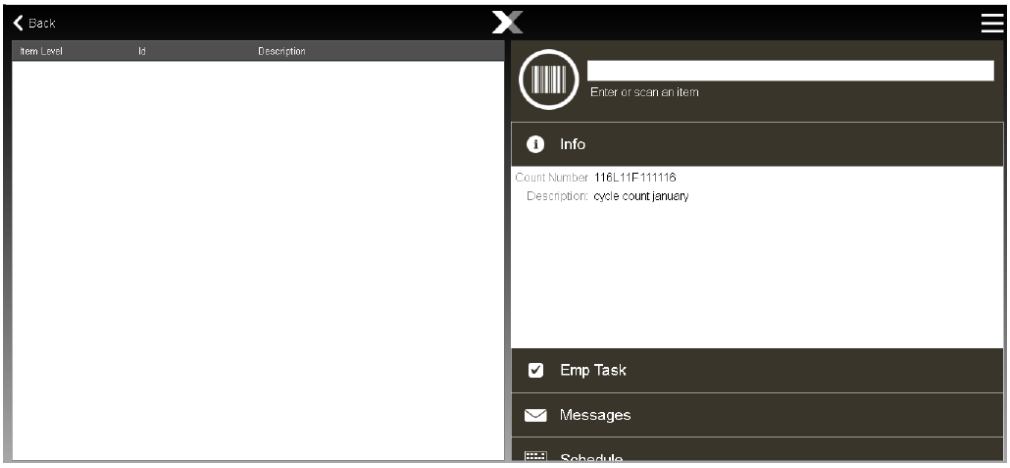


Figure 29–11 Cycle Count Setup Screen - Mobile Tablet



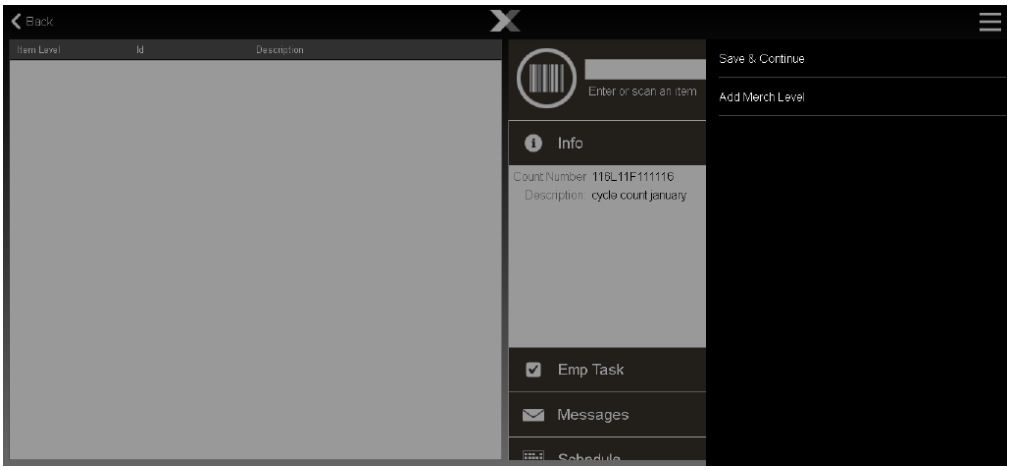
1. Choose one of the following options to add the items to the new Cycle Count document:

   Scan or enter the item IDs to be counted on this Inventory Count document.

   <OR>

   Select the **Add Merch Level** option from the Context Menu to add all items in a merchandise level.

Figure 29–12 Add Merch Level Context Menu Option - Mobile Tablet

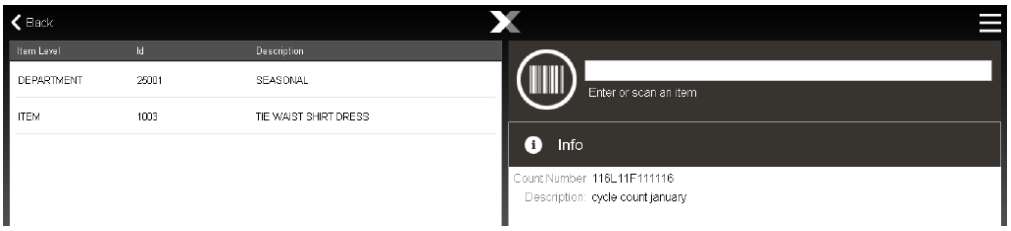


If you select the **Add Merch Level** option you will be prompted to select a merchandise level to be added to the Inventory Count document:

Department, SubDepartment, Class, Subclass.

The actual items associated with each merchandise level are not shown in the list of items to be counted on the Inventory Count document. The merchandise level identifier (CLASS, DEPARTMENT, and so on) is displayed as a place holder and will be expanded to show the items within this merchandise level on the count sheets created in a later step. On Xstore Mobile, the count sheet is blank until items are scanned.

Figure 29–13 Cycle Count Items - Merch Level and Item Level



2. After adding the items to be counted on this Inventory Count document, select **Save & Continue** to create the new Cycle Count. Cycle Counts only use a single count sheet for all items.

Figure 29–14 Save & Continue Option - Mobile Handheld

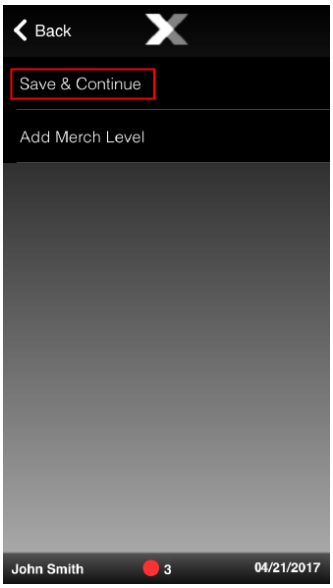


Figure 29–15 Save & Continue Option - Mobile Tablet



3. At the confirmation prompt, select **Yes** to save the Cycle Count items you added.

Figure 29–16 Continue Count Process Prompt

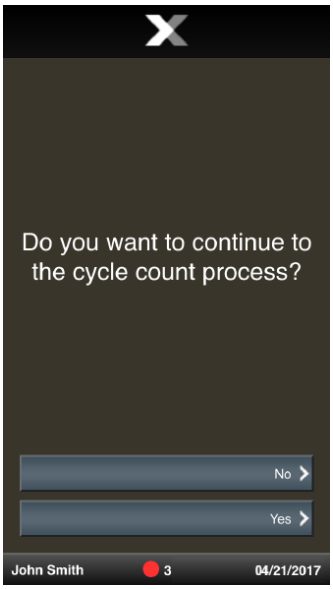
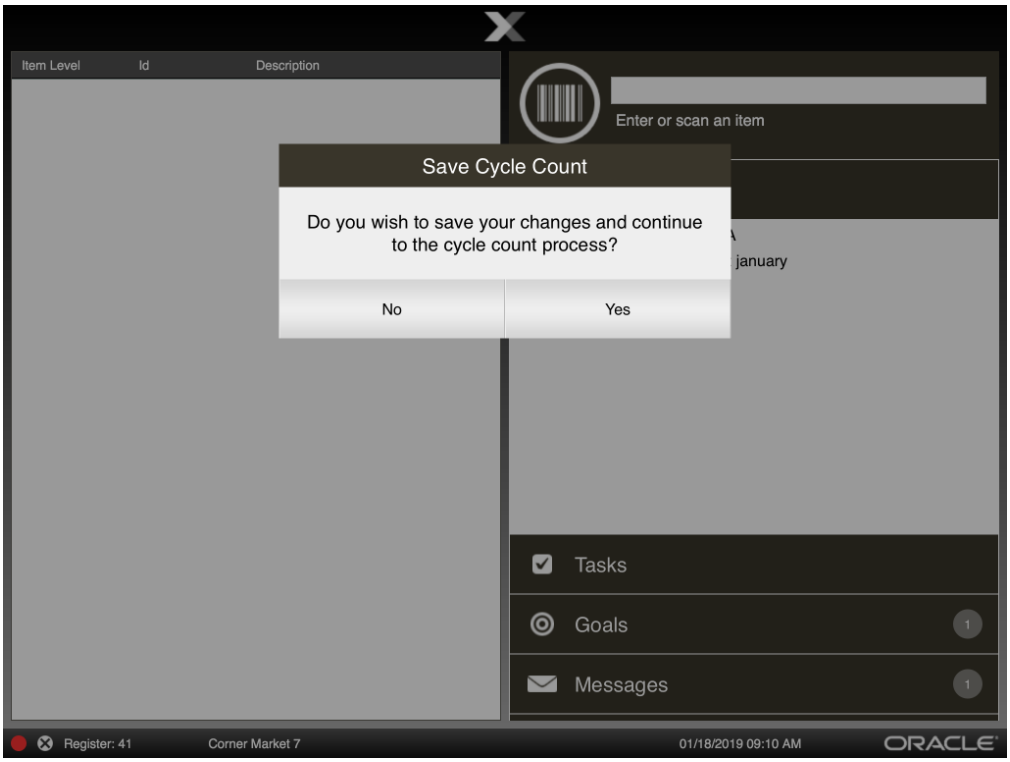
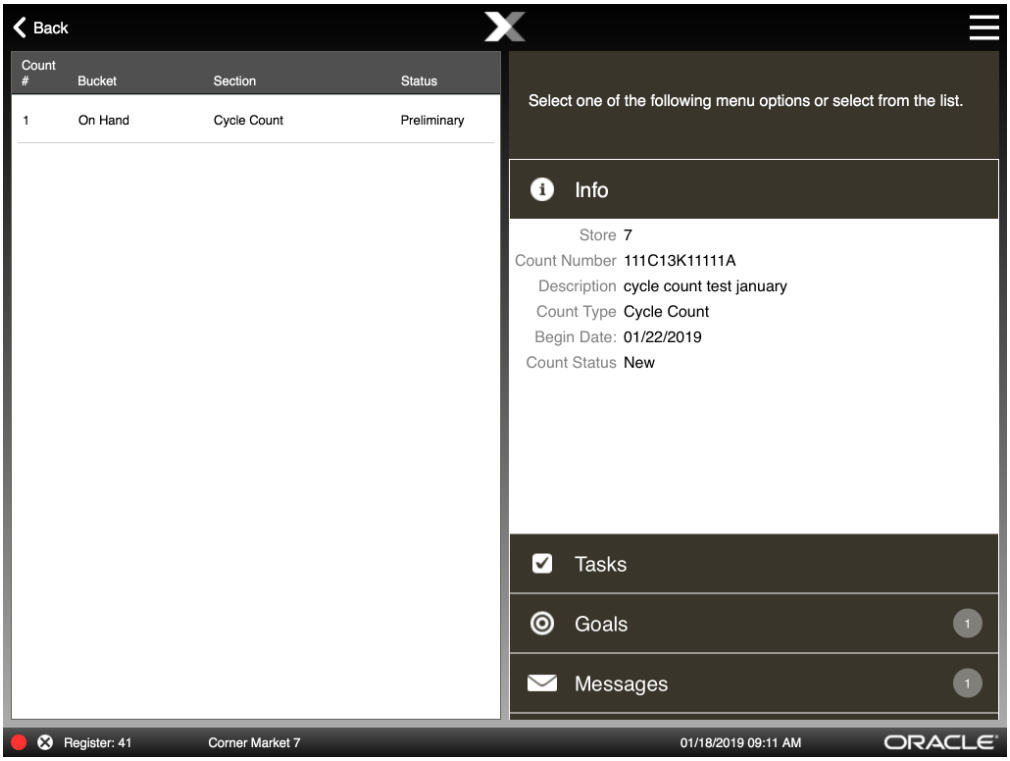


Figure 29–17 Save & Continue Option - Mobile Tablet



4. The system displays the Cycle Count screen:

Figure 29–18 Cycle Count Screen - Mobile Tablet



- Refer to Cycle Count Process to continue with the counting process.

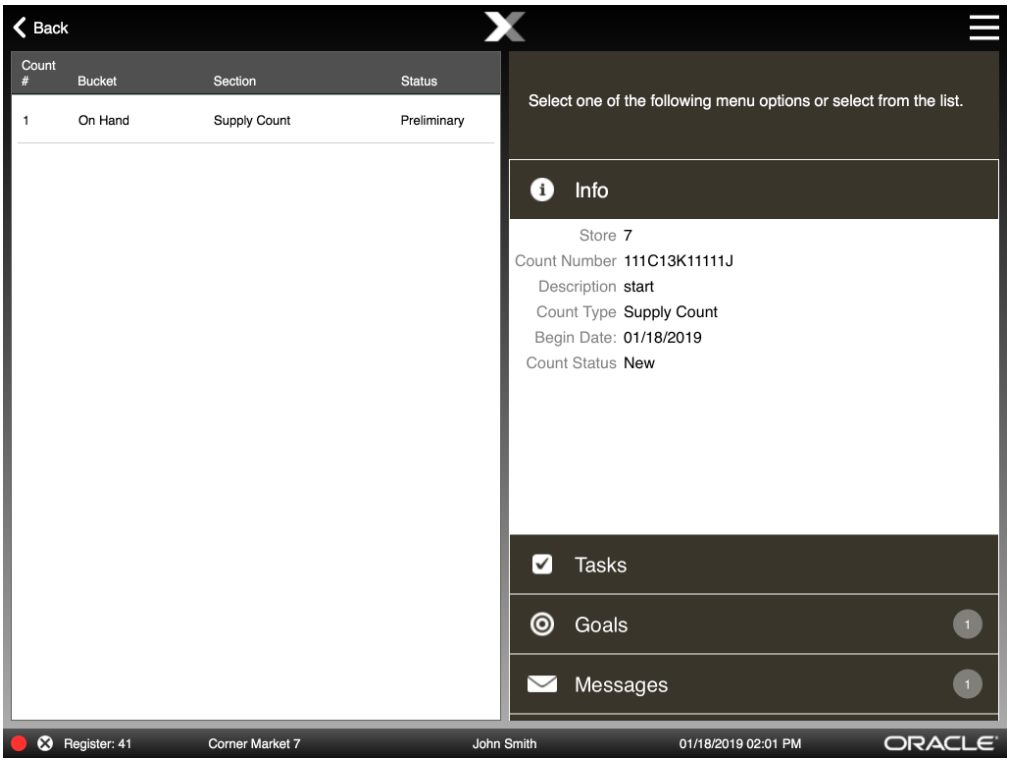
  <OR>

- Select **Back** at the Cycle Count screen if you are not ready to begin counting at this time. The Cycle Count document will be available in the list of existing Inventory Count documents when you are ready to continue with the count process.

Supply Count Type Setup

...continued from step 1

Figure 29–19 New Supply Count - Mobile Tablet



For a Supply Count, all items identified as supplies in your store are automatically added to the count sheet. Supply Counts use a single count sheet for all items. You cannot remove supply items or add any items to this sheet.

> **Note:** Supply Count items are listed automatically. You do not need to create the list.

Select **Back** if you are not ready to begin counting at this time. The Supply Count document will be available in the list of existing Inventory Count documents when you are ready to continue with the count process.

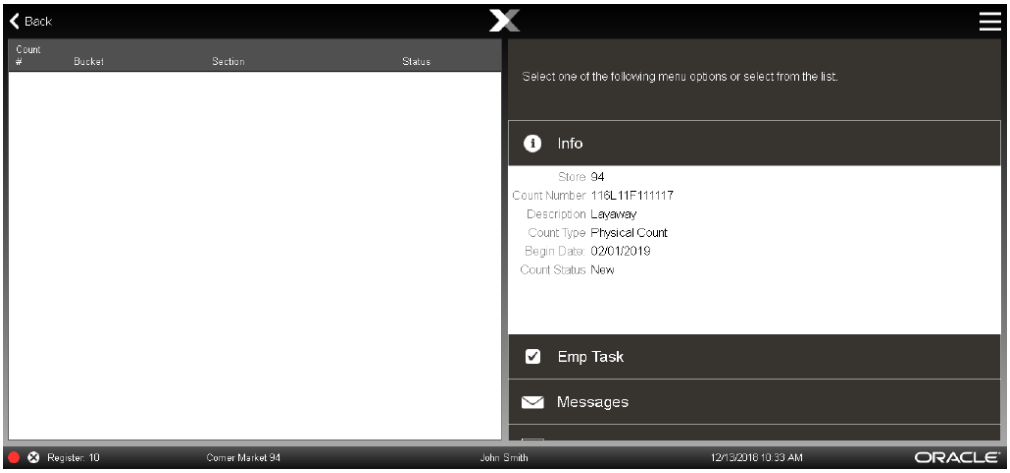
Refer to Supply Count Process to continue the counting process.

Physical Count Type Setup

...continued from step 1

1. Select the **Generate Count Sheets** menu option to add the items in each section to this new Inventory Count Document.

Figure 29–20 New Physical Count



Note: For a Physical Count, the Store Layout defined for your store is used to add items to be counted. See Store Layout Maintenance (Mobile Tablet Only) for detailed information about defining sections and items for your store.

The actual items associated with each section are not shown in the list of items to be counted on the Inventory Count document. The section identifier is displayed as a place holder and will be expanded to show the items within this section on the count sheets created in a later step.

Once the count is created, do one of the following:

- To continue the counting process, refer to Physical Count Process.
- If you are not ready to begin counting at this time, select **Back**. The Physical Count document will be available in the list of existing Inventory Count documents when you are ready to continue with the count process.

Count Process

The following steps describe the count process. Select a count type:

- Cycle Count Process
- Supply Count Process
- Physical Count Process

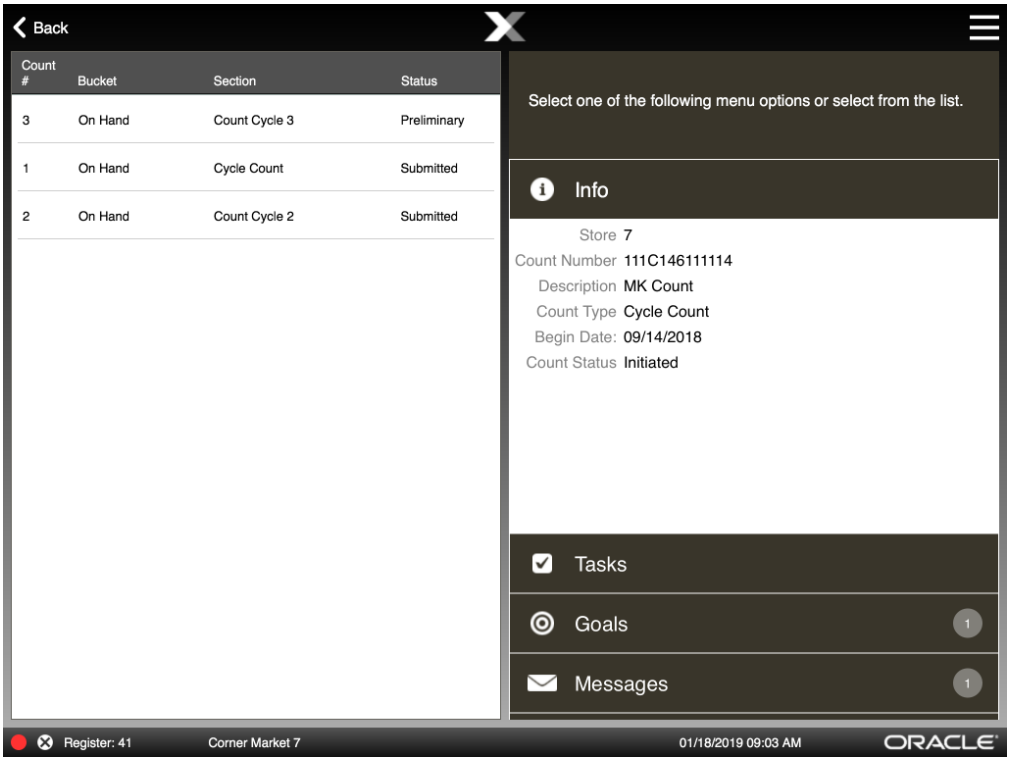
Cycle Count Process

The initial step in the Cycle Count process is to find an existing Inventory Count document, or to create a new document if allowed by your store policy. See Inventory Count Documents for detailed information about locating an Inventory Count document.

Once the Inventory Count document is located, perform the following steps.

1. Select the Cycle Count document you want to count and press **Enter**.

Figure 29–21 Cycle Count - Mobile Tablet



The Cycle Count screen displays showing the Cycle Count status for both the Inventory Count document and for the count:

The area on the right side of the screen displays the information for the Inventory Count document: Store ID, Count Number, Count Type, Begin Date, and Count Status (New, Initiated, or Complete).

To the left, this area displays information for the count sheet:

- **Count Cycle (Count #):** Indicates the number of times the bucket has been counted so far in order to reconcile any count variances and complete the count. The count cycle will always be set to 1 for the first count. If additional

counts are needed to resolve a discrepancy, this number will increment for each recount.

- **Bucket:** The inventory bucket identifier for this count sheet. Inventory buckets are pre-defined for your store. For cycle counts, only the On Hand bucket is counted.
- **Section:** Identifies which cycle count we are on. Cycle Count without a number is the first cycle count done. Cycle Count coincides with the Count #.
- **Status:** The status of the bucket within the current count and cycle:
  - Preliminary - The beginning status for a new count.
  - Printed - Indicates the count sheet has been printed.
  - Saved - Indicates the count sheet has been saved.
  - Complete - Indicates the count sheet has been completed.

2. To begin the counting process, you have the following options:
   a. OPTIONAL If you want to see the items on the count sheet, select the count sheet. After the first cycle count the items to be counted are displayed. During the first cycle count, the count sheet is blank.

      Press **Back** to return to the previous screen and print the count sheet.

   b. Select the **Print Count Sheet** menu option to print the count sheet on the report printer. The count sheet status is updated to **Printed** and a count sheet is created in readiness to enter the number of items found although, it is not required to print count sheets when using Xstore Mobile.

Figure 29–22 Printed Count Sheet



ORACLE

Store Count Sheet

Store: 201 - Weiss Furs

Count Number: 11CP11311111I
Count Cycle: 1
Bucket: On Hand

Count Sheet Number: 1

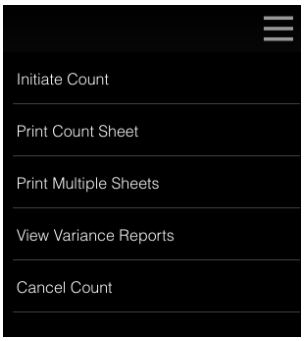
Status: Printed
Count Type: Physical Count
Section: 1 A

Recorded by: _____ Counted by: _____

Item ID	Description	Quantity
100101271	EIT_FASHION_GP_WORKBOOT:BROWN:SIZE 6	
100150057	Archu_SMKCHK_item_1	
100150065	Nimmi_Reg_Item	
100300019	Sharmi_L1_26/9	
100400028	Rah_EIT_141_290914	
100400044	Sharmi_Item_29/9	
100400079	Archu_CR446_item_1	
100750001	Arc_RA_L1_item_Adidas_1	
100850002	Arc_RA_L2_AdidasShoe_item1	
100900022	Arc_RA_L3_AdidasShoe_item1	
101050082	Arc_RA_Oct6_SP_L1_1	
102700104	NImmi_L2_10/10	
105000154	Ramya_Reg_Nov03	
105350277	Test_SM_Vat_IC_TSF	
230001	Tan Shoe 9	
230002	Brown Shoe 10	
230003	Brown Shoe 11	
230004	Black Shoe 10 Wide	

On the Mobile Tablet, items to be counted are scanned and not manually added.

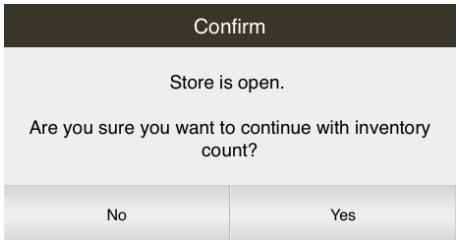
Figure 29–23 Context Menu Options



Note: The Print Multiple Sheets option is usually used for Physical Counts of the entire store when more than one count sheet exists, not for Cycle Counts.

To print multiple count sheets, select the **Print Multiple Sheets** menu option. Select the count sheets to be printed. When prompted, select **Yes** to confirm. The count sheet status will be updated from Preliminary to Printed.

Important: The store no longer needs to be closed to initiate a count and submit your counts. However, a warning message is displayed if you are performing an inventory count while the store is open.



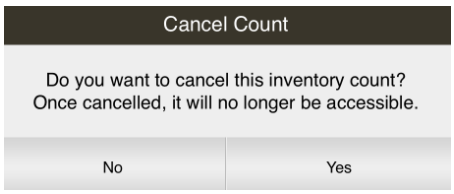
Counts are usually initiated on the day the inventory count takes place.

If enforced by your store policy, you cannot enter your counts until the count has been initiated.

Note: About the count menu options:

- **Initiate Count** BASED ON SECURITY PRIVILEGE - This process allows your counts to be compared to the snapshot system-expected quantity. Depending on your store policy, you may be required to initiate the count before entering any counts into the system. Or, if your store policy allows, you may be able to enter your counts before initiating the count.
- **Cancel Count** BASED ON SECURITY PRIVILEGE - This option allows you to cancel your count up until it is completed. Only store-created Inventory Counts can be cancelled. When prompted, select **Yes** to cancel the count.

Figure 29–24 Confirm Cancel Count



- **Complete Count** BASED ON SECURITY PRIVILEGE - This option marks the count sheet as complete. The Complete Count menu option will only be enabled after the count cycles for the inventory count are complete.
- **Back** - This option will exit the current Count document, and take you back to the Inventory Count search form (Figure 29–5).

3. Select **Initiate Count** to take a snapshot of current inventory. If the store is open, a warning message is displayed. Select **Yes** to continue or **No** to exit the count.

   This initiation process takes a snapshot of your current inventory ledger to be used to calculate variances between the expected (snapshot) quantity and the quantity you entered into the system.

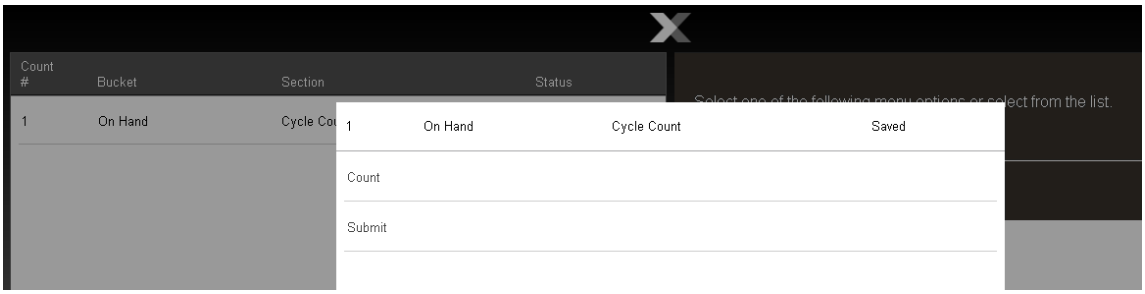
   Counts must be initiated before they can be submitted.

4. Scan the items.
5. Open the Context menu and select **Save Count Sheet**.
6. Select **Yes** to confirm.

   You are returned to the Cycle Count main page. The count sheet status changes to Saved.

7. Select the count sheet just saved to bring up two menu options:
   - Count: Returns to the count sheet to scan more items.
   - Submit: Submits the count sheet.

Figure 29–25 Cycle Count - Count or Submit Menu



8. Select **Submit**. The count sheet status changes to Submitted.

   The system compares the count quantity you entered with the expected quantity based on the snapshot taken of the inventory ledger:

   - If the counted quantity and the expected quantity match, the inventory bucket for the item is marked as settled - no variance, and the count is complete. Skip to step 13.
   - If the counted quantity and the expected quantity do not match, the inventory bucket for the item is marked as having a variance.
     - If your system is set up for Automatic Variance Processing, any variances will automatically result in a new count cycle: count cycle 2. See Automatic Variance Processing for detailed information about this type of variance processing.
     - If your system is set up for Manual Variance Processing, you can choose whether or not to perform a recount. See Manual Variance Processing for detailed information about this type of variance processing.

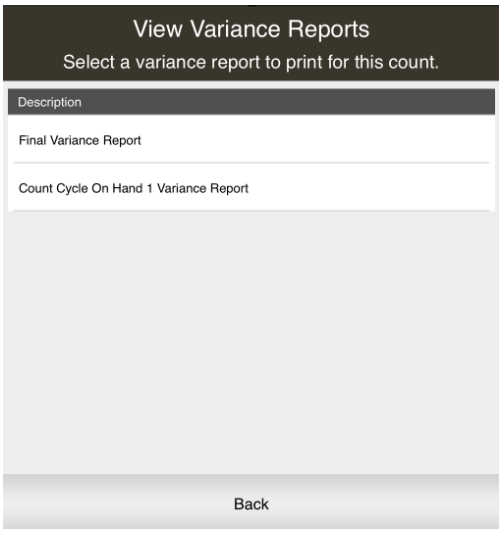
9. If you must recount any items, perform the same steps you used for count cycle 1:

   Note: Since subsequent count cycles are always compared to the initial snapshot taken for the first count cycle, you cannot initiate the count again.

   Select the count sheet on tablet (it's displayed as a row). Only the items with variances will be listed for a recount.

10. OPTIONAL You can select the **View Variance Report**s menu option to create a variance report showing the count discrepancies.

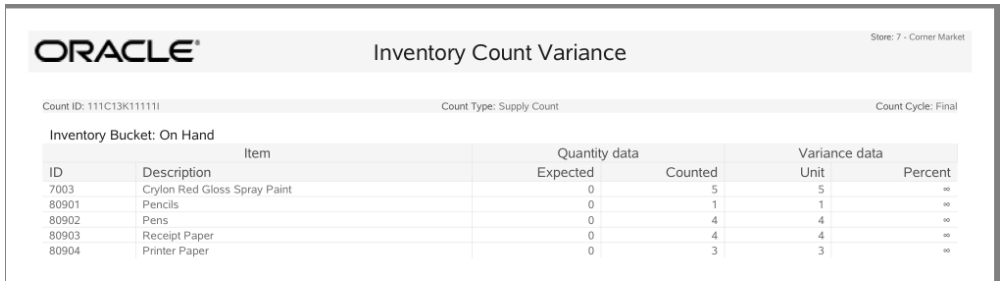
Figure 29–26 View Variance Reports - Mobile Tablet



If prompted, select a Variance Report from the list.

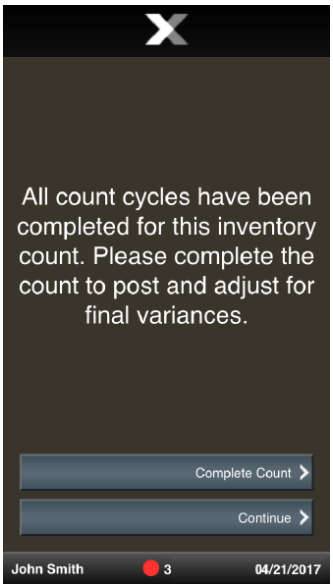
11. The system creates and displays the report. See Variance Report for more information about these reports.

Figure 29–27 Inventory Count Variance Report



12. After the final count cycle sheet is submitted, the system displays a prompt indicating you have completed all count cycles:

Figure 29–28 Complete Count



Select one of the following options to continue the counting process:

- Select **Continue** to return to the Inventory Count screen. From the Inventory Count screen you can:
  - View/Print Variance Reports from all count cycles that had variances.

    Note: No Variance Report will be available for a count cycle that had no variances since all variance values would be 0.

  - Save the submitted count cycles and post inventory counts at another time.
  - Print count sheets (if available).
  - Cancel the count BASED ON SECURITY PRIVILEGE.
  - Complete the count to post inventory counts and adjust the inventory counts in the system BASED ON SECURITY PRIVILEGE.

  <OR>

- Select **Complete Count** to post inventory counts and adjust the inventory counts in the system BASED ON SECURITY PRIVILEGE.

13. After completing the count sheets, the system marks the Inventory Count document as Complete and inventory quantity will be adjusted accordingly.

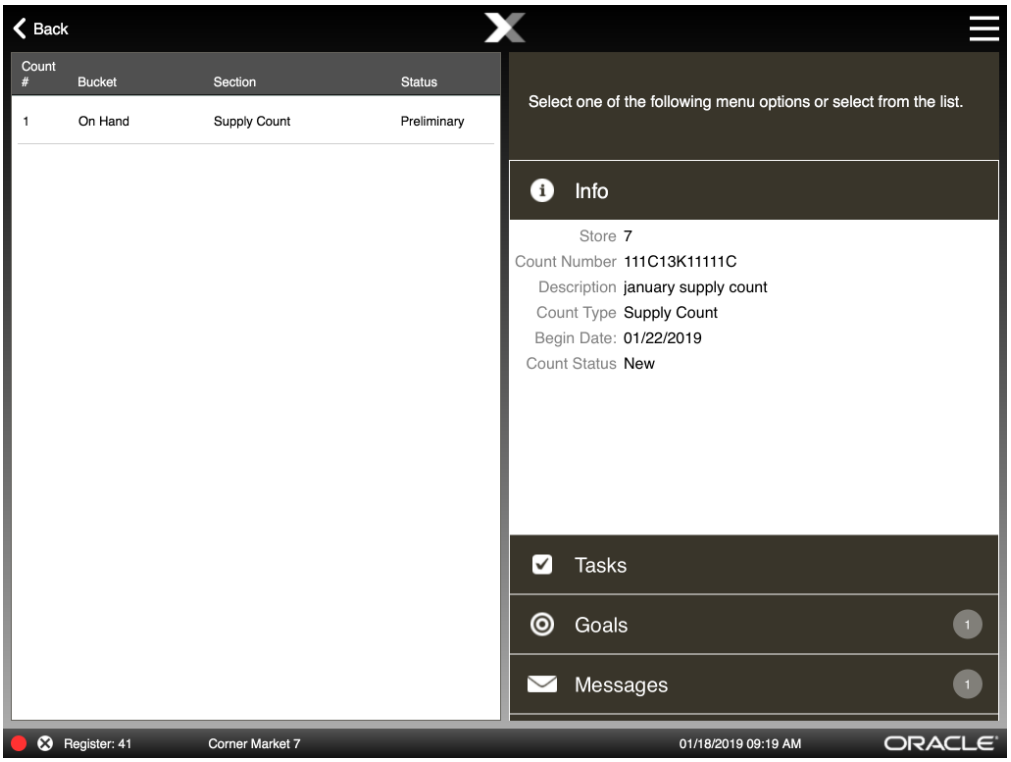
Supply Count Process

A Supply Count is a count of items not sold in your store, but are required for normal store operations, such as rolls of receipt paper for cash registers or printer paper for report printers. The Supply Count process is similar to the Cycle Count process; however, the count sheets are automatically populated with only the items identified as supplies in your store. Usually Supply Counts are not downloaded from the home office, and you cannot add items to the count sheets.

The initial step in the Supply Count process is to find an existing Inventory Count document, or to create a new document. To locate a Supply Count document refer to Finding an Existing Inventory Count Document. To create a new supply count document see Creating a New Inventory Count Document.

1. Select the Supply Count document you want to count.
2. The Supply Count screen displays showing the count status for both the Inventory Count document and for the count sheet:

Figure 29–29 Supply Count Screen - Count Cycle 1



The Info box on the right hand side of screen displays the information for the Inventory Count document: Store, Count Number, Description, Count Type, Begin Date, and Count Status.

The area to the left displays information for the count sheet:

- **Count Cycle (Count#):** Indicates the number of times the bucket has been counted in order to reconcile any count variances and complete the count. The count cycle will always be set to 1 for the first count. If additional counts are needed to resolve a discrepancy, this number will increment for each recount.

- **Bucket**: The inventory bucket identifier for this count sheet. Inventory buckets are pre-defined for your store. For supply counts, only the On Hand bucket is counted.
- **Section:** Identifies which cycle count we are on. Supply Count without a number is the first cycle count done. Supply Count coincides with the Count #.
- **Status**: The status of the bucket within the current count and cycle:
  - Preliminary: The beginning status for a new count.
  - Printed: Indicates the count sheet has been printed.
  - Saved: Indicates the count sheet has been saved.
  - Complete: Indicates the count sheet has been completed.

3. Select the top row to display the count sheet.

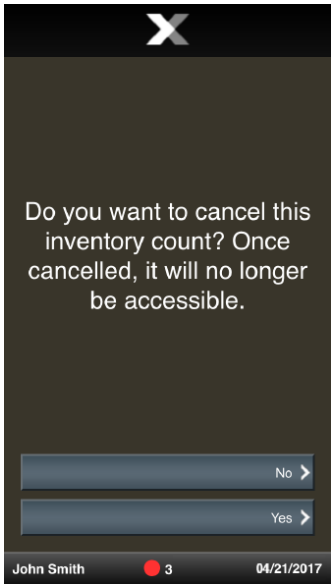
Note: If enforced by your store policy, you may not be able to enter your counts until the count has been initiated. Counts are usually initiated on the day of the count.

If the store is open, a warning message is displayed. Select **Yes** to continue or **No** to exit the count.

Note: About the count menu options:

- **Initiate Count** BASED ON SECURITY PRIVILEGE - This process allows your counts to be compared to the snapshot system-expected quantity. Depending on your store policy, you may be required to initiate the count before entering any counts into the system. Or, if your store policy allows, you may be able to enter your counts before initiating the count.
- **Cancel Count** BASED ON SECURITY PRIVILEGE - This option allows you to cancel your count up until it is completed. Only store- created Inventory Counts can be cancelled. When prompted, select **Yes** to cancel the count.

Figure 29–30 Confirm Cancel Count

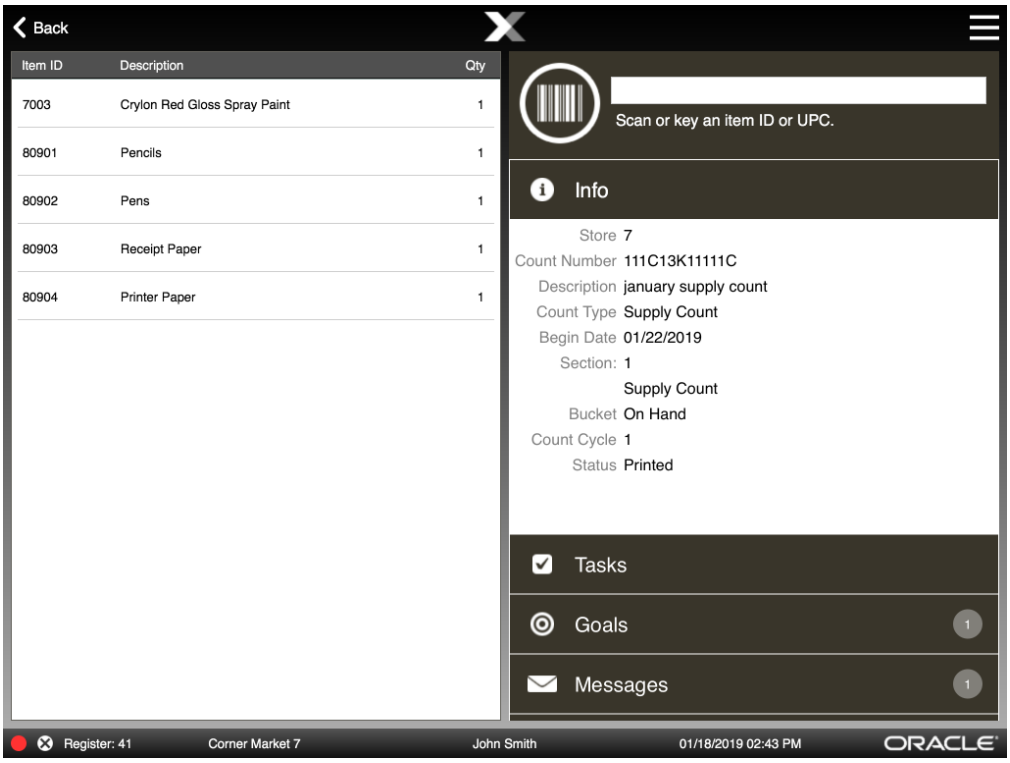


- **Complete Count** BASED ON SECURITY PRIVILEGE - This option marks the count sheet as complete. The Complete Count menu option will only be enabled after the count cycles for the inventory count are complete.
- **Back** - This option will exit the current Count document and take you back to the Inventory Count search form (Figure 29–5).

4. Select **Initiate Count** to take a snapshot of current supply inventory. If the store is open, a warning message is displayed. Select **Yes t**o continue and the Count Status changes to Initiated, or **No** to exit the count.
5. Scan the items. As you scan the supply items they display. You cannot enter a quantity, all items must be scanned to be counted.

Note: The count sheet will be blank for the first cycle count. The next cycle counts display the items that need recounting, that is, the items with quantity discrepancies.

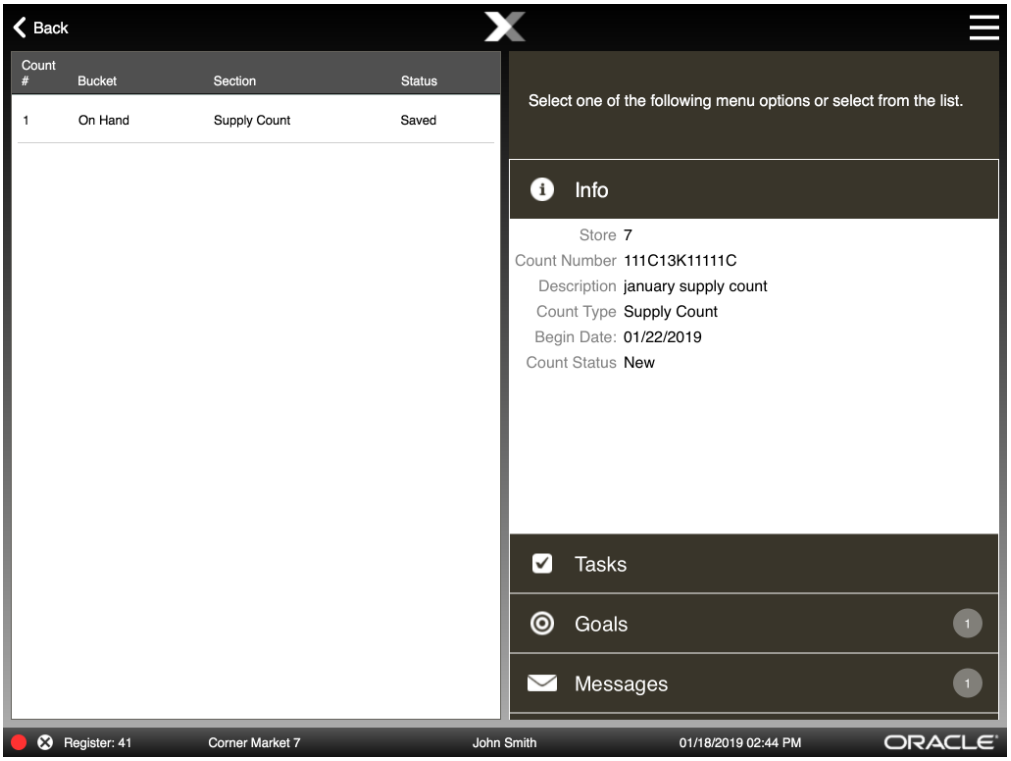
Figure 29–31 After Scanning Items



6. Select **Save Count Sheet**.

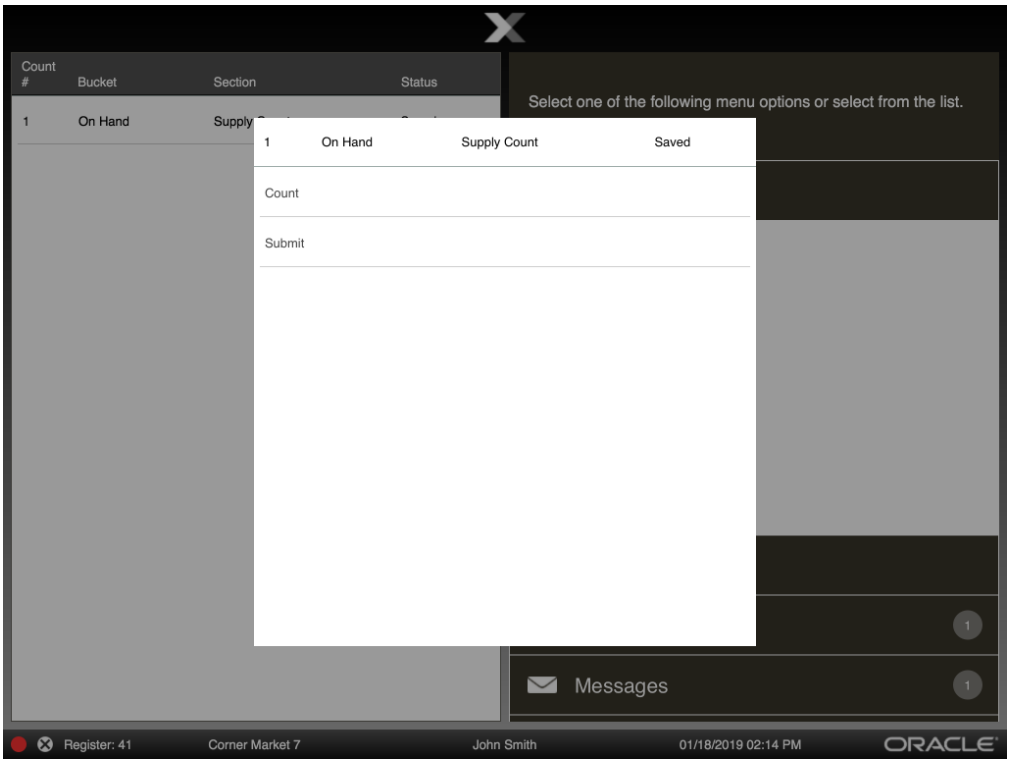
7. Select **Yes** to confirm. The count sheet status changes to Saved.

Figure 29–32 Supply Count Sheet - Saved Status



8. Select the Supply Count row. The following menu list displays:

Figure 29–33 Supply Count Menu Options



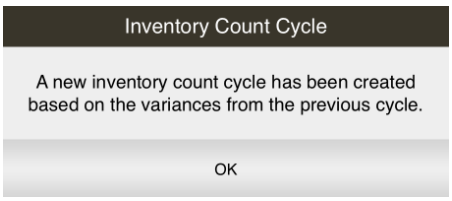
- Count: Returns to the count sheet to scan more items.
- Submit: Submits the count sheet.

9. Select **Submit Count Sheet**.

10. Continue with step 5 through step 9 to submit and complete your supply count following the same process used for cycle counts.

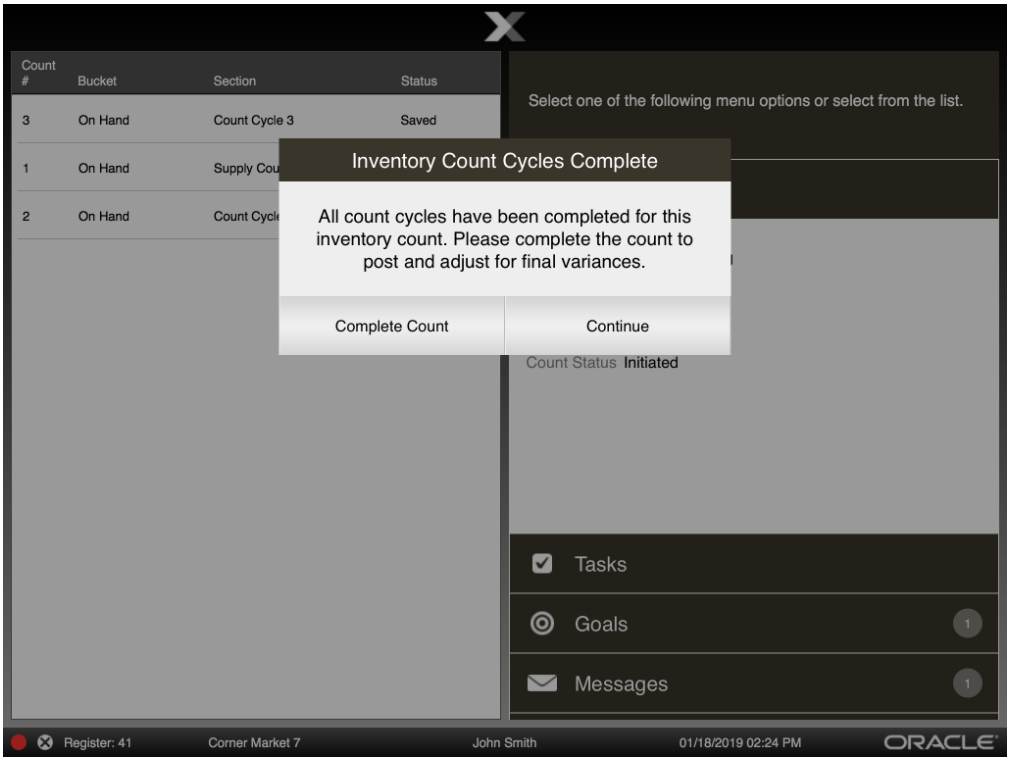
    The system compares the count quantity you entered with the expected quantity based on the snapshot taken of the inventory ledger for supply items.

Figure 29–34 New Inventory Count Cycle Prompt



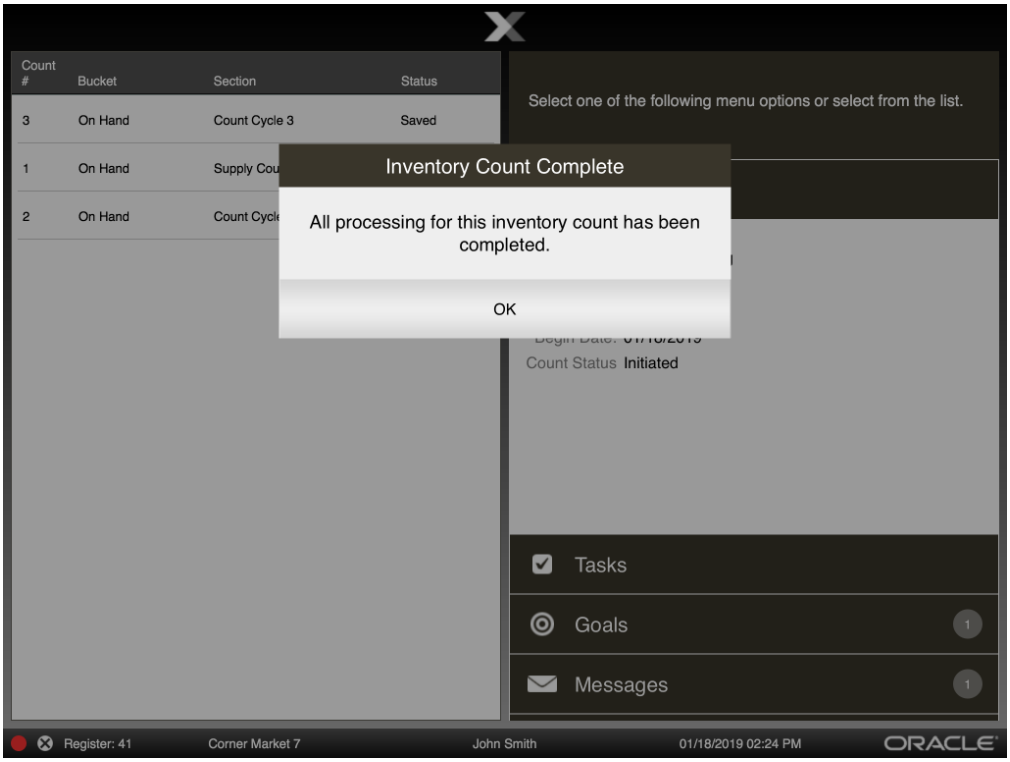
11. After Submitting the last cycle count (configurable number of counts), the following prompt is displayed:

Figure 29–35 Inventory Count Cycles Complete



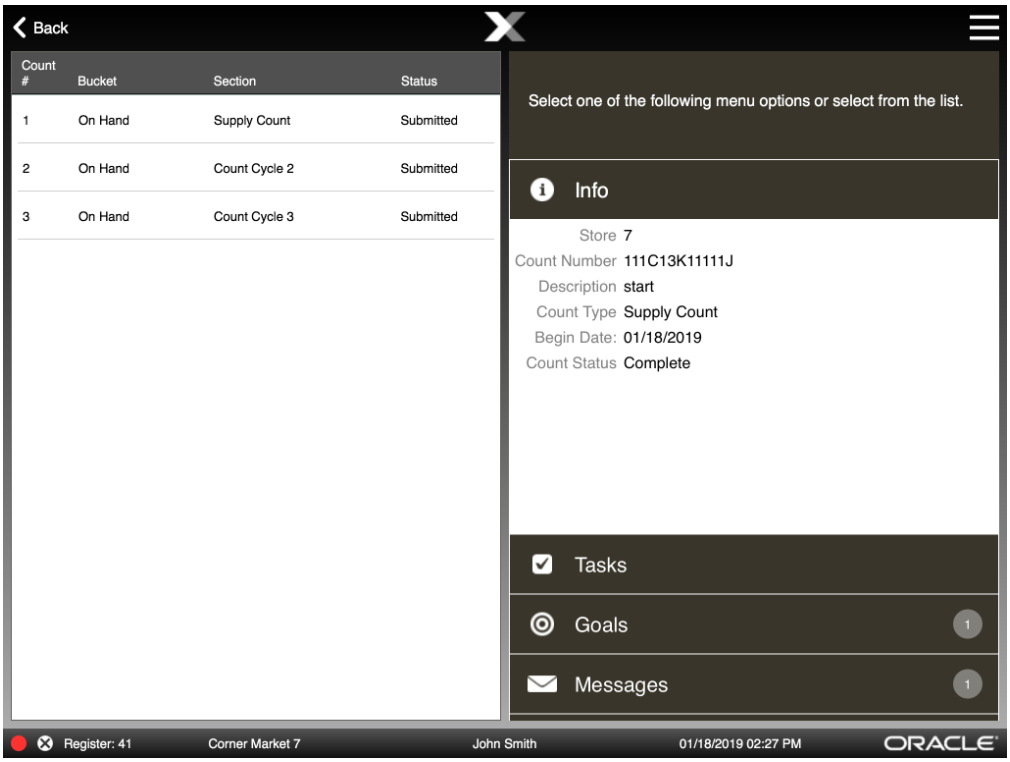
12. Select **Complete Count**.

Figure 29–36 Inventory Count Complete



13. Select **OK**.

Figure 29–37 Supply Count Complete



The count screen shows the following status information:

Inventory Document Count Status: Complete

Count Status: Complete and the number of count cycles required to complete the count. Each count sheet status for all cycles is set to Submitted.

Physical Count Process

Before you can perform a Physical Count for all items in your store, you must set up a store layout plan to divide your store into manageable sections. Each section will have its own count sheet showing the items in that section. These count sheets can then be distributed to the associates responsible for counting each section. Refer to Store Layout Maintenance (Mobile Tablet Only) for more information about setting up your store layout.

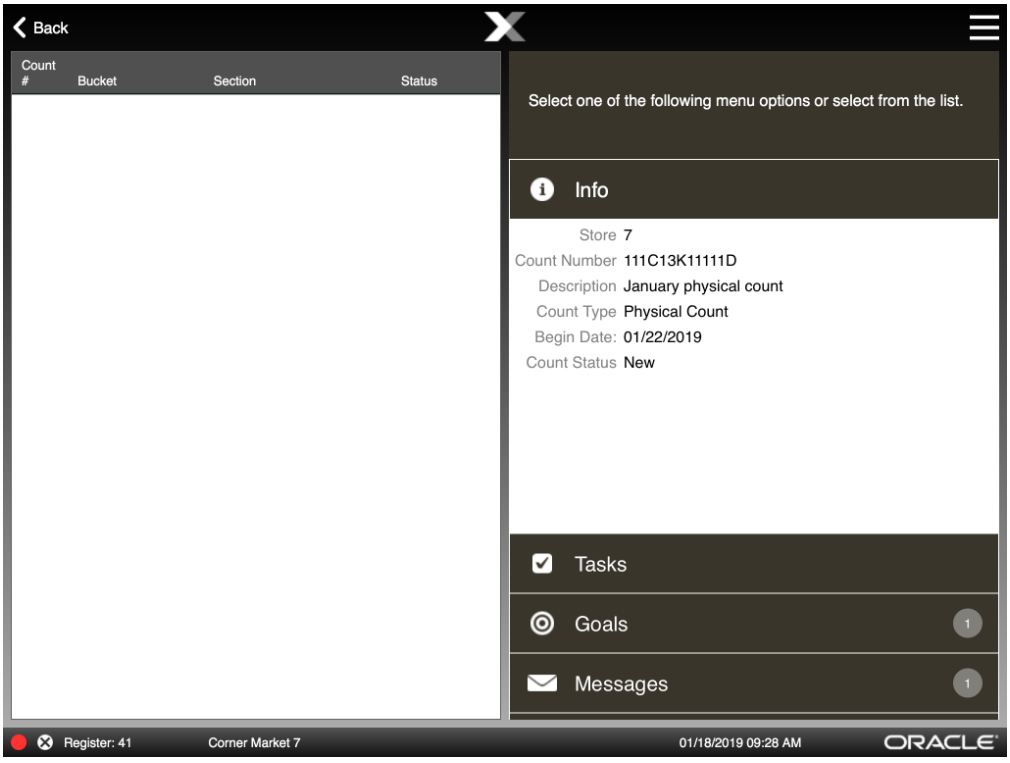
The initial step in the Physical Count process is to find an existing Inventory Count document, or to create a new document if allowed by your store policy.

See Inventory Count Documents for detailed information about locating an Inventory Count document. See Creating a New Inventory Count Document for detailed information about creating an Inventory Count document.

Once the Inventory Count document is located, perform the following steps:

1. Select the Physical Count document you want to count and select **Process**. The system displays the Physical Count screen.
2. Select the **Generate Count Sheets** menu option on the Physical Count screen to create the count sheets based on your store layout. This screen shows the following information for the new Physical Count:

Figure 29–38 Physical Count Screen



The Info box on the right hand side of the screen displays the information for the Inventory Count document: Store ID, Count Number, Description, Count Type, Begin Date, and Count Status.

The left side of the screen displays information for the count sheet:

- **Bucket**: The inventory bucket identifier for this count sheet. Inventory buckets are pre-defined for your store.

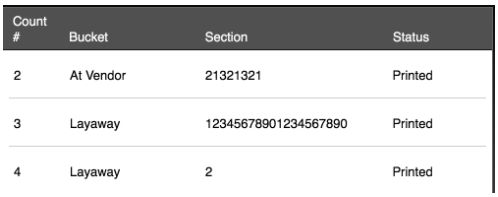
- **Count Cycle**: Indicates the number of times the bucket has been counted in order to reconcile any count variances and complete the count. The count cycle will always be set to 1 for the first count. If additional counts are needed to resolve a discrepancy, this number will increment for each recount.will always be set to 1 for the first count. If additional counts are needed to resolve a discrepancy, this number will increment for each recount.
- **Status**: The status of the bucket within the current count and cycle:
  - Preliminary - The beginning status for a new count.
  - Printed - Indicates the count sheet has been printed.
  - Saved - Indicates the count sheet has been saved.
  - Complete - Indicates the count sheet has been completed.

The screen lists each count sheet based on your store layout:

- **Count Sheet #:** The sequential number associated with each count sheet for this Physical Count.
- **Bucket:** The inventory bucket associated with the count sheet.
- **Section**: The store area to be counted as defined in your store layout.
- **Status**: The status for each count sheet.

3. Select a row to display that counts' count sheet. Start to scan items. If required, use the Context Menu to print the count sheets:
   - To print one count sheet at a time, highlight the count sheet and select the **Print Count Sheet** menu option. The count sheet is printed and the status will be updated from Preliminary to Printed.

Figure 29–39 Count Sheet - Status Printed



Count #	Bucket	Section	Status
2	At Vendor	21321321	Printed
3	Layaway	12345678901234567890	Printed
4	Layaway	2	Printed

   - To print multiple count sheets, select the **Print Multiple Sheets** menu option. The system prompts you to select the count sheets to be printed. With the count sheet highlighted, press the **Spacebar** to select each sheet individually, or choose the **Select All** menu option to print all sheets. When prompted, select **Yes** to confirm the count sheets to be printed. The count sheet status will be updated from Preliminary to Printed.

Figure 29–40 Printed Count Sheet Example



ORACLE Store Count Sheet

Store: 201 - Weiss Furs

Count Number: 11CP11311111I
Count Cycle: 1
Bucket: On Hand

Count Sheet Number: 1

Status: Printed
Count Type: Physical Count
Section: 1 A

Recorded by: _____ Counted by: _____

Item ID	Description	Quantity
100101271	EIT_FASHION_GP_WORKBOOT:BROWN:SIZE 6	
100150057	Archu_SMKCHK_item_1	
100150065	Nimmi_Reg_Item	
100300019	Sharmi_L1_26/9	
100400028	Rah_EIT_141_290914	
100400044	Sharmi_Item_29/9	
100400079	Archu_CR446_item_1	
100750001	Arc_RA_L1_item_Adidas_1	
100850002	Arc_RA_L2_AdidasShoe_item1	
100900022	Arc_RA_L3_AdidasShoe_item1	
101050082	Arc_RA_Oct6_SP_L1_1	
102700104	NImmi_L2_10/10	
105000154	Ramya_Reg_Nov03	
105350277	Test_SM_Vat_IC_TSF	
230001	Tan Shoe 9	
230002	Brown Shoe 10	
230003	Brown Shoe 11	
230004	Black Shoe 10 Wide	

Use the printed count sheets to record the item counts. Blank lines are provided so that you can write in any items you find in the section that were not included on the printed list. When you have finished counting the items, return to the Inventory module to enter your counts into the system.

Important: If allowed by your store policy, you can enter your counts before initiating the count.

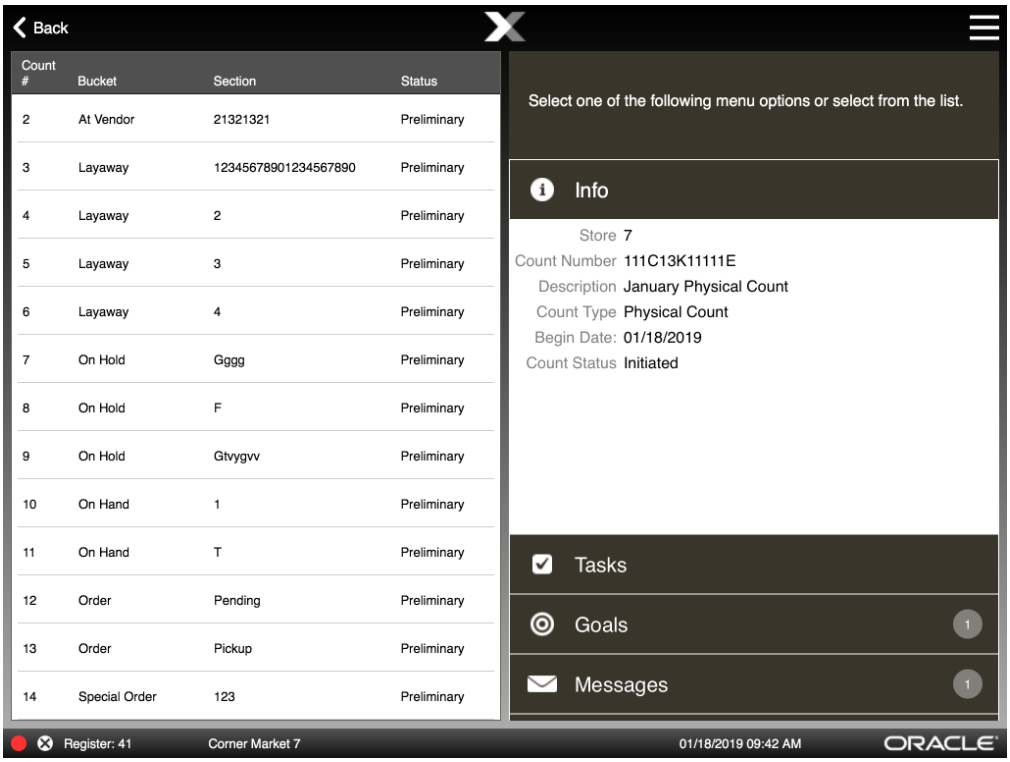
If enforced by your store policy, you cannot enter your counts until the count has been initiated. See step 4 below.

---

4. Select **Initiate Count** to take a snapshot of current inventory.

   If the store is open, a warning message is displayed. Select **Yes** to continue and the Count Status changes to Initiated, or **No** to exit the count.

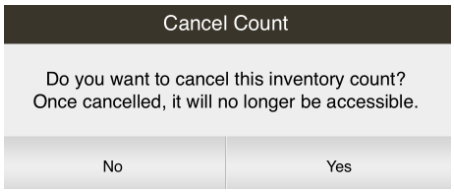
Figure 29–41 Physical Count Initiated - Mobile Tablet



Note: About the count menu options:

Initiate Count BASED ON SECURITY PRIVILEGE - This process allows your counts to be compared to the snapshot system-expected quantity. Depending on your store policy, you may be required to initiate the count before entering any counts into the system. Or, if your store policy allows, you may be able to enter your counts before initiating the count.

Cancel Count BASED ON SECURITY PRIVILEGE - This option allows you to cancel your count up until it is completed. Only store-created Inventory Counts can be cancelled. When prompted, select **Yes** to cancel the count.



Complete Count BASED ON SECURITY PRIVILEGE - This option marks the count sheet as complete. The **Complete Count** menu option will only be enable after the count cycles for the inventory count are complete.

Back - This option will exit the current Count document and take you back to the Inventory Count search form (Figure 29–5).

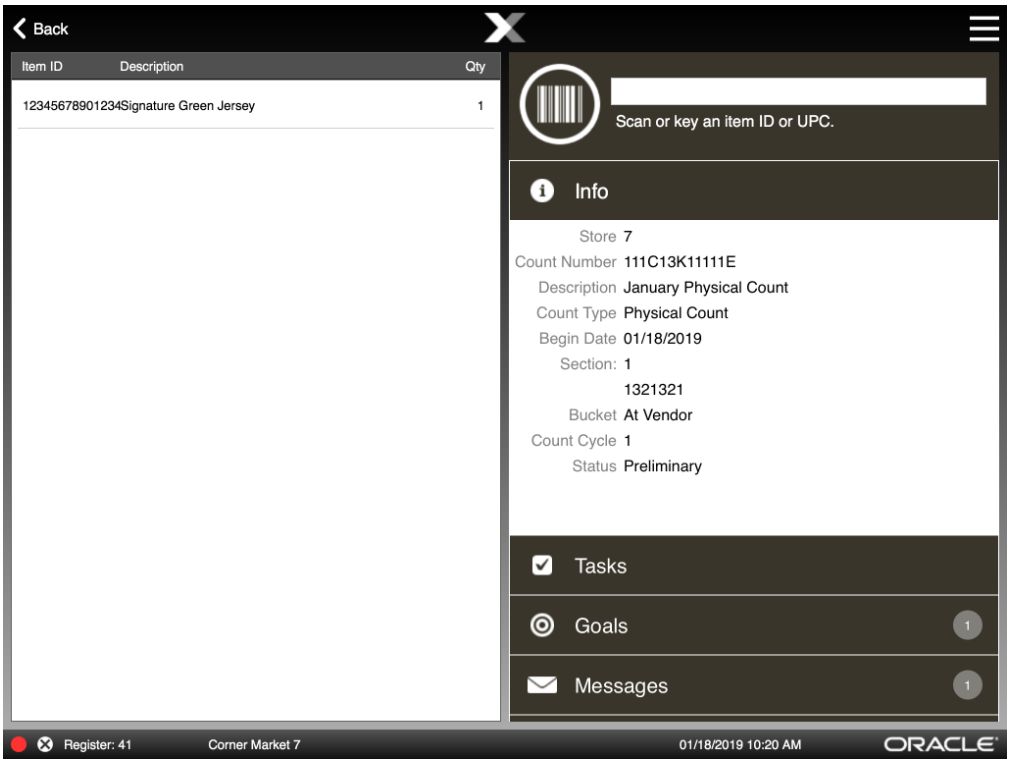
5. Now count the items listed on the count sheets...

   When you have finished counting the inventory items, return to the Inventory module to enter your counts into the system. Refer to Physical Count Process if you need instructions for locating the Inventory Count document you are working on.

6. At the Physical Count screen, select a count sheet from the list and press **Enter**. Use the Count details that display to identify the area to begin your count. If required, print the count sheets.

   Start scanning the items in the section of the store. No items display on the count sheet until the start of scanning and then the scanned items are displayed on the tablet.

Figure 29–42 After Scanning Item



Note: Items cannot be added that do not belong to the area so there is no **Add Count Item** option.

7. After scanning all items on the count sheet, select **Save Count Sheet** from the Context Menu.The count sheet status will change from Preliminary to Saved. Repeat steps 5-7 for all count sheets.

Figure 29–43 Save Count Sheet Option - Mobile Tablet

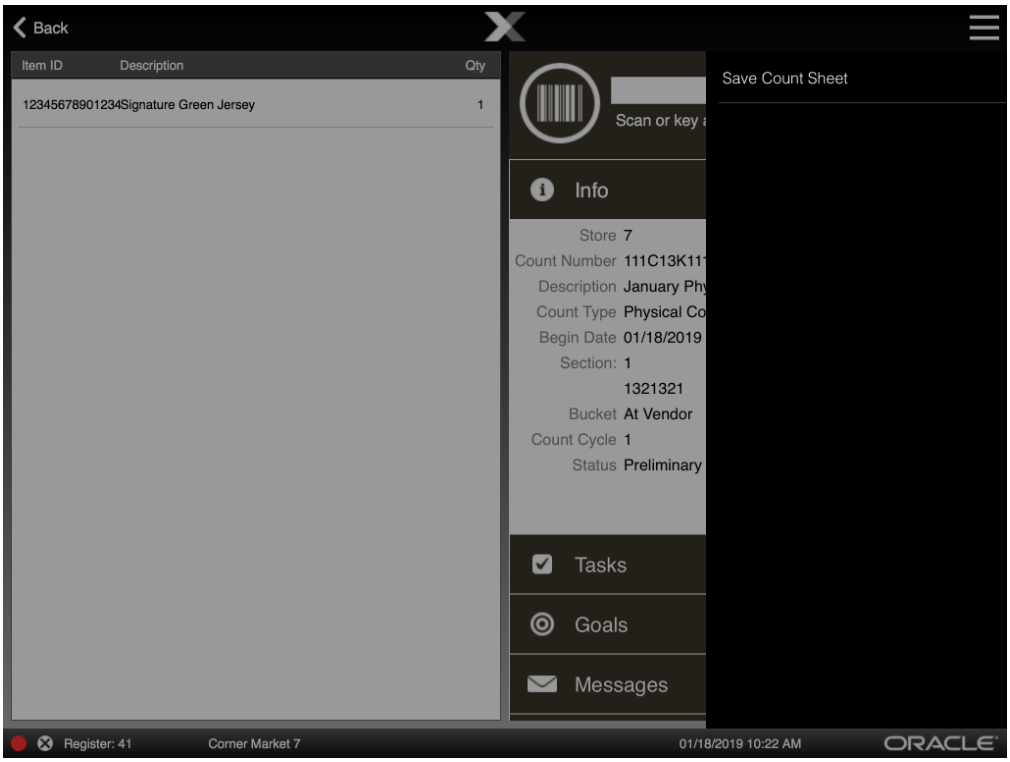
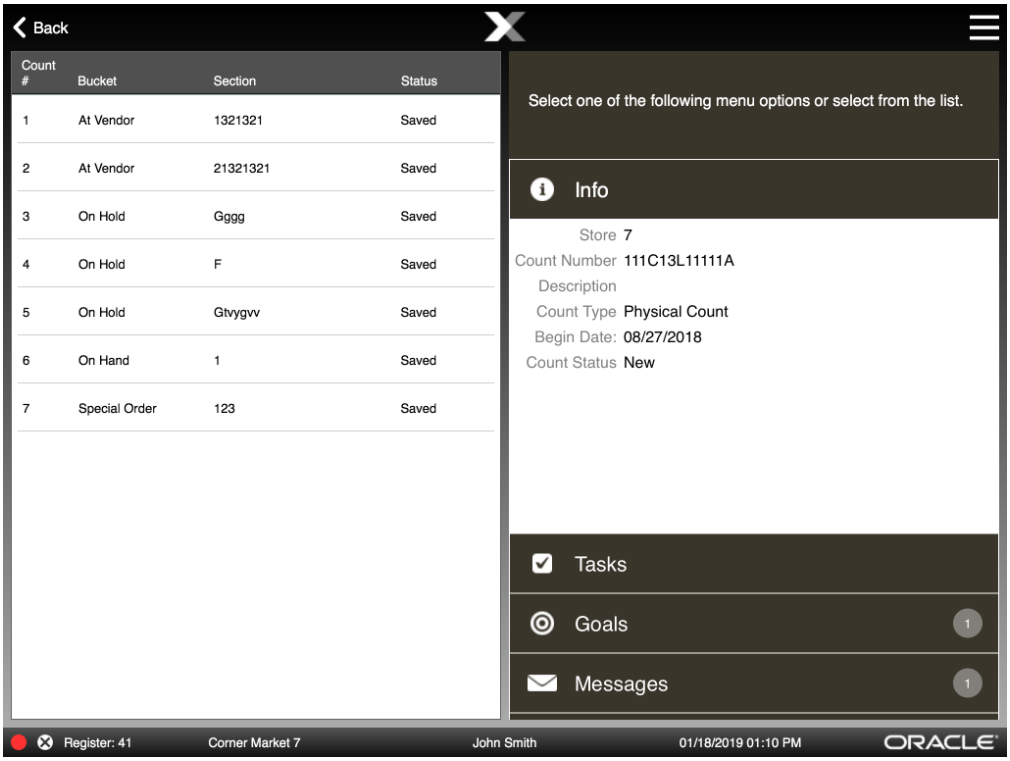


Figure 29–44 All Count Sheets Saved Status

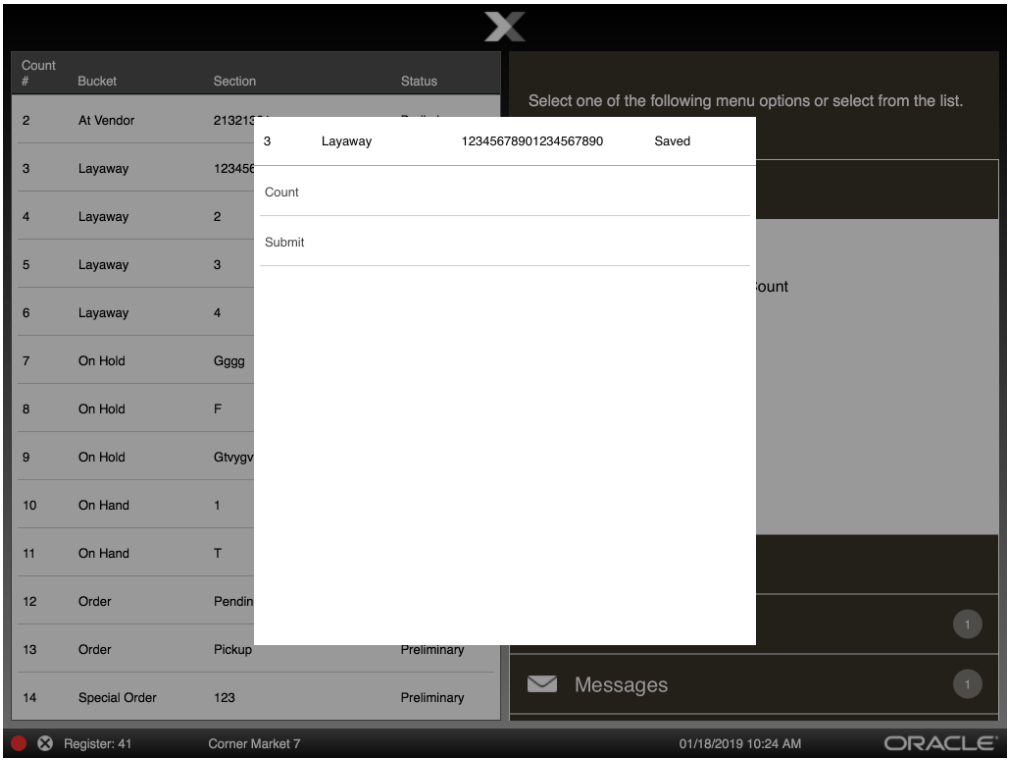


8. Submit the counts.

In this step, your count is compared to the system-expected quantity captured during the initiation process. Any variances between your count and the system-expected quantity will be reported, allowing you to resolve any discrepancies through additional counting cycles.

- To submit a single count sheet, select that count sheet and select **Submit**. The count sheet status changes to Submitted.
- To submit multiple count sheets at one time, select the **Submit Multiple Sheets** menu option. The system prompts you to select the count sheets to be submitted. With the count sheet highlighted, press the **Spacebar** to select each sheet individually, or choose the **Select All** menu option to submit all sheets. When prompted, select **Yes** to confirm the count sheets to be submitted.

Figure 29–45 Submit Option



9. The next step depends on the type of variance processing used: Automatic or Manual.
   - If the counted quantity and the expected Snapshot quantity match, the inventory bucket for the item is marked as settled – no variance, and the count is complete.
   - If the counted quantity and the expected Snapshot quantity do not match, the inventory bucket for the item is marked as having a variance.
     - If your system is set up for Automatic Variance Processing, any variances will result in a new count cycle: Count Cycle 2. See Automatic Variance Processing for detailed information about this type of variance processing.
     - If your system is set up for Manual Variance Processing, you can choose whether or not to perform a recount. See Manual Variance Processing for detailed information about this type of variance processing.

Note: In Count Cycle 2 (and higher), all items with variances will be grouped by Bucket. The Sections used for counting in Cycle 1 are not used for Cycle 2 and greater.

For example, if you have sections within the Layaway bucket such as an Earrings Section, a Watch Section, and a Jewelry Section with variances reported in Cycle 1 (1), then in Count Cycle 2 (2), the three Layaway sections (Earrings Section, Watch Section, and Jewelry Section) will be consolidated into a single Layaway bucket and the Section identifier will be ignored.



10. If you must recount any items, perform the same steps you used for count cycle 1:

    Note: Since subsequent count cycles are always compared to the initial snapshot taken for the first count cycle, you cannot initiate the count again.

    a. Select the count sheet. Only the items with variances will be listed for a recount.

    b. You cannot add additional items to Count Cycle 2.

    c. When the recount is finished and saved, select the **Submit Count Sheet** menu option. Once again, the system will compare the entered counts with the expected counts.

11. You can select the **View Variance Report**s menu option to create a variance report showing the count discrepancies. When prompted, select a Variance Report from the list and press **Enter**. The system creates and displays the report.

12. After the final count cycle sheet is submitted, the system displays a prompt indicating you have completed all count cycles.

Figure 29–46 Complete Count - Mobile Handheld

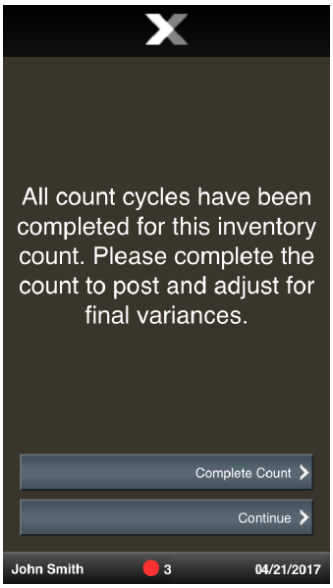
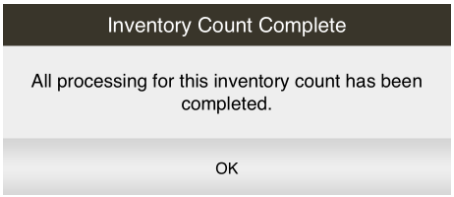


Figure 29–47 Complete Count - Mobile Tablet



13. Select one of the following options to continue the counting process:

    - Select **Continue** to return to the Inventory Count screen. From the Inventory Count screen you can:
      - View/Print Variance Reports from all count cycles that had variances.

        Tip: No Variance Report will be available for a count cycle that had no variances since all variance values would be 0.

      - Save the submitted count cycles and post inventory counts at another time.
      - Print count sheets.
      - Cancel the count.
      - Complete the count to post inventory counts and adjust the inventory counts in the system.

        <OR>

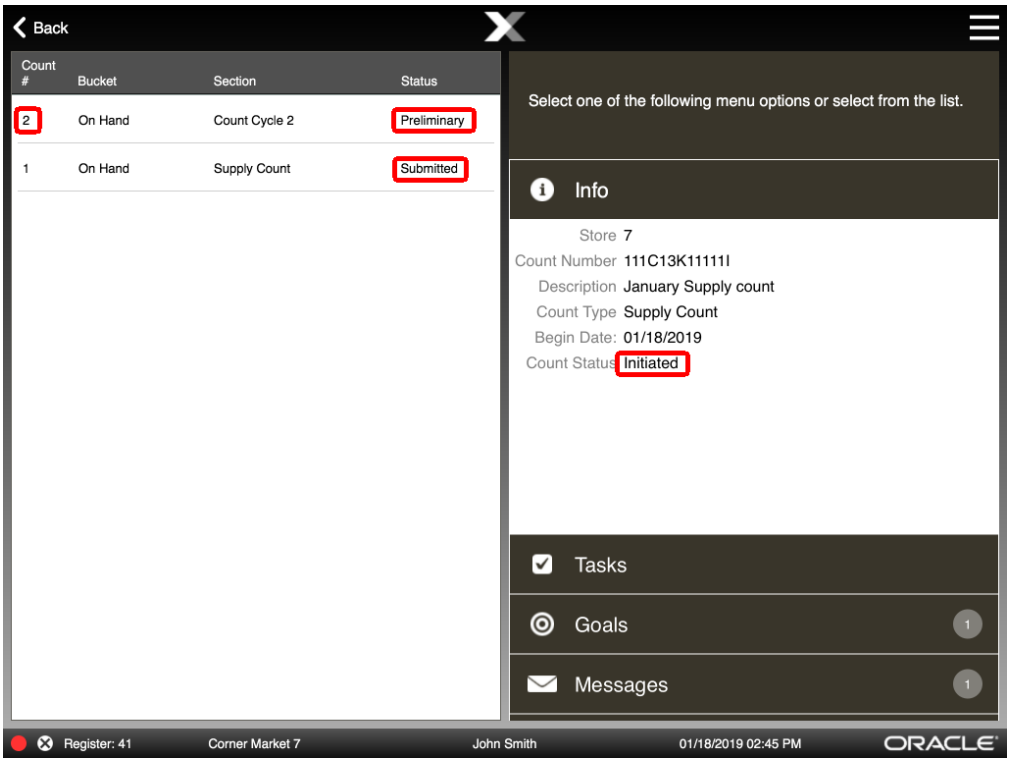
    - Select **Complete Count** to post inventory counts and adjust the inventory counts in the system.

14. After completing the count sheets, the system marks the Inventory Count document as Complete and inventory quantity will be adjusted accordingly.

Automatic Variance Processing

In Automatic Variance Processing only items with count variances are moved to the next cycle of counting. This process will continue moving items with count variances to the next count cycle automatically until the count for the item matches the value expected by the system (from the snapshot), or the quantity counted for two count cycles matches.

Figure 29–48 Cycle Count - Automatic Count Cycle 2



About Count Cycle 2:

The Inventory Count document status is Initiated. Any subsequent count cycles are always compared to the initial snapshot taken for the first count cycle. You cannot initiate the count again for this Count document.

If using Automatic Variance Processing, count cycle 2 is created automatically any time there is a count discrepancy between the counted and expected quantities in count cycle 1.

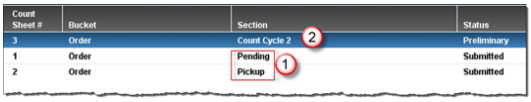
Any items with variances in count cycle 1 are moved to count cycle 2 for a recount. Items that matched the entered quantity and expected quantity will not be included in the recount.

Physical Inventory count processing for count cycle 2: Consolidating Sections

In Count Cycle 2 (and higher), all items with variances will be grouped by Bucket. The Sections used for counting in Cycle 1 are not used for Cycle 2 and greater.

For example, if you have sections within the Layaway bucket such as an Earrings Section, a Watch Section, and a Jewelry Section with variances reported in Cycle 1, then in Count Cycle 2, the three Layaway sections (Earrings Section, Watch Section, and Jewelry Section) will be consolidated into a single Layaway bucket and the Section identifier will be ignored.

Figure 29–49 Count Cycle 2 - Consolidated Sections



The count sheet status for count cycle 2 is set to Preliminary, indicating this is a new count.

The count sheet status for count cycle 1 is set to Submitted status and cannot be changed.

How the Variance is Calculated in Automatic Variance Processing

This section shows a simple example of the process the system uses to calculate variances between expected quantity and counted quantity. In this example, the store is set up to use a maximum of 4 count cycles per Inventory Count document.

Count Cycle 1

The system compares the submitted item count for the inventory bucket against the snapshot:

- If the numbers match, the inventory bucket for the item is considered settled - no variance, and the count for the item is Complete.
- If the numbers do not match, the item is moved to the next count cycle (count cycle 2) and must be recounted.

Count Cycle 2

The system compares the submitted item recount for the inventory bucket against the snapshot:

- If the recount and snapshot numbers match, the inventory bucket for the item is considered settled - no variance, and the count for the item is complete.
- If the recount and snapshot numbers do not match, the count is compared against the inventory bucket's prior count for count cycle 1.
  - If the count matches the count for count cycle 1, the recount of the inventory bucket is considered as matched, the count for the item is complete, and the matched count will be used to compute the variance.
  - If the count does not match the count for count cycle 1, or the original snapshot, the item is moved to the next count cycle (count cycle 3) and must be recounted.

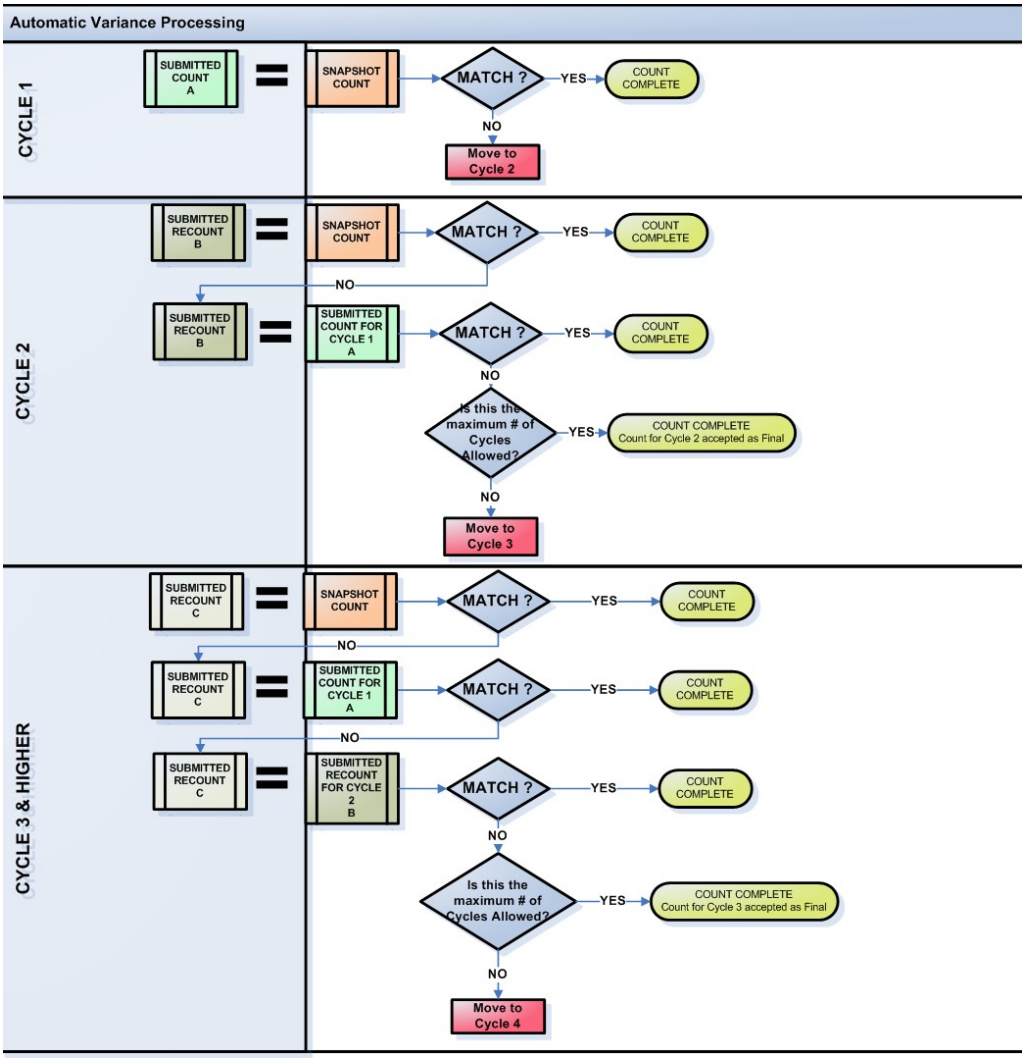
Note: Count Cycle Grouping: In a Physical Count, only a single count sheet will be created for Count Cycle 2 (and higher). The items to be recounted on the count sheet will be grouped by Bucket, and the Sections defined for Count Cycle 1 are no longer referenced.

Count Cycle 3 and Higher

The process is generally the same as described in Count Cycle 2. However, if the numbers do not match for the inventory bucket, the count will be compared against the inventory buckets for all prior count cycle counts, in addition to the original snapshot. If the item is not settled or matched once the maximum number of count

cycles is reached, the system considers the last count as final and uses it to calculate the variance.

Figure 29–50 Count Cycles: Automatic Processing



Automatic Variance Processing Examples:

Example 1 (Maximum: 4 count cycles)

Snapshot value = 4

Count for cycle 1 = 3

Count for cycle 2 = 4

Item is considered settled Cycle 2 = Snapshot, no variance 4-4=0

Example 2 (Maximum: 4 count cycles)

Snapshot value = 4

Count for cycle 1 = 3

Count for cycle 2 = 3

Item is considered matched Cycle 2 = Cycle 1, variance= -1 3-4=-1

Example 3 (Maximum: 4 count cycles)

Snapshot value = 4

Count for cycle 1 = 3

Count for cycle 2 = 2

Item automatically moved to count cycle 3 for recount No match between Snapshot or Cycles 1 and 2

Example 4 (Maximum: 4 count cycles)

Snapshot value = 4

Count for cycle 1 = 3

Count for cycle 2 = 2

Count for cycle 3 = 2

Item is considered matched Cycle 3 = Cycle 2, variance= -2 2-4=-2

Example 5 (Maximum: 4 count cycles)

Snapshot value = 4

Count for cycle 1 = 3

Count for cycle 2 = 2

Count for cycle 3 = 1

Count for cycle 4 = 6

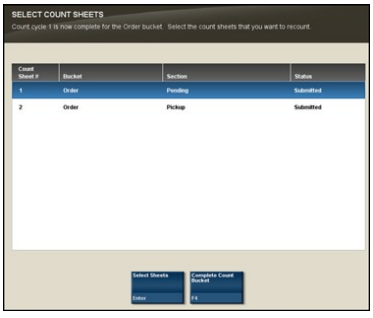
The 4th count of 6 is final, variance= +2 6-4=2(System uses last count cycle value as the final count when there are no matches once the maximum cycles allowed is reached).

Manual Variance Processing

In Manual Variance Processing, the system does not perform any automatic movement of items from one count to the next. Instead, you can select individual count sheets to be recounted in the next cycle. The sheet can be moved to the next cycle until you determine that the count is complete, or until the maximum number of cycles is reached. The entire count sheet is provided for the recount, not only items that had a count variance from the expected quantity. However, on the last count cycle, or once the maximum cycles allowed is reached, only items with variances will appear on the Inventory Count Variance Report.

After submitting the last count sheet for an inventory bucket, the system displays a prompt to ask whether or not you want to recount this count sheet.

Figure 29–51 Manual Variance Processing - Recount Prompt



- To recount the count sheet, press the **Spacebar** to select the sheet from the list and press **Enter**. This moves the sheet to the next cycle of the count. Recount

  the items on the count sheet following the same process used for count cycle 1. However, it is not necessary (or possible) to initiate the count again. Any subsequent count cycles are always compared to the initial snapshot taken for the first count cycle. You can recount the count sheet as many times as necessary, up to the maximum number of cycles permitted by your store policy.

  Note: If you select a Count Sheet for a recount and the maximum number of cycles has been reached, you will be prompted to complete the count and no additional count cycles are permitted.

- To complete the count sheet, accepting any variances if applicable, select **Complete Count Bucket**. This option does not move any counts into the next count cycle, but completes the count for this inventory bucket. The counts from

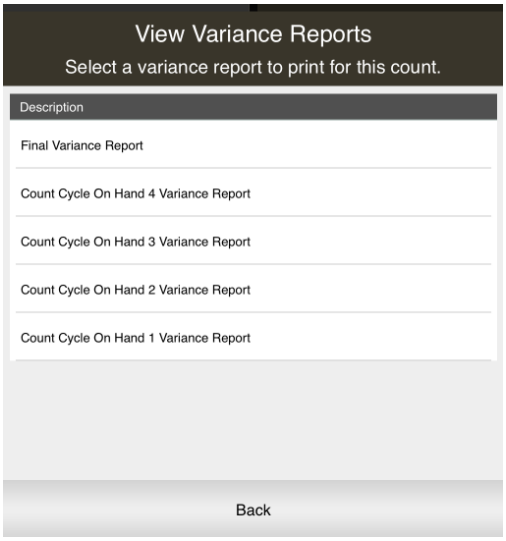
  the last cycle completed will be used to calculate the final variances for the bucket against the snapshot.

Variance Report

A variance report is created for each bucket in each cycle of the inventory count. After the final count cycle sheet has been submitted, or once all inventory bucket statuses are complete, the system posts inventory and creates the final variance report for all buckets.

1. To view a variance report, select the **View Variance Reports** menu option. See Figure 29–52.
2. Select a variance report from the list:

Figure 29–52 Variance Reports LIst



3. Select **Print** report to execute the report and send the results to a printer.
4. Select **Save report** to save this report with the current data, or save only the report parameters to run this specific report with these parameters again. If you save the report, assign a name to it so it can be viewed whenever needed. Xstore suggests a name, but you may type in the Save Report As field and change it.

   Variance Reports include the following header information:

   - **Count #:** The auto-generated count identifier associated with the Inventory Count document.
   - **Count Type:** The type of count: Physical Count, Cycle Count, Supply Count
   - **Count Cycle:** Indicates the number of times the bucket was counted to obtain these results.
   - **Inventory Bucket Section:** Used for Physical Inventory counts; defines the store layout area for the count.

   For each Item ID with a variance in the inventory bucket, the following information is shown:

   - **Item ID:** The item identifier.
   - **Description:** The item description.
   - **Snapshot quantity:** The quantity recorded when the count was initialized.

- **Counted quantity:** The count value submitted by the associate after counting the items.
- **Unit variance:** The difference between the snapshot value and the submitted count value.
- **% variance:** The difference between the snapshot value and the submitted count value, as a percentage.

Variance Percentage Calculation Formula: If snapshot quantity = 0 then infinity,

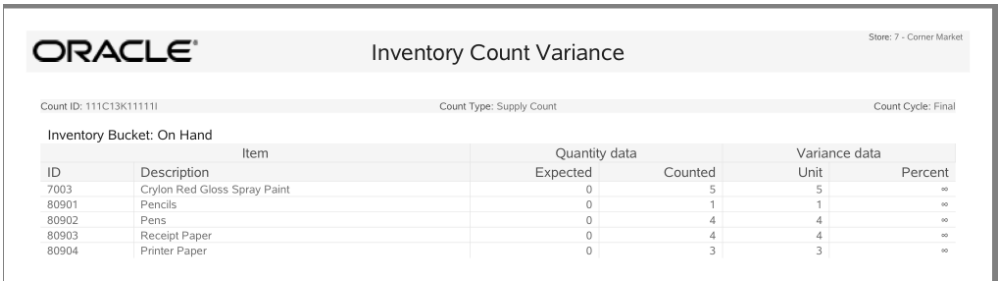
else,

If snapshot quantity < 0 then (-1 * (unit variance / snapshot quantity)) * 100, else,

(unit variance / snapshot quantity) * 100

Please note that rather large variance percentages (well over 100%) are correct if you have a small snapshot quantity and a large unit variance.

Figure 29–53 Count Cycle Variance Report Example



ORACLE

Inventory Count Variance

Store: 7 - Corner Market

Count ID: 111C13K11111I | Count Type: Supply Count | Count Cycle: Final

Inventory Bucket: On Hand

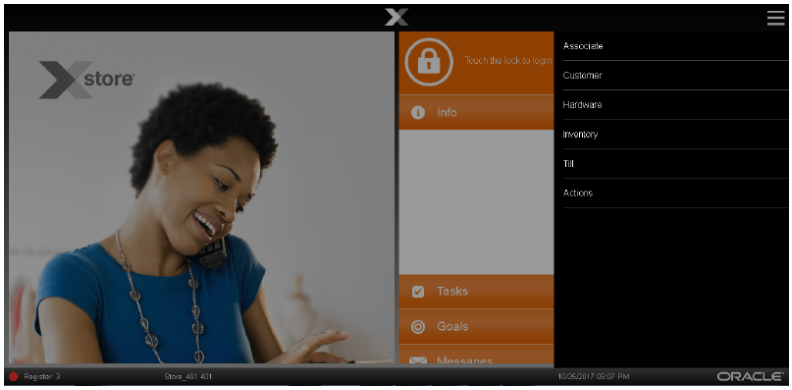
Item		Quantity data		Variance data	
ID	Description	Expected	Counted	Unit	Percent
7003	Crylon Red Gloss Spray Paint	0	5	5	∞
80901	Pencils	0	1	1	∞
80902	Pens	0	4	4	∞
80903	Receipt Paper	0	4	4	∞
80904	Printer Paper	0	3	3	∞

Store Layout Maintenance (Mobile Tablet Only)

The most efficient way to count physical inventory is to divide the store into specific count sections, based on the physical store layout, and possibly the number of associates that will be counting the items. These count sections are set up for inventory buckets you have defined for your store. Each count section will generate a list of items on a count sheet. For example, if you set up four sections, then four separate count sheets will be created for the count process. This allows you to assign the associates to specific areas of the store, equipped with a count sheet specifying the items to be counted in that section.

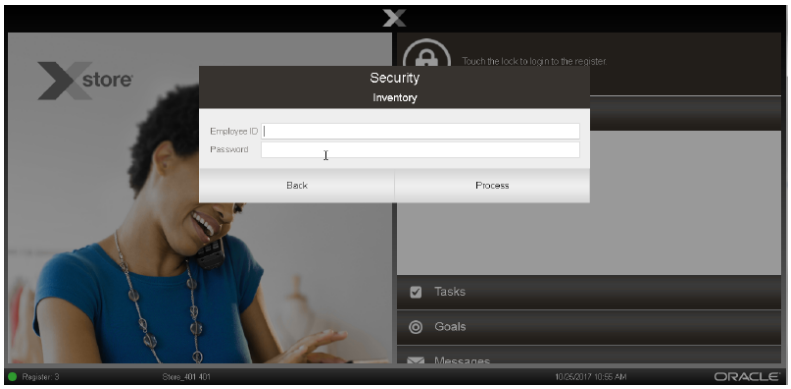
1. At the Register Login screen, select **Inventory** from the Context Menu.

Figure 29–54 Register Login Context Menu



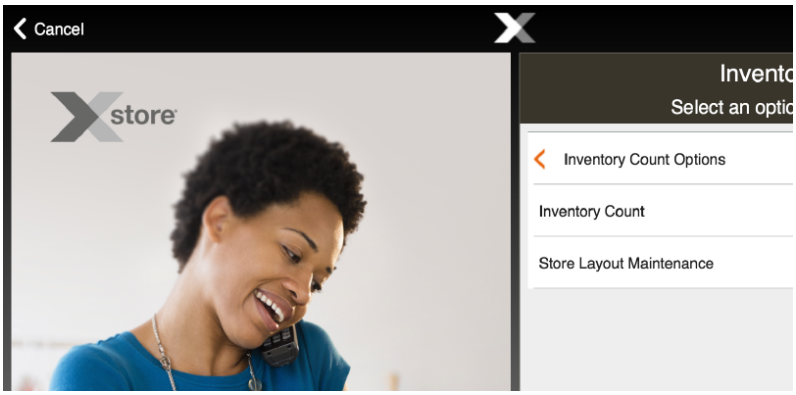
2. Enter your employee ID and password.

Figure 29–55 Login Credentials



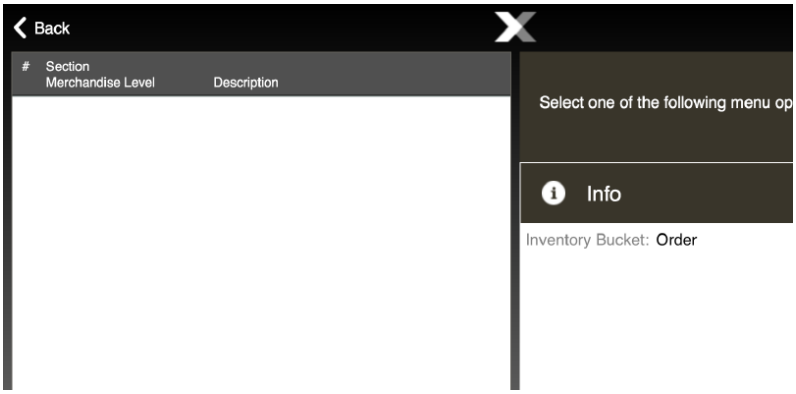
3. At the **Inventory** menu, select the **Inventory Count Options** option.

Figure 29–56 Inventory Count Options Menu



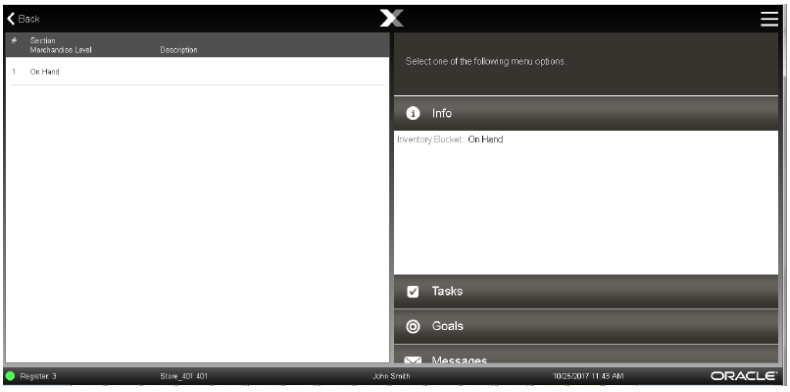
4. At the **Inventory Count Options** menu, select **Store Layout Maintenance**.

Figure 29–57 Store Layout Maintenance - Inventory Bucket List



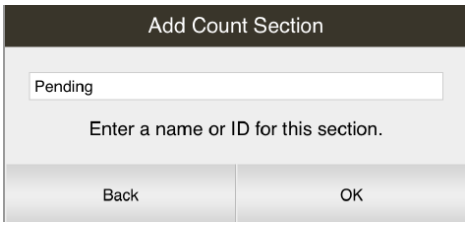
5. The system displays a list of the inventory buckets defined for the store. Select an inventory bucket for this count section.

Figure 29–58 Inventory Bucket - Add Count Section



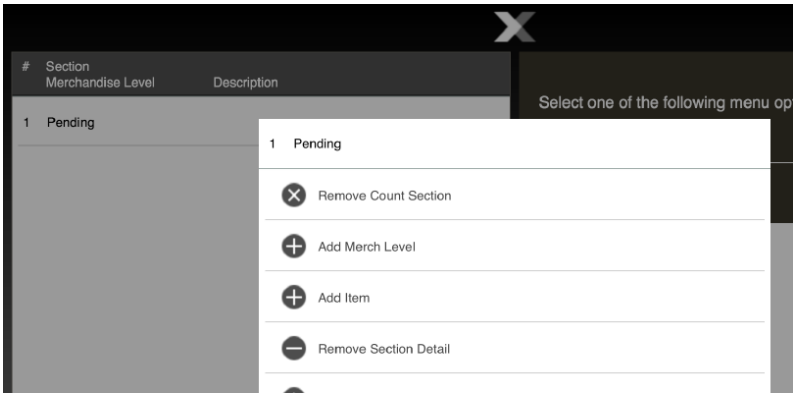
6. The system opens the Inventory Bucket. Select the **Add Count Section** menu option from the Context Menu to create a count section for the bucket.

Figure 29–59 Add Count Section Name Prompt



7. Type a name or ID for the new count section within this inventory bucket and **OK** to add the count section to the bucket.
8. Repeat adding count and entering name sections to the inventory bucket as needed.
9. Next, define the items that are part of the count section. Items can be added individually (**Add Item** option) or by merchandise level (**Add Merch Level** option). Select the **Count Section**.

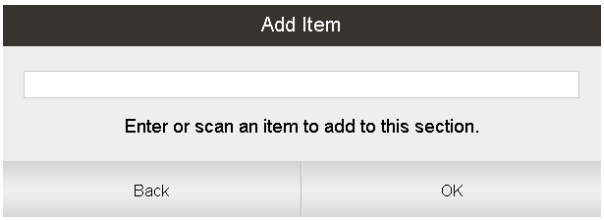
Figure 29–60 Count Section Options



10. Select either the **Add Item** option or the **Add Merch Level** option

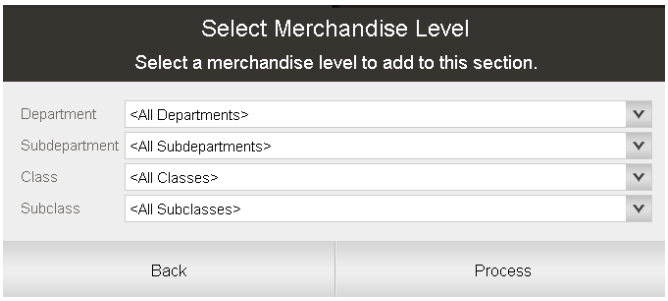
    a. If you chose to add an item, scan or enter the item ID at the prompt and press **OK**.

Figure 29–61 Add Item Prompt



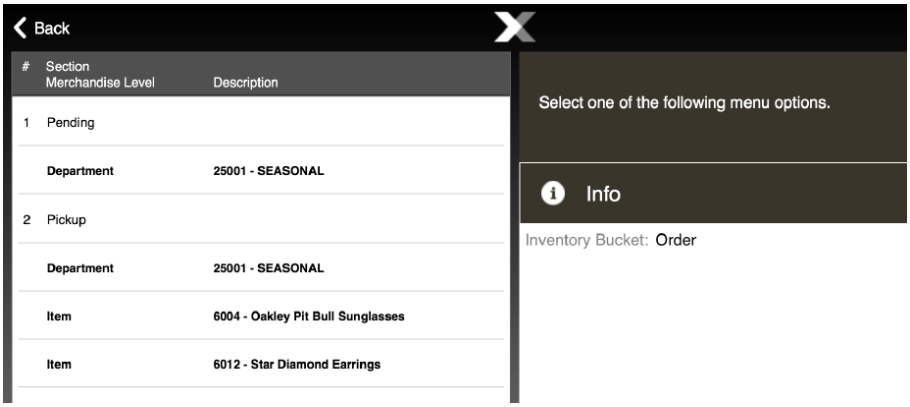
    b. If you chose to add a merchandise level, select the merchandise level from the list and select **Process**.

Figure 29–62 Merchandise Levels List



The items and/or merchandise levels are added to each count section for the inventory bucket and shown on the view port.

Figure 29–63 Count Sections with Items and Merchandise Levels Added



The following options are available if you need to modify the count sections and items.

- Select the **Remove Count Section** option to remove a count section and the associated items from the store layout.
- Select the **Remove Section Detail** option to remove an item or merchandise level from a count section.
- Select the **Move Section Up** or **Move Section Down** options to move the count section position higher or lower in the list of count sections.

At the Context Menu, select the **Print Store Layout** option to print a report showing the Store Layout setup for the inventory bucket.

11. Select the **Save and Exit** menu option to save the store layout and return to the Inventory Count Options menu.

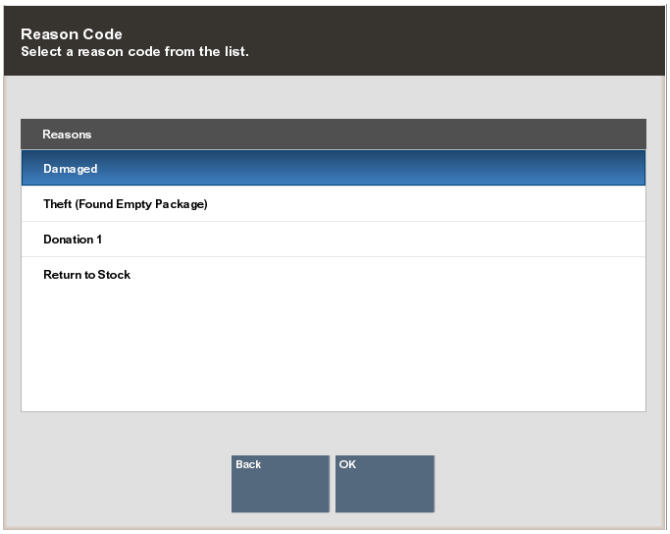
    Once count sections are set up for an inventory bucket, you can maintain these sections by adding or removing items and merchandise levels as needed. However, any updates you make to the store layout will only apply to new Inventory Counts going forward. Any existing Inventory Counts that have been generated will use the layout defined at the time the Inventory Count was set up.

Inventory Adjustment

Use this function to adjust an item's inventory count outside of the actual physical inventory process. You can categorize the relative location of merchandise within the retail environment by selecting the location that is impacted by adding or removing an item from inventory.

1. At the Register Login screen, select the **Back Office** option.
2. After logging in to the Back Office by entering your employee ID and password, select the **Inventory** option from the Main Menu and press **Enter**.
3. At the Inventory menu, select the **Inventory Adjustment** option and press **Enter**.
4. The system prompts you to select the reason for the inventory adjustment. Select a reason from the list and press **Enter** to continue.

Figure 29–64 Inventory Adjustment Reason List

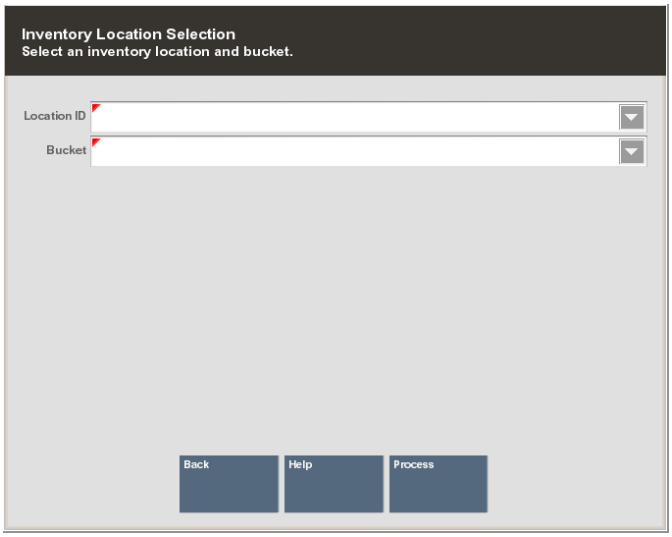


5. The system prompts you to select the Location ID and bucket for the item. Choose an option from the drop-down lists for each field, then select **Process**.

   A Location ID generally refers to a physical location where items are found, and it includes specific inventory buckets that are associated with it.

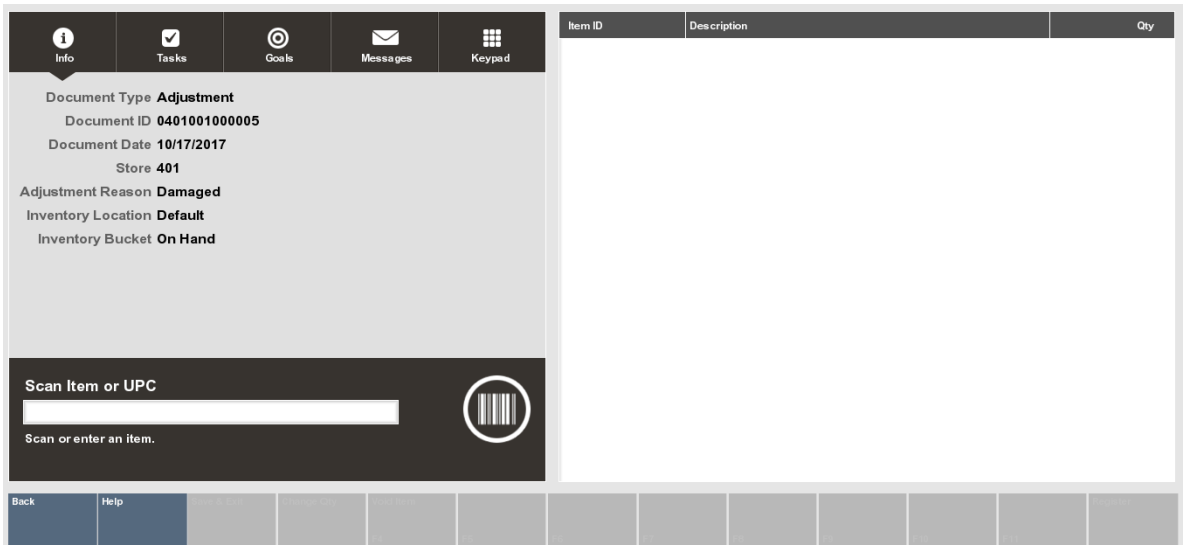
   A bucket is a descriptive term that usually relates to the status of an item in a particular location. For example, the On Hand bucket is a very inclusive category relating to currently available items.

Figure 29–65 Inventory Location Selection Form



6. The system displays the adjustment information that you have entered and prompts you to scan or enter the item ID. Scan the item ID or enter the item ID and press **Enter** to continue.

Figure 29–66 Prompt to Scan or Enter an Item



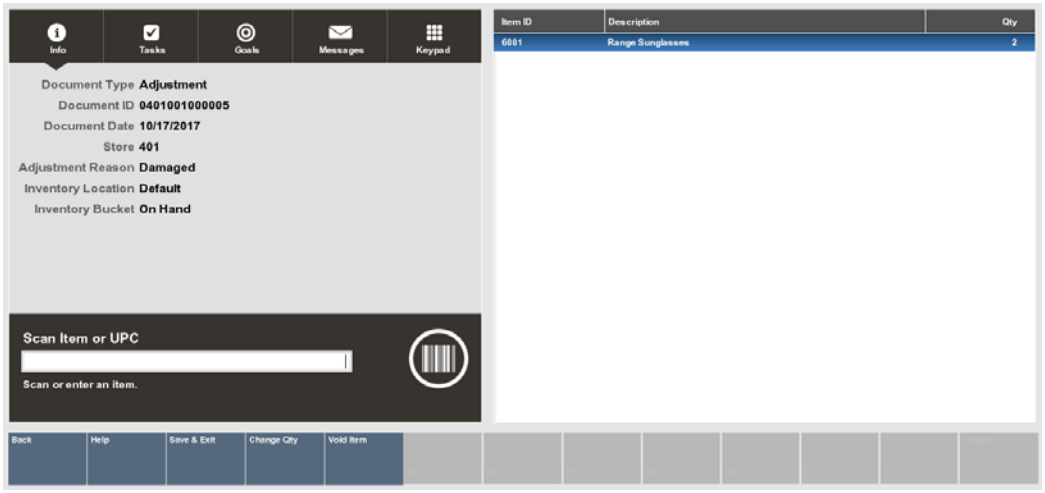
7. The system prompts for the item's quantity to be adjusted. Enter the item's quantity at the prompt and press **Enter** to continue.

Figure 29–67 Item Quantity Prompt



8. The system displays the item's information and adjustment quantity in the view port area of the screen.

Figure 29–68 Inventory Adjustment Screen



9. You also have the following edit options before saving the adjustment record:
   - **Change Quantity**: Select this option to edit the item's quantity to be adjusted.
   - **Void Item**: Select this option to remove an item from the list of adjusted items.
10. Select the **Save & Exit** option to retain the inventory adjustment.
11. The system displays a prompt asking you to confirm that you want to keep the changes. Select **Yes** to continue or **No** to return to the Adjustment screen.
12. The system automatically prints an Inventory Adjustment report for your records.

Figure 29–69 Inventory Adjustment Report Example

ORACLE

Inventory Adjustment

Store: 999 - Corner Market

Document: 0999001000403

Reason Code: Damaged

Date	Item and Description	Quantity	Bucket	Location
9/16/16	1002 - COTTON JERSEY TIERED DRESS	(1)	AT_VENDOR	DEFAULT
9/16/16	1003 - TIE WAIST SHIRT DRESS	(1)	AT_VENDOR	DEFAULT
9/16/16	1004 - BLK WHITE CAP SLEEVE DRESS	(10,000)	AT_VENDOR	DEFAULT
9/16/16	1005 - PEASANT TOP JERSEY DRESS	(1)	AT_VENDOR	DEFAULT
9/16/16	1006 - ROLL SLEEVE SWEATER DRESS	(1)	AT_VENDOR	DEFAULT
9/16/16	1007 - ANIMAL PRINT CAP SLEEVE DRESS	(2)	AT_VENDOR	DEFAULT
9/16/16	1008 - DRAWSTRING PEASANT DRESS	(1)	AT_VENDOR	DEFAULT
9/16/16	1009 - MAXI LENGTH TANK DRESS	(1)	AT_VENDOR	DEFAULT
9/16/16	2010 - House Account Reversal	(2)	AT_VENDOR	DEFAULT
9/16/16	2003 - $5 Xstore Gift Certificate	(1)	AT_VENDOR	DEFAULT
9/16/16	2004 - Send Sale Shipping Fee	(1)	AT_VENDOR	DEFAULT
9/16/16	2005 - Restocking Fee	(1)	AT_VENDOR	DEFAULT
9/16/16	2006 - Gift Wrapping	(1)	AT_VENDOR	DEFAULT
9/16/16	2007 - Item Alteration	(1)	AT_VENDOR	DEFAULT
9/16/16	2008 - Item Repair	(1)	AT_VENDOR	DEFAULT
9/16/16	2009 - House Account Payment	(1)	AT_VENDOR	DEFAULT
9/16/16	2011 - Core Charge	(1)	AT_VENDOR	DEFAULT
9/16/16	2013 - Prepaid advertisment 1 description	(1)	AT_VENDOR	DEFAULT
9/16/16	1111 - MALE DRESS	(1)	AT_VENDOR	DEFAULT
9/16/16	1112 - FEMALE DRESS	(1)	AT_VENDOR	DEFAULT
9/16/16	1114 - MADE IN 2009	(1)	AT_VENDOR	DEFAULT
9/16/16	1115 - 10 yrs old	(1)	AT_VENDOR	DEFAULT
9/16/16	1116 - 20 yrs old	(1)	AT_VENDOR	DEFAULT
9/16/16	1117 - CHILDREN_ONLY	(1)	AT_VENDOR	DEFAULT
9/16/16	1118 - FREE FOR ALL	(1)	AT_VENDOR	DEFAULT
9/16/16	9260 - PF Quantity/Min Sale Qo2	(1)	AT_VENDOR	DEFAULT
9/16/16	9270 - Max Sale Qo4	(1)	AT_VENDOR	DEFAULT
9/16/16	9280 - PFC Required	(1)	AT_VENDOR	DEFAULT
9/16/16	9290 - PFC Optional	(1)	AT_VENDOR	DEFAULT
9/16/16	9301 - Minimum Age	(1)	AT_VENDOR	DEFAULT
9/16/16	9995 - On Hold Account Credit	(1)	AT_VENDOR	DEFAULT
9/16/16	601 - Shipping Fee @ $3.95	(1)	AT_VENDOR	DEFAULT
9/16/16	602 - Shipping Fee @ $6.95	(1)	AT_VENDOR	DEFAULT
9/16/16	603 - Shipping Fee @ $7.95	(1)	AT_VENDOR	DEFAULT
9/16/16	604 - Shipping Fee @ $9.95	(1)	AT_VENDOR	DEFAULT
9/16/16	605 - Shipping Fee @ $12.95	(1)	AT_VENDOR	DEFAULT

Run Date: 9/16/16 4:25 PM

Page 1 of 2

Inventory Count Technical Limitations

Inventory counts have several technical limitations to which they must adhere based on the amount of system resources available to a computer running Xstore. All size limitations are necessitated by either a memory concern, or an imposed technical limitation of supporting software, such as Microsoft® SQL Server®.

Limitations/Information

The following numbers are based on a system running Xstore with a maximum of 512MB of memory allocated to it.

- The maximum number of items that can be on an inventory count is 300,000. When the count sheets are generated, an algorithm is employed to determine what the final count size will be. If it will be greater than 300,000, generation of count sheets will not be allowed to continue. This limit is necessary to prevent systems from running out of memory while processing an inventory count.
- The maximum number of items that can be on a cycle count or supply count is 2,000. This limitation exists due to the required functionality of these types of counts in conjunction with the limitations of Microsoft SQL Server.
- The maximum number of inventory adjustments that will be processed by Xstore at the conclusion of an inventory count is 15,000. If a count produces more than 15,000 final variances, the user will be prompted that inventory levels cannot be adjusted. Xstore automatically notifies the corporate office via the inventoryCount.xml file to indicate that variances were not adjusted. The corporate office can then take appropriate action to account for the variances. This limit is necessary to prevent systems from running out of memory while processing an inventory count.
- Inventory count data must be deleted routinely at the corporate level to ensure the optimal performance of the queries involved in inventory counts. Also, the inventoryCount.xml file must be deleted after it reaches a certain size (a maximum size is about 250MB). After this size, performance in writing to this file will be significantly decreased

30

Inventory Adjustment

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

Figure 30–1 Main Menu - Inventory



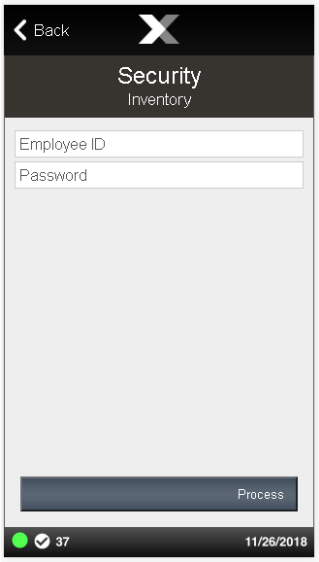
This chapter includes the following procedures:

- Open Inventory Adjustment
- Perform an Inventory Adjustment

Open Inventory Adjustment

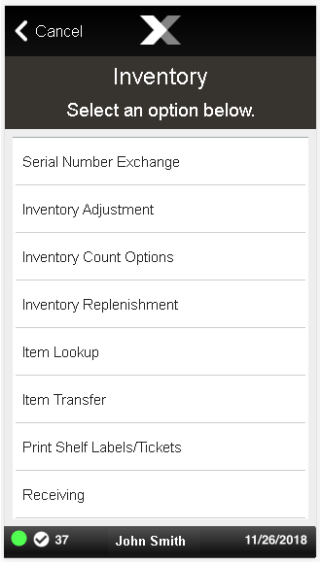
1. Select Inventory in the Main Menu.

Figure 30–2 Login Screen



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

Figure 30–3 Inventory Menu



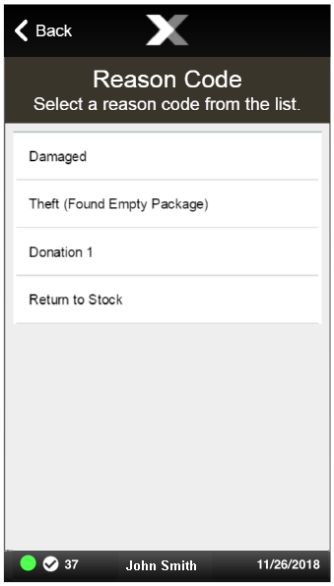
4. Select **Inventory Adjustment**.

   Continue with Perform an Inventory Adjustment.

Perform an Inventory Adjustment

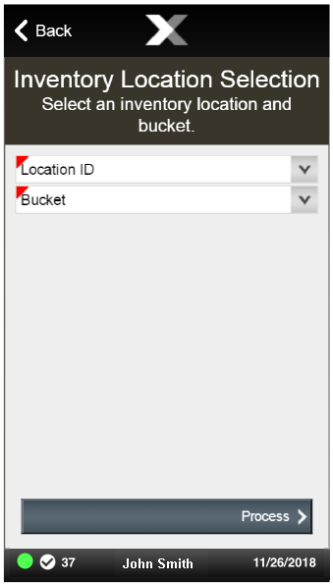
To perform an inventory adjustment:

Figure 30–4 Select a Reason Code



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

Figure 30–5 Inventory Location Selection



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

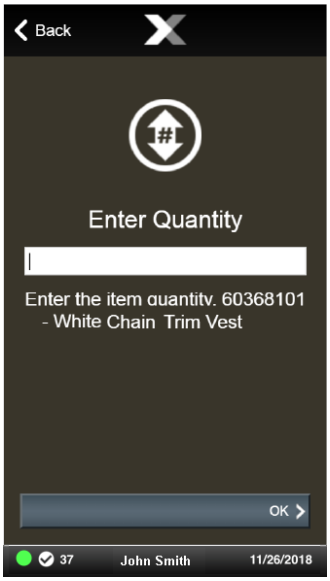
Figure 30–6 Scan an Item or Enter an Item ID



5. Scan an item or enter an Item ID.

   If prompted for an item quantity:

Figure 30–7 Enter Quantity



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

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

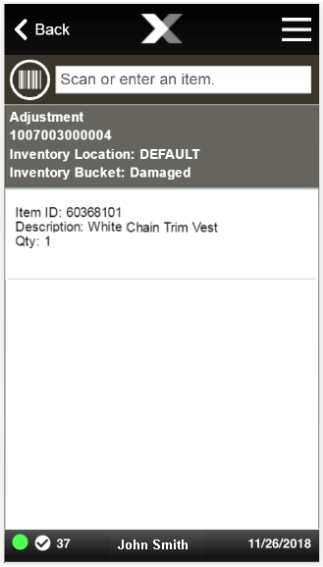
   Do one of the following:

   - Change an Item
   - Save and Exit

Change an Item

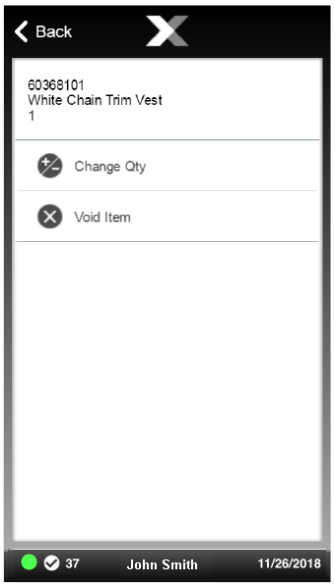
To make changes to an inventory item being adjusted:

Figure 30–8 Select Inventory Item



1. Select the item to change.

Figure 30–9 Inventory Adjustment Options



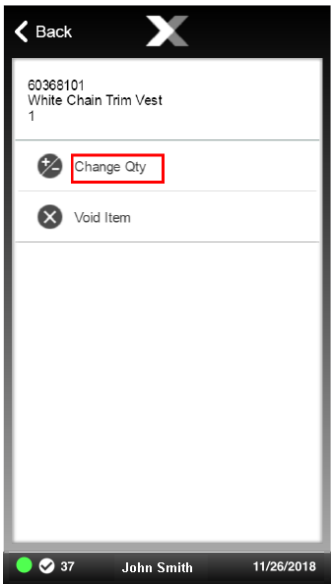
Do one of the following:

- Change Item Quantity
- Void Item

Change Item Quantity

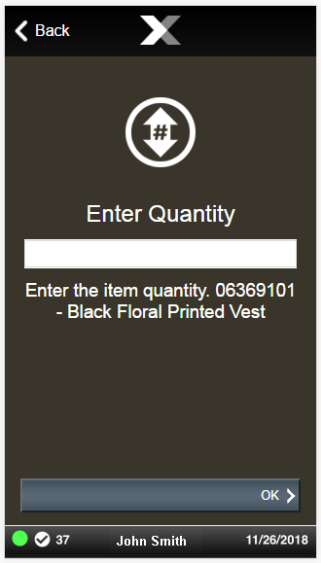
To change the quantity of an item:

Figure 30–10 Change Item Quantity



1. Select **Change Qty**.

Figure 30–11 Enter Quantity



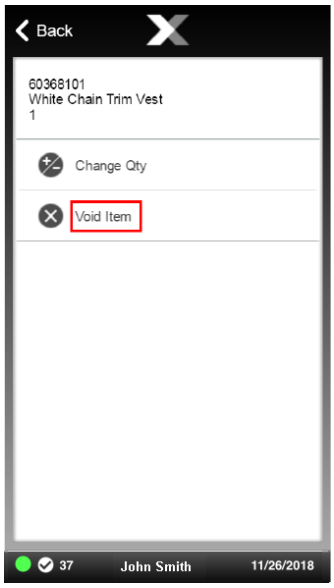
2. Enter the item quantity.
3. Select **OK**.

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

Void Item

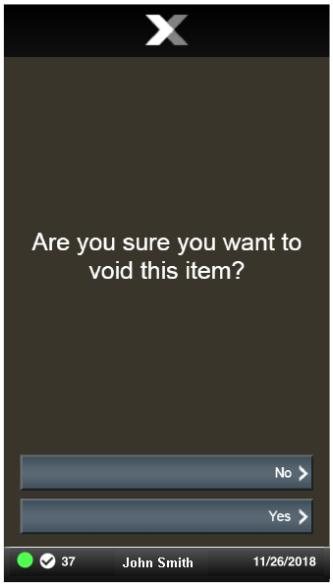
To void an item:

Figure 30–12 Void Item



1. Select **Void Item**.

Figure 30–13 Confirm Void Item



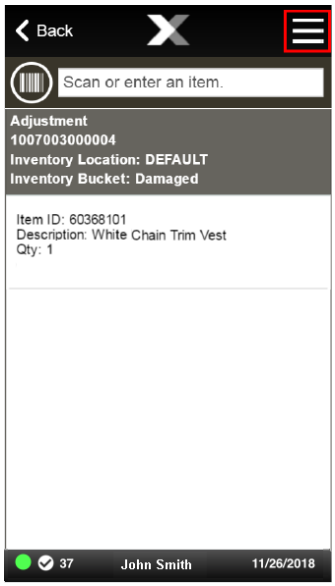
2. Select **Yes**.

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

Save and Exit

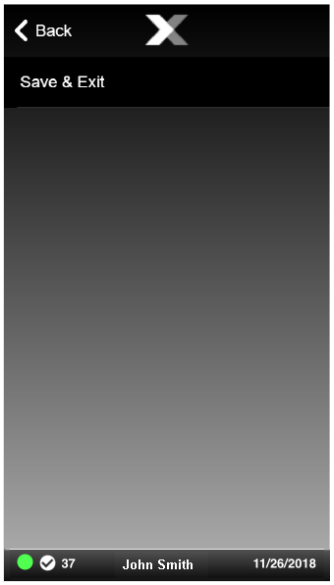
To save the inventory changes and exit:

Figure 30–14 Context Menu Button



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

Figure 30–15 Save & Exit Option



2. Select **Save and Exit**.

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

31

Item Transfer

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

About This Chapter

This chapter contains the following procedures:

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

Start Item Transfer

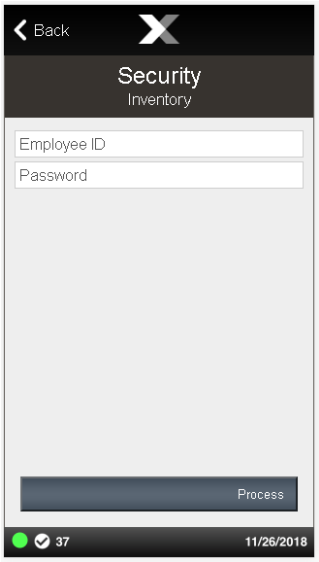
To start the item transfer process:

Figure 31–1 Main Menu - Inventory



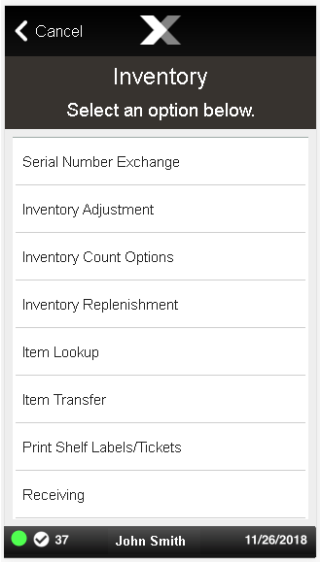
1. Select Inventory in the Main Menu.

Figure 31–2 Login Screen



2. Enter **Employee ID** and **Password**.
3. Select **Process**.

Figure 31–3 Inventory Menu



4. Select **Item Transfer**.

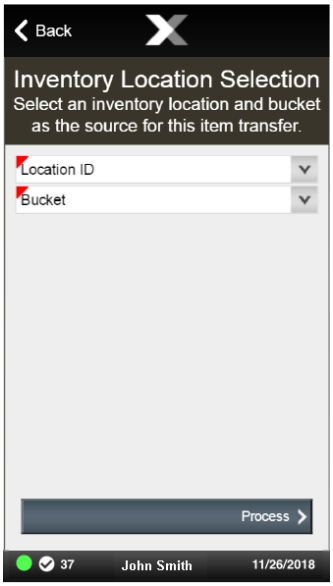
   Continue with Perform Transfer.

Perform Transfer

To perform an item transfer:

Select the location from which the item will be transferred:

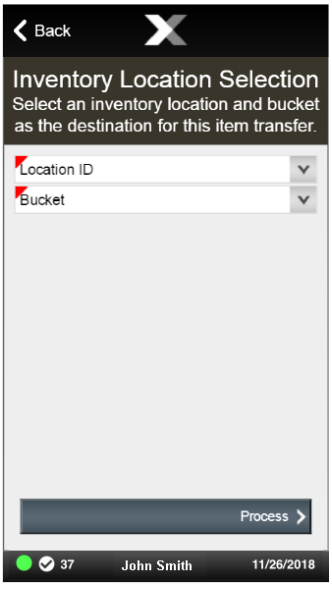
Figure 31–4 Inventory Location Selection - From Location



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

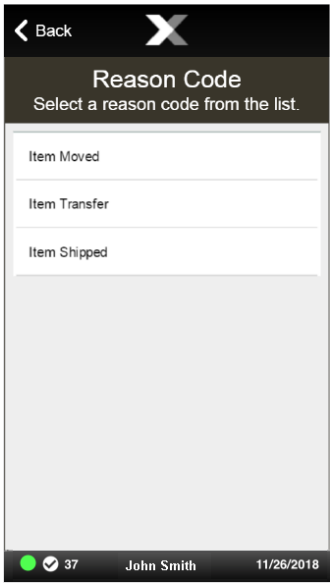
   Select the location to which the item will be transferred:

Figure 31–5 Inventory Location Selection - To Location



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

Figure 31–6 List of Reason Codes



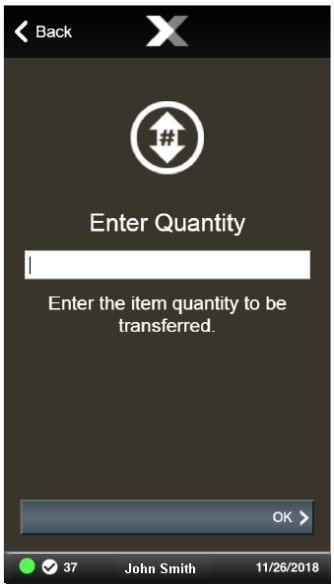
7. Select the reason for the transfer.

Figure 31–7 Select an Item



8. Scan an item or enter an item ID or select an item to adjust. See Adjust Item or select the Context Menu for additional options. See Change Item Quantity.

Figure 31–8 Enter Quantity



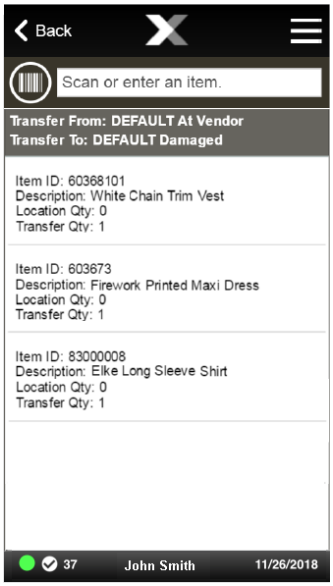
Adjust Item

This section describes how to adjust an item.

Change Item Quantity

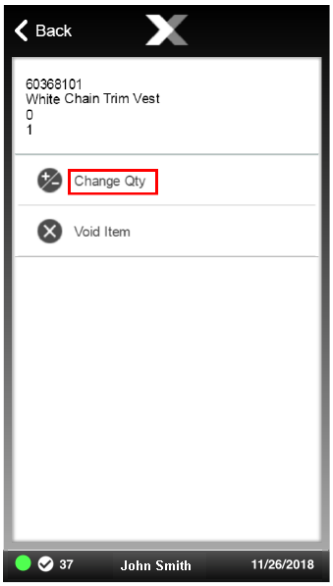
To change the quantity of an item:

Figure 31–9 Select an Item



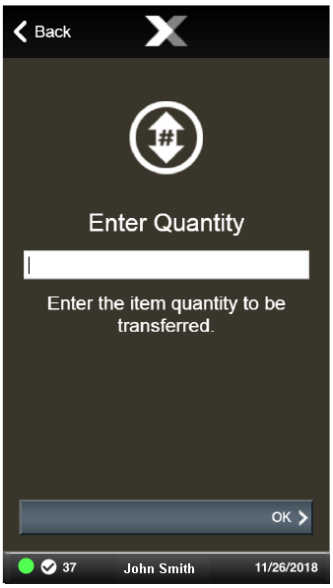
1. Select the item.

Figure 31–10 Change Quantity



2. Select **Change Qty**.

Figure 31–11 Enter Quantity



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

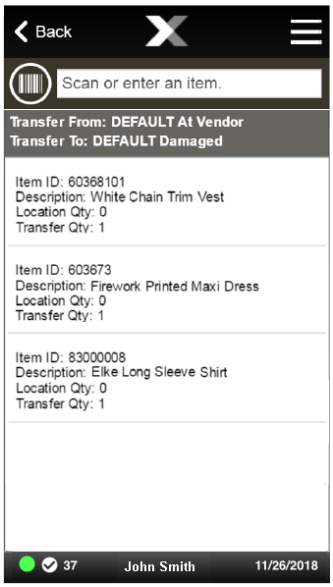
   The quantity is updated.

   Return to the transfer item list screen.

Void Item

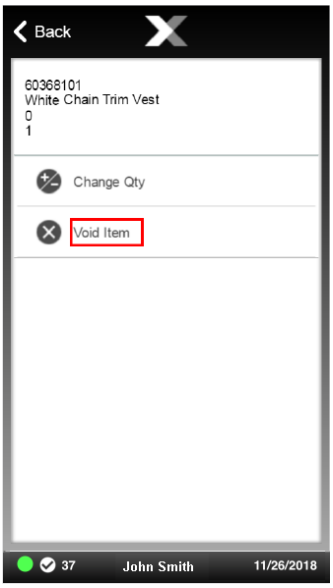
To remove an item from an item transfer:

Figure 31–12 Select an Item



1. Select the item.

Figure 31–13 Void Item



2. Select **Void Item**.

   The quantity is set to zero.

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

   Return to the transfer item list screen.

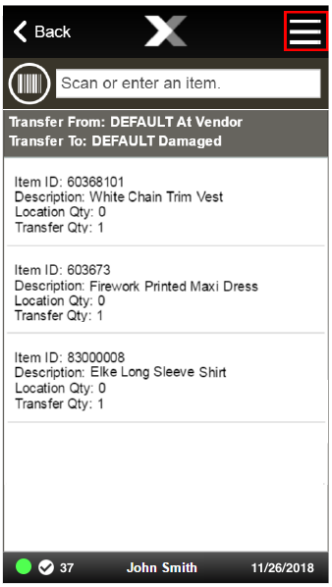
Additional Options

This section describes additional item transfer options.

Save & Exit

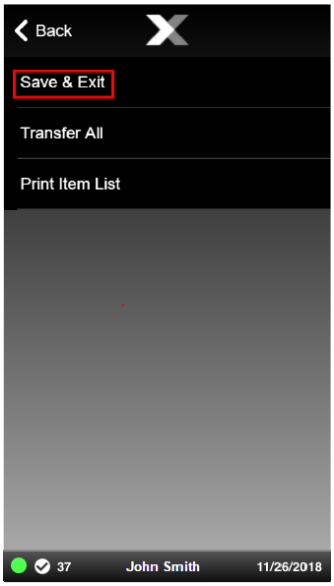
To save the transfer and return to the inventory screen:

Figure 31–14 Context Menu Button



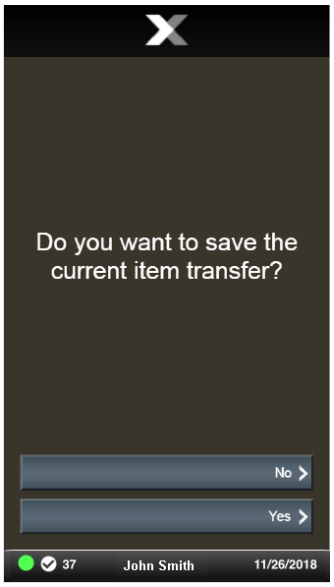
1. Select the **Context Menu** button.

Figure 31–15 Save & Exit Option



2. Select **Save & Exit**.

Figure 31–16 Confirm Save Transfer



3. Select **Yes**.

   The item transfer completes. Return to the inventory menu.

Transfer All

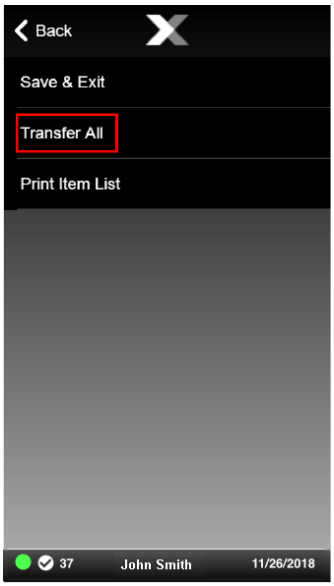
To include all the items in the list, setting each item to the maximum quantity:

Figure 31–17 Context Menu Button



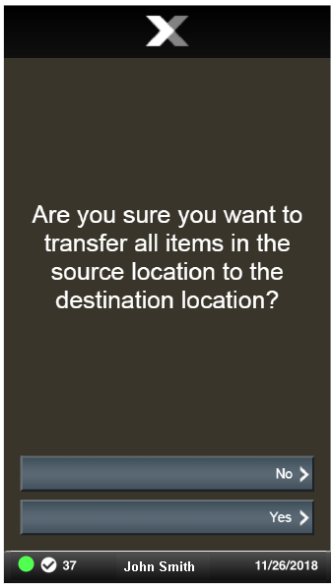
1. Select the **Context Menu** button.

Figure 31–18 Transfer All Option



2. Select **Transfer All**.

Figure 31–19 Confirm Transfer All Items



3. Select **Yes.**

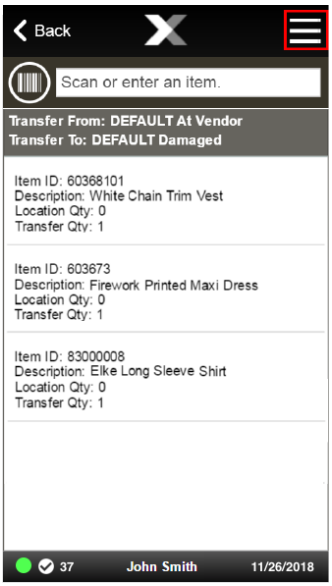
   The quantity of every item in the list is set to its maximum value.

   Return to the item transfer list screen.

Print Item List

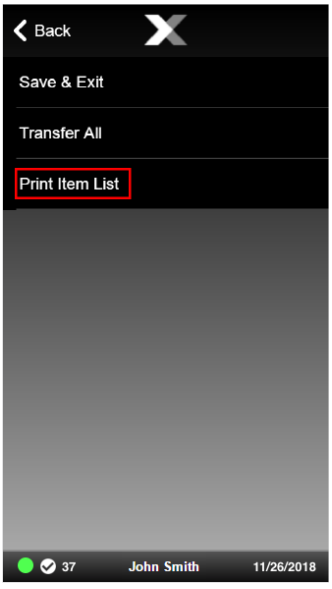
To print a list of items in the transfer:

Figure 31–20 Context Menu Button



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

Figure 31–21 Print item List Option



2. Select **Print Item List**.

   Follow the print procedure for your system.

   The list of items prints.

   Return to the item transfer list screen.

32

Inventory Replenishment

The Inventory Replenishment function in Xstore Mobile allows stores to review suggested inventory orders that the Home Office has created for them. The store can then approve and/or edit the suggested orders and submit them to the Vendor.

This feature also gives stores the ability to create their own Inventory Replenishment orders.

Accessing the Back Office

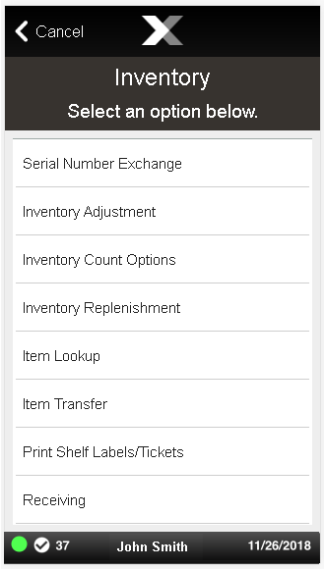
1. From the Main Menu, select the Inventory option.

Figure 32–1 Main Menu - Inventory



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

Figure 32–2 Inventory Menu



4. At the Inventory menu, select **Inventory Replenishment** and press **Enter**.

   The Inventory Replenishment Order Search screen opens.

   Continue with Search for a Replenishment Document or Adding Items to an Inventory Replenishment Order.

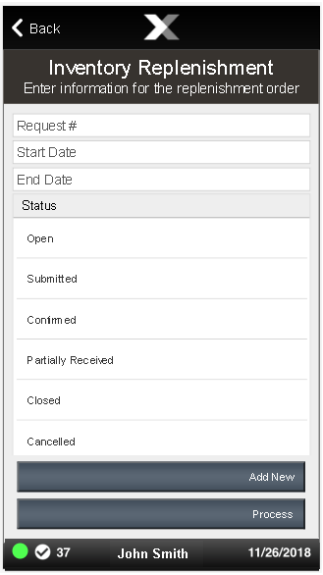
Inventory Replenishment Document

This section describes the inventory replenishment document functions.

Search for a Replenishment Document

1. At the Inventory Replenishment search form, enter your search criteria:

Figure 32–3 Document Search Form



- Scan or enter a specific Inventory Replenishment Request #
- Enter Start and/or End Dates
- Select one or more Status options:
  - Open
  - Submitted
  - Confirmed
  - Partially Received
  - Closed
  - Cancelled

2. Select **Process** to display Inventory Replenishment Documents that match your search criteria.

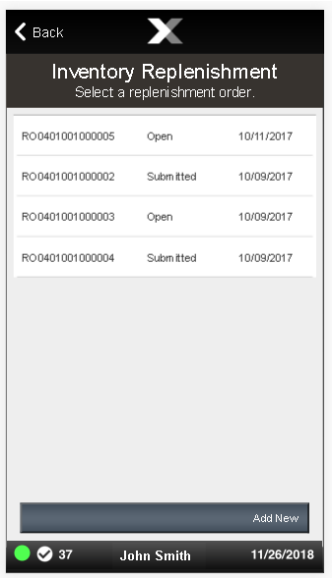
More Information About Document Searches

Note: If you know a Replenishment Document does not exist, you can select the **Add New** option at the Document Search form (Figure 32–3) to create a new Inventory Replenishment Document. Refer to Creating a New Inventory Replenishment Orderfor more information about creating a new Inventory Replenishment Document at the store.

If the document you are looking for is not found in the list of Replenishment Documents, select the Add New option at the Inventory Replenishment Document Search Results form (Figure 32–4) to create a new Inventory Replenishment Document. Refer to Creating a New Inventory Replenishment Order for more information about creating a new Inventory Replenishment Document at the store.

1. Select the Replenishment Document you want to view from the list and press **Enter**.

Figure 32–4 Inventory Replenishment Document Search Results



Xstore displays the Replenishment screen for the selected Document.

Figure 32–5 Inventory Replenishment Screen Item List



This screen shows the following information for the Inventory Replenishment Document:

- Replenishment Document Identifier
- Items: how many unique items are in the order
- Units: total number of items in the order

- Status of the shipment: (OPEN, SUBMITTED, CONFIRMED, PARTIALLY RECEIVED, CLOSED)
- For each item:
  - Item ID
  - Description
  - On Hand Qty
  - Suggested Order
  - Order Qty

Inventory Replenishment Order Status Definitions

An Inventory Replenishment order can be in one of the following statuses:

- **OPEN:** This is the initial status that an order is in after being created in Xstore or when sent as a suggestion from the Home Office. This is the only status an order can be in to update or edit.
- **SUBMITTED:** The order can go into a SUBMITTED status when all items in the order are approved.
- **CONFIRMED:** Home Office can send orders down in a CONFIRMED status which means they are not suggestions and are not changeable.
- **PARTIALLY RECEIVED:** When any item in the order is received, but not all items, the order is PARTIALLY RECEIVED.
- **CLOSED:** The order is considered CLOSED when all items are received or the order is Force Closed.
- **CANCELLED:** Home Office or the Store can cancel an order. Once cancelled it cannot be edited or re-opened.

Adding Items to an Inventory Replenishment Order

Note: Items can only be added to Inventory Replenishment Orders that are in an OPEN status. Follow step 2 to add items to an order.

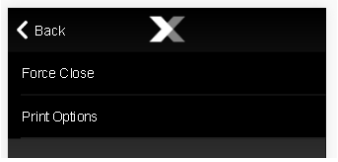
1. Enter or scan an item or use the Item Lookup option in the Context Menu to search for an item in the database.
2. Enter the Quantity and select **OK**.

Inventory Replenishment Options

The following option is available at the Inventory Replenishment screen for all orders/statuses:

Print Options: Select this option to view the printable reports available for this order. Refer to Print Options for procedural information.

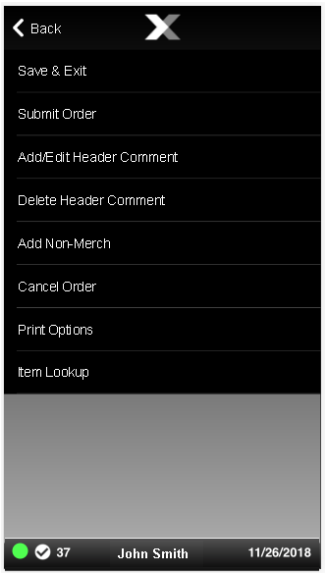
Figure 32–6 Context Menu - Confirmed, Submitted, and Partially Received Status



The following option is available at the Inventory Replenishment context menu for all CONFIRMED, SUBMITTED, and PARTIALLY RECEIVED orders:

Force Close: Select this option to force close the order without manually receiving the items. Refer to Force Close for procedural information.

Figure 32–7 Inventory Replenishment Context Menu - Open Status



The following options are only available at the Inventory Replenishment context menu for orders that are in an OPEN status:

Save and Exit: Select this option to save your changes and return to the list of documents.

Submit Order: Select this option to approve the order. This will change the status of the order to Submitted. Refer to Submit an Order for procedural information.

Add/Edit Header Comment: Select this option to add comments to the document. Refer to Add or Edit Header Comments for procedural information.

Delete Header Comment: Select this option to remove comments from the document. Refer to Delete Header Comments for procedural information.

Add Non-Merch: Select this option to add Non-Merchandise items to the document. Refer to Add Non-Merchandise for procedural information.

Cancel Order: Select this option to cancel the order. This will change the status of the order to Cancelled. Cancelled orders cannot be edited or submitted.

Item Lookup: Select this option to look up an item ID in the file. You also have the options to add the item to the Replenishment Document. Refer to Item Lookup.

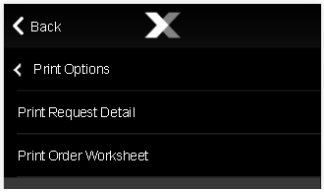
Selecting an item on the Replenishment screen with a status of Open allows you to

Change Item: Select this option to change the quantity of, add/edit/remove comments for, or edit the source of a specific item within the order. Refer to Change an Item for procedural information.

Print Options

Select Print Options from within a Replenishment Order for the following printing options.

Figure 32–8 Print Options



There are two reports to help manage your Inventory Replenishment orders.

- Print Request Detail prints the Print Request Detail Status Report for the selected order.
- Print Order Worksheet prints the Replenishment Order Worksheet that shows details for each item in the order - source ID, Item ID, and so on.

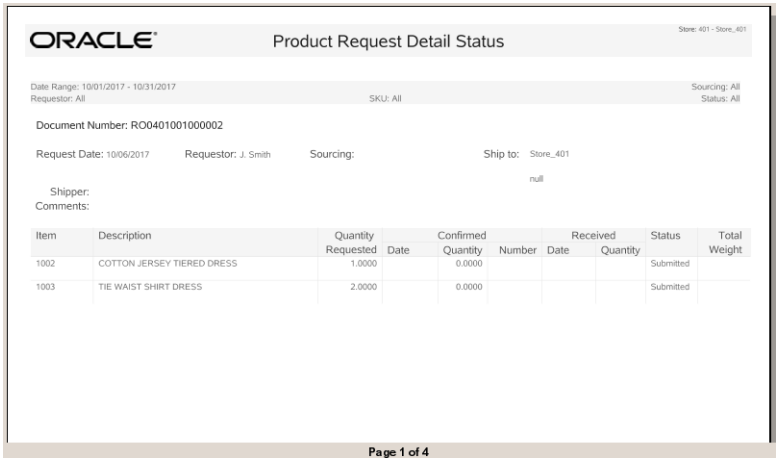
Print Request Detail Status Report

The Replenishment Product Request Report allows you to query by Order Status, Date Range or Specific Date, Requestor ID, Item ID, and Sourcing Entity. The report can be viewed on the screen and printed.

This report includes the following information for each item:

- Item ID: Item identifier.
- Item Description: Item description.
- Quantity Requested: Requested quantity for this item.
- Confirmed Date: Date the quantity for the item was confirmed
- Confirmed Quantity: Confirmed quantity for this item.
- Confirmed Number: The PO number, DC shipment number, or any other number generated by the home office to fulfill the store's request.
- Received Date: Date item was received for this request.
- Quantity Received: Quantity of this item received for this request.
- Status: Status of this item.
- Total Weight: Total shipping weight of all items for the request.

Figure 32–9 Replenishment Product Request Detail Report



Replenishment Order Worksheet

The Replenishment Order Worksheet is a summary by item ID and shows one line for each item Id on the current order. This report prints automatically when chosen so there are no criteria selections available. The following parameters are shown:

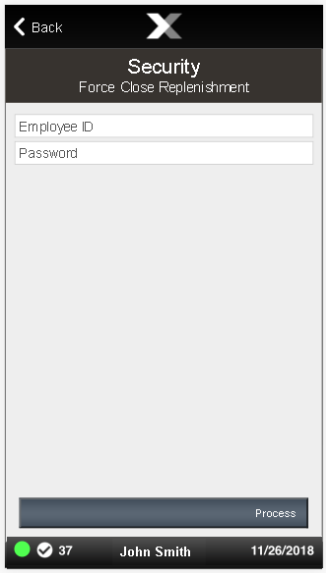
- Source ID: The default source id for the item.
- Item ID: The item identifier.
- Item Description: The item description.
- Order Quantity: The total number of items that have been ordered but not confirmed by the home office yet.
- Pack Size: The item pack size.
- On Hand: The on-hand quantity of the item.
- Suggested (quantity): The suggested quantity of the item.
- Confirmed (quantity): The confirmed quantity of the item.
- Shipped (quantity): The shipped quantity of the item.
- Received (quantity): The received quantity of the item.

Force Close

Replenishment Orders with a CONFIRMED, SUBMITTED, or PARTIALLY RECEIVED status can be forced to close without receiving the items. Once force closed, the order cannot be edited or reopened.

1. Select **Force Close** on the Replenishment screen. See Figure 32–6.
2. Enter your Employee ID and Password if your system requires a security login to perform a force close. Select **Process** to continue.

Figure 32–10 Security Verification Prompt



3. An Inventory Replenishment prompt displays to confirm that you want to force close the request:

Figure 32–11 Force Close Prompt



- Select **Yes** to close the Replenishment Order.
- Select **No** to return to the Replenishment screen.

Submit an Order

Once a Replenishment Order is reviewed and approved you can Submit the order to the vendor(s).

1. Select **Submit Order** from the Replenishment screen. See Figure 32–7.

2. When prompted, select **Yes** to Submit the order.

Note: If you do not want to submit the order, select **No** to cancel the request and return to the Replenishment screen.

The Submit Order prompt will ask if you want to print a copy of the request.

Figure 32–12 Submit Order Print Copy Request Prompt



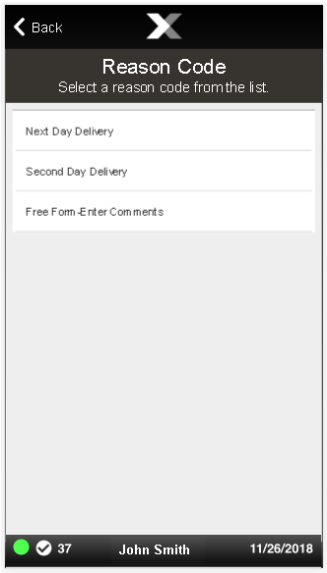
- Select **Yes** to print a Print Request Detail Status Report.
- Select **No** if you do not wish to print. You will return to the Inventory Replenishment search screen. See Figure 32–3.

Add or Edit Header Comments

Xstore allows you to add delivery or free-form comments to a Replenishment Order that is in an OPEN status. These comments display on the Replenishment screen as well as the Product Detail Status Report.

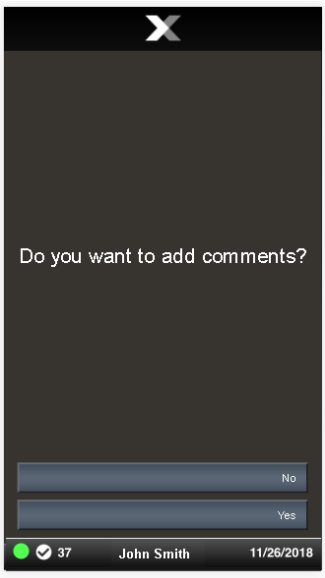
1. Select **Add/Edit Header Comment** from the Replenishment screen.
2. Select the type of comment you want to add or edit: Next Day Delivery, Second Day Delivery, or Free Form.

Figure 32–13 Header Comment Prompt



3. For Next Day Delivery and Second Day Delivery, confirm that you want to add a comment.

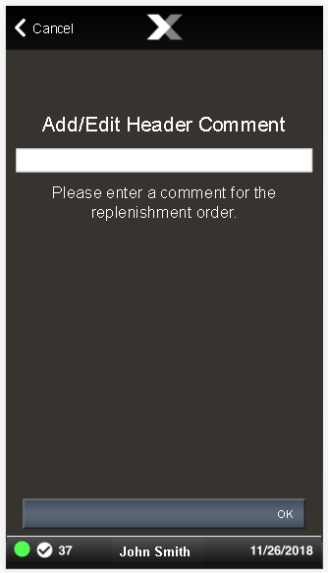
Figure 32–14 Header Comment Confirmation



- Select **Yes** to create a comment.
- Select **No** to cancel and return to the Replenishment screen.

4. Enter the comment that you want to display. If there is already a comment of the selected type, then you will be able to edit it here.

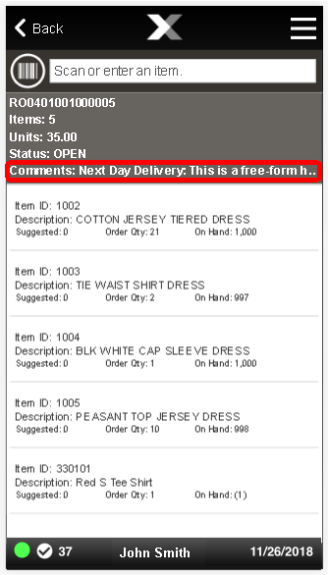
Figure 32–15 Header Comment Entry/Edit



- Select **OK** to save your comment and return to the Replenishment screen.
- Select **Cancel** to cancel your request.

5. The comment(s) display on the Replenishment screen.

Figure 32–16 Header Comments



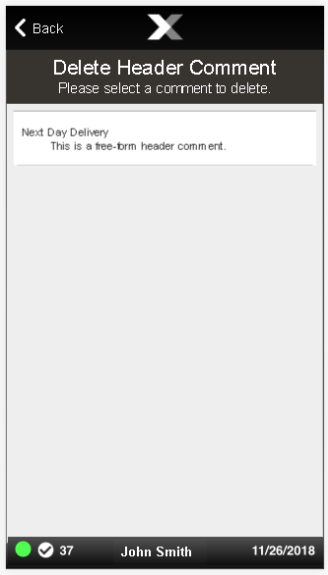
Note: If you do not select Save and Exit after entering Header Comments, they will not save with the order.

Delete Header Comments

Remove Header comments quickly by using the Delete Header Comment function.

1. Select **Delete Header Comment** from the Replenishment screen. See Figure 32–7.
2. Select the comment that you would like to delete and select **OK**.

Figure 32–17 Delete Header Comment Selection



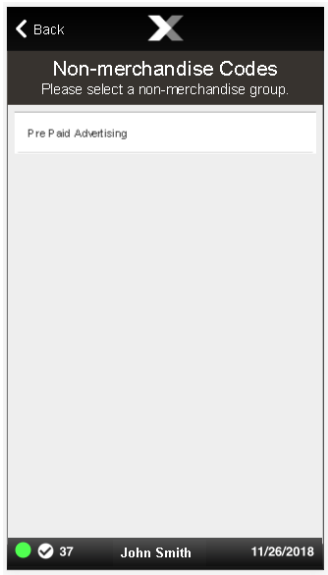
3. The selected comment is removed from the Replenishment order.

Add Non-Merchandise

Xstore allows you to add Non-Merchandise items to a Replenishment Order.

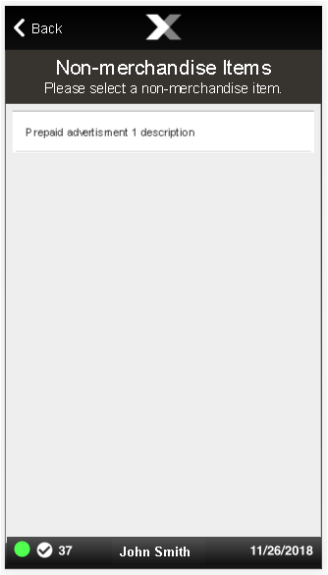
1. Select **Add Non-Merch** from the Replenishment screen.
2. Select the Non-Merchandise code from the list and then select **OK**.

Figure 32–18 Add Non-merchandise Selection



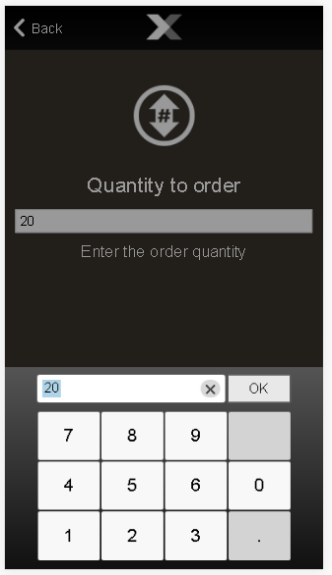
3. Select a Non-Merchandise item and press **Enter**.

Figure 32–19 Non-Merchandise Items



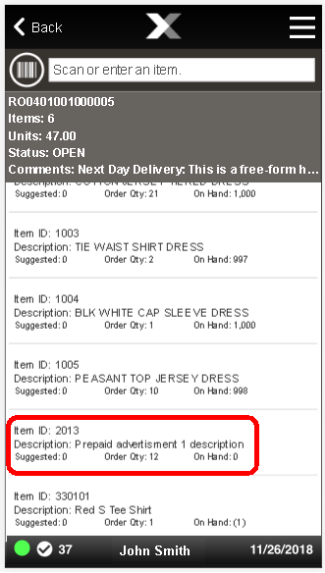
4. In the Quantity to Order field, type the quantity and select **OK**.

Figure 32–20 Non-Merchandise Quantity



5. The Non-Merchandise item is added to the item list.

Figure 32–21 Non-merchandise Example

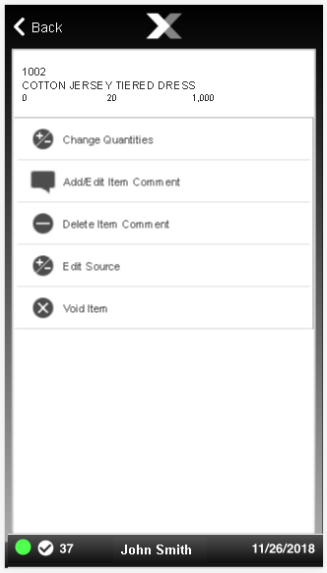


Change an Item

Selecting an item on the Replenishment screen with a status of Open allows you to:

- Change the quantity
- Add or edit an item comment
- Delete an item comment
- Edit the source of an item
- Void an item

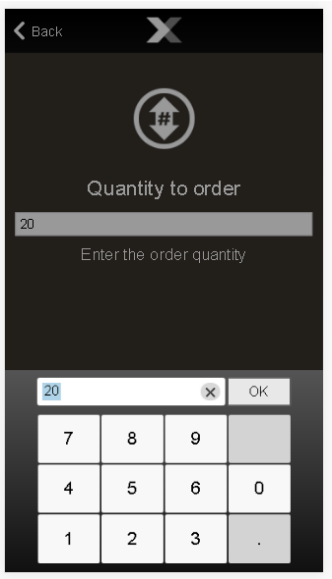
Figure 32–22 Change Item



To Change Item Quantities

1. Select the Item on the Replenishment screen. See Figure 32–5.
2. Select **Change Quantities**. See Figure 32–23.
3. In the Quantity to Order field, type the new quantity and select **OK**. The system displays the new quantity.

Figure 32–23 Quantity to Order Field

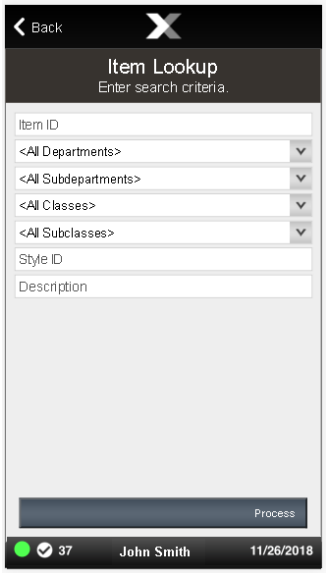


Item Lookup

Use the Item Lookup option to search for an item in the database. The item can then be added to the Replenishment Document if it is a store-created document.

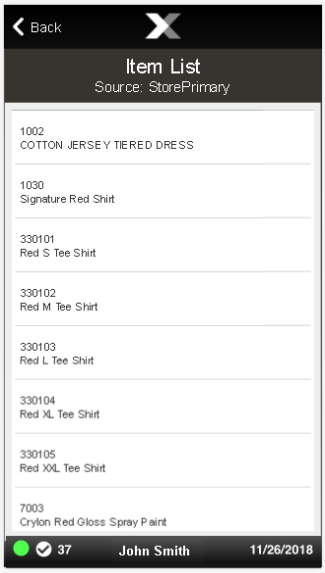
1. Select the **Item Lookup** option.
2. Xstore displays the Item Lookup form. Enter the search criteria and select Process.

Figure 32–24 Item Lookup Form



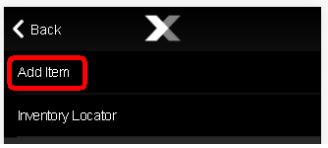
3. If more than one item matches the search criteria you entered, select the item from the list of items and select **OK**. Xstore displays the item information.

Figure 32–25 Item List



4. Select the item to add the item to the Replenishment Document.
5. Select **Add Item** from the context menu.

Figure 32–26 Add Item Option



To Add/Edit Item Comments

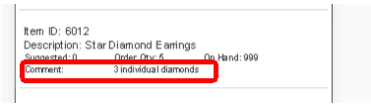
1. Select the item that you want to add a comment to from the Replenishment screen. See Figure 32–5.
2. Select **Add/Edit Item Comment**.
3. Select the type of comment you want to enter for the item.

Figure 32–27 Comment Type



4. Enter or update the comment and select **OK** to save.
5. The comment displays in the item list.

Figure 32–28 Item Comment Example



To Delete an Item Comment

1. Select the item that you want to remove a comment from the Replenishment screen. See Figure 32–5.
2. Select **Delete Item Comment**.
3. Select the type of comment you want to delete and then select **OK** to delete.

Figure 32–29 Comment Type



To Void an Item

1. Select the item you want to remove from the order.
2. Select **Void Item**.
3. The Void Item prompt will ask you to confirm that you want to remove the item. Select **Yes** to void the item.

Figure 32–30 Void Item Prompt



Creating a New Inventory Replenishment Order

Inventory Replenishment Documents are downloaded from the home office; however, you can also create a Replenishment Document in your store. Use the following process to create a new Inventory Replenishment Document.

1. At the Document Search form, select the **Add New** option, or select the Add New option at the Inventory Replenishment Search Results form to create a new Replenishment Document.

Figure 32–31 Document Search Form

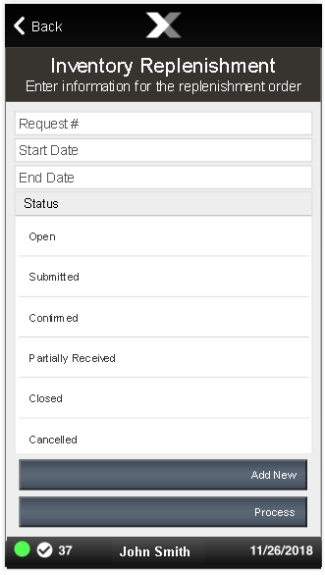
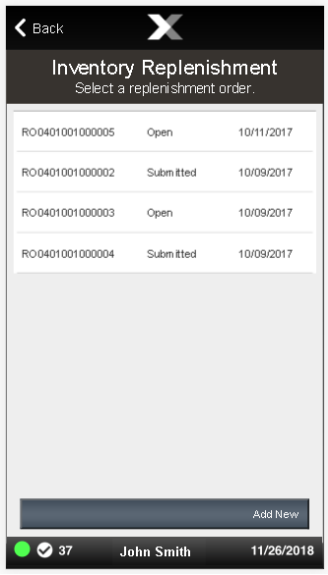
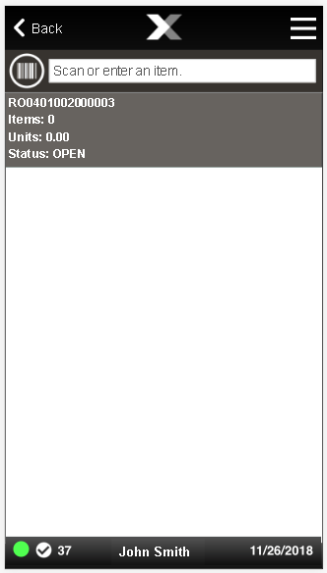


Figure 32–32 Document Search Results



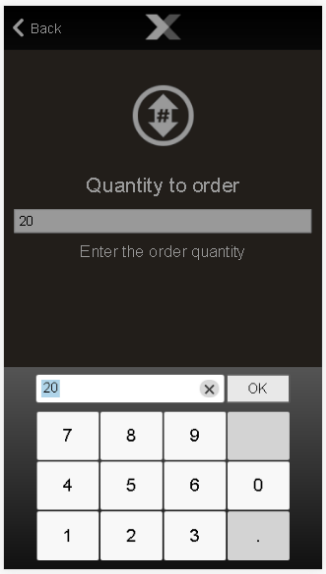
2. Xstore displays a blank Replenishment form. Scan or enter the item ID of the item you want added to the document.

Figure 32–33 New Inventory Replenishment Screen



3. Enter the Quantity and select **OK**.

Figure 32–34 Quantity To Order Prompt



Note: If the item has a Pack Size defined then you must enter a quantity that is a multiple of the pack size. Otherwise Xstore will prompt if you want to round your quantity to the nearest multiple.

- Select **Yes** to add the item with the Quantity rounded to the nearest multiple of the Pack Size. For example, you entered a quantity of 1 but the pack size is 5, quantity will be rounded up to 5.
- Select **No** to return to the Item Entry screen without adding the item.

Figure 32–35 Item Entry Screen



Xstore displays the following information for the item entered:

- Item ID
- Description
- Quantity (Suggested, Order, On Hand)
- Pack Size (if applicable)
- Source Id (if applicable)
- Source Name (if applicable)

4. When you have entered all the information for this new Replenishment Document, select Save and Exit from the Context Menu.

Note: To modify the replenishment order before saving, see Inventory Replenishment Options.

5. Answer the confirmation prompt:

Figure 32–36 Save & Exit Prompt



- Select **Yes** to save the Replenishment Order and return to the document search screen.
- Select **No** to return to the Item Entry screen without saving the document. Your changes are not lost.

33

Shelf Labels

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.

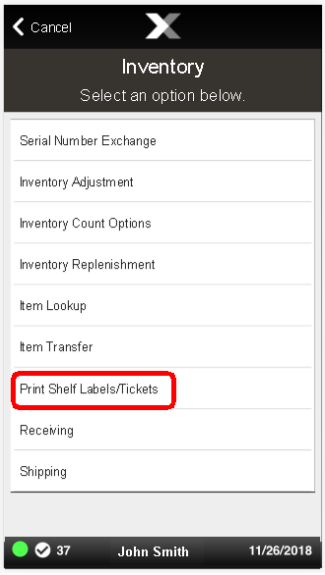
In addition to scanning/entering items in order to print labels, the system also provides an option to print shelf labels for all of the items on an entire receiving document at once, and from previously saved batches if using ZPL II communication.

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

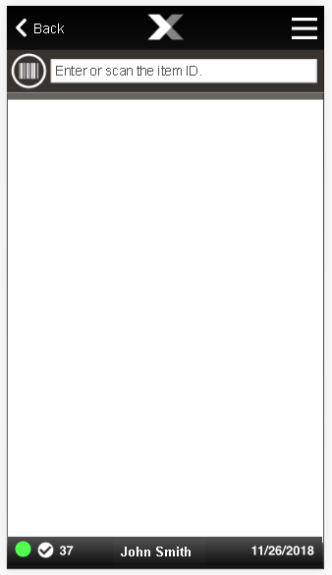
1. From the Main Menu, select the Inventory option.

Figure 33–1 Inventory Menu



2. At the Inventory menu, select the **Print Shelf Labels/Tickets** option.
3. When prompted scan the barcode or manually enter the item ID and press **Enter**.

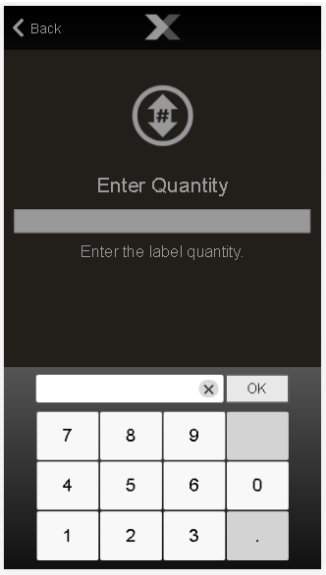
Figure 33–2 Item ID Prompt



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. SeeTo Retrieve a Batch - ZPL II Only.

When prompted for the number of labels you want to print for this item, type the quantity and press **Enter**.

Figure 33–3 Label Quantity Prompt



Note: By default, the system displays the number of items in your on hand inventory.

4. The next steps depend upon your label printer setup:
   - If you **are not** using ZPL II communication with a label printer, continue with step 5 below.
   - If you **are** using ZPL II communication with a label printer, skip to ZPL II Label Printers.
5. Xstore Mobile 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.

Figure 33–4 View Port Displays Items Added for Labels

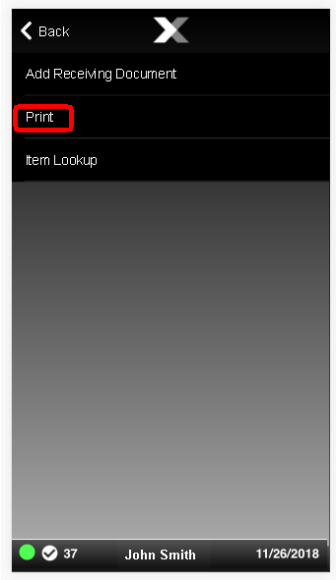


Additional Options:

- 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.

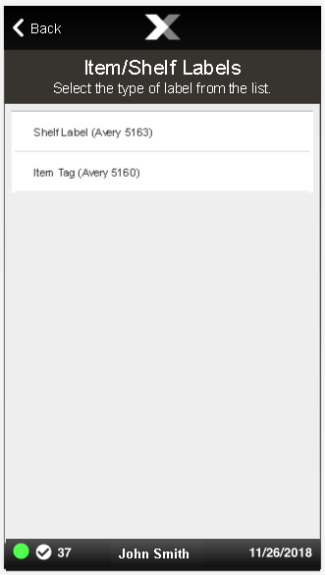
6. When you have entered and/or edited all the items and label quantities, select the **Print** option to continue with label setup.

Figure 33–5 Print Shelf Label Context Menu



7. Xstore Mobile prompts you to select the type of label from the list. Select the label type and press **Enter** to continue.

Figure 33–6 Shelf Label Types



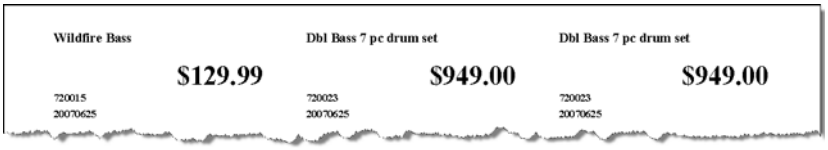
8. Xstore Mobile shows the number of label sheets you need. When prompted, press **Enter** to acknowledge the message informing you of the number of label sheets required.

Figure 33–7 Print Label Prompt



9. Xstore Mobile confirms the request and prints the labels.

Figure 33–8 Sample Labels



Note: If you exit from the Item/Shelf Labels screen without printing the labels, Xstore Mobile displays a warning message that all current label settings will be lost. Select **Yes** to return to return to the Inventory Menu or select **No** to continue working with labels.

ZPL II Label Printers

...continued from step 4.

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 the defined label 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.

- 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 Delete 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.

Note: Before printing, Xstore Mobile automatically groups the items by stock type and verifies all items are associated with a label stock type. If Xstore Mobile 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.
   - 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.

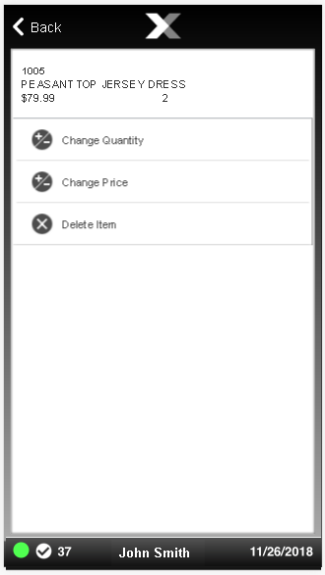
5. If prompted, select **Yes** to save and name this batch so it can be printed in the future, or select **No** if you do not want to print this batch again.

   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 the item to edit it. The following options are available from the Change Item menu before you print labels for the items.

Figure 33–9 Change Item Menu



Change Quantity: Select Change Quantity to change the number of labels to be printed.

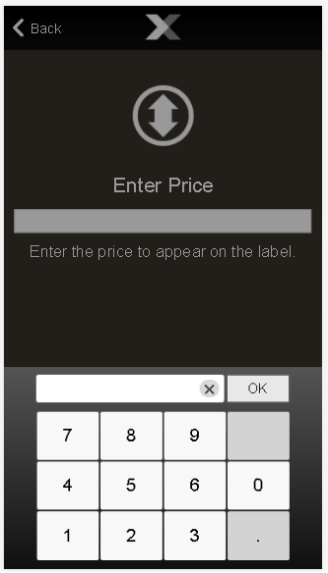
- Use the arrow keys to select the item and press **Enter**.
- At the Enter Quantity prompt (see Figure 33–3), enter the number of labels you want to print for the item and press **Enter**.

Xstore Mobile 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 33–10 Enter Price Prompt



Xstore Mobile 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.
- 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**.

> **Note:** There is no confirmation prompt before deleting the item. Be sure you are highlighting the correct item in the View Port display area.

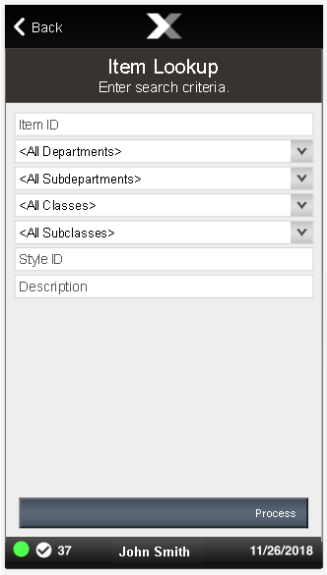
Xstore Mobile removes the item from the list of item labels to be printed.

To Look Up an Item

Item Lookup: Select Item Lookup from the Context Menu 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.

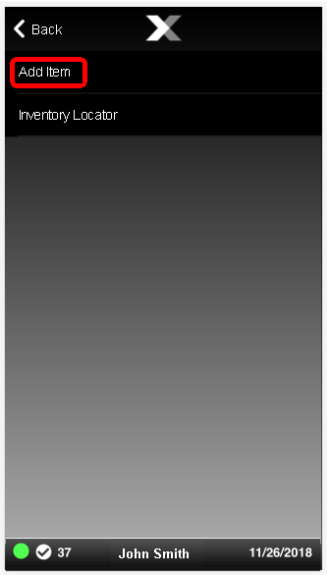
- At the Item Lookup form, enter the search criteria and select Process.

Figure 33–11 Item Lookup Form



- If more than one item matched the search criteria you entered, select the item from the list and **OK**. Xstore Mobile displays the item information.
- Select the Add Item option from the Context Menu to include the item on the list of item labels to be printed.

Figure 33–12 Item Lookup Results - Add Item Option



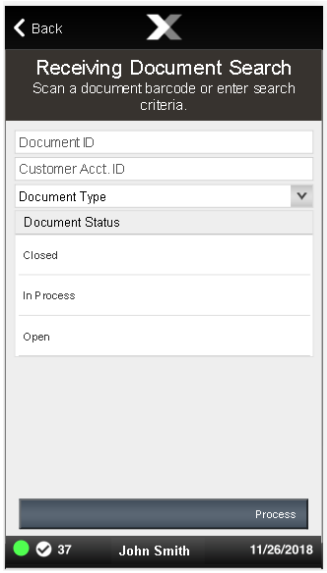
Enter the number of labels to be printed for the item and press **Enter** to add the item to the list of item labels to be printed. By default, the on hand quantity for the item is shown in the Label Quantity focus bar prompt (Figure 32-3).

To Add a Receiving Document

Add Receiving Document: Select this option to print labels for *all* of the items on a receiving document.

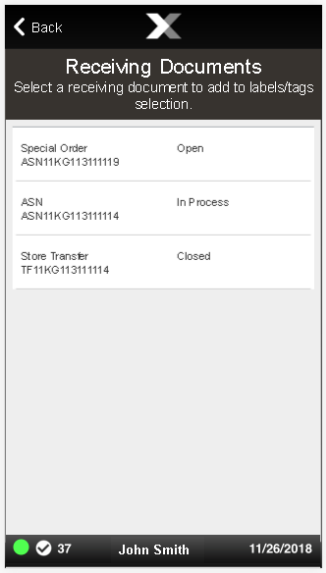
- At the Document Search form, scan the barcode for the Receiving Document or enter search criteria to locate the Receiving Document.

Figure 33–13 Document Search Form



Xstore Mobile 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 33–14 List of Receiving Documents



- Select the receiving document that has the items that need labels and choose OK. Xstore Mobile 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**.
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 Onlyabove 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.

34

Reporting

Oracle Retail Xstore Point of Service Mobile provides a wide variety of reports to help you monitor and analyze your store's operations and sales. All Xstore POS desktop reports are now available on Mobile Tablet. They are accessed via the Reporting option on the Xstore Mobile Tablet Context Menu. This option is only available when outside of a sale. The information in this guide will help you understand what reports are available and how to access the reports you need.

> **Note:** All Oracle Retail Xstore Point of Service desktop reports are available on Mobile Tablet and Workstation 610 but not on the Mobile Handheld. See *Oracle Retail Xstore Reports Guide* for more information on report options and details of individual reports.

This chapter contains the following sections:

- Report Menu Configuration and Security
- How to Access Reports on Xstore Mobile Tablet
- Saving a Report

Report Menu Configuration and Security

The reports available on the Back Office menu are based on your business needs. The order in which the reports are displayed may also be customized. Because each Oracle Retail Xstore Point of Service Mobile menu is configurable, the menu options and locations shown on your system may be different than the options shown throughout this guide.

Controlling access to company information on reports is a significant issue and Oracle Retail Xstore Point of Service Mobile addresses that requirement through system security privileges. Access to reports can be controlled at an individual employee level or at a group level.

Table 34–1 List of Report Categories and Reports

Report Category	Report
Airport Reports	Airport Sales Tax Report
Customer Account Activity Summary Reports	
Customer List Report	
Dashboard	

Table 34–1 (Cont.) List of Report Categories and Reports

Report Category	Report	
Employee Reports	Employee Productivity Report	
	Employee Schedule Reports	Employee Performance
		Employee Schedule Detail Report
		Employee Time Off Summary Report
	Employee Tasks	
	Time and Attendance Reports	Open Timecard Report
		Payroll Detail by Employee
		Payroll Summary
		Posted Timecard
Fiscal Reports	Generate Last Daily Report	
Flash Sales		
Inventory Reports	Inventory Movement History Report	
	Inventory Movement	
	Inventory Movement Pending Report	
	Inventory Stock Cost	
	Item List Report	
	Receiving Exception Report	
	Receiving Report	
	Replenishment Open Product Requests Report	
	Replenishment Product Request Report	
	Restock Report	
	Shipping Exception Report	
	Shipping Manifest Report	
Journal Report		
Layaway Reports	Layaway Account Activity Report	
	Layaway Aging Report	
Price Change Report		

Table 34–1 (Cont.) List of Report Categories and Reports

Report Category	Report
Sales Reports	Daily Sales & Cash Report
	Best Sellers
	Cancelled Transaction Report
	Credit Card Report
	Daily Sales Report
	Gift Certificate Report
	Line Void Report
	Merchandise Sales Analysis Report
	No Sale Report
	Post Void Transaction Report
	Price Override Report
	Restock Report
	Returned Merchandise Report
	Sales By Department Report
	Sales By Hour Analysis Report
	Sales By Hour Report
	Sales Goals Report
	Suspended Transaction Report
	Tax Exemption Report
Saved Reports	
Special Order Reports	
Store Locations Report	
Till Reports	Cash Drawer Audit Report
	Cash Drawer Report
	Paid In/Paid Out
XBRi Sales &Productivity	

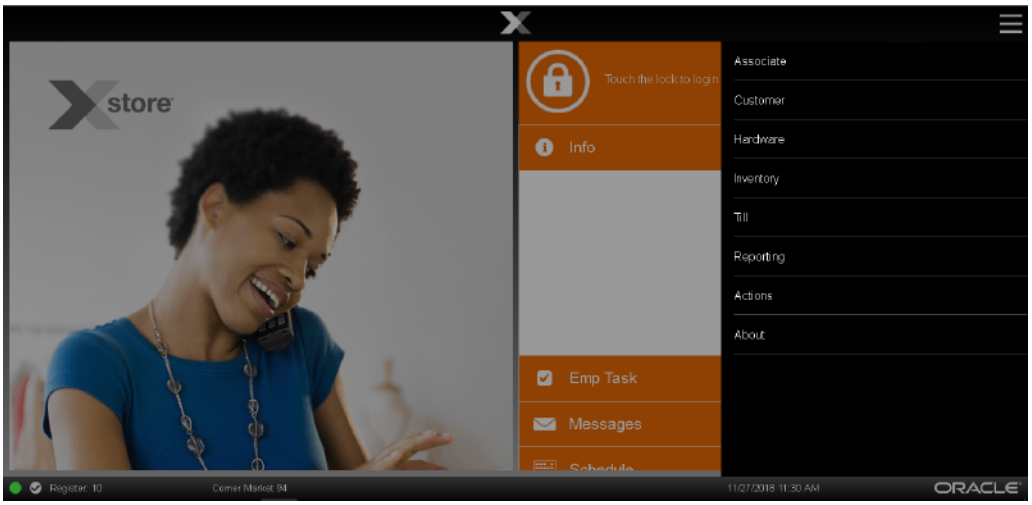
How to Access Reports on Xstore Mobile Tablet

Xstore POS desktop reports are accessed via the Reporting option on the Xstore Mobile Tablet Context Menu. This option is only available when outside of a sale.

To access Xstore reports on your tablet, follow the steps below.

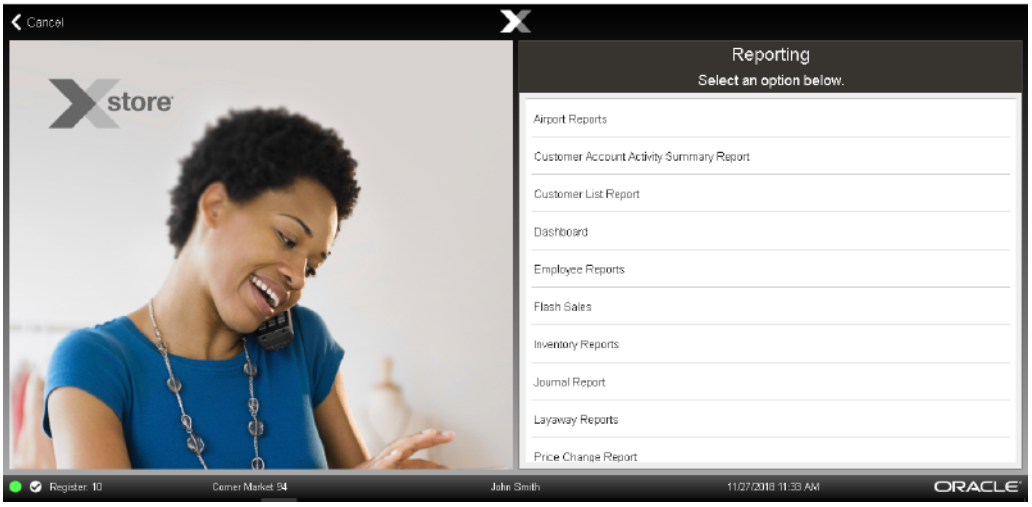
1. At the Login screen, select the **Context Menu** button in the upper-right hand corner of the screen.
2. On the Context Menu, select **Reporting**.

Figure 34–1 Xstore Mobile Tablet Context Menu (Outside a Sale)



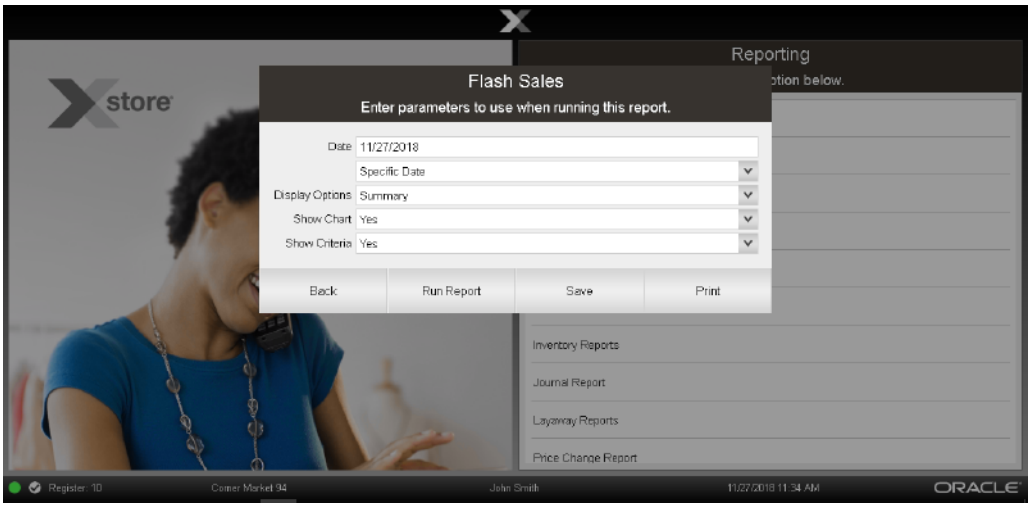
3. Login with your Employee ID and password.
4. Depending on your system's configuration Report Categories are displayed.

Figure 34–2 Reporting Menu



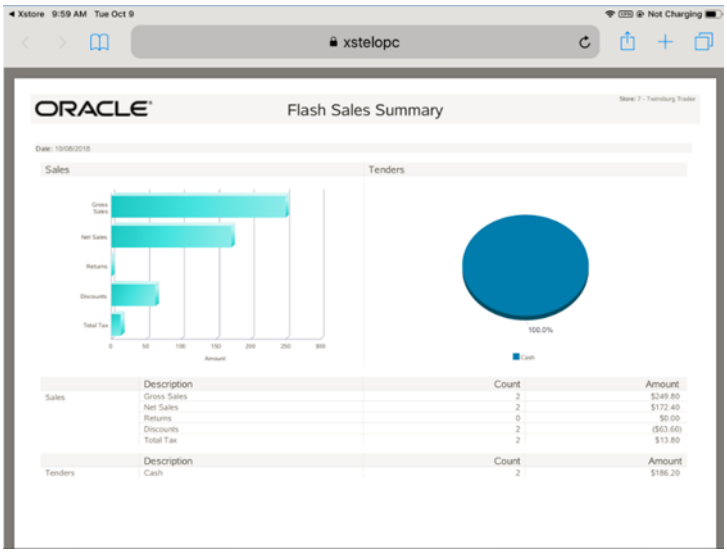
   - Select **Cancel** to return.
5. Select a Report Category. Xstore Point of Service displays a list of available reports.
   - Select **Cancel** to return to Reporting.
6. Select a report from the list. The system displays the Report Search screen where applicable. Enter the search criteria.

Figure 34–3 Report Parameters



7. Select **Run Report.** The report is displayed in the PDF viewer of your device, for example Apple devices use iBooks or PDF Reader depending on their default viewer.

Figure 34–4 Flash Sales Summary Report



Close the report when done by selecting **Xstore** displayed in the very top left corner of the screen. Alternatively, select **Save** or **Print**.

Saving a Report

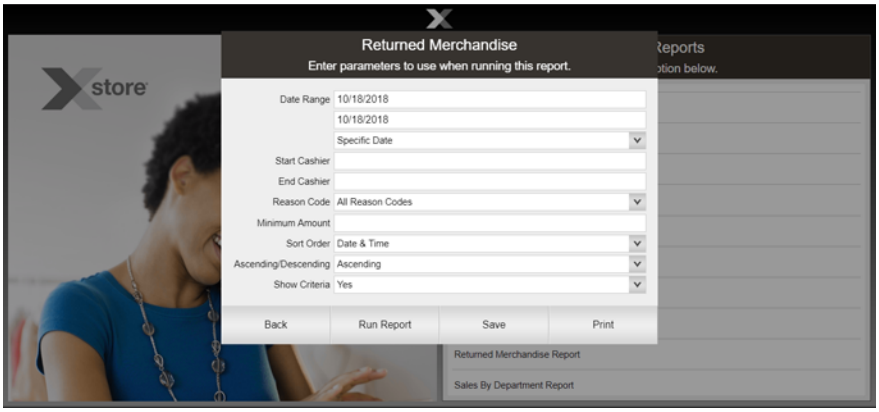
After running a report, it can be saved so that the data can be reviewed later. The system automatically stores your saved report in a location based on the system's configuration and your login ID.

Note: Only you can view the reports you have saved. No one else has access to your saved reports.

1. Select the **Save** option on the criteria selection form to rerun or view a report later.

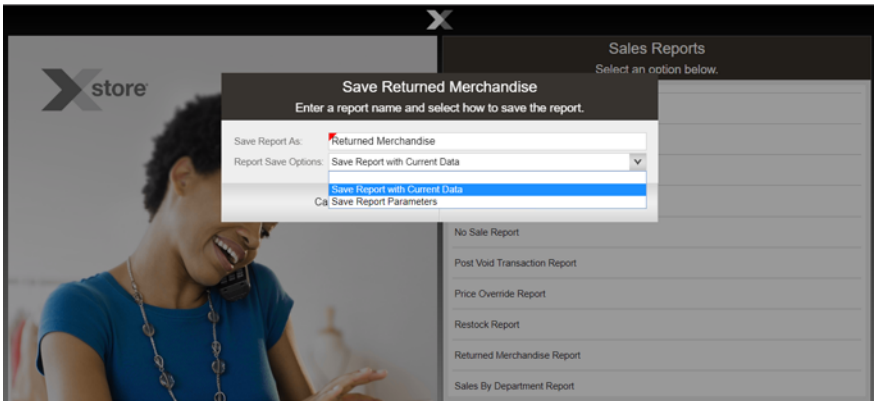
   This option is also available when viewing a report using the Save menu option.

Figure 34–5 Criteria Selection Form



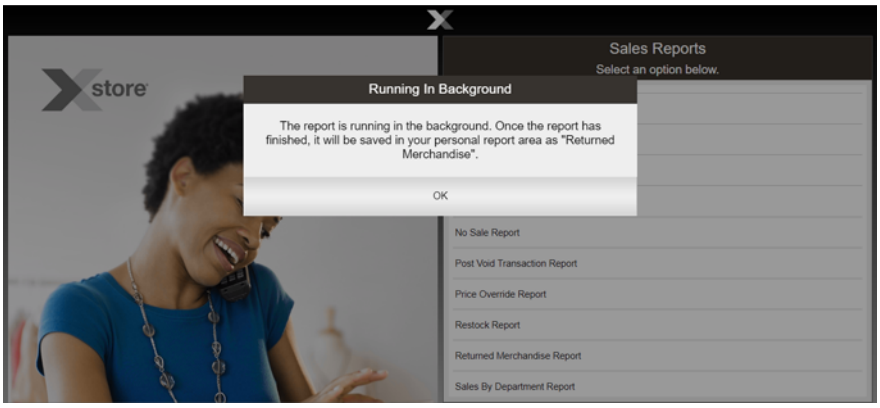
2. The system displays the Save Form for the report.

Figure 34–6 Save Form Window



3. Edit or accept the report name in the **Save Report As** field.
4. Select one of the two options in the **Report Save Options** field:
   - **Save Report With Current Data**: The next time you view this report, it will be exactly the same as it was when originally generated.
   - **Save Report Parameters**: The next time you view this report, it will be based on the same selection criteria (parameters). If you use a relative date parameter, the actual data retrieved is updated using current information.
5. Select **OK** to save the report.
6. The Report Criteria Saved or Running in Background prompt displays, select **OK**.

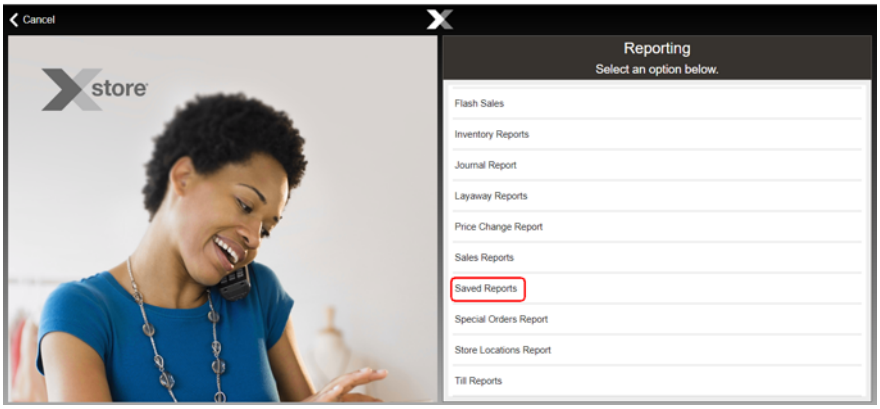
Figure 34–7 Saved Report Confirmation Report - Report Running



View Saved Reports

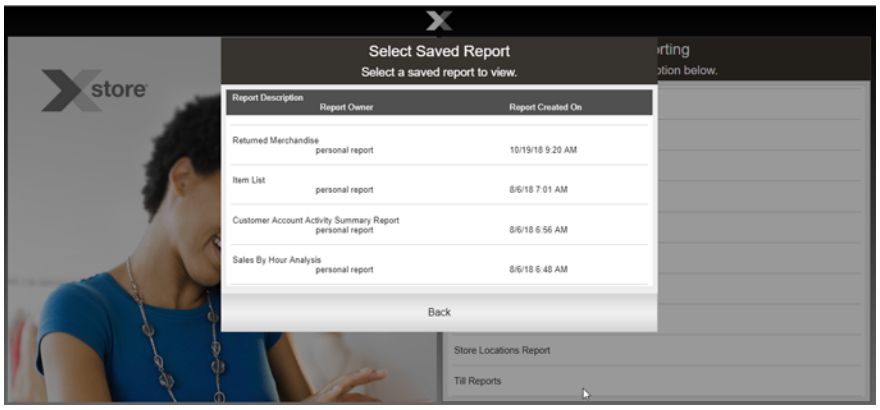
1. Select **Reporting** in the Context Menu, login with your Employee credentials, and then choose the **Saved Reports** option, and select **OK**.

Figure 34–8 Reports Window



2. Select the report you want to see. If necessary, use the up and down arrows to scroll and see additional saved reports.

Figure 34–9 List of Your Saved Reports



- To view a saved report, select the View option to display the report on the screen.
- To delete a saved report, select the **Delete** option on the list of saved reports and select Yes to confirm that you want to delete the selected report.

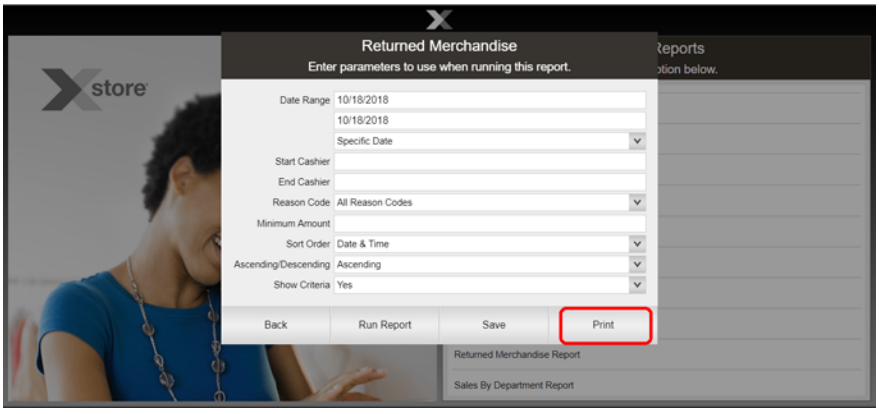
3. After you are finished viewing or deleting the report, select the **Back** option to return to the saved reports list.

Report Printing Options

An option to print a page range may be available for some reports. The reports that support this feature are determined by the Home Office. If a report supports printing a specified page range, you will be prompted to enter the page(s).

1. After generating a report, and with the report displayed, select the **Print** option.

Figure 34–10 Print Report



2. If prompted, type the page, pages, or page range to be printed. For example, at the prompt, type 1-3,6,7-9,12 to print only those pages and press **Enter** to print the report.