Oracle® Retail Xstore Point of Service

User Guide
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Oracle® Retail Xstore Point of Service, User Guide, Release 7.1

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CHAPTER 1

Documentation and Screen Conventions

The rebranding for the latest version of this documentation set is in development as part of post MICROS acquisition activities. References to former MICROS product names may exist throughout this existing documentation set.

Overview

This chapter describes the Xstore screen and documentation conventions and provides brief descriptions and examples of the methods used to initiate Xstore features.

- Refer to the Documentation Conventions section below for a description of the documentation conventions used in this User Guide.
- Refer to the “Basic Navigation” on page 3 section for touch-screen and key functions.
- Refer to the “Register Screen Conventions Overview” on page 10 section for a description of the Xstore application features.

Documentation Conventions

The following explains the conventions used throughout the XstoreUser Guide to denote task-related information, highlight information for special emphasis, or to bring your attention to an important point.

Text Conventions

Due to the flexibility of the system, menu options in this guide are not identified by a function key number [F2, F3, etc.]. Instead, the name on the button is used throughout the procedures and processes.

Table 1-1: *Documentation Conventions in the User Guide*

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

Information Conventions

This information is provided to assist touch-screen users. Touch-screen features are configurable by your corporate office and may differ from the base features documented in this manual.

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

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

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

Basic Navigation

The following sections explain how to navigate with a touch-screen or keyboard.

Touch-Screen Navigation

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

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

Table 1-2: *Touch-Screen Navigation*

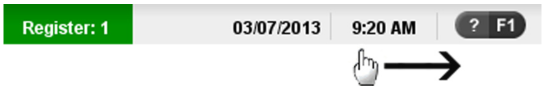
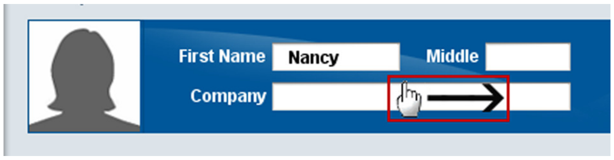
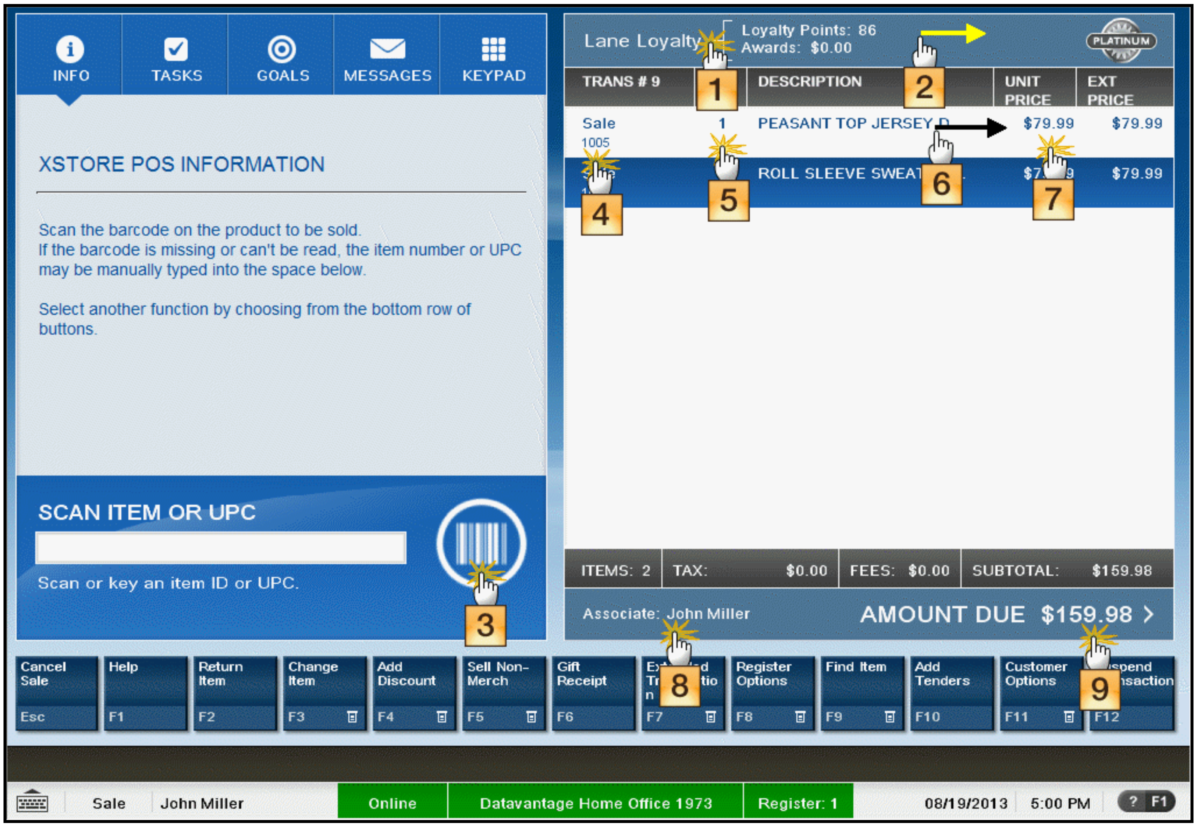
Function	Navigation
Open Register	Tap the register area on the status bar. 
Open Store	With the store closed, tap the Store Name area to invoke the store opening process. ***Note:*** *Applies to Register Login and Back Office Login screens only.*
View Dashboard	Swipe the Store Name area to open the Store Dashboard. ***Note:*** *Applies to Register Login and Back Office Login screens only.*
Clock-in/clock-out	Swipe the clock area on the status bar. 
Remove	Swipe completely from left to right on screen components that have this feature, such as the Sale screen (see "Sale Screen Touch-Screen Navigation" on page 5). 

Table 1-2: *Touch-Screen Navigation (continued)*

Function	Navigation
Scroll search results	There are a few options for scrolling: ☐ Tap the up ▲ or down ▼ arrows. ☐ Slide the side scroll bar up or down. ☐ Keep finger pressed while pulling up or down. ☐ Swipe up or down.
Edit Mode	If you swipe to the right on certain screens, such as the Customer Maintenance screen, Xstore will allow you to edit the fields (invokes edit mode).  First Name Nancy Middle Company
Select and enter	Most screens require you to tap once to select and enter. Some screens may require you to tap once to highlight and then tap another option to enter. Depending on your configuration, you may hear a sound when certain fields are tapped.

Sale Screen Touch-Screen Navigation

The Sale screen contains the following touch components.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Scan or key an item ID or UPC.

Lane Loyalty — Loyalty Points: 86, Awards: $0.00

TRANS # 9		DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY D	$79.99	$79.99
		ROLL SLEEVE SWEAT		$79.99

ITEMS: 2 TAX: $0.00 FEES: $0.00 SUBTOTAL: $159.98

Associate: John Miller AMOUNT DUE $159.98

Sale John Miller Online Datavantage Home Office 1973 Register: 1 08/19/2013 5:00 PM

Figure 1-1: Sales Screen Touch-Screen Navigation

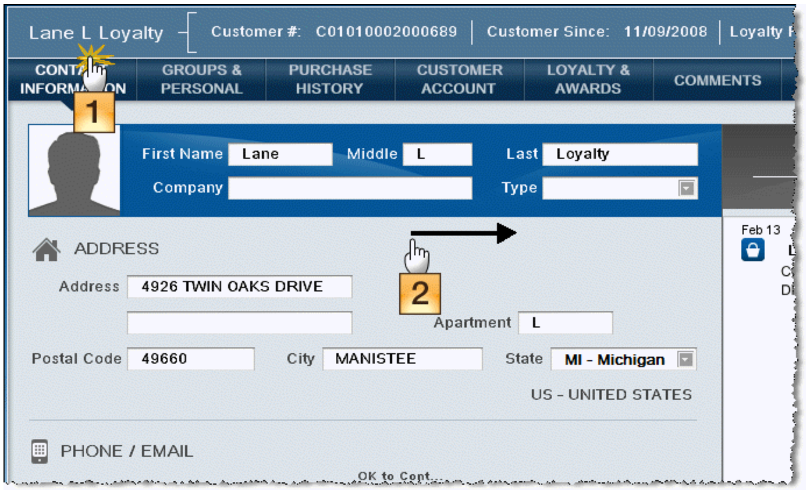
Touch-Screen Component #	Description
1. Tap Customer Loyalty Banner	■ If no customer is attached, Xstore invokes the add-customer process. ■ If a customer has been assigned to the transaction, Xstore opens the customer maintenance screen.
2. Swipe Customer Loyalty Banner	From left to right, prompts to remove the assigned customer. Unassign
3. Tap Bar Code Graphic	Invokes the find item feature. Xstore Base is set to open the item matrix.
4. Tap Item ID	Displays item information (see "Locating Items: Inventory Lookup" on page 196).
5. Tap item quantity	Invokes the change quantity process. This displays the numeric keypad.

Touch-Screen Component #	Description
6. Swipe Item	From left to right, prompts to void the item. 
7. Tap Unit Price	Invokes the change price process. This displays the numeric keypad.
8. Tap Associate Area	Invokes the change commissioned associate process (with an item selected).
9. Tap Amount Due	Invokes Add Tenders.

Customer Maintenance Touch-Screen Navigation

The following touch-screen components are available in the Customer Maintenance screen:

Contact Information Tab



Lane L Loyalty | Customer #: C01010002000689 | Customer Since: 11/09/2008 | Loyalty

First Name: Lane
Middle: L
Last: Loyalty
Company:
Type:

ADDRESS

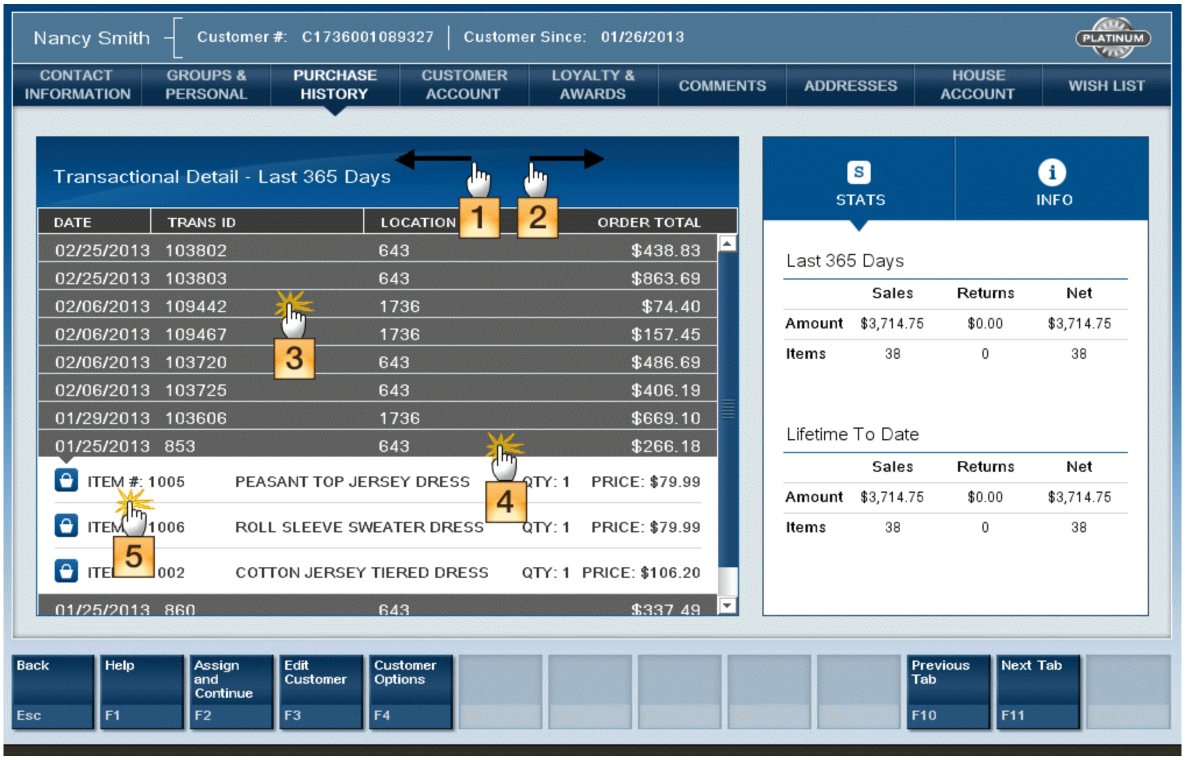
Address: 4926 TWIN OAKS DRIVE
Apartment: L
Postal Code: 49660
City: MANISTEE
State: MI - Michigan
US - UNITED STATES

PHONE / EMAIL

Figure 1-2: Customer Maintenance Touch-Screen Navigation

Touch-Screen Component #	Description
1. Tap Header	Tap the Customer Header to return to the previous screen while in a transaction.
2. Swipe Form	Swipe from left to right in the form area to open editing mode.

Purchase History Tab Navigation



Nancy Smith Customer #: C1736001089327 Customer Since: 01/26/2013

Transactional Detail - Last 365 Days

DATE	TRANS ID	LOCATION	ORDER TOTAL
02/25/2013	103802	643	$438.83
02/25/2013	103803	643	$863.69
02/06/2013	109442	1736	$74.40
02/06/2013	109467	1736	$157.45
02/06/2013	103720	643	$486.69
02/06/2013	103725	643	$406.19
01/29/2013	103606	1736	$669.10
01/25/2013	853	643	$266.18
ITEM #: 1005	PEASANT TOP JERSEY DRESS	QTY: 1	PRICE: $79.99
ITEM 1006	ROLL SLEEVE SWEATER DRESS	QTY: 1	PRICE: $79.99
ITE 002	COTTON JERSEY TIERED DRESS	QTY: 1	PRICE: $106.20
01/25/2013	860	643	$337.49

Last 365 Days

	Sales	Returns	Net
Amount	$3,714.75	$0.00	$3,714.75
Items	38	0	38

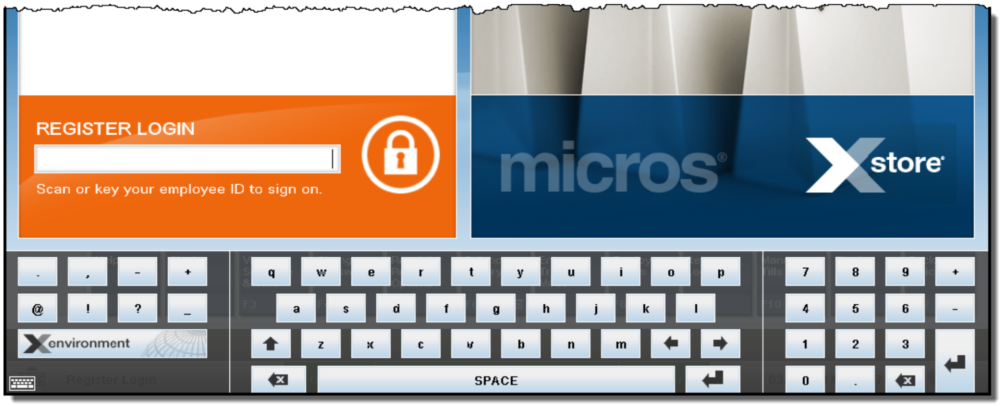
Lifetime To Date

	Sales	Returns	Net
Amount	$3,714.75	$0.00	$3,714.75
Items	38	0	38

Figure 1-3: Purchase History Tab Touch-Screen Navigation

Touch-Screen Component #	Description
1. Swipe Transaction Detail Header	Swipe from right to left in the **Transaction Detail Header** to collapse the history display.
2. Swipe Transaction Detail Header	Swipe from left to right in the **Transaction Detail Header** to open the history display.
3. Tap Transaction Header	Tap one **Transaction Header** to collapse the selected transaction.
4. Tap Transaction Header	Tap a collapsed **Transaction Header** to open the selected transaction.
5. Tap Item	Tap a specific item and the INFO tab to display the item detail.

Virtual Keyboard



REGISTER LOGIN

Scan or key your employee ID to sign on.

Figure 1-4: Virtual Keyboard

The following table describes how to use the virtual keyboard: f

Table 1-3: *Virtual Keyboard Navigation*

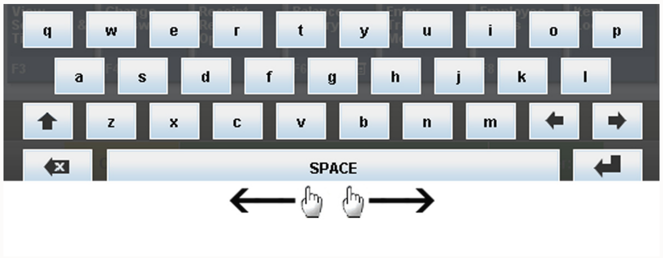
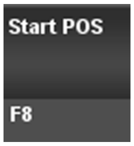
Function	Navigation
Launch virtual keyboard	Options include: ❑ Swipe up from the keyboard ⌨ icon region to launch the keyboard. ❑ Tap the ⌨ icon to launch the keyboard. ❑ Tap a text field. When you select something other than a text field (or makes an action to change the page) the keyboard hides.
Switch virtual keyboard layouts	Your store may have multiple keyboards. Within the current Keyboard area, swipe left to switch to the next layout, swipe right for the previous layout. 
Data entry	Tap keyboard keys to enter information into a field.

Table 1-3: *Virtual Keyboard Navigation (continued)*

Function	Navigation
Close virtual keyboard	Options to close the virtual keyboard include: ☐ Swipe down anywhere on the keyboard. ☐ Swipe down directly on the ⌨ icon. ☐ Tap the ⌨ icon. ☐ Tap anywhere outside of the keyboard.
Switch to Xenvironment	☐ Tap the **Xenvironment** button to open Xenvironment.  ☐ To return to Xstore, select the **Start POS** button. 

Active Keyboard Keys

Use the following guidelines to navigate through the Xstore system:

Table 1-4: *Active Keyboard Keys*

Key	Description
arrows	Use the up and down arrow keys to browse through list boxes.
Enter	Press [Enter] to select **Ok** at any prompt that includes Ok (Enter) as an option. Also, press [Enter] in active list boxes to select the highlighted option.
Esc	Press [Esc] to exit any prompt that has Back or Cancel as an option. You can also press [Esc] to exit the current menu and return to the previous menu. In either case, if changes were made that were not saved, you must verify that you want to exit without saving your changes.
Function keys	On each Xstore window, the [F1] through [F12] function keys correspond to the menu options. Press the function key that corresponds to the option to choose it.
Home/End	Use these keys to jump to the top (Home) or bottom (End) of the current page of a report that you are viewing.
Plus (+)/ Minus(-)	Use these two keys to increase (+) or decrease (-) the on-screen magnification level of a report that you are viewing.

Table 1-4: *Active Keyboard Keys*

Key	Description
Shift-Tab	Press [Shift]-[Tab] to move to the previous list box on an Xstore window. When the first list box is reached, press [Shift]-[Tab] to activate the last list box on the window.
Tab	Press [Tab] to move from the first list box to the next list box on the window. When the last list box is reached, press [Tab] to activate the first list box on the window.
Spacebar	Press the spacebar to select items in multiple-select lists.
Ctrl-Tab	Press [Ctrl]-[Tab] to access the Information, Task, Message, and Sales Goals tabs and move one tab forward on the Register Login screen and the Back Office Login screen.
Ctrl-Shift-Tab	Press [Ctrl]-[Shift]-[Tab] to access the Information, Task, Message, and Sales Goals tabs and move one tab backward on the Register Login screen and the Back Office screen.

Register Screen Conventions Overview

The Xstore system includes a variety of elements that comprise its user interface. Those elements have been grouped into the following categories, and each of the individual elements in them are described in this chapter.

- "Dual Screen" on page 11
- "Screen Layout Overview" on page 11
- "Active Keyboard Keys" on page 9
- "Menu Buttons" on page 12
- "Focus Bar" on page 17
- "View Port" on page 20
- "Status Bar" on page 22
- "Message Window" on page 13:
- "Info Tab" on page 14
- "Tasks Tab" on page 14
- "Goals Tab" on page 15
- "Messages Tab" on page 16
- "Prompts and Forms" on page 24
- "Response Required Prompt" on page 24
- "Selection Required Prompt" on page 24
- "Entry Required Prompt" on page 25
- "Search Form" on page 25

- "Data Entry Form" on page 27
- "System Information Prompts" on page 27
- "Error Screen" on page 28

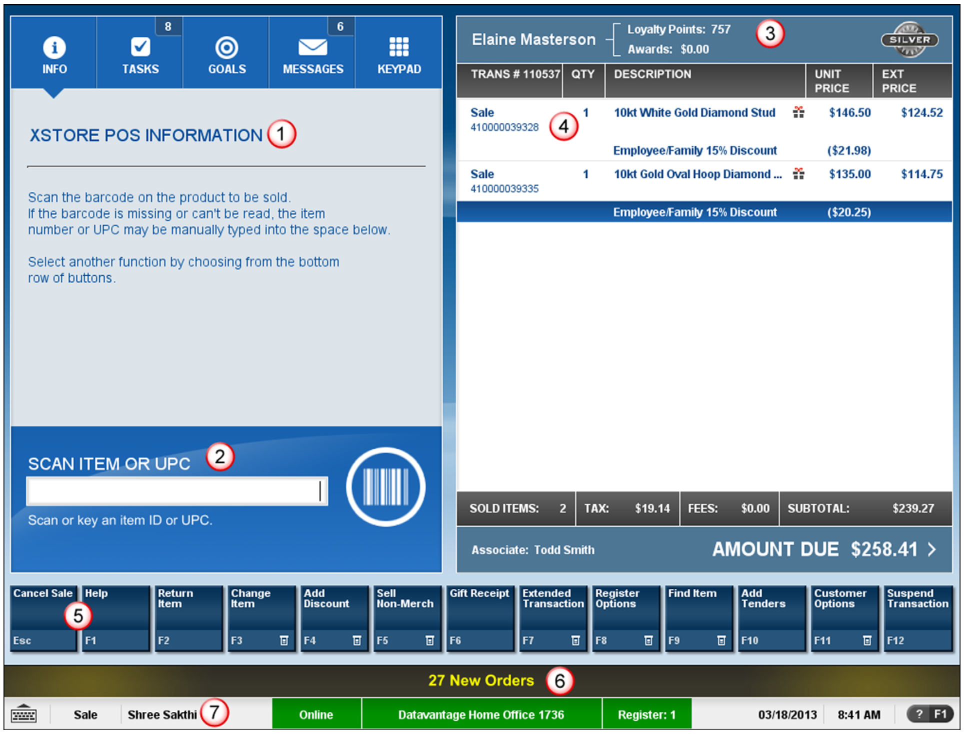
Dual Screen

Your store may be equipped with a dual screen which contains a customer facing display. The customer facing display is controlled by the corporate office. It may contain:

- ☐ Videos
- ☐ Suggested Items
- ☐ Customer Messages

Screen Layout Overview

The layout and design for all screens used for the Register functions is very similar to the example shown below. The names of the seven sections identified in the figure below are used throughout this manual.



Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Scan or key an item ID or UPC.

TRANS # 110537	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 410000039328	1	10kt White Gold Diamond Stud	$146.50	$124.52
		Employee/Family 15% Discount	($21.98)	
Sale 410000039335	1	10kt Gold Oval Hoop Diamond ...	$135.00	$114.75
		Employee/Family 15% Discount	($20.25)	

SOLD ITEMS: 2 TAX: $19.14 FEES: $0.00 SUBTOTAL: $239.27

Associate: Todd Smith AMOUNT DUE $258.41

Figure 1-5: Sale Screen Layout

Component #	Refer To
1. Message Window	"Message Window" on page 13
2. Focus Bar	"Focus Bar" on page 17

Component #	Refer To
3. Customer Loyalty Banner	"Customer Loyalty Banner" on page 19
4. View Port	"View Port" on page 20
5. Menu Buttons	"Menu Buttons" on page 12
6. Message Bar	"Message Bar" on page 21
7. Status Bar	"Status Bar" on page 22

Menu Buttons

Menu buttons with the following icons denote additional functions:

This icon indicates there are more sub-menu choices associated with this option. Selecting an option displaying this icon opens another menu with additional options.

This icon indicates this function is not available to the user currently signed on to Xstore, without manager override. This function is based on security levels.

The ellipsis (...) after the word "More" indicates that there are additional menu options available at this screen. Selecting the "More..." option displays another set of menu buttons.

Function Keys

Touch-screen users do not use function keys. You can tap the buttons but you are not using a regular keyboard.

The Xstore menu buttons show the keyboard functions that appear on each Xstore window.

Each menu button has a function key [F1] --> [F12] assigned to it. Because each Xstore menu is configurable, the button functions on your system may appear in a different order or have different text than examples shown in this manual.

Some menu buttons may not be available to every associate. Security configuration determines which options are available to an individual associate. Security may be configured for each associate, by employee group, or by register group.

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

Figure 1-6: Menu Buttons

Message Window

The tab colors vary depending on which screen you are using.

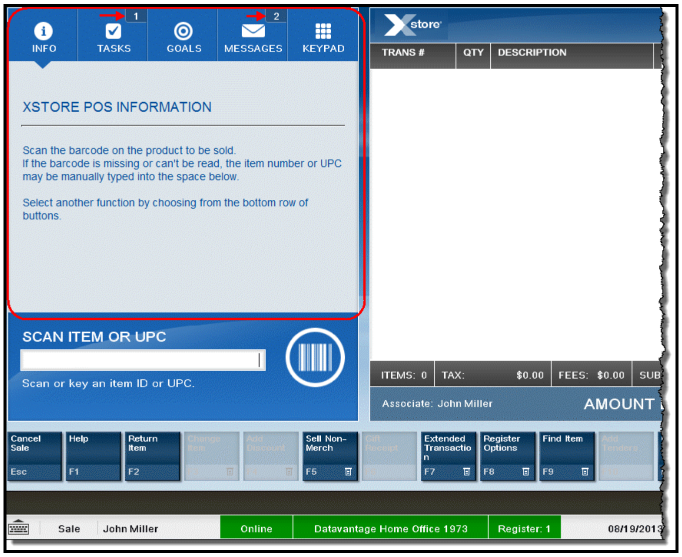
> *Your home office may have configured additional message tabs customized for your store. This manual describes the features standard in Xstore base.*

The information message area is located in the upper left section of various screens. The following message tabs are available in base:

- "Info Tab" on page 14
- "Tasks Tab" on page 14
- "Goals Tab" on page 15
- "Messages Tab" on page 16
- "Prompts and Forms" on page 24

You have the following options to access the tabs:

- ☐ Use a mouse for navigation.
- ☐ Touch the tabs if you have a touch-screen.
- ☐ Press the Ctrl + Tab keys on the keyboard to move one tab forward, and press the Ctrl + Shift + Tab keys on the keyboard to move one tab backward.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

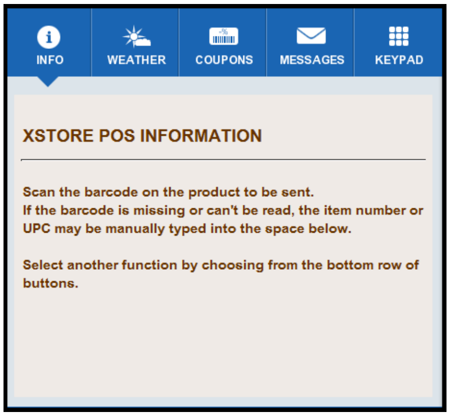
Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Scan or key an item ID or UPC.

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.



XSTORE POS INFORMATION

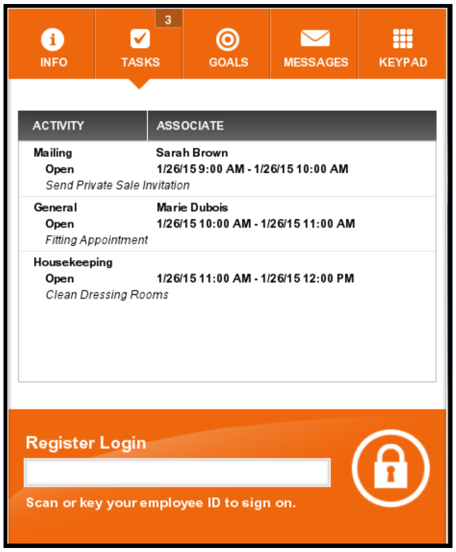
Scan the barcode on the product to be sent.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Tasks Tab

The Tasks tab displays open and in progress tasks with start date/time prior to the current business date and end date/time equal to the current business date or in the future. Tasks shown here are view only.

- To view and maintain task assigned to you see "Viewing and Maintaining Your Tasks" on page 408.
- To view tasks for a specific customer, see "Tasks Tab" on page 159.



ACTIVITY	ASSOCIATE
Mailing Open Send Private Sale Invitation	Sarah Brown 1/26/15 9:00 AM - 1/26/15 10:00 AM
General Open Fitting Appointment	Marie Dubois 1/26/15 10:00 AM - 1/26/15 11:00 AM
Housekeeping Open Clean Dressing Rooms	1/26/15 11:00 AM - 1/26/15 12:00 PM

Register Login

Scan or key your employee ID to sign on.

Figure 1-7: Tasks Tab T

> *In previous versions, Tasks and Appointments were separate tabs. They are now combined in the Task tab.*
>
> *The numeric value shown on the Tasks tab indicates how many tasks there are.*

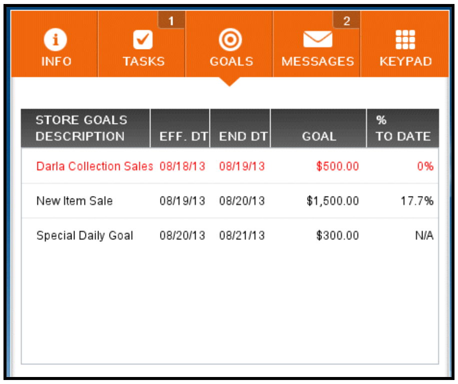
Information displayed includes:

Table 1-5: *Task Tab Information*

Column	Information Displayed
Activity	The type, status, and description associated with the task.
Associate	The assigned associate, appointment start date/time, and end date/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.



STORE GOALS DESCRIPTION	EFF. DT	END DT	GOAL	% TO DATE
Darla Collection Sales	08/18/13	08/19/13	$500.00	0%
New Item Sale	08/19/13	08/20/13	$1,500.00	17.7%
Special Daily Goal	08/20/13	08/21/13	$300.00	N/A

Figure 1-8: Store Goals Tab

The goals are listed in the following order:

1) Completed goals
2) Active goals
3) Future goals

The goals are also displayed in color based on their status:

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

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

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.

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.

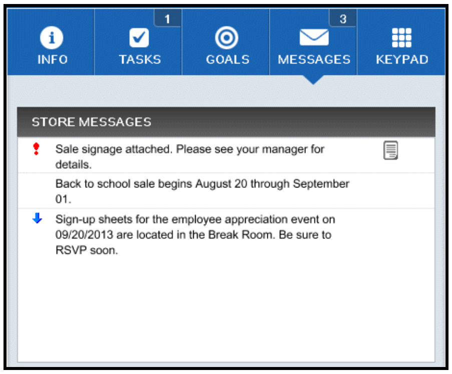
Messages Tab

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).

> *The numeric value shown on the Messages tab indicates how many messages there are.*

These messages are time-based, and no longer display once the expiration date has passed.



STORE MESSAGES

! Sale signage attached. Please see your manager for details. 🗎

Back to school sale begins August 20 through September 01.

↓ Sign-up sheets for the employee appreciation event on 09/20/2013 are located in the Break Room. Be sure to RSVP soon.

Figure 1-9: Messages Tab

Messages use the following icons to indicate priority:

Table 1-6: *Messages priority level/icon*

Priority Level	Icon
High	!
Medium	None
Low	↓

> *If the message contains a URL link, select the 🗎 link icon to open the URL.*

Keypad Tab (Touch-Screen)

When using a touch-screen, 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.

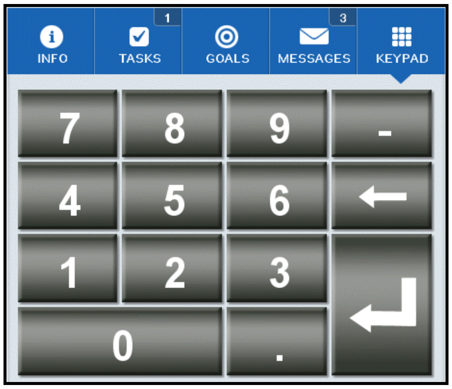


Figure 1-10: Keypad Tab

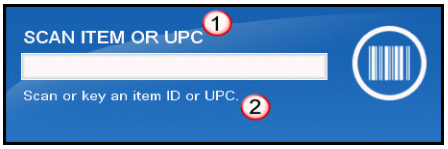
Touch-Screen users, when you tap on a numeric field (such as quantity), the keypad automatically displays.

Focus Bar

The focus bar provides a single-entry field, that is, a data entry form in which only one entry for a specified piece of data may be captured and then stored in the database.

The text area above the entry field shows the title of the focus bar (①).

The message area displays instructions for the current operation (②).



SCAN ITEM OR UPC

Scan or key an item ID or UPC.

Figure 1-11: Focus Bar (Scan Item or Enter UPC Example)

The focus bar changes color to indicate the specific function you are performing. The base version of Xstore uses the following color conventions:

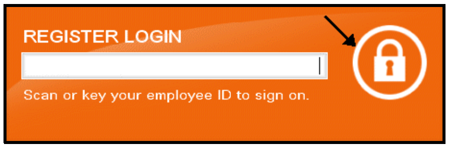
- **Blue** — sale transaction
- **Orange** — login
- **Yellow** — clock in
- **Red** — return merchandise

- **Brown** — send sale
- **Green** — back office login
- **Purple** — layaway, order, and special order transactions

> *Touch-screen users can click on the bar code of the scan item focus bar to open the Item Matrix. See "Searching for Items Using the Item Matrix" on page 199.*

The image on the focus bar provides a visual clue for the type of data accepted for the function you are performing. For example, the two Login prompts below accept different types of input for the same information: Employee ID.

The user must type an Employee ID number or scan an Employee ID card at this focus bar prompt.



REGISTER LOGIN

Scan or key your employee ID to sign on.

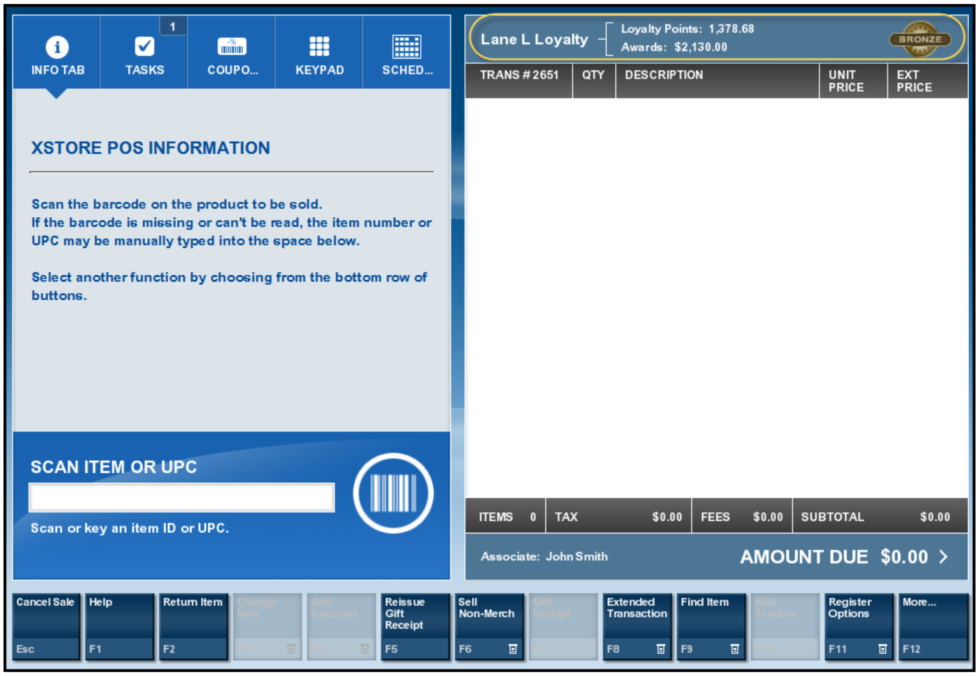
This prompt accepts a fingerprint scan from a biometric device for Employee ID and password in addition to keyed or scanned entry.

REGISTER LOGIN

Scan or key your employee ID to sign on.

Customer Loyalty Banner

When a customer is attached to a transaction and your store has a loyalty program, a Customer Loyalty Banner displays.



Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Scan or key an item ID or UPC.

Loyalty Points: 1,378.68
Awards: $2,130.00

Associate: John Smith

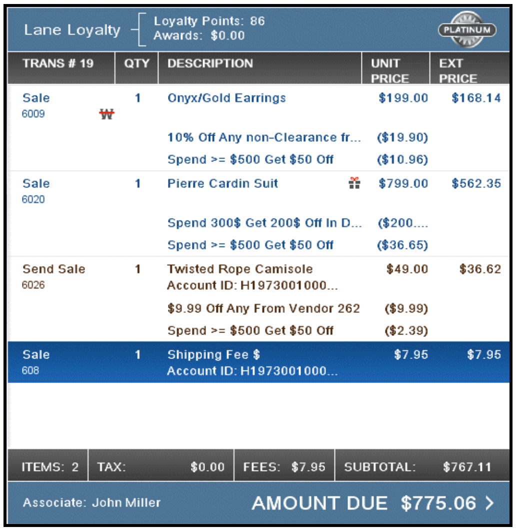
Figure 1-12: Customer Loyalty Banner

Table 1-7: *Loyalty Banner Display*

If	then Xstore
a customer is not signed up for loyalty rewards,	prompts if the customer would like to sign up for rewards.
a customer is signed up for rewards,	displays the reward information along with a loyalty badge (Figure 1-12 shows a platinum banner). Loyalty badges vary depending on your store's configurations and policies.
your store does not have rewards,	displays your store banner.

View Port

The View Port area of the screen presents all relevant information about the current function to the register operator. For example, in a sale transaction, the View Port displays the sale transaction information for items, taxes, discounts, tenders or any other detailed data about the current sales transaction.



Lane Loyalty

Loyalty Points: 86
Awards: $0.00

TRANS # 19	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 6009 ₩	1	Onyx/Gold Earrings	$199.00	$168.14
		10% Off Any non-Clearance fr...	($19.90)	
		Spend >= $500 Get $50 Off	($10.96)	
Sale 6020	1	Pierre Cardin Suit 🎁	$799.00	$562.35
		Spend 300$ Get 200$ Off In D...	($200....	
		Spend >= $500 Get $50 Off	($36.65)	
Send Sale 6026	1	Twisted Rope Camisole Account ID: H1973001000...	$49.00	$36.62
		$9.99 Off Any From Vendor 262	($9.99)	
		Spend >= $500 Get $50 Off	($2.39)	
Sale 608	1	Shipping Fee $ Account ID: H1973001000...	$7.95	$7.95

ITEMS: 2 TAX: $0.00 FEES: $7.95 SUBTOTAL: $767.11

Associate: John Miller AMOUNT DUE $775.06 >

Figure 1-13: View Port

Table 1-8: *View Port Icons and Indicators*

Icon	Description
🎁	Gift
₩	Warranty Declined
🔗	Attached Item
⬇	Mark Down or Airside Store Special Price Code
☂	Rain Check
📋	Wish List
$88.5(E)	Airside Store Tax Exempt (E)

Note the "Items" count in the lower left section of the View Port. This count represents the number of items the customer physically takes out of the store. In this example, the customer has purchased a total of 3 items, but one of the items will be shipped directly to the recipient via a Send Sale process. In this scenario, the item count is 2 since the customer will be taking 2 items out of the store and the third item will be processed for shipping by the store.

Message Bar

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

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

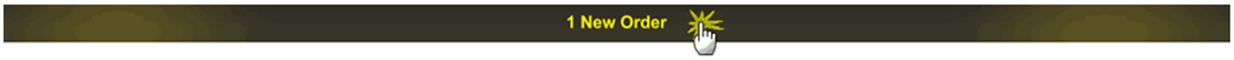
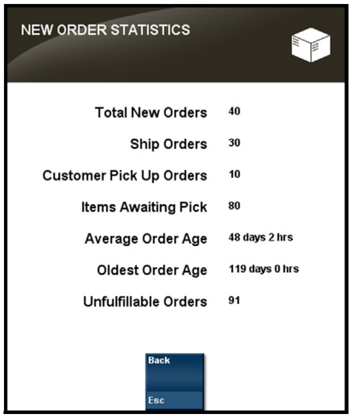


Figure 1-14: Message Bar

Select the message to view information.



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

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

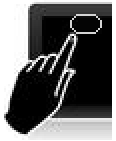
See the *Xstore Manager's Guide* for more information about processing orders in the Back Office.

Status Bar

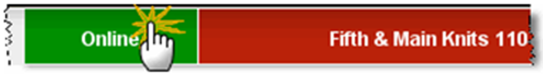
The Status Bar is a screen component that displays several sections containing store-related information. It is always visible from every Register screen and Back Office screen.

Urgency levels - Stoplight-like color indicators convey urgency for the online, store, and register sections:

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



- Tap online/offline to view the database indicator.



- Tap the store to open the store. To close the store, use the Back Office.

- Swipe the store area to open the Dashboard.

- Tap the register area to open the register. To close the register use the Back office.

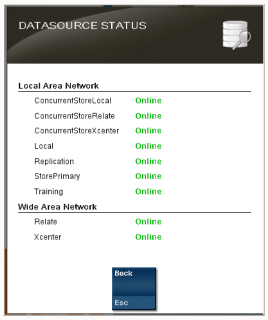
- Tap the F1 help to open the help feature.

Figure 1-15: Status Bar

Table 1-9: *Status Bar Components*

Component #	Description
1. Keyboard icon	For touch screen monitors this icon opens the keyboard see "Virtual Keyboard" on page 8.
2. Area Locator	This field indicates where you are within the system (i.e. Sale, Return, etc.).

Table 1-9: *Status Bar Components*

Component #	Description
3. Signed-In User Identifier	This field identifies the user that is currently signed into Xstore.
4. Database Status Indicator	Green indicates the Datasources are online. Yellow indicates at least one WAN Datasource is offline. The system is using the local Datasource. Red indicates at least one LAN Datasource is offline. The system is using the offline process set up for your store. Touch-screen users tap the indicator to view the Datasource Status.  DATASOURCE STATUS **Local Area Network** ConcurrentStoreLocal Online ConcurrentStoreRelate Online ConcurrentStoreXcenter Online Local Online Replication Online StorePrimary Online Training Online **Wide Area Network** Relate Online Xcenter Online
5. Store Identifier	This field identifies your store name and store number. Green indicates the store is open. Yellow or red indicates the store is closed.
6. Register Identifier	This field identifies the register number. Green indicates the register is open and Red indicates the register is closed.
7. Date	This field displays the current register date.
8. Time	This field displays the current register time. If using a touch screen, swipe this field to clock-in/clock-out.
9. ? F1[1]	This icon is available from all screens. Clicking or touching this icon opens the help feature.

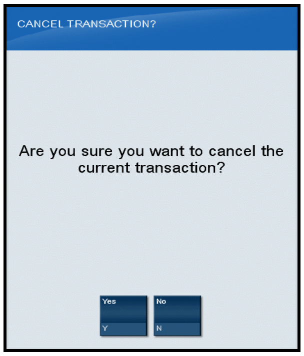
[1] *The [F1] key is a configurable key. It is not automatically assigned to the Help option. If the help option is enabled and available for the function, pressing the [F1] key displays a context-sensitive HTML page.*

Prompts and Forms

During various system operations, you may be prompted to confirm a procedure, select from a list of options, acknowledge a system action, enter/select information, etc. Xstore provides several different types of prompts and forms to help you complete a task.

Response Required Prompt

During a transaction process, you may be required to confirm an action. For example, in Figure 1-16 below, you would press [Y] (Yes) to confirm that you want to cancel the transaction, or press [N] (No) to remove the prompt and return to the transaction.



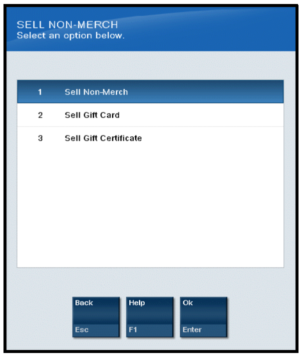
CANCEL TRANSACTION?

Are you sure you want to cancel the current transaction?

Figure 1-16: Response Required Prompt

Selection Required Prompt

During a transaction process, you may be required to select from a list of options. For example, in Figure 1-17 below, you would use the up and down arrow keys to select a non-merchandise item from the list, or press the number on the keyboard associated with the option you want to select. To save your selection, press [Enter] to choose **Ok**. To exit without making a selection, press [Esc].

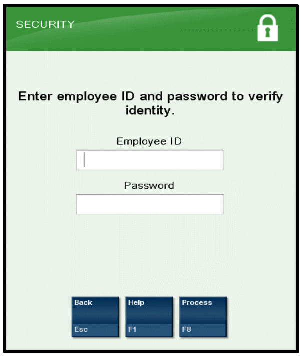


SELL NON-MERCH
Select an option below.

Figure 1-17: Selection Required Prompt

Entry Required Prompt

During a transaction process, you may be required to enter a value before continuing. For example, in Figure 1-18 below, you must enter your employee ID and password. After entering your employee ID number and password, you would select **Process** to continue. To return to the previous screen, press [Esc] (Back).



Enter employee ID and password to verify identity.

Figure 1-18: Entry Required Prompt

The Fingerprint scan is also supported at the Security prompt.

Search Form

In a search form you enter parameters, or criteria, to initiate a database search. Xstore displays a search form automatically when you need to retrieve specific information.

To initiate a search, you need to enter only the first few letters or numbers in the appropriate search criteria fields. The more parameters you enter, the narrower the scope of the search becomes. That results in a decreased number of records being found. When one of the parameters is not matched, the system uses the remaining parameters to conduct a broader search. If the system cannot find any matches, Xstore displays a message indicating that no information was found.

Because each Xstore search form is configurable, the search parameters on your system may appear in a different order or have different text than the search forms shown in this guide.

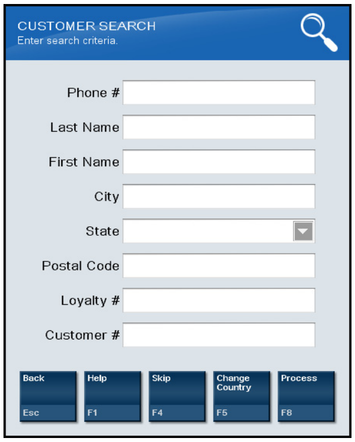
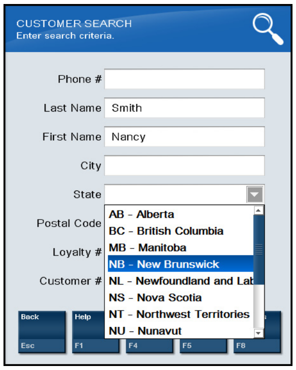


Figure 1-19: Search Form (Customer Search)

	An arrow on the right side of a field indicates a drop-down list of options is available.
	A red triangle in the upper left corner of a field indicates that information must be entered.

When applicable, use the ***Change Country*** *menu option on the Customer Search screen to modify the drop-down State options and further refine your search. In this example, the search is for Nancy Smith and the country has been changed to Canada so that the drop-down options contain Canadian Provinces (New Brunswick).*



Last Name Smith

First Name Nancy

- AB - Alberta
- BC - British Columbia
- MB - Manitoba
- NB - New Brunswick
- NL - Newfoundland and Lab
- NS - Nova Scotia
- NT - Northwest Territories
- NU - Nunavut

Data Entry Form

In a data entry form you enter specific information about the initiated activity. For example, in Figure 1-20 below you must enter specific information about the tax exempt customer for the transaction.

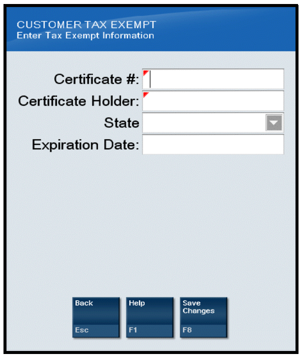
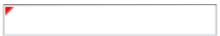


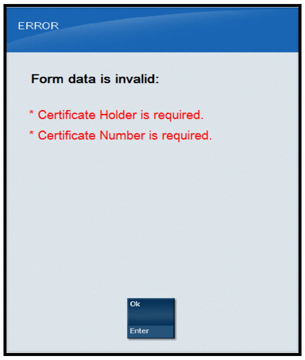
Figure 1-20: Data Entry Form (Tax Exempt Form)

	An arrow on the right side of a field indicates a drop-down list of options is available.
	A red triangle in the upper left corner of a field indicates that information must be entered.
	A grayed out field indicates the field is non-editable.

Enter the information as required and select **Save Changes** to continue or press [Esc] (Back) to return to the previous screen without saving the data. If you select **Save Changes** before completing all the required fields, then Xstore displays a message explaining the error, as shown in Figure 1-21 below.

System Information Prompts

Throughout Xstore, the system displays prompts and messages to indicate that the system is processing a request or transaction, or to provide additional information about a process or error. For example, Figure 1-21 below provides additional information about a required field on the tax exempt form before the tax exempt transaction process can continue.



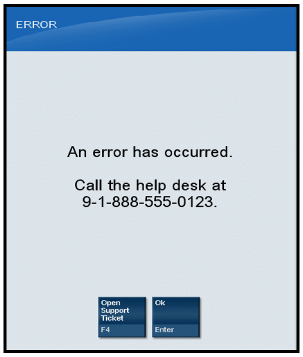
Form data is invalid:

* Certificate Holder is required.
* Certificate Number is required.

Figure 1-21: Error Message

Error Screen

If a help desk error occurs during processing, Xstore alerts you that an error has occurred and that you should call the help desk.


ERROR

An error has occurred.

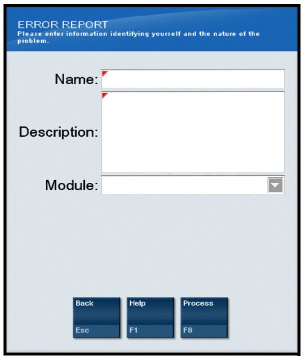
Call the help desk at
9-1-888-555-0123.

Figure 1-22: Help Desk Error Occurred

The phone number shown in Figure 1-22 is only a sample help desk number. Call the phone number displayed on your screen.

If you receive this message, do one of the following:

- Press [Enter] to acknowledge the message and continue.
- Call the help desk phone number displayed on the screen and follow the instructions given to you by the help desk.
- If available, select the **Open Support Ticket** option. Xstore prompts you for your name, a description of what you were doing, and the module you were using. Enter the requested information, then select the **Process** option.


ERROR REPORT
Please enter information identifying yourself and the nature of the problem.

Name:

Description:

Module:

Figure 1-23: Error Report Form

An email is automatically sent to the help desk, describing the date, time, location, and system where the problem occurred, as well as the entered information and additional system log files.

a

CHAPTER 2

Basic Transaction Entry

Overview

A basic transaction consists of the exchange of store merchandise for a customer’s tender. No transactions can be entered into Xstore 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.

> *Ensure that the store/register is open, the cash drawer/till has been counted, the associate is clocked in* ***(if required)****, and the till is attached to the register* ***(if required)*** *before beginning a transaction.*

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 “Clocking In and Clocking Out” on page 420.

> *Your store may have a dual screen which displays items that the customer may be interested in purchasing. Depending on your store’s policy, you may want to discuss these with the customer during check out.*

Logging In to Xstore

Use the following steps to log in to Xstore:

1. At the Register Login screen, scan or key your **employee ID** number and press [Enter] to continue.[1]

REGISTER LOGIN

Scan or key your employee ID to sign on.

Figure 2-1: Register Login ID Prompt

2. The system prompts for your password. Type your password and press [Enter] to continue. For security purposes, your password displays as a row of asterisks.

REGISTER LOGIN

Key your password to complete sign on.

Figure 2-2: Employee Login Password Prompt

You may be prompted to clock-in and select a work code.

Entering Pre-Sale Information

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

- "Associating Flight Information" on page 31
- "Selecting Commissioned Associates" on page 34
- "Associating a Customer with the Sale" on page 37

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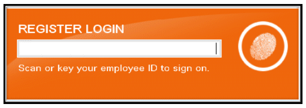
[1] If your system is set up to use a Biometric Fingerprint device, an Employee ID Login prompt displays. Use the device to scan your fingerprint rather than entering your user ID and password.
Note: Keyed entry and card scan are also supported here.



REGISTER LOGIN

Scan or key your employee ID to sign on.

Associating Flight Information

Airside stores scan or manually enter boarding pass information into Xstore to determine the tax of the transaction based on flight destination.

1. Scan the boarding pass barcode or enter the **Flight Number** and select **Process**.

> *The Flight Number can include spaces but **not** special characters.*
>
> *If the Flight Number is unknown or the scan does not work, search for the flight. See "Search for Flight Information" on page 33.*

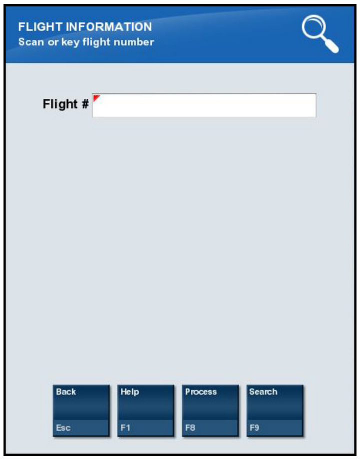
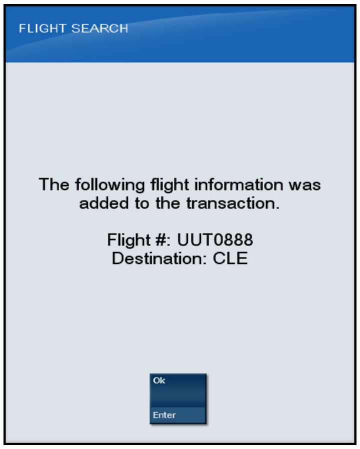


Figure 2-3: Flight Information Prompt

2. If the information is valid, confirmation that the flight information was added to the transaction displays. Select **Ok**.

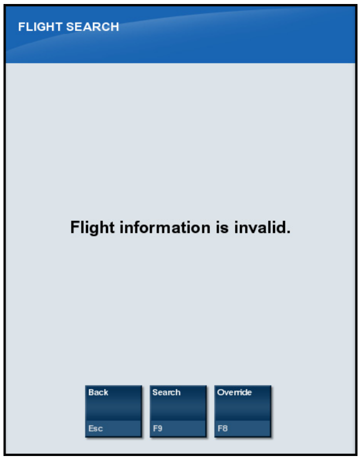


The following flight information was added to the transaction.

Flight #: UUT0888
Destination: CLE

Figure 2-4: Flight Information Added Prompt

3. If the information is ***invalid***, the following prompt displays:

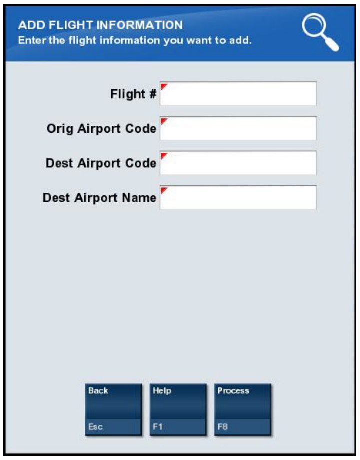


FLIGHT SEARCH

Flight information is invalid.

Figure 2-5: Invalid Flight Information

- Select **Back** to return to the flight information prompt.
- Select **Search** to find flight information (see “Search for Flight Information” on page 33).
- Select **Override** to add the flight information. Depending on your store policy, managers may need to enter their **Employee ID** and **Password**. At the Add Flight information prompt, enter the following fields and then select **Process**:
    - **Flight #** - The International Air Transport Association (IATA) flight number.
    - **Original Airport Code** - Three digit code of the passenger’s originated airport (for example: CLE).
    - **Destination Airport Code** - Three digit code of the passenger’s destination airport (for example: LGA).
    - **Destination Airport Name** - Full name of the passenger’s destination airport (for example: LaGuardia).



ADD FLIGHT INFORMATION
Enter the flight information you want to add.

> *You can also scan the boarding pass barcode to populate the fields.*

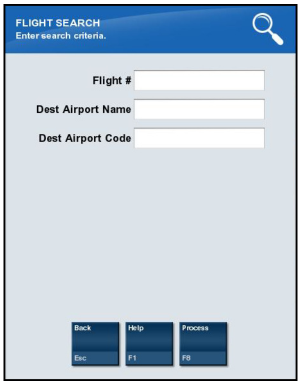
- Confirmation that the flight information was added to the transaction displays. Select **Ok** (see Figure 2-4 on page 31).

Search for Flight Information

1. Select the **Search** button.

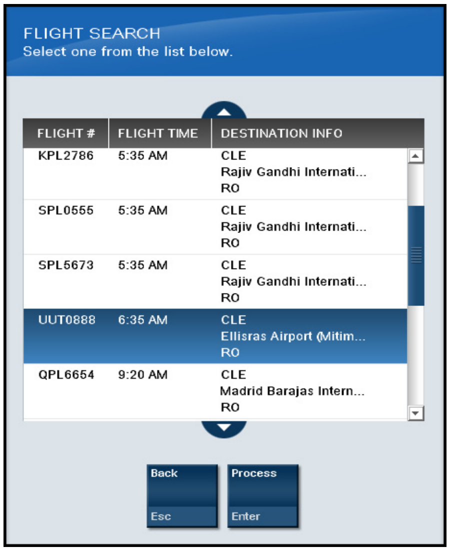
2. Enter one or more of the search criteria and then select **Process**. Criteria includes:

- **Flight #** - International Air Transport Association (IATA) flight number.
- **Destination Airport Name -** Full name of the passenger's destination airport.
- **Destination Airport Code** - Three digit code of the passenger's destination airport (for example: LGA).



If the search is invalid, the Flight search prompt displays (see step 3 on page 32).

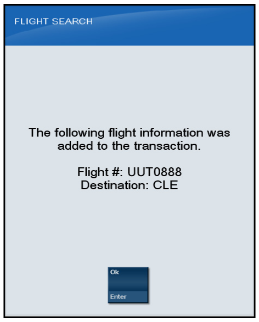
3. Select the flight from the search results display list and then select **Process**. If the Flight result is not correct, select **Back** to search again.



FLIGHT #	FLIGHT TIME	DESTINATION INFO
KPL2786	5:35 AM	CLE Rajiv Gandhi Internati... RO
SPL0555	5:35 AM	CLE Rajiv Gandhi Internati... RO
SPL5673	5:35 AM	CLE Rajiv Gandhi Internati... RO
UUT0888	6:35 AM	CLE Ellisras Airport (Mitim... RO
QPL6654	9:20 AM	CLE Madrid Barajas Intern... RO

Figure 2-6: Flight Search Results

4. Confirmation that the flight information was added to the transaction displays. Select **Ok**.



The following flight information was added to the transaction.

Flight #: UUT0888
Destination: CLE

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.

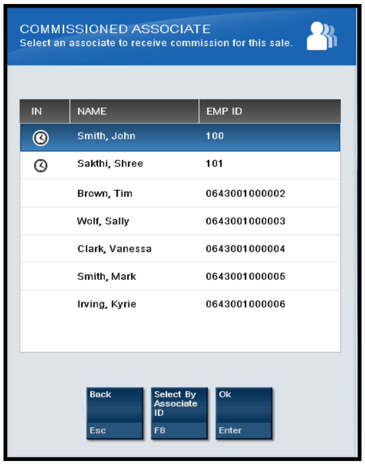
Xstore awards commissions on a per-item basis, either automatically based on the associate(s) selected at the start of a retail transaction, or by prompting for the commissioned associate (or associates) each time an item is added to the transaction.

> *If your system is not set up for automatic commissioned associate prompting, you also have the option to link an associate (or associates) to individual items in a sale transaction. See "Changing the Commissioned Associate" on page 223 for more information about associating a commissioned associate with a specific item in a transaction.*

1. If prompted, add a commissioned associate to the sale transaction through one of two methods:

☐ Select the sale associate(s) for this transaction from the list and press [Enter].

> *The clock icon in the "In" column indicates the Associate has clocked in (see "Clocking In and Clocking Out" on page 420).*



COMMISSIONED ASSOCIATE

Select an associate to receive commission for this sale.

IN	NAME	EMP ID
🕓	Smith, John	100
🕓	Sakthi, Shree	101
	Brown, Tim	0643001000002
	Wolf, Sally	0643001000003
	Clark, Vanessa	0643001000004
	Smith, Mark	0643001000005
	Irving, Kyrie	0643001000006

Figure 2-7: List of Commissioned Associates

Procedure:

Touch-screen users, tap the associate's name and then tap ***OK****.*

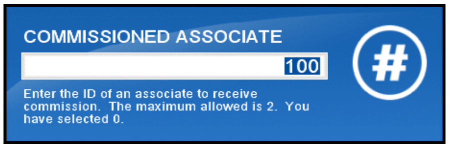
a. Use the up and down arrow keys to highlight an associate's name.

b. Press the [Spacebar] to select each associate's name.

- After selecting a name, you may move up or down the list of names using the Up and Down arrow keys, then press [Spacebar] to select one or more additional associates.
- If you make a mistake, press the [Spacebar] again to deselect the currently highlighted name.

<OR>

☐ Select the **Select By Associate ID** option to enter the associate's ID and press [Enter].



COMMISSIONED ASSOCIATE

100

Enter the ID of an associate to receive commission. The maximum allowed is 2. You have selected 0.

Figure 2-8: Commissioned Associate Prompt

2. The system adds the associate(s) to the sale transaction and displays the associates' names on the view port.

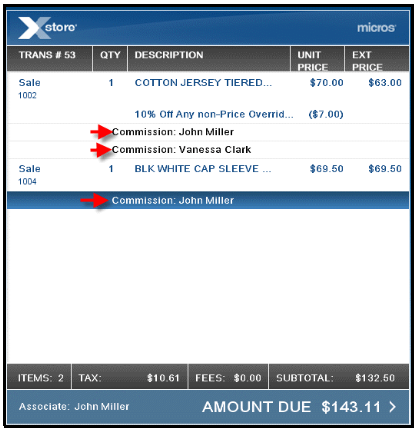
TRANS # 52	QTY	DESCRIPTION
Sale 1002	1	COTTON JERSEY TIERED
		10% Off Any non-Price Ov

ITEMS: 1 | TAX: $5.04 | FEES: $0.00

Associate: John Miller AMOU

Figure 2-9: Associate Name in View Port

If your system prompts for the commissioned associate for each item, the associate's name displays below the line item in the View Port.



TRANS # 53	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1002	1	COTTON JERSEY TIERED...	$70.00	$63.00
		10% Off Any non-Price Overrid...	($7.00)	
		Commission: John Miller		
		Commission: Vanessa Clark		
Sale 1004	1	BLK WHITE CAP SLEEVE ...	$69.50	$69.50
		Commission: John Miller		

ITEMS: 2 | TAX: $10.61 | FEES: $0.00 | SUBTOTAL: $132.50

Associate: John Miller AMOUNT DUE $143.11 >

Figure 2-10: Items with the Commissioned Associate's Name in the View Port

You also have the option to link an associate (or associates) to individual items in a sale transaction. See "Changing the Commissioned Associate" on page 223 for more information about associating a commissioned associate with a specific item in a transaction.

Your store policy determines the minimum and maximum number of commissioned associates assigned to a transaction.

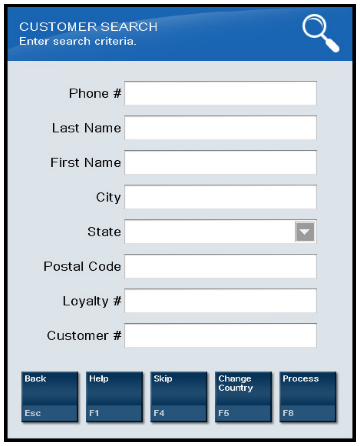
Associating a Customer with the Sale

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

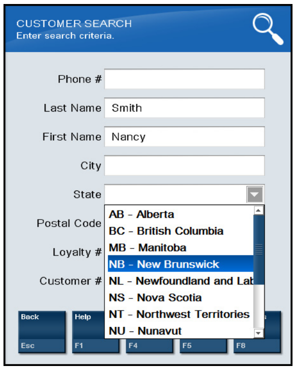
> *If a customer is not required for this transaction, select the **Skip** option to continue with the sale process.*

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

   If the customer has a loyalty card, you may swipe it. You may also manually enter the customer's number or name, loyalty number, house account number, or enter other customer information in the Customer Search form and select **Process** to continue.



> *Enter as much information as possible in the Customer Search form to limit the number of customer records that are returned. The maximum number of returned records is configurable. If your search results exceed that number, you may see a message indicating there are too many results.*
>
> *If the name you want is not listed, select the **Back** option to return to the Customer Lookup form. Enter the customer's full name or make additional entries in the other searchable fields. Select **Process** to search again.*
>
> *When applicable, use the **Change Country** menu option on the Customer Search screen to modify the drop-down State options and further refine your search. In this example, the search is for Nancy Smith and the country has been changed to Canada so that the drop-down options contain Canadian Provinces (New Brunswick).*



Last Name Smith

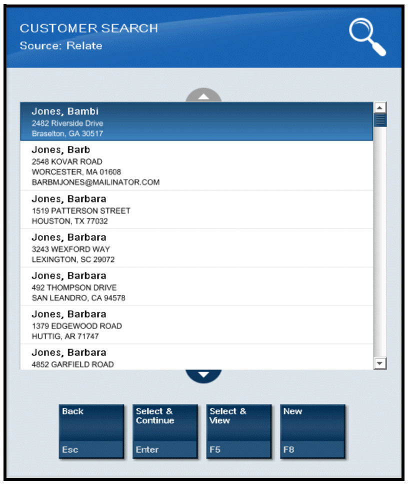
First Name Nancy

2. Depending on the configuration of your system, if only one matching customer is found, the system may display the customer record in Customer Maintenance. Verify that the information is correct, and select the **Assign Customer To Tran** option to associate the customer's information to the sale in progress and return to the Sale Screen. If the information needs to be corrected, see "Customer Maintenance" on page 139.

   If a list of matching customer records is found, select a customer from the list and choose one of these options:

   - **Select & Continue** – Assigns the selected name to the sale transaction.
   - **Select & View** – Opens the selected customer record for viewing, editing, or printing. See "Viewing a Customer Record" on page 148. Once you are done viewing or editing the record, select **Assign Customer To Tran** option to associate the customer's information to the sale.
   - **New** – Displays a form for adding a new customer record to the customer database. See "Adding a New Customer Record" on page 143.

   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.



Jones, Bambi
2482 Riverside Drive
Braselton, GA 30517

Jones, Barb
2548 KOVAR ROAD
WORCESTER, MA 01608
BARBMJONES@MAILINATOR.COM

Jones, Barbara
1519 PATTERSON STREET
HOUSTON, TX 77032

Jones, Barbara
3243 WEXFORD WAY
LEXINGTON, SC 29072

Jones, Barbara
492 THOMPSON DRIVE
SAN LEANDRO, CA 94578

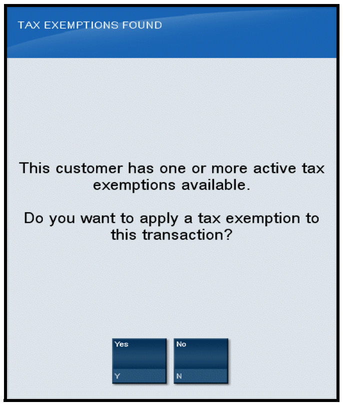
Jones, Barbara
1379 EDGEWOOD ROAD
HUTTIG, AR 71747

Jones, Barbara
4852 GARFIELD ROAD

Figure 2-11: Customer Search Multiple Results

The associated customer's name is displayed on the Customer Loyalty Banner of the Register Screen. See "Customer Loyalty Banner" on page 19.

3. If the customer you selected has a tax exemption(s) on file, the system displays a prompt asking if the customer wants to apply one of them to the transaction. Based on the customer's decision about the exemption, select **Yes** or **No**.



This customer has one or more active tax exemptions available.

Do you want to apply a tax exemption to this transaction?

- ❑ If you select **Yes**, the system displays a list of the customer's exemptions that may be applied. Select an exemption from the list and choose **Select & Continue** (to proceed to the next prompt) or choose **Select & View** (if you need to see the details of the exemption).
- ❑ If you select **No**, the system goes to the next prompt.

4. If your store has a loyalty program there are several possible scenarios that may occur after assigning a customer to the sale:

Table 2-1: *Loyalty Card Pre-Sale Scenarios*

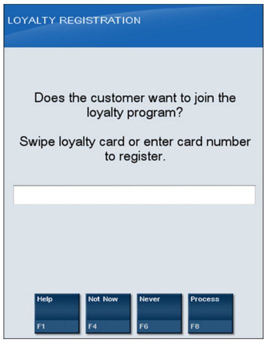
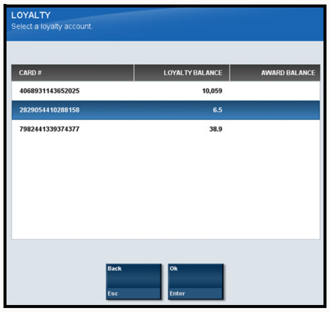
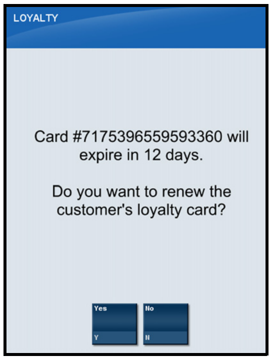
If	Then
The customer assigned to the transaction is ***not*** enrolled in a loyalty program.	The system prompts you to ask the customer about enrollment.  Does the customer want to join the loyalty program? Swipe loyalty card or enter card number to register. ■ To enroll the customer in a loyalty program: ❑ If your store does ***not*** provide a physical card, select **Process**. <OR> ❑ If your store gives the customer a physical card, swipe the loyalty card, or enter the loyalty number found on the card and select **Process** If the customer decides not to enroll now, select **Not Now**. ■ If the customer indicates no intention to enroll at any time, select **Never**.
The customer assigned to the transaction has more than one loyalty card.	Select from the list. This list may not show the cards expiration date depending on your store configuration.  LOYALTY Select a loyalty account. CARD # / LOYALTY BALANCE / AWARD BALANCE 4068931143652025 / 10,059 2829054410288158 / 6.5 7982441339374377 / 38.9

Table 2-1: *Loyalty Card Pre-Sale Scenarios*

If	Then	
The customer's loyalty card has expired (your store may be configured to display a prompt to renew the card).	Press [Y] for yes to renew the card. A confirmation prompt displays with the new expiration date (configured by your corporate office). Press [N] for no, a message prints on the receipt indicating that the loyalty card has expired. The card expiration information also displays on the Customer Maintenance Activity Stream "Contact Information Tab" on page 150	 Card #7175396559593360 will expire in 12 days. Do you want to renew the customer's loyalty card?

If the customer declines the loyalty program and then decides to enroll during the sale transaction, you can enroll the customer through the Customer Maintenance screen, see "To Enroll the Customer in a Loyalty program" on page 172.

If the customer declines the loyalty program and then decides to purchase a Loyalty card during the transaction, void the line item ("Voiding an Item" on page 221) or cancel the sale ("Cancelling a Sale" on page 246).

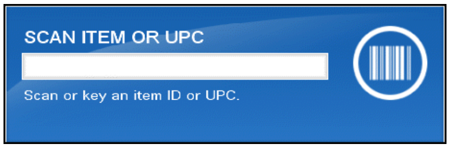
If you have completed the sale and the customer decides not to enroll in the loyalty program, you will need to post void the sale ("Post Void" on page 440) to disassociate the customer.

Entering Items into the Sale Screen

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/Award to an Item or Transaction" on page 201, "Email Receipt Options" on page 54, "Modifying Line Items in a Sale" on page 216, and "Gift Registry" on page 403 for more information about these activities. You may also be able to enter special order, layaway, work order, order, send sale, pre-sale and on hold transactions.

To look up an item see "Searching for Items" on page 187.

1. At the scan item prompt, scan or enter an item ID or UPC and press [Enter] to process. Repeat as needed per item.



Scan or key an item ID or UPC.

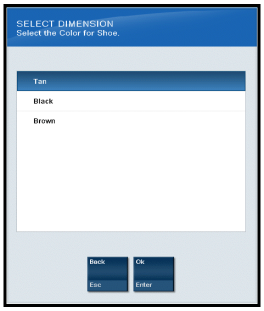
Figure 2-12: Scan Item Prompt

When scanning items, you do not need to press [Enter].

Other Prompts

About Entering Style IDs

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

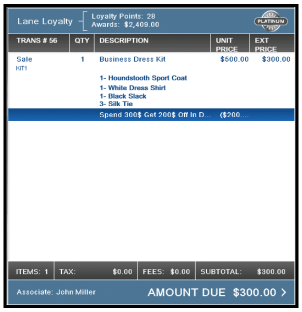


Select the Color for Shoe.

About Selling Kits

When a Kit is added to a sale, the component items are automatically shown in rows below the parent Kit line. Each component item in the Kit shows the quantity included in the Kit, along with the component's description. The component items that make up a Kit cannot be changed using the change item function in Xstore, only the parent Kit can be changed using the change item function.

If not all kit components can be shown on the View Port due to limited space, the last component row displays an ellipsis (...) to indicate there are additional items in the kit. However, the receipt shows all items that are part of the kit.



Loyalty Points: 28
Awards: $2,409.00

TRANS # 56	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale KIT1	1	Business Dress Kit	$500.00	$300.00
		1- Houndstooth Sport Coat 1- White Dress Shirt 1- Black Slack 3- Silk Tie		
		Spend 300$ Get 200$ Off In D...	($200....	

ITEMS: 1 TAX: $0.00 FEES: $0.00 SUBTOTAL: $300.00

Associate: John Miller AMOUNT DUE $300.00

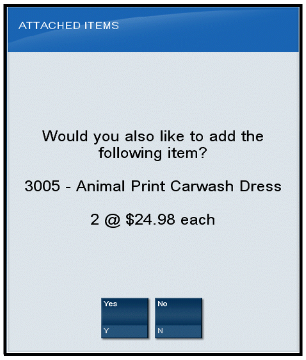
About Attached Items

When an item with an associated attached item is added to a sale, you may be prompted whether or not this additional item should be added to the sale.

- ❑ If prompted, choose **Yes** to add the item or choose **No** if the customer does not want the additional item.
- ❑ If you are not prompted per your store policy, the item is added to the sale automatically.

Attached items are shown with the Link 🔗 icon.

Note: If multiple attached items are available, you may be prompted with a list showing the items. If prompted, select the items to be added and press [Enter] to add them to the transaction.



ATTACHED ITEMS

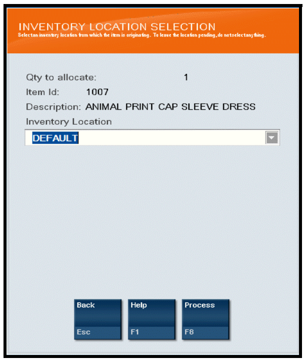
Would you also like to add the following item?

3005 - Animal Print Carwash Dress

2 @ $24.98 each

About Inventory Location Selection

Depending on the configuration of your system, 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.



INVENTORY LOCATION SELECTION

Select an inventory location from which the item is originating. To leave the location pending, do not select anything.

Qty to allocate: 1

Item Id: 1007

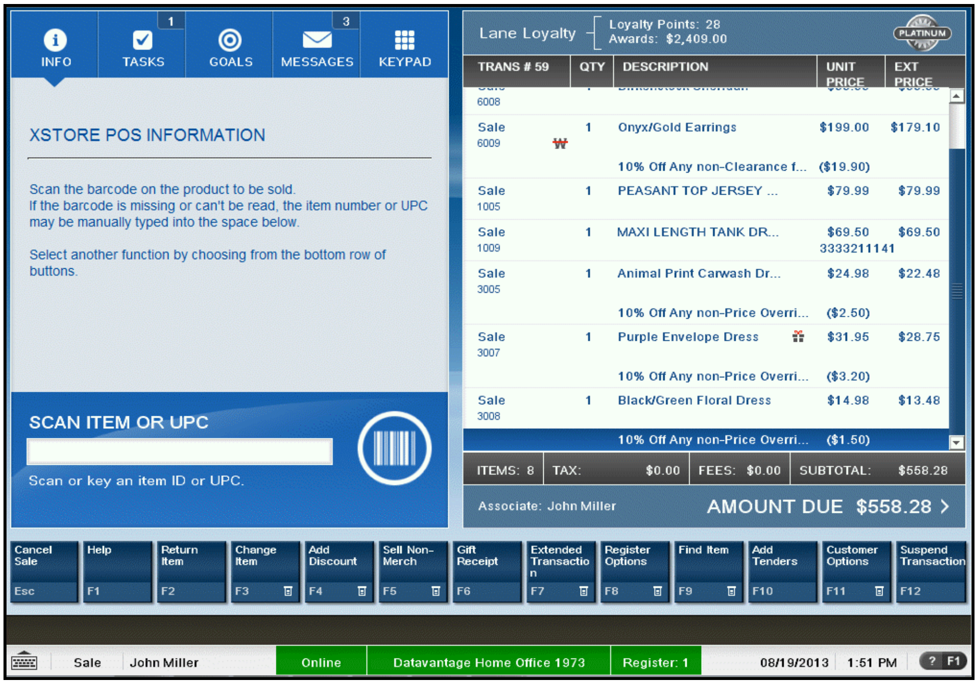
Description: ANIMAL PRINT CAP SLEEVE DRESS

Inventory Location

DEFAULT

2. The system automatically looks up the price and displays the item information on the View Port. For more information see "Sale Screen Touch-Screen Navigation" on page 5 and "Screen Layout Overview" on page 11.

For Airside stores, Xstore calculates the price based on the departure zone and customer's destination zone from the boarding pass. See "View Port Icons and Indicators" on page 20.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Scan or key an item ID or UPC.

Lane Loyalty
Loyalty Points: 28
Awards: $2,409.00

TRANS # 59	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
6008				
Sale 6009	1	Onyx/Gold Earrings	$199.00	$179.10
		10% Off Any non-Clearance f...	($19.90)	
Sale 1005	1	PEASANT TOP JERSEY ...	$79.99	$79.99
Sale 1009	1	MAXI LENGTH TANK DR...	$69.50 3333211141	$69.50
Sale 3005	1	Animal Print Carwash Dr...	$24.98	$22.48
		10% Off Any non-Price Overri...	($2.50)	
Sale 3007	1	Purple Envelope Dress	$31.95	$28.75
		10% Off Any non-Price Overri...	($3.20)	
Sale 3008	1	Black/Green Floral Dress	$14.98	$13.48
		10% Off Any non-Price Overri...	($1.50)	

ITEMS: 8 TAX: $0.00 FEES: $0.00 SUBTOTAL: $558.28

Associate: John Miller AMOUNT DUE $558.28

Figure 2-13: Sale Screen

> *If you enter more items than can fit on the View Port, Xstore displays a scroll bar on the right side of the View Port. Press the [Page Up] and [Page Down] keys to scroll through the listed items.*

Purchasing Wish List Item(s)

Wish list items are purchased through the wish list tab of the Customer Maintenance screen.

1. Open the type of transaction screen needed with the customer assigned to the sale (see "Associating a Customer with the Sale" on page 37):

- ❑ Sale Transaction ("Entering Pre-Sale Information" on page 30)
- ❑ Extended Transactions:
  - ❍ Locate Order ("Order Transactions via Locate" on page 361)
  - ❍ Send Sale ("Send Sale Transactions" on page 247)
  - ❍ Layaway ("Layaway Transactions" on page 255)
  - ❍ Special Order("Special Order Transactions" on page 287)
  - ❍ Pre-Sale ("Pre-Sale Accounts" on page 381)

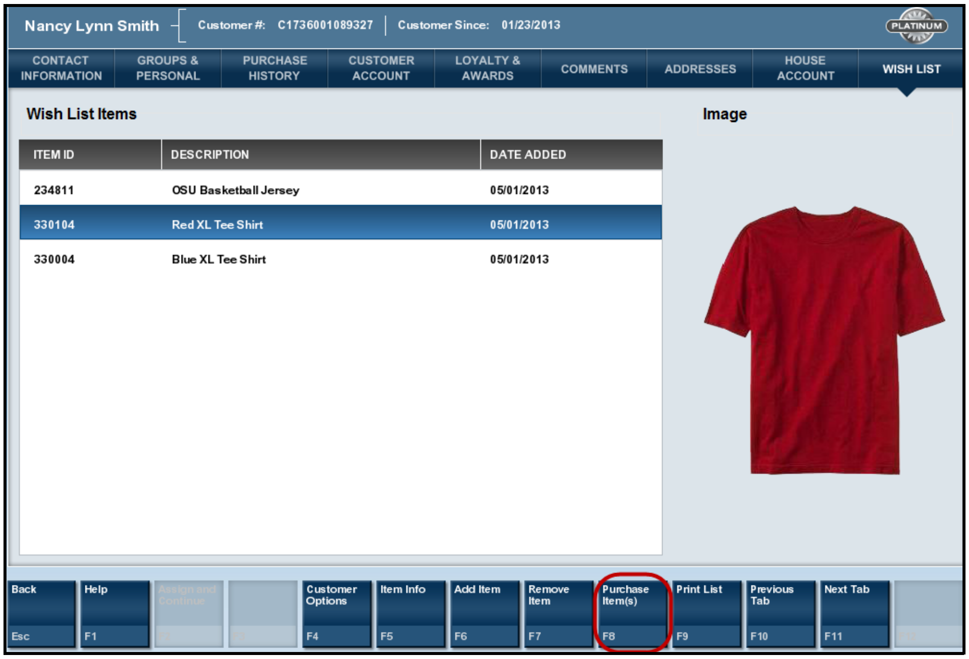
- On-Hold (“Hold Account Transactions” on page 393)

> *You cannot purchase wish list items when creating a Work Order.*

2. From the Sale screen, select **Customer Options** and then **View Customer**.
   <OR>
   From an Extended Transaction screen, **View Customer**.

> *Touch-screen users tap the Customer Loyalty Banner within a transaction to view the customer record. See “Customer Maintenance Touch-Screen Navigation” on page 6.*

3. Select the **Wish List** tab.
4. Select the **Purchase Item(s)** button.



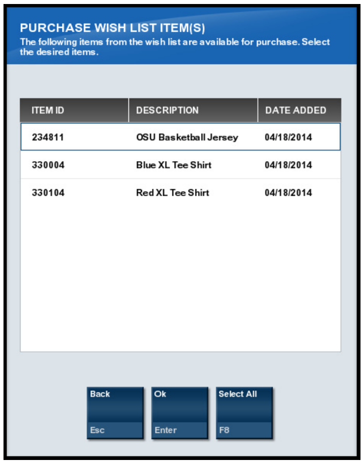
Nancy Lynn Smith
Customer #: C1736001089327
Customer Since: 01/23/2013

Wish List Items

ITEM ID	DESCRIPTION	DATE ADDED
234811	OSU Basketball Jersey	05/01/2013
330104	Red XL Tee Shirt	05/01/2013
330004	Blue XL Tee Shirt	05/01/2013

Figure 2-14: Wish List Tab - Purchase Item

5. Select the item(s) to purchase and then press [Enter] or if purchasing everything on the list, choose **Select All** and then press [Enter].

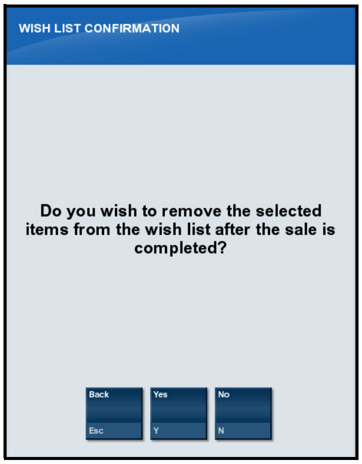


PURCHASE WISH LIST ITEM(S)

The following items from the wish list are available for purchase. Select the desired items.

ITEM ID	DESCRIPTION	DATE ADDED
234811	OSU Basketball Jersey	04/18/2014
330004	Blue XL Tee Shirt	04/18/2014
330104	Red XL Tee Shirt	04/18/2014

6. The Wish List Confirmation Prompt displays:



WISH LIST CONFIRMATION

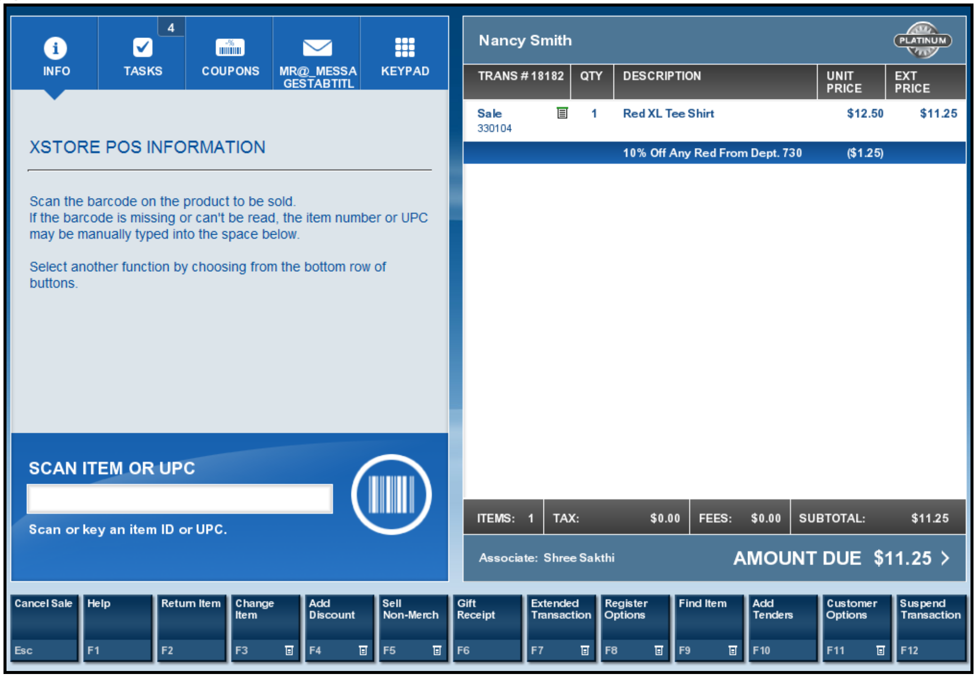
Do you wish to remove the selected items from the wish list after the sale is completed?

Figure 2-15: Wish List Confirmation Prompt

- ❑ Select **Back** to return to the Wish List screen. The item(s) are not added to the sale transaction or removed from the wish list.
- ❑ Select **Yes** to add item(s) to the sale transaction and remove the item(s) from the wish list.
- ❑ Select **No** to add item(s) to the sale transaction but not remove the item(s) from the wish list.

If the transaction is post-voided or returned, the wish list item is not reinstated to the wish list.

The Sale screen displays with the selected item(s) in the View Port. The item appears in the View Port with a Wish List ☰ icon.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Scan or key an item ID or UPC.

Nancy Smith

TRANS # 18182	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 330104	1	Red XL Tee Shirt	$12.50	$11.25
		10% Off Any Red From Dept. 730	($1.25)	

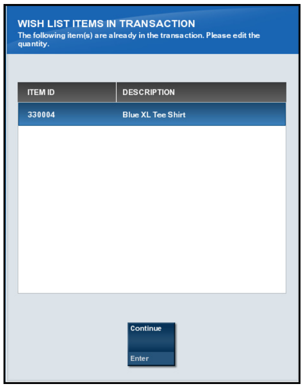
ITEMS: 1 TAX: $0.00 FEES: $0.00 SUBTOTAL: $11.25

Associate: Shree Sakthi AMOUNT DUE $11.25

Figure 2-16: Sale Screen - Wish List Item

7. If the customer wishes to purchase greater quantity of a wish list item, follow the "Changing the Item Quantity" on page 217 instructions.

If you attempt to add the same item through the Wish List options, a prompt displays indicating the item is already in the transaction. Select ***Continue*** *to return to the Sale screen and* follow the "Changing the Item Quantity" on page 217 instructions*.*



WISH LIST ITEMS IN TRANSACTION

The following item(s) are already in the transaction. Please edit the quantity.

ITEM ID	DESCRIPTION
330004	Blue XL Tee Shirt

8. To add a warranty to a wish list item, see "Adding a Warranty/Service Plan to an Item" on page 349.

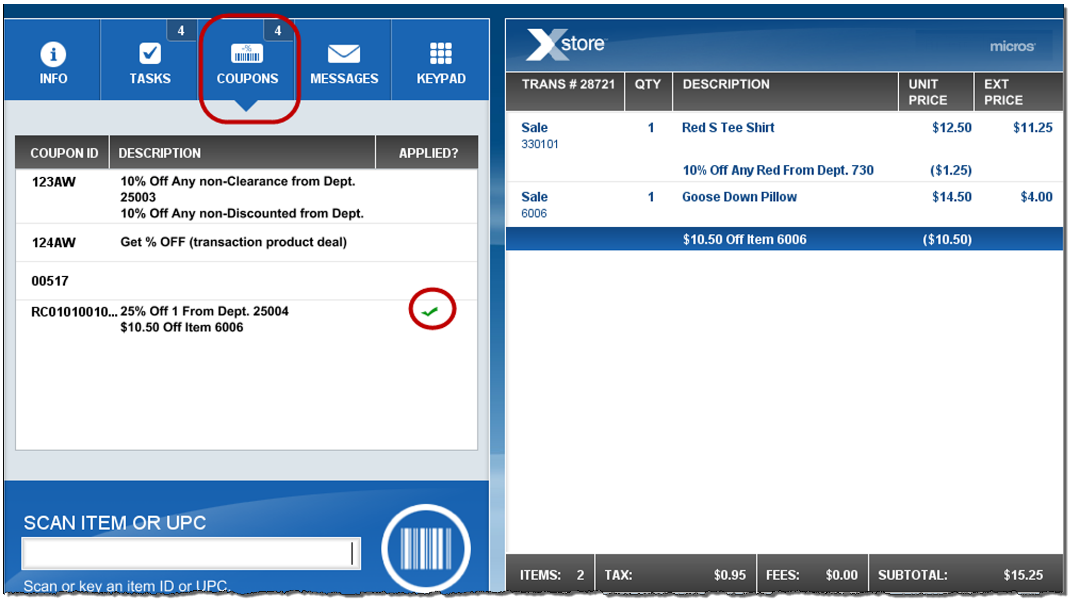
9. Add any additional items needed and complete the transaction.

Adding Item Coupons

To add a coupon to a sale, enter a valid coupon id in the **Scan Item or UPC** prompt and press [ENTER]. This tab will be active during the entire transaction even if there are no coupons scanned. The count in the upper right corner is the number of coupons entered/ scanned into the transaction.

If the coupon was applied to the sale, a green check mark displays in the applied column.

To void the item to which the coupon is associated see "Voiding an Item" on page 221.



COUPON ID	DESCRIPTION	APPLIED?
123AW	10% Off Any non-Clearance from Dept. 25003 10% Off Any non-Discounted from Dept.	
124AW	Get % OFF (transaction product deal)	
00517		
RC01010010...	25% Off 1 From Dept. 25004 $10.50 Off Item 6006	✓

TRANS # 28721	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 330101	1	Red S Tee Shirt	$12.50	$11.25
		10% Off Any Red From Dept. 730	($1.25)	
Sale 6006	1	Goose Down Pillow	$14.50	$4.00
		$10.50 Off Item 6006	($10.50)	

ITEMS:	2	TAX:	$0.95	FEES:	$0.00	SUBTOTAL:	$15.25

Figure 2-17: Coupon Tab

Redeeming a Rain Check

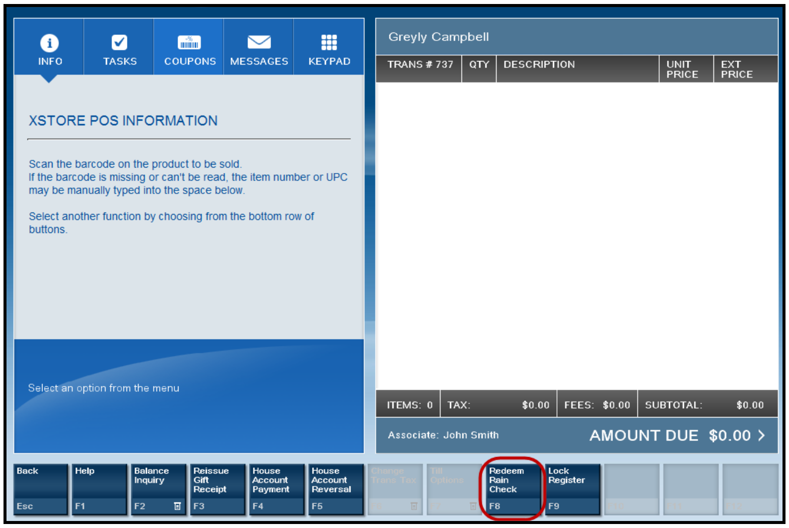
Rain Check is an optional feature that allows customers to purchase out of stock items for the same price at a later date.

Once a customer uses a rain check, it cannot be used again. Rain checks are only redeemable through the Sale screen (not extended transactions).

Depending on your store configuration may not be able to redeem rain checks issued from other stores.

To redeem a rain check:

1. From the Sale screen, select the **Register Options** menu button.
2. Select the **Redeem Rain Check** menu button.



Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

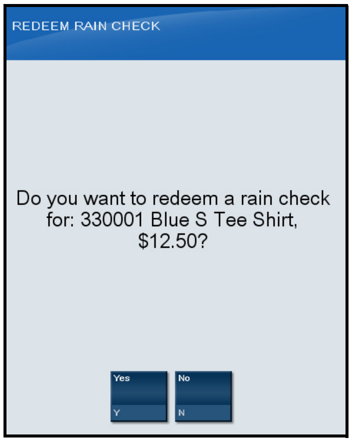
Select an option from the menu

Figure 2-18: Redeem Rain Check Menu Option

3. Scan the barcode or type the rain check ID (begins with RC) in the **Redeem Rain Check** field and press [Enter].

> *If the rain check has expired a message displays indicating it has expired and cannot be redeemed.*

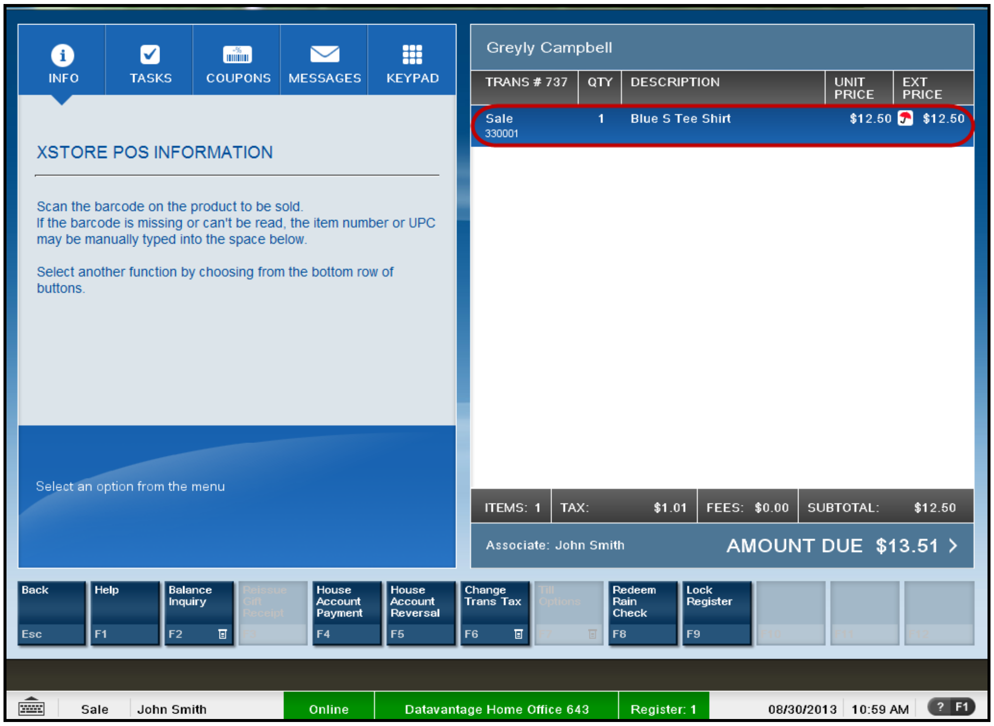
4. The Redeem Rain Check prompt displays. Select **Yes** to redeem the rain check. Select **No** to return to the Sale screen.



Do you want to redeem a rain check for: 330001 Blue S Tee Shirt, $12.50?

Figure 2-19: Redeem Rain Check Confirmation Prompt

The item appears in the View Port with a Rain Check ☂ icon.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Select an option from the menu

Greyly Campbell

TRANS # 737	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 330001	1	Blue S Tee Shirt	$12.50	$12.50

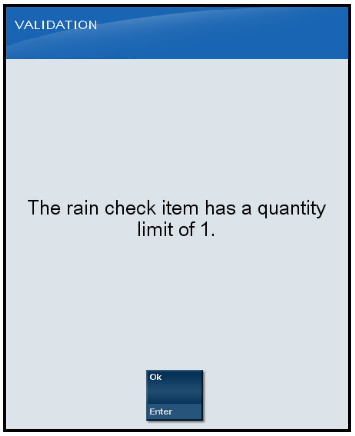
ITEMS: 1 | TAX: $1.01 | FEES: $0.00 | SUBTOTAL: $12.50

Associate: John Smith AMOUNT DUE $13.51

Sale | John Smith | Online | Datavantage Home Office 643 | Register: 1 | 08/30/2013 | 10:59 AM

Figure 2-20: Rain Check Item View Port

5. Customers can purchase additional quantities for the rain check item. See "Changing the Item Quantity" on page 217. The quantity limit for a rain check is configurable. If you enter more than the limit a validation message displays.



VALIDATION

The rain check item has a quantity limit of 1.

Figure 2-21: Validation Prompt

6. Add any additional items to the purchase and then complete the Sale. See "Entering Items into the Sale Screen" on page 40 and "Sale Tenders" on page 84.

> ! *If you cancel the transaction, the rain check is still valid.*

During a basic sale you can also perform the following activities before tendering the sale:

- 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" on page 214 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" on page 187 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" on page 196 for more information.
- To add a discount, refer to "Adding a Discount/Award to an Item or Transaction" on page 201 for more information.
- To change the tax (both item and transaction), refer to "Changing Item Taxes" on page 227 for 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" on page 201 for more information.

You can also use the following options to modify a line item in the sale:

- To change item quantities, refer to "Changing the Item Quantity" on page 217 for more information.
- To override a price, refer to "Changing the Item Price" on page 219 for more information.
- To void an item, refer to "Voiding an Item" on page 221 for more information.
- To change the commissioned sale associate for the sale, refer to "Changing the Commissioned Associate" on page 223 for more information.
- To add a comment for an item, refer to "Adding/Editing a Line Item Comment" on page 226.

7. After you have entered all of the items for the transaction, and completed all of the processing you wish to perform at the Sale screen, press [Enter] at the item prompt or select **Add Tenders**.

If you are using a touch-screen, tap the amount due area and go to step 3 on page 52.

8. Continue with “Tendering the Transaction” on page 51.

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, etc.)
- 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:

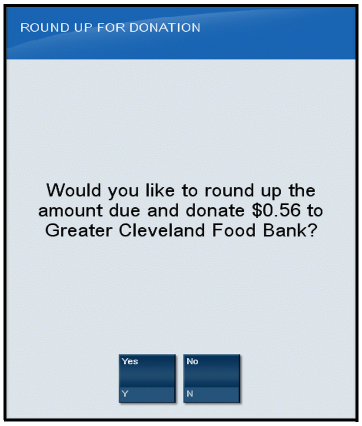
- Credit card account number, CID number, and expiration date
- Additional tender types if the first tender type did not pay the total due
- Additional forms of customer ID (driver's license number, birth date, credit card number, or other ID)
- Customer name
- Customer address
- Security approval for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

Refer to “Processing Tenders” on page 83 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. A Charitable Donation prompt may display asking if the customer would like to make a charitable donation. Select the appropriate answer.

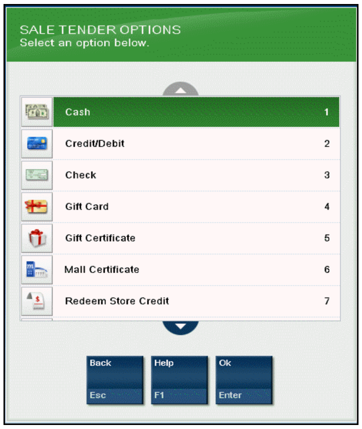


ROUND UP FOR DONATION

Would you like to round up the amount due and donate $0.56 to Greater Cleveland Food Bank?

Figure 2-22: Round Up For Donation Prompt

3. 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.

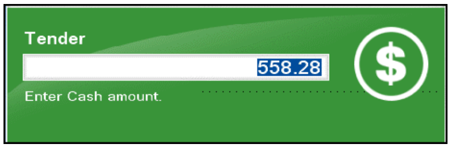


SALE TENDER OPTIONS
Select an option below.

Figure 2-23: List of Tender Types

> *You may return to the previous sale screen by pressing the [Esc] key, unless you have added all tenders and the system is prompting you to confirm that the sale is complete. In that case, you must void the tenders before you can return to the Register Sale screen. Refer to “Voiding the Tender” on page 136 for procedural information.*

4. 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.



Tender

558.28

Enter Cash amount.

Figure 2-24: Tender Cash Amount Prompt

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.

Tender

558.28

Enter Cash amount.

Figure 2-25: Quick Cash Buttons

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

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.

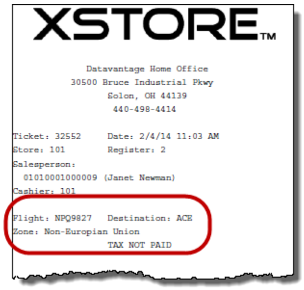
6. The system prints receipts as required.

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to "Email Receipt Options" on page 54 for more information about sending email receipts.

See "Printing a Gift Receipt" on page 58 for information about printing Gift Receipts.

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

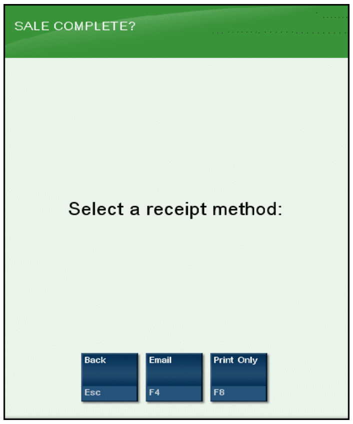


```
       Datavantage Home Office
    30500 Bruce Industrial Pkwy
          Solon, OH 44139
           440-498-4414

Ticket: 32552     Date: 2/4/14 11:03 AM
Store: 101        Register: 2
Salesperson:
  01010001000009 (Janet Newman)
Cashier: 101

Flight: NPQ9827   Destination: ACE
Zone: Non-Europian Union
                  TAX NOT PAID
```

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.



Select a receipt method:

Figure 2-26: Sale Complete Prompt - Email Receipts Enabled

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.

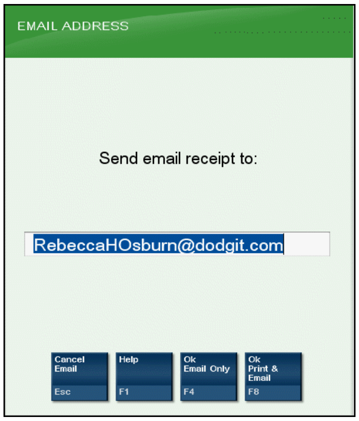
However, any receipt types that are not supported for distribution in an email, per your store policy, automatically print on the receipt printer.

- ☐ 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:



Send email receipt to:

RebeccaHOsburn@dodgit.com

Figure 2-27: 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 & 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 2-26 on page 54) where you can choose to print the receipts.

Notes: About Email Receipts

- The customer may have indicated that they wish to have email receipts as their default (see "Contact Information Tab" on page 144). 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.

Reprinting Receipts and Documents

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

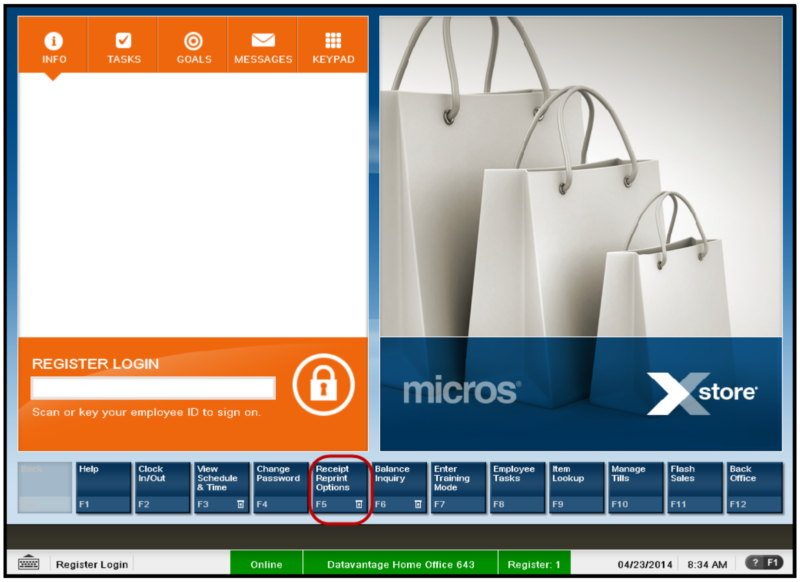


Figure 2-28: Login Screen - Receipt Reprint Options Menu Button

Reprinting the Last Receipt

1. At the Register Login screen, select **Receipt Reprint Options** to reprint the receipts from the last transaction rung on this register.

   Xstore displays the Receipt Reprint Options menu.

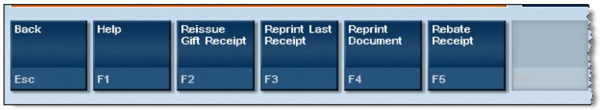


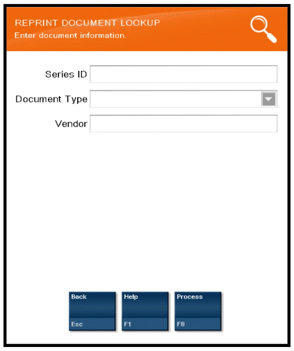
Figure 2-29: Receipt Reprint Options Menu.

2. Select the **Reprint Last Receipt** option.
3. The system prompts to confirm that you want to reprint the receipts. Press [Y] to reprint the receipts from the most recent transaction. The receipts are clearly labeled as reprints.

Reprinting a Document (Rebate Offer)

1. Select the **Reprint Document** option (Figure 2-29 on page 56) to reprint a rebate offer for a customer.

   The system prompts for search information to locate the applicable rebate.



REPRINT DOCUMENT LOOKUP
Enter document information.

Figure 2-30: Reprint Document Lookup Form

2. Enter the information as required to locate the correct rebate offer and select **Process** to continue.

   The system displays a list of rebate documents matching your search criteria.

3. Select a document from the list and press [Enter]. The system prints the rebate offer on the report printer.

If the source for a document is not in a PDF file format, it may also be printed on a receipt printer.

Printing a Rebate Receipt

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

1. Select the **Rebate Receipt** option (Figure 2-29 on page 56) to print a rebate receipt for a customer.
2. The system prompts for transaction information. Scan or enter the transaction barcode information.
3. The rebate receipt is printed on the receipt printed and is clearly labeled as a Rebate Authorization receipt. This receipt is not valid for merchandise return and may have other restrictions.

Reissuing a Gift Receipt

See "Gift Receipts—After the Sale" on page 62 for more information.

Printing a Gift Receipt

Gift receipts can be issued at the end of a sale transaction for a completed sale transaction and also from the Electronic Journal for eligible items in a transaction. Eligible items include regular sale items, special order pickup items, and layaway pickup items.

You may select items for a gift receipt before a tender is selected or between tenders. Once the sale is finalized, the gift receipt option is no longer available.

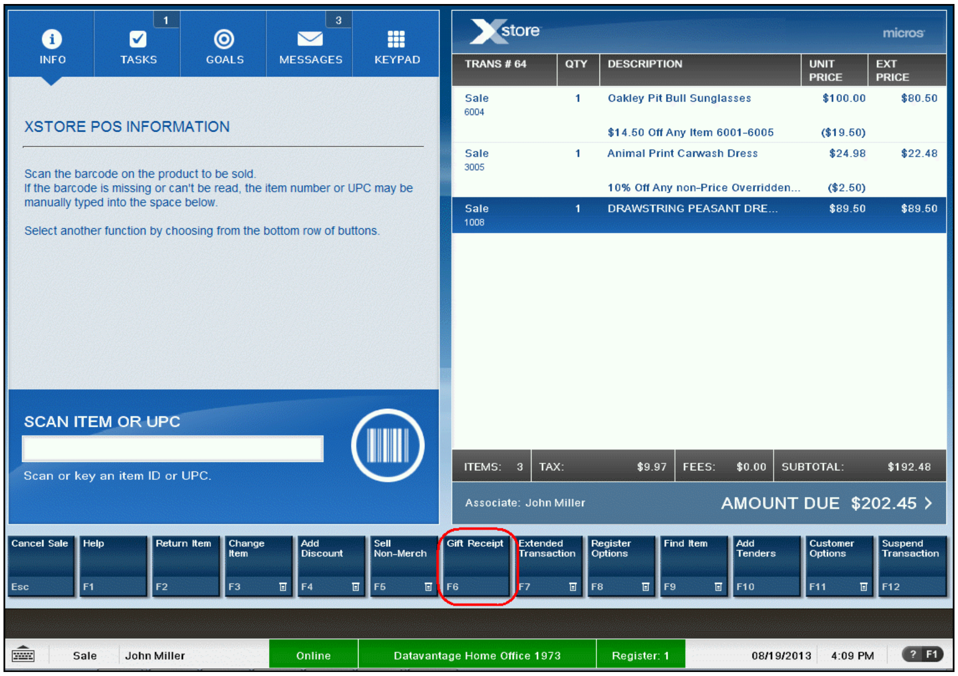
Gift receipts may also be printed when the transaction is complete by using the **Issue Gift Receipts** menu option at the Electronic Journal. They may also be reprinted from the Register Login screen by using the **Receipt Reprint** Options.

Gift Receipts—From a Sale

Use the following steps to designate which items require a gift receipt during the sale transaction. You may select items for a gift receipt before a tender is selected.

> *Because each Xstore menu is configurable, the location of the **Gift Receipt** option on your system may be different than the option location shown here.*

1. During the sale transaction, select the **Gift Receipt** option from the Register Sale menu.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Scan or key an item ID or UPC.

TRANS # 64	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 6004	1	Oakley Pit Bull Sunglasses	$100.00	$80.50
		$14.50 Off Any Item 6001-6005	($19.50)	
Sale 3005	1	Animal Print Carwash Dress	$24.98	$22.48
		10% Off Any non-Price Overridden...	($2.50)	
Sale 1008	1	DRAWSTRING PEASANT DRE...	$89.50	$89.50

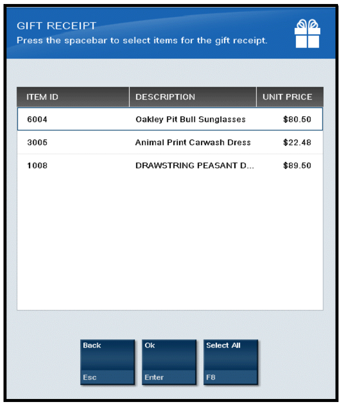
ITEMS: 3 TAX: $9.97 FEES: $0.00 SUBTOTAL: $192.48

Associate: John Miller AMOUNT DUE $202.45

Sale John Miller Online Datavantage Home Office 1973 Register: 1 08/19/2013 4:09 PM

Figure 2-31: Sale Menu - Gift Receipt Button

2. Xstore displays a list of the items eligible for a gift receipt.



GIFT RECEIPT

Press the spacebar to select items for the gift receipt.

ITEM ID	DESCRIPTION	UNIT PRICE
6004	Oakley Pit Bull Sunglasses	$80.50
3005	Animal Print Carwash Dress	$22.48
1008	DRAWSTRING PEASANT D...	$89.50

Figure 2-32: List of Items Eligible for a Gift Receipt

3. Use the up and down arrow keys to select an item. Press the [Spacebar] to mark it for a gift receipt, or select the **Select All** option to print gift receipts for all listed items. You may select as many individual items as necessary. Press [Enter] to continue.

4. Items that have been selected for a gift receipt are identified by the Gift 🎁 icon next to the item on the View Port.

TRANS # 64	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 6004	1	Oakley Pit Bull Sunglasses 🎁	$100.00	$80.50
		$14.50 Off Any Item 6001-6005	($19.50)	
Sale 3005	1	Animal Print Carwash Dress 🎁	$24.98	$22.48

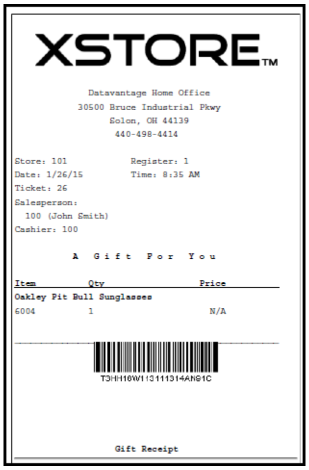
5. Continue processing the sale transaction as normal. After tendering, gift receipts are printed for the designated items.

If you select 2 or more items for gift receipts, you may be prompted whether you want to print a single gift receipt for all the items (No) or a separate gift receipt for each item (Yes).

If supported by your store policy, you may be prompted whether or not to group the gift items on a gift receipt. See "Multiple Gift Items - Grouping Items for Gift Receipts" on page 60.

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to "Email Receipt Options" on page 54 for more information about sending email receipts.



XSTORE™

Datavantage Home Office
30500 Bruce Industrial Pkwy
Solon, OH 44139
440-498-4414

Store: 101 Register: 1
Date: 1/26/15 Time: 8:35 AM
Ticket: 26
Salesperson:
100 (John Smith)
Cashier: 100

A Gift For You

Item	Qty	Price
Oakley Pit Bull Sunglasses		
6004	1	N/A

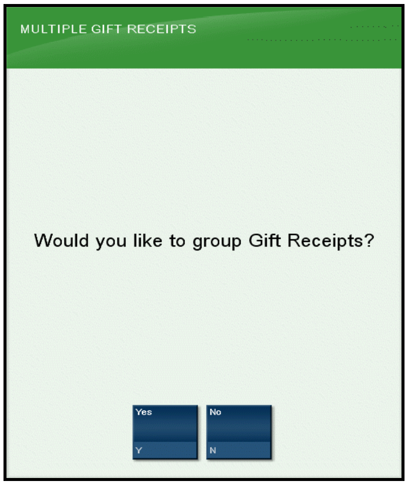
T3HH16W113111314AN91C

Gift Receipt

Figure 2-33: Gift Receipt Example

Multiple Gift Items - Grouping Items for Gift Receipts

After tendering the sale, if there are multiple items that have been labeled as requiring a gift receipt, you may be prompted whether or not the items should be grouped on separate gift receipts. For example, 2 items on one receipt, and 3 items on another receipt.



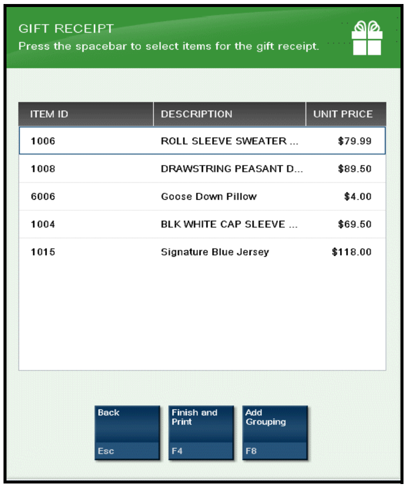
Would you like to group Gift Receipts?

Figure 2-34: Multiple Gift Items - Group Receipts Prompt

- To group the items, select **Yes**, and continue with "To Group Gift Items" on page 61.
- If you do not want to group the items, select **No** and continue with "To Continue Without Grouping Gift Items" on page 62.

To Group Gift Items

After selecting **Yes** at the Multiple Gift Receipts prompt (Figure 2-34), the system displays the list of items that were labeled as requiring gift receipts. Press the [Spacebar] to highlight and select the gift items for the first gift receipt, then select one of the following options:


GIFT RECEIPT

Press the spacebar to select items for the gift receipt.

ITEM ID	DESCRIPTION	UNIT PRICE
1006	ROLL SLEEVE SWEATER ...	$79.99
1008	DRAWSTRING PEASANT D...	$89.50
6006	Goose Down Pillow	$4.00
1004	BLK WHITE CAP SLEEVE ...	$69.50
1015	Signature Blue Jersey	$118.00

Figure 2-35: Items for Gift Receipts

Finish and Print option

- Select **Finish and Print** to print a gift receipt with the grouped items you selected.
  - ❑ If there are at least 2 or more gift items still available after setting up the grouping, you are prompted whether or not you want to print a separate gift receipt for each remaining gift item:
    - ❍ When prompted, select **Yes** to print a separate gift receipt for each remaining gift item.

      <OR>
    - ❍ Select **No** to print the remaining gift items on a single gift receipt.
  - ❑ If only 1 gift item is still available after setting up the grouping, the system automatically prints that gift item on a separate gift receipt.

Add Grouping option

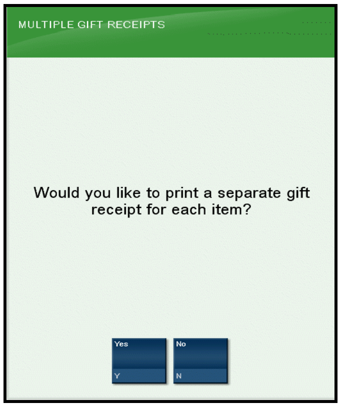
- Select **Add Grouping** to create multiple grouped gift receipts, beginning with the first group of gift items you selected.
  - ❑ The system then displays the gift item list again showing only the items that are still available for grouping. Select the gift items to be printed on the next gift receipt.
  - ❑ You can continue grouping the items using the **Add Grouping** option as long as there are at least two remaining items in the list.
  - ❑ When only one item remains in the list, the **Add Grouping** option is no longer available and a gift receipt for the remaining gift item is created.

- If there are two or more gift items still available after setting up the groupings, you are prompted whether or not you want to print a separate gift receipt for each remaining gift item:
  - When prompted, select **Yes** to print a separate gift receipt for each remaining gift item.

    <OR>
  - Select **No** to print the remaining gift items on a single gift receipt.

To Continue Without Grouping Gift Items

1. After selecting **No** at the Multiple Gift Receipts prompt (Figure 2-34), the system prompts whether or not you want to print a separate gift receipt for each gift item.



Would you like to print a separate gift receipt for each item?

Figure 2-36: Multiple Gift Receipts - Print Separate Receipts Prompt

2. Select one the following options:
   - Select **Yes** to print one gift receipt per gift item.
   - Select **No** to print a single gift receipt with all gift items.

Gift Receipts—After the Sale

If you have completed tendering a sale, you can find the original sale transaction information in the database and print gift receipts once the transaction has been located.

1. At the Register Login screen, select the **Receipt Reprint Options** option (Figure 2-28 on page 56) to print gift receipts for a completed transaction.
2. At the Receipt Reprint Options menu, select **Reissue Gift Receipt** to reissue only the Gift Receipts or select **Reprint Last Receipt** to print both the transaction sale receipt and the Gift Receipts.

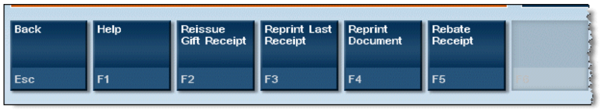


Figure 2-37: Receipt Reprint Options Menu

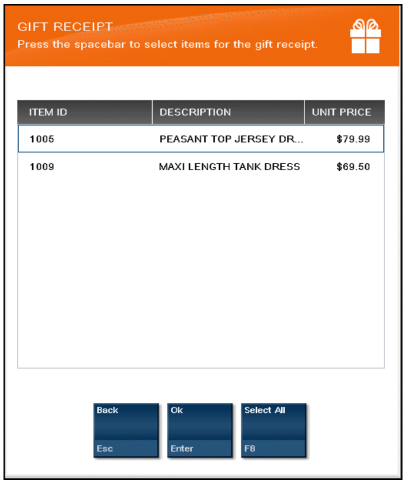
3. The system prompts for the original transaction barcode information. Scan the barcode on the original receipt or enter the barcode information.

T3HH4WW1131113I4ALYIQ

Enter or scan the transaction barcode.

Figure 2-38: Transaction Lookup Prompt

Xstore retrieves the item information from the original transaction and displays a list of the items eligible for a gift receipt.



Press the spacebar to select items for the gift receipt.

ITEM ID	DESCRIPTION	UNIT PRICE
1005	PEASANT TOP JERSEY DR...	$79.99
1009	MAXI LENGTH TANK DRESS	$69.50

Figure 2-39: List of Items Eligible for a Gift Receipt

4. Use the up and down arrow keys to select an item. Press the [Spacebar] to mark it for a gift receipt, or select the **Select All** option to print gift receipts for all listed items. Press [Enter] to continue.

> *Refer to "Multiple Gift Items - Grouping Items for Gift Receipts" on page 60 for more information about grouping items on gift receipts.*

5. Xstore prints gift receipts for the designated items.

CHAPTER 3

Return Transactions

Overview

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

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

With Original Receipt or Credit Card

Verified Returns (With Original Receipt or Credit Card)

If the customer has the original receipt or credit card, the system verifies that the receipt that accompanies the return, or the original credit card used in the sale, is found either on the local system or the home office system. When the original transaction is found, the system displays the original sale information in the View Port. 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:

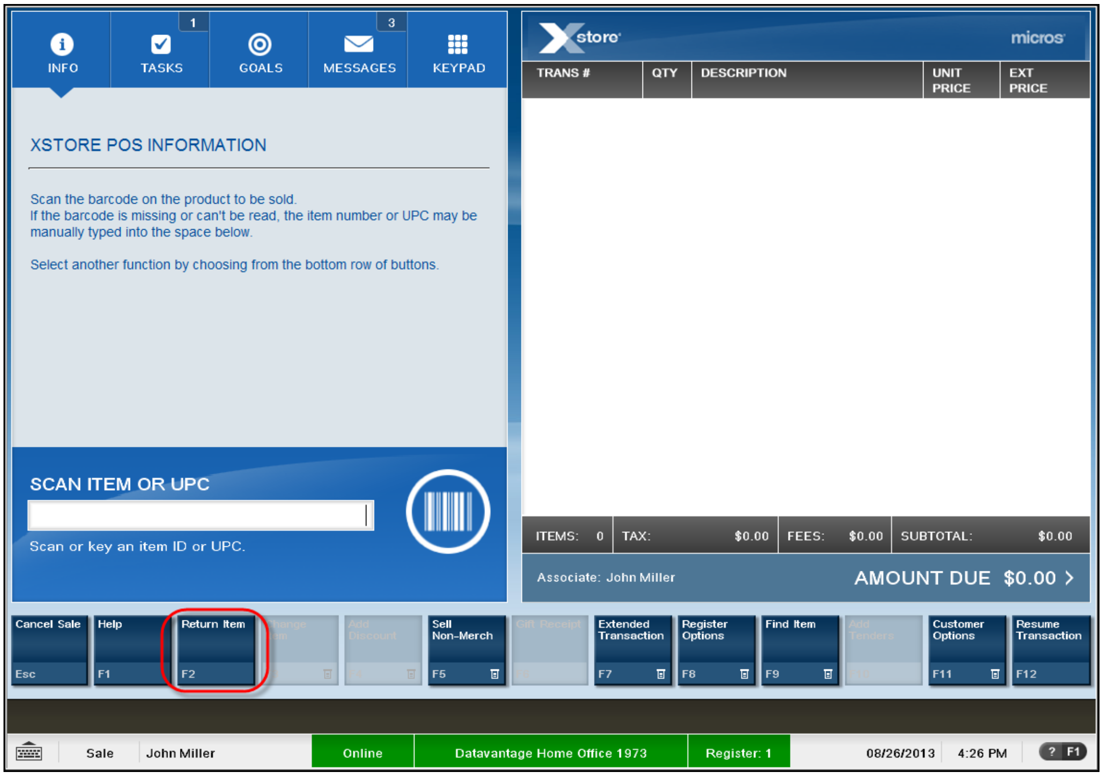
1. At the Register Sale screen, scan the barcode on the customer's original receipt. The system recognizes that this is a sale receipt barcode rather than an item identifier. If the original transaction is found in the database, the system immediately transitions to return mode and the original transaction information is shown on the View Port. Refer to "What happens if the original transaction is not found or is missing data?" on page 69 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 on page 70.

If you select the Return Item menu option:

1. At the Register Sale screen, select the **Return Item** option from the Register Sale menu. Perform the following steps to create a **verified** return.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Scan or key an item ID or UPC.

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Miller AMOUNT DUE $0.00

Sale John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 4:26 PM

Figure 3-1: Register Sale Screen

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

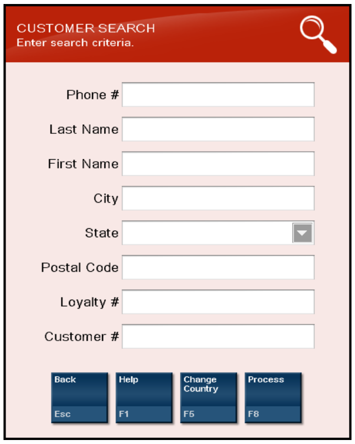
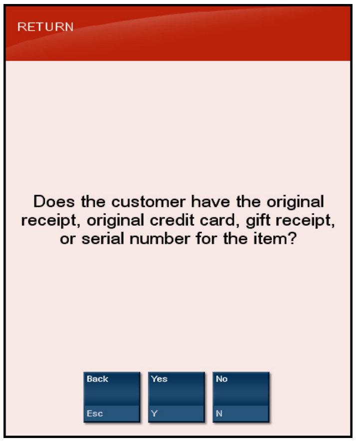


Figure 3-2: Customer Search Form

*For more information about the **Change Country** option on the Customer Search form, see “Search Form” on page 25.*

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 [Y] for Yes.



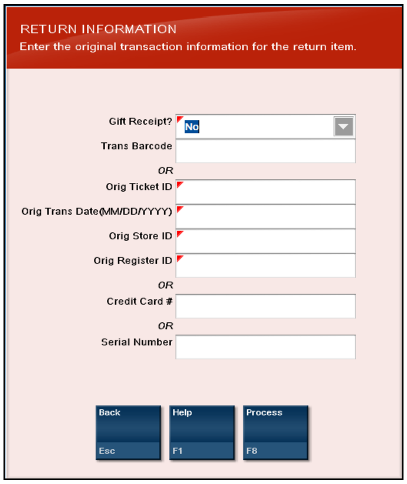
Does the customer have the original receipt, original credit card, gift receipt, or serial number for the item?

Figure 3-3: Return Original Receipt Prompt

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.

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

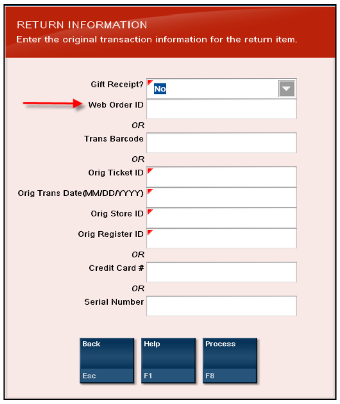


RETURN INFORMATION

Enter the original transaction information for the return item.

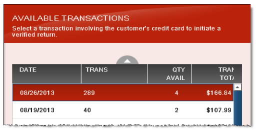
Gift Receipt? No

Figure 3-4: Original Transaction Return Information

> *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.*
>
> 
>
> RETURN INFORMATION
>
> Enter the original transaction information for the return item.
>
> Gift Receipt? No
>
>
>
> *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. Xstore 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.



AVAILABLE TRANSACTIONS

Select a transaction involving the customer's credit card to initiate a verified return.

DATE	TRANS	QTY AVAIL	TRAN TOT
08/26/2013	289	4	$166.84
08/19/2013	40	2	$107.99

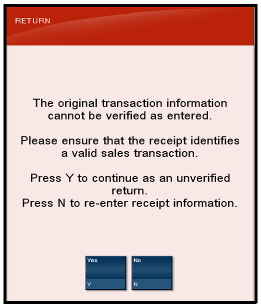
  Xstore displays the original item information in the View Port (Figure 3-5 on page 70).

- ❑ If you entered the receipt information, Xstore displays the original item information in the View Port.

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

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

- ■ Select **No** to enter/scan the receipt information again.
- ■ Select **Yes** to process the return as an unverified return. See “Entering Returns without Original Receipt” on page 73 for processing information



RETURN

The original transaction information cannot be verified as entered.

Please ensure that the receipt identifies a valid sales transaction.

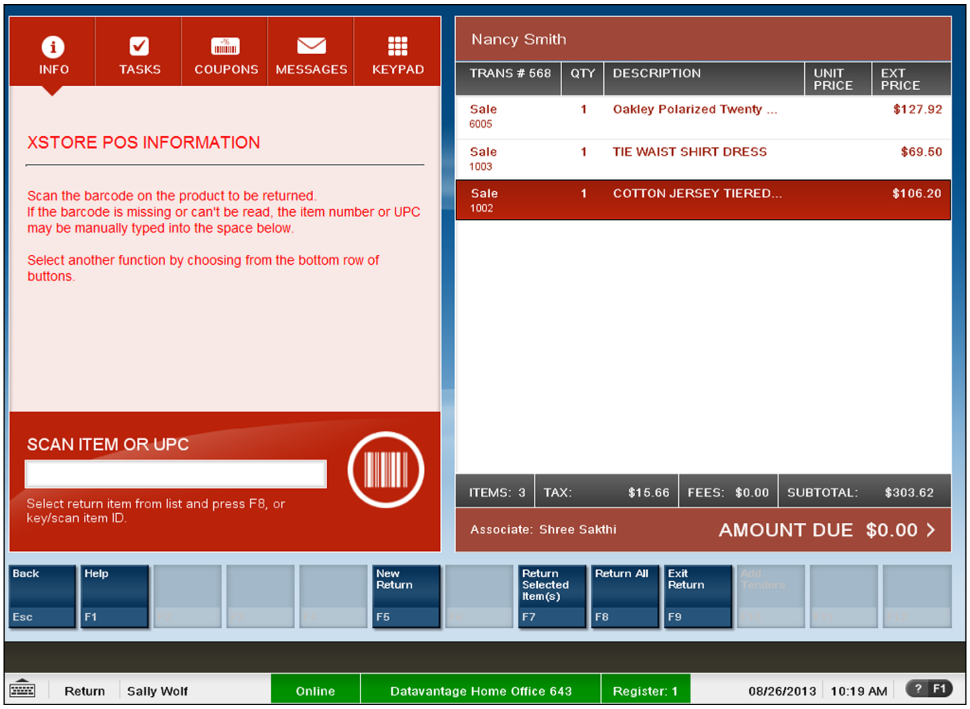
Press Y to continue as an unverified return.
Press N to re-enter receipt information.

If you want to search for the original transaction using the customer’s credit card, go to step 1 on page 66.

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” on page 73 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.



XSTORE POS INFORMATION

Scan the barcode on the product to be returned.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Select return item from list and press F8, or key/scan item ID.

Nancy Smith

TRANS # 568	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 6005	1	Oakley Polarized Twenty ...		$127.92
Sale 1003	1	TIE WAIST SHIRT DRESS		$69.50
Sale 1002	1	COTTON JERSEY TIERED...		$106.20

ITEMS: 3 TAX: $15.66 FEES: $0.00 SUBTOTAL: $303.62

Associate: Shree Sakthi AMOUNT DUE $0.00

Return Sally Wolf Online Datavantage Home Office 643 Register: 1 08/26/2013 10:19 AM

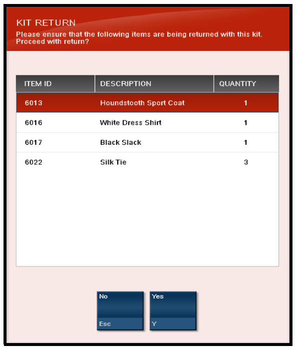
Figure 3-5: Original Transaction Information

Notes:

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

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

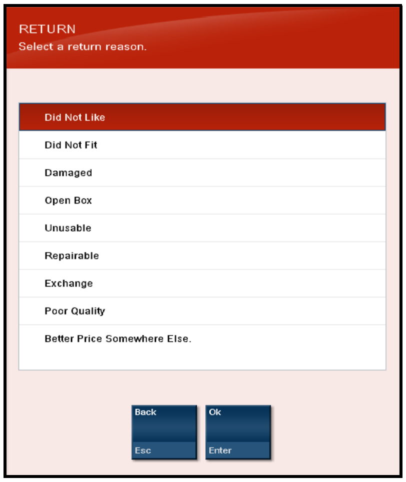
  Choose **Yes** to continue with the return process to return all component items from the Kit.



KIT RETURN
Please ensure that the following items are being returned with this kit. Proceed with return?

ITEM ID	DESCRIPTION	QUANTITY
6013	Houndstooth Sport Coat	1
6016	White Dress Shirt	1
6017	Black Slack	1
6022	Silk Tie	3

7. Xstore 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].

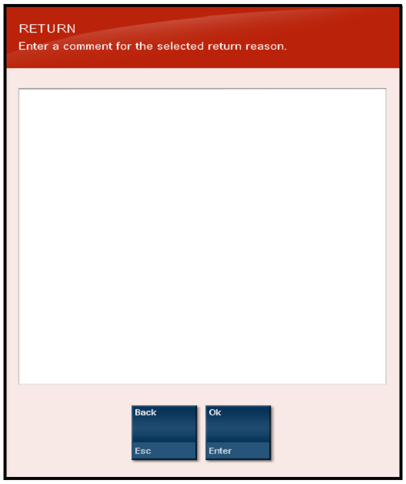


RETURN
Select a return reason.

- Did Not Like
- Did Not Fit
- Damaged
- Open Box
- Unusable
- Repairable
- Exchange
- Poor Quality
- Better Price Somewhere Else.

Figure 3-6: List of Return Reasons

8. Depending upon the return reason you chose, you may be prompted for additional information as shown in Figure 3-7 below. Enter the required information and press [Enter] to continue.



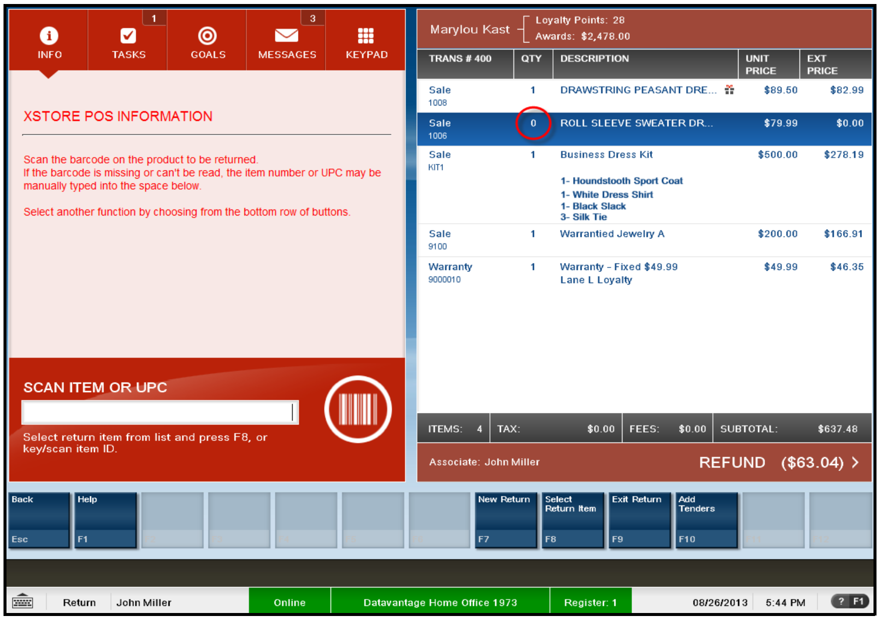
RETURN
Enter a comment for the selected return reason.

Figure 3-7: Return Comment Form

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

> *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.*

10. Xstore returns to the Register 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.



XSTORE POS INFORMATION

Scan the barcode on the product to be returned.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Select return item from list and press F8, or key/scan item ID.

Marylou Kast
Loyalty Points: 28
Awards: $2,478.00

TRANS # 400	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1008	1	DRAWSTRING PEASANT DRE...	$89.50	$82.99
Sale 1006	0	ROLL SLEEVE SWEATER DR...	$79.99	$0.00
Sale KIT1	1	Business Dress Kit 1- Houndstooth Sport Coat 1- White Dress Shirt 1- Black Slack 3- Silk Tie	$500.00	$278.19
Sale 9100	1	Warrantied Jewelry A	$200.00	$166.91
Warranty 9000010	1	Warranty - Fixed $49.99 Lane L Loyalty	$49.99	$46.35

ITEMS: 4 TAX: $0.00 FEES: $0.00 SUBTOTAL: $637.48

Associate: John Miller REFUND ($63.04)

Figure 3-8: Register Return Screen

11. 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. Refer to "Return Tenders (Refunds)" on page 118 for more information about tendering refund transactions.
- ❑ Select **Exit Return** to return to the Register Sale screen to continue selling items.
- ❑ Select **New Return** if the customer would like to return additional items that do not appear on this original receipt.

When the transaction is complete, the system prints receipts.

Entering Returns without Original Receipt

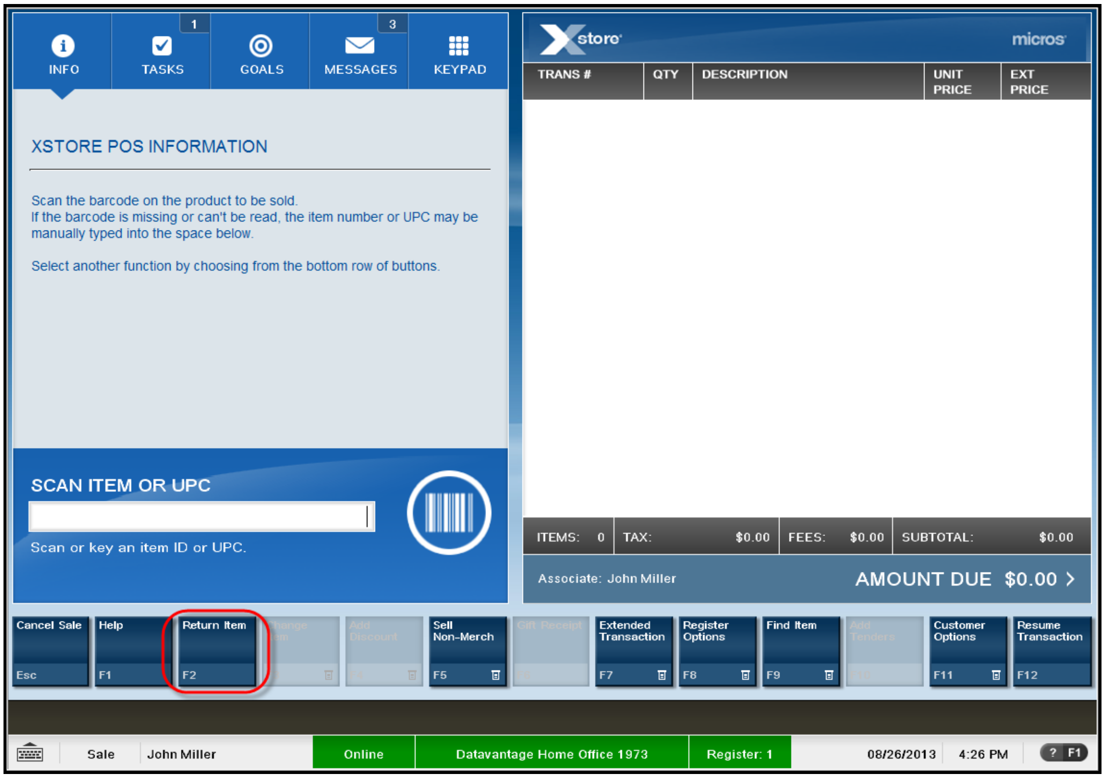
Blind Returns & Unverified Returns

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

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

> *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” on page 80.*

1. At the Register Sale screen, select the **Return Item** option from the Register Sale menu. Use the following steps to perform a **blind (or unverified)** return.



XSTORE POS INFORMATION

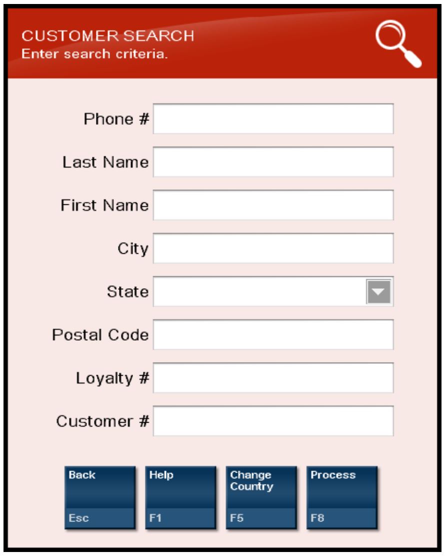
Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Scan or key an item ID or UPC.

Figure 3-9: Register Sale Screen Menu

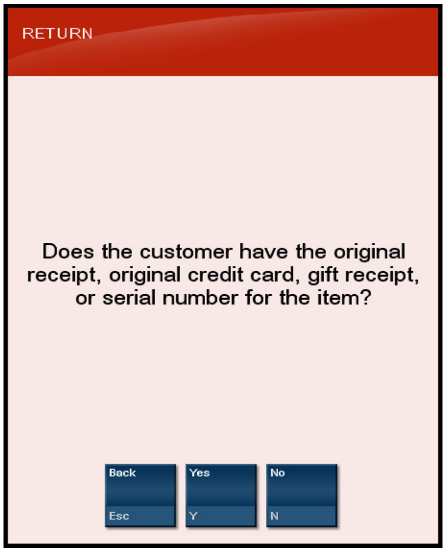
2. Depending upon your system's configuration, you may be prompted for customer information if a customer has not been associated with the current transaction. Enter the customer’s information and select the **Process** option.



CUSTOMER SEARCH
Enter search criteria.

Figure 3-10: Customer Search Form

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



RETURN

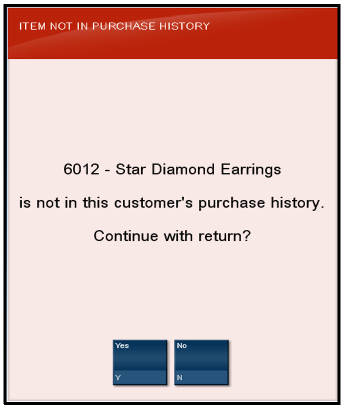
Does the customer have the original receipt, original credit card, gift receipt, or serial number for the item?

Figure 3-11: Return Original Receipt Prompt

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

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

   Go to step 7 below.



ITEM NOT IN PURCHASE HISTORY

6012 - Star Diamond Earrings

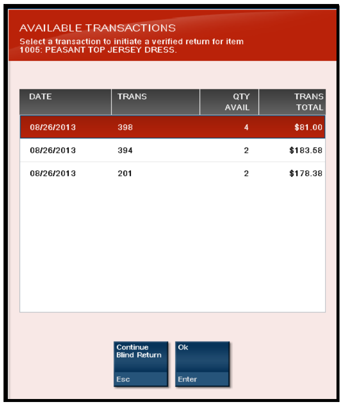
is not in this customer's purchase history.

Continue with return?

   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 on page 70.

   <OR>

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

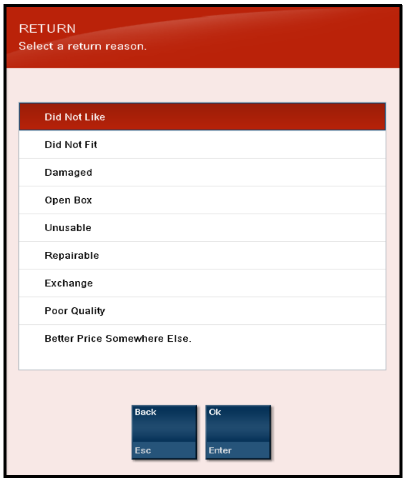


AVAILABLE TRANSACTIONS

Select a transaction to initiate a verified return for item 1005: PEASANT TOP JERSEY DRESS.

DATE	TRANS	QTY AVAIL	TRANS TOTAL
08/26/2013	398	4	$81.00
08/26/2013	394	2	$183.58
08/26/2013	201	2	$178.38

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



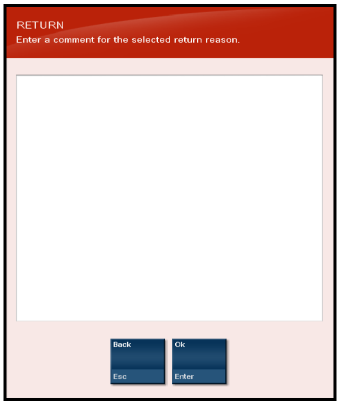
RETURN

Select a return reason.

- Did Not Like
- Did Not Fit
- Damaged
- Open Box
- Unusable
- Repairable
- Exchange
- Poor Quality
- Better Price Somewhere Else.

Figure 3-12: List of Return Reasons

8. Depending upon the return reason you chose, you may be prompted for additional information as shown in Figure 3-13 below. Enter the text of your comment and press [Enter] to continue.



RETURN

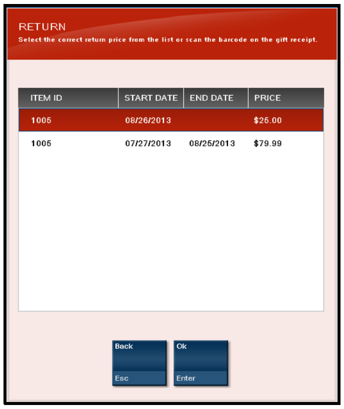
Enter a comment for the selected return reason.

Figure 3-13: 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.

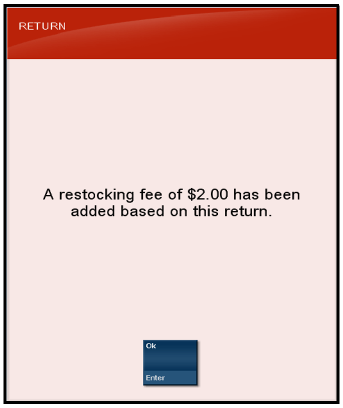


RETURN

Select the correct return price from the list or scan the barcode on the gift receipt.

ITEM ID	START DATE	END DATE	PRICE
1005	08/26/2013		$25.00
1005	07/27/2013	08/25/2013	$79.99

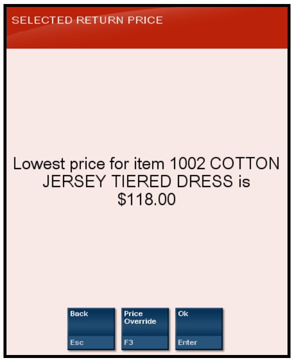
- ❑ A prompt may appear stating that a restocking fee has been added based on the item returned. This amount is deducted from the amount of the refund. Press [Enter] to continue.



RETURN

A restocking fee of $2.00 has been added based on this return.

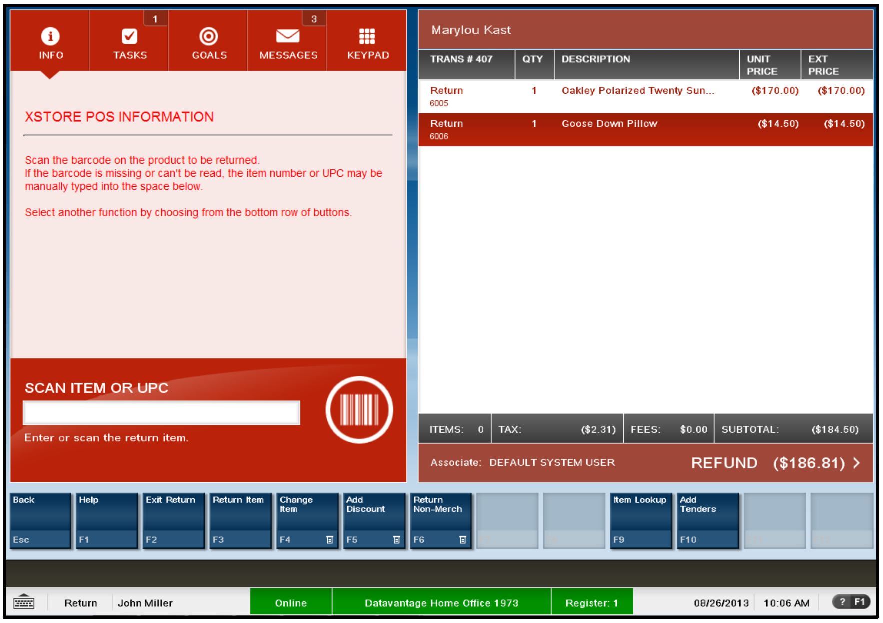
- ☐ The lowest price for the item may display. To override the price, select **Price Override**. A manager will need to enter an **Employee ID** and **Password** to override.



SELECTED RETURN PRICE

Lowest price for item 1002 COTTON JERSEY TIERED DRESS is $118.00

10. Xstore returns to the Register Return screen. When all return items have been entered, perform one of the following functions to complete the process:



XSTORE POS INFORMATION

Scan the barcode on the product to be returned.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Enter or scan the return item.

Marylou Kast

TRANS # 407	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Return 6005	1	Oakley Polarized Twenty Sun...	($170.00)	($170.00)
Return 6006	1	Goose Down Pillow	($14.50)	($14.50)

ITEMS: 0 TAX: ($2.31) FEES: $0.00 SUBTOTAL: ($184.50)

Associate: DEFAULT SYSTEM USER REFUND ($186.81)

Figure 3-14: Return Items Displayed in View Port

- ☐ Select **Add Tenders** or press [Enter] to tender the refund. Refer to "Return Tenders (Refunds)" on page 118.

> *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 Register 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 Line Items in a Sale” on page 216 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.

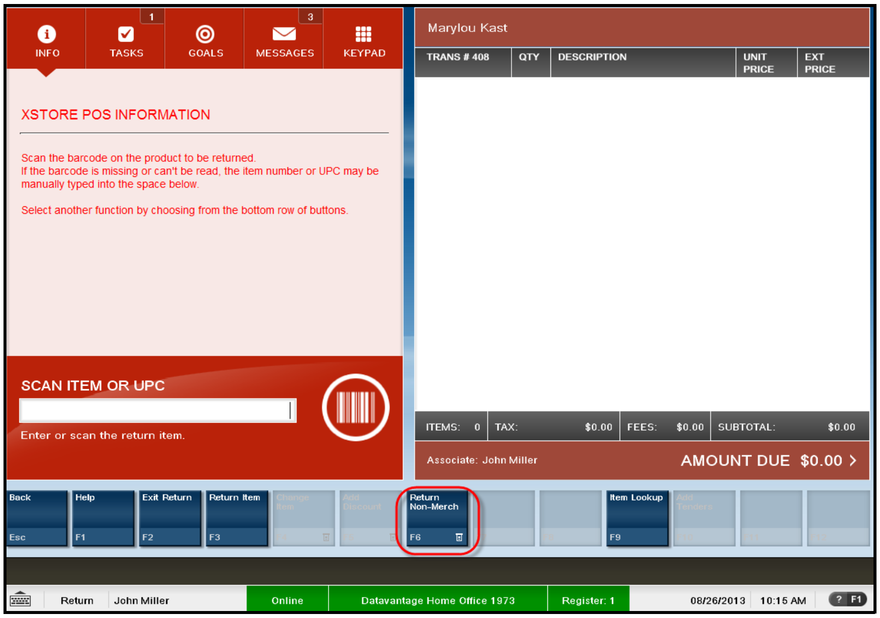
❑ Select **Return Non-Merch** to return a non-merchandise item.

❑ Select **Item Lookup** to find the Item ID for the return item. Refer to “Searching for Items Using Item Lookup” on page 187 for more information about looking up item information.

Returning Non-Merchandise Items Without a Receipt

1. At the Register Sale screen, select the **Return Item** option from the Register Sale menu. The system prompts you to specify whether or not the customer has a receipt or serial number for the return item.

2. Respond to the prompt by selecting **No**. After confirming that the customer does not have the original receipt, select the **Return Non-Merchandise** option from the Register Return screen.



XSTORE POS INFORMATION

Scan the barcode on the product to be returned.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Enter or scan the return item.

Marylou Kast

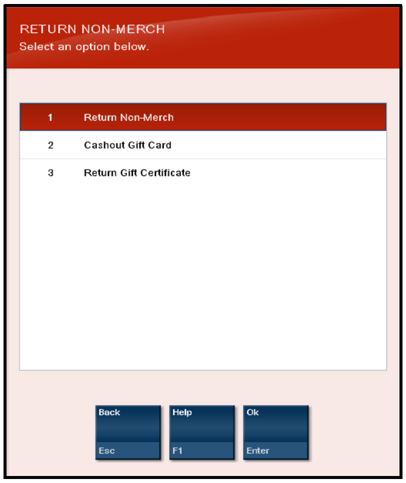
TRANS # 408	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Miller AMOUNT DUE $0.00

Figure 3-15: Register Return Screen

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

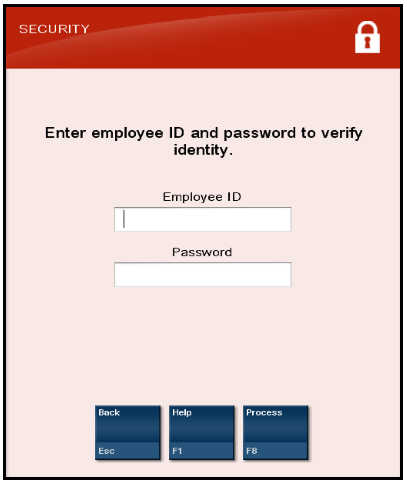


RETURN NON-MERCH
Select an option below.

1 Return Non-Merch
2 Cashout Gift Card
3 Return Gift Certificate

Figure 3-16: 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**.



SECURITY

Enter employee ID and password to verify identity.

Employee ID

Password

Figure 3-17: Security Verification Prompt

> *If your system is set up to use a Biometric Fingerprint device, use the device to scan your fingerprint rather than entering your user ID and password. However, keyed entry and card scan are also supported here.*

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. Refer to "Return Tenders (Refunds)" on page 118
   - ☐ Select **Exit Return** to return to the Register 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 Line Items in a Sale" on page 216" 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" on page 65.
- 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" on page 73.

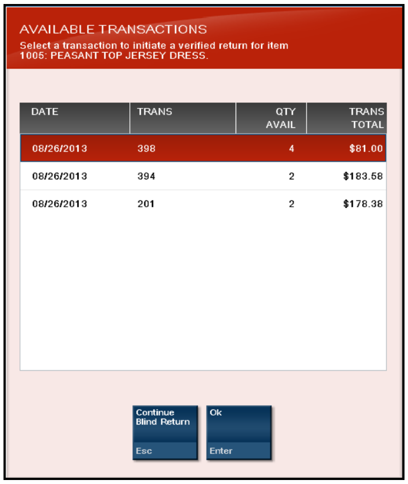
Perform the following steps to determine return item pricing using customer purchase history.

1. At the Register Sale screen, select the **Return Item** option from the Register Sale menu.
2. If a customer has not been associated with the current transaction, enter the customer's information when prompted and select the **Process** option.
3. When prompted if the customer has the original receipt or a gift receipt for the item, press [N] for 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.


AVAILABLE TRANSACTIONS

Select a transaction to initiate a verified return for item 1005: PEASANT TOP JERSEY DRESS.

DATE	TRANS	QTY AVAIL	TRANS TOTAL
08/26/2013	398	4	$81.00
08/26/2013	394	2	$183.58
08/26/2013	201	2	$178.38

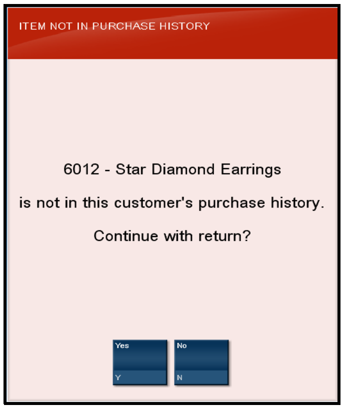
This Available Transaction list shows the following information for each transaction:

- **Date** – The original transaction business 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 on page 70 to complete the return.
- To use Blind Return processing rather than selecting the item from the customer’s purchase history record, select the **Continue Blind Return** menu option and go to step 5 on page 75 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.


ITEM NOT IN PURCHASE HISTORY

6012 - Star Diamond Earrings

is not in this customer's purchase history.

Continue with return?

- Select **Yes** to continue with a blind return. Go to step 5 on page 75.
  (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.

> *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” on page 227” for more information about changing taxes.

CHAPTER 4

Processing Tenders

Overview

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; i.e., cash, check, credit card, etc.)

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

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, select the **Add Tenders** option, or 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” on page 91.

- If you selected the **Add Tenders** option, Xstore displays a list of tender types as shown in Figure 4-1 and Figure 4-2 below.
- If your store uses PayPal, see "PayPal" on page 96 and Figure 4-23 on page 98.

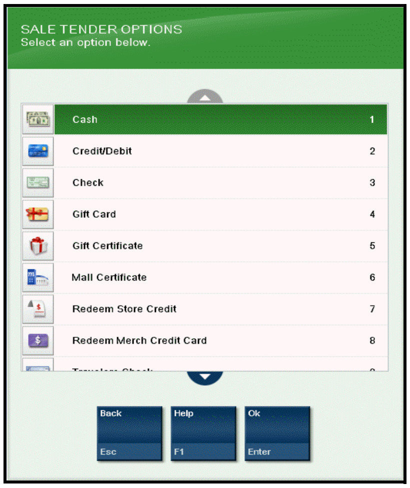


Figure 4-1: Sale Tender List

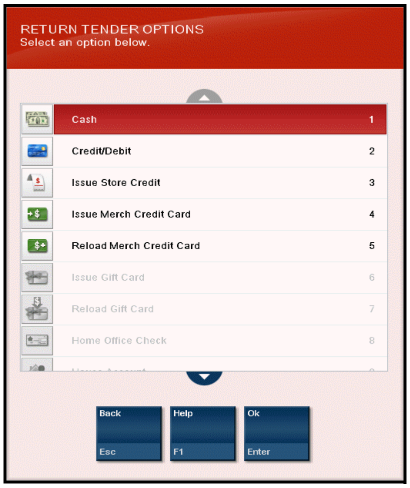


Figure 4-2: Refund Tender List

Use the up and down arrow keys to select a tender and press [Enter].

Your tender lists may be different from the examples shown here.

Sale Tenders

To tender a sale, refer to the section for the appropriate tender type as indicated below:

Tender Type	Refer To
Cash	"Cash" on page 85
Check	"Check (Personal)" on page 88
Credit/Debit Card	"Credit Card" on page 91, and "Debit Card" on page 96
PayPal	"PayPal" on page 96
Gift Certificate	"Gift Certificate" on page 102
Travelers Check	"Traveler's Check" on page 103
Foreign Currency	"Foreign Currency" on page 105
Redeem Store Credit	"Redeem Store Credit" on page 109

Tender Type	Refer To
Coupon	"Coupon Tender" on page 111
Redeem Merchandise Credit Card	"Redeem Merchandise Credit Card" on page 112
House Account	"House Account" on page 112
Gift Card	"Gift Card" on page 115
Room Charge	"Room Charge" on page 117

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]. See Figure 4-1 and Figure 4-2.

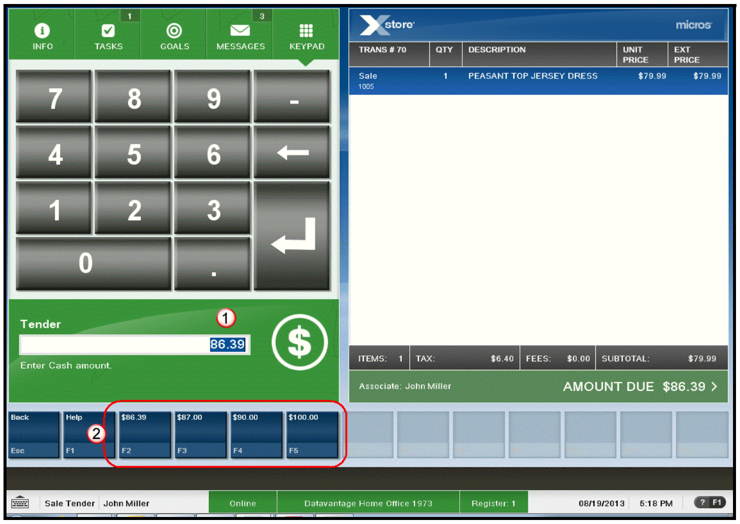
> *Depending upon the configuration of your system, the Cash Amount Due prompt may default to the total amount owed for the transaction.*

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

① Enter dollar amounts.

<OR>

② Choose one of the **Quick Cash** options.



TRANS # 70	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	$79.99	$79.99

ITEMS: 1 TAX: $6.40 FEES: $0.00 SUBTOTAL: $79.99

Associate: John Miller AMOUNT DUE $86.39

Tender 86.39

Enter Cash amount.

Sale Tender John Miller Online Datavantage Home Office 1973 Register: 1 08/19/2013 5:18 PM

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

If prompted, press [Y] for Yes to complete the transaction. Press [N] for No to return to the Sale Tender screen to re-tender with another tender type. See "Split Tenders" on page 133 for more information.

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

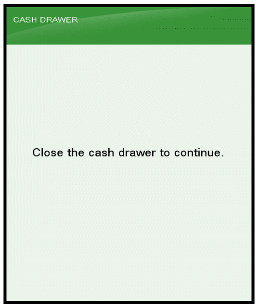
4. The system prints receipts as required.

> **Email Receipts**
>
> *If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54 for more information about sending email receipts.*

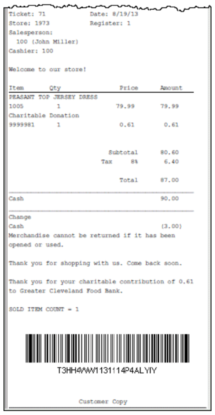
5. When you complete the sale, Xstore opens the cash drawer. You can accept money from the customer, place it in the cash drawer and return the change due amount, if the total of all tenders exceeds the amount due.

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

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



Close the cash drawer to continue.



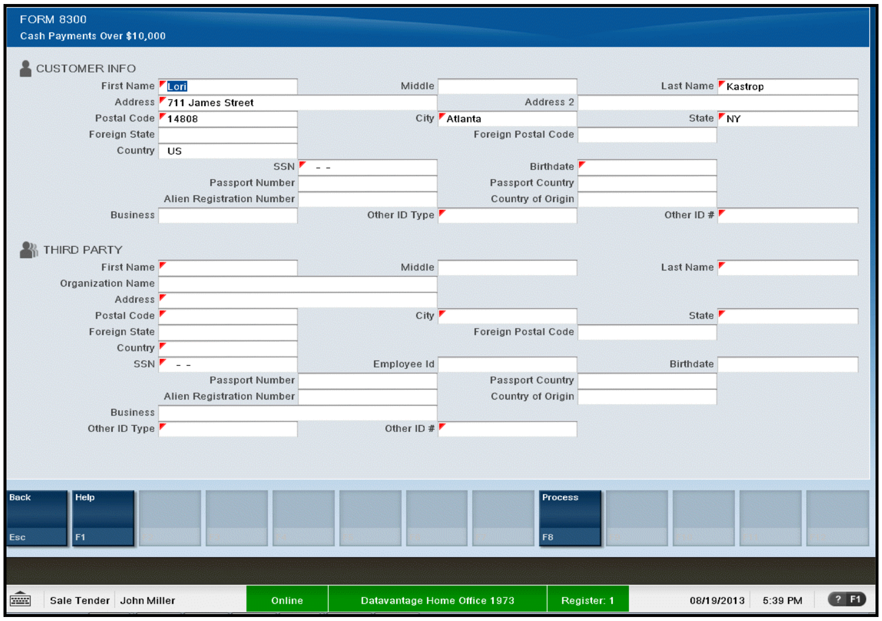
```
Ticket: 71              Date: 8/19/13
Store: 1973             Register: 1
Salesperson:
  100 (John Miller)
Cashier: 100

Welcome to our store!

Item       Qty                 Price      Amount
PEASANT TOP JERSEY DRESS
1005         1                 79.99       79.99
Charitable Donation
9999981      1                  0.61        0.61


                            Subtotal       80.60
                          Tax     8%        6.40

                               Total       87.00

Cash                                       90.00

Change
Cash                                      (3.00)
Merchandise cannot be returned if it has been
opened or used.

Thank you for shopping with us. Come back soon.

Thank you for your charitable contribution of 0.61
to Greater Cleveland Food Bank.

SOLD ITEM COUNT = 1

            T3HH4WW131114P4ALYIY

                Customer Copy
```

Figure 4-3: Customer Sale Receipt - Cash Tender Example

Large Cash Transactions; Greater Than $10,000

United States law requires that you submit IRS Form 8300 if you receive more than $10,000 cash in a single transaction. You must report the transaction to the IRS within 15 days of receipt of the cash. The law also requires that a properly filed Form 8300 that lists the correct cash payer's name, address and tax identification number. It must also include the amount of cash received, transaction date and nature of the transaction.

1. If the customer tenders a transaction with more than $10,000 in cash, the system automatically displays Form 8300. Complete all required fields.



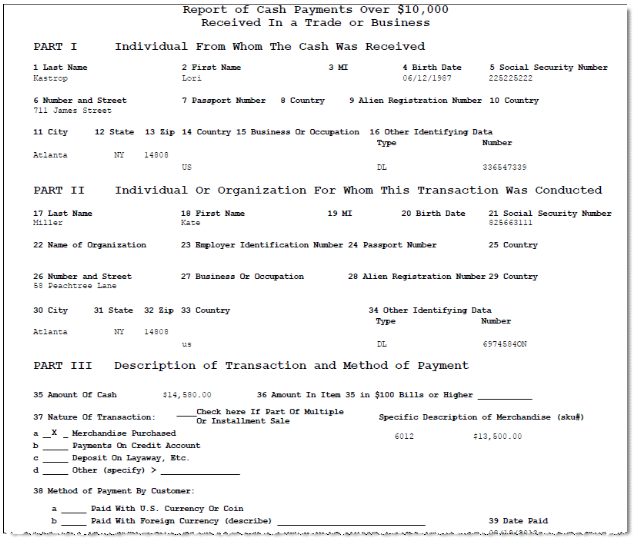
First Name: Lori
Last Name: Kastrop
Address: 711 James Street
Postal Code: 14808
City: Atlanta
State: NY
Country: US

Figure 4-4: IRS Form 8300

> *The system checks to see that all required fields have an entry. If you leave any required fields blank, the system does not allow you to leave this form.*

2. Select **Process** to continue.

The system prints copies of IRS Form 8300 as required by your store policy.



Report of Cash Payments Over $10,000
Received In a Trade or Business

PART I Individual From Whom The Cash Was Received

1 Last Name	2 First Name	3 MI	4 Birth Date	5 Social Security Number
Kastrop	Lori		06/12/1987	225225222

6 Number and Street: 711 James Street
7 Passport Number
8 Country
9 Alien Registration Number
10 Country

11 City	12 State	13 Zip	14 Country	15 Business Or Occupation	16 Other Identifying Data Type	Number
Atlanta	NY	14808	US		DL	336547339

PART II Individual Or Organization For Whom This Transaction Was Conducted

17 Last Name	18 First Name	19 MI	20 Birth Date	21 Social Security Number
Miller	Kate			825663111

22 Name of Organization
23 Employer Identification Number
24 Passport Number
25 Country

26 Number and Street: 58 Peachtree Lane
27 Business Or Occupation
28 Alien Registration Number
29 Country

30 City	31 State	32 Zip	33 Country	34 Other Identifying Data Type	Number
Atlanta	NY	14808	us	DL	6974584ON

PART III Description of Transaction and Method of Payment

35 Amount Of Cash $14,580.00
36 Amount In Item 35 in $100 Bills or Higher ___________

37 Nature Of Transaction: ____Check here If Part Of Multiple Or Installment Sale

a _X _ Merchandise Purchased
b _____ Payments On Credit Account
c _____ Deposit On Layaway, Etc.
d _____ Other (specify) > ________________

Specific Description of Merchandise (sku#)	
6012	$13,500.00

38 Method of Payment By Customer:

a _____ Paid With U.S. Currency Or Coin
b _____ Paid With Foreign Currency (describe) ______________________________
39 Date Paid

Figure 4-5: IRS Form 8300 Example

3. Continue with step 5 on page 86.

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 **Add Tenders** or press [Enter]. Xstore displays the Sale Tender list. Use the up and down arrow keys to select the **Check** option and then press [Enter].

> *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].

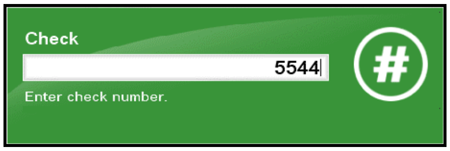
Check

Enter MICR number (Route# + Acc# + Check#).

Figure 4-6: Check MICR Number Prompt

> *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.



Check

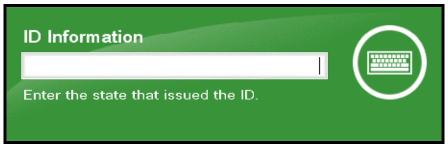
5544

Enter check number.

Figure 4-7: Check Number Prompt

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

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

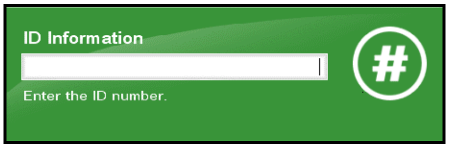


ID Information

Enter the state that issued the ID.

Figure 4-8: 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].



ID Information

Enter the ID number.

Figure 4-9: ID Prompt

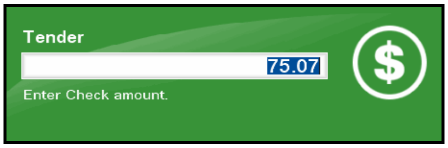
6. If prompted, enter the customer's birth date (as printed on the state-issued ID card) in the MM/DD/YYYY format and then press [Enter].

ID Information

Enter birth date. (Format: MM/DD/YYYY)

Figure 4-10: Check Birth Date Prompt

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



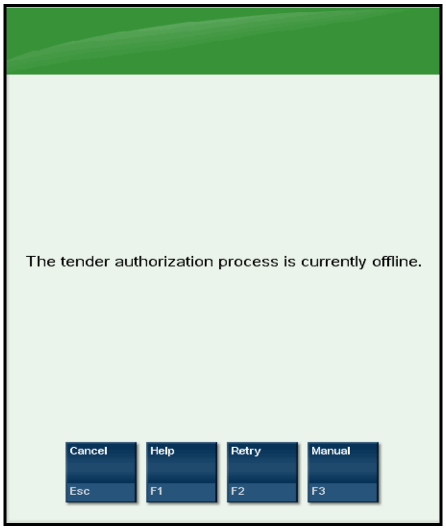
Tender

75.07

Enter Check amount.

Figure 4-11: Check Amount Prompt

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



The tender authorization process is currently offline.

Figure 4-12: Tender Authorization Offline Prompt

- Select the **Cancel** option to re-tender with another tender type. Xstore returns to the tender list where you can select a different tender type.
- Select the **Retry** option to attempt to process the check again.
- Select the **Manual** option 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 the **Ok** option 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 returns to the Sale Tender screen.

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54, for more information about sending email receipts.

The receipt indicates that the purchase was paid with a check and shows the check number and amount.

```
Welcome to our store!

Item       Qty                Price      Amount
BLK WHITE CAP SLEEVE DRESS
1004         1                69.50      69.50


                           Subtotal      69.50
                         Tax     8%       5.57

                              Total      75.07
- - - - - - - - - - - - - - - - - - - - - - - -
Check                                    75.07
    #5544
- - - - - - - - - - - - - - - - - - - - - - - -
Change                                    0.00
Merchandise cannot be returned if it has been
opened or used.

Thank you for shopping with us. Come back soon.

Sold Item Count = 1

              T3HH16W113111344AN91A

                 Customer Copy
```

Figure 4-13: Receipt Example - Personal Check Tender

If prompted, insert the check into the printer for franking, and press [Enter] if the system prompts you to do so. After franking is complete, remove the check from the printer, and press [Enter].

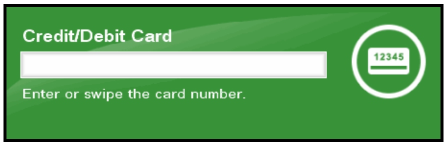
Credit Card

A Credit Card is a type of tender that can be exchanged for merchandise. If supported by your authorization processor, you can swipe the credit card through the magnetic stripe reader (MSR) without selecting a tender type when you are ready to tender the sale, or you can enter the information manually when prompted. Xstore prompts may vary depending on the payment system your store uses.

1. After all items have been entered or scanned, select **Add Tenders** or press [Enter]. Xstore displays the Sale Tender list. Use the up and down arrow keys to select the **Credit/Debit** option and then press [Enter].

If your processor does not allow credit card keyboard entry or MSR swiping, instruct the customer to swipe the card on the PIN pad device and skip to step 4 on page 92. Examples of processors that restrict keyboard and MSR entry include EFTLink and Tender Retail.

2. If prompted, swipe the credit card using the MSR or enter the card number manually and press [Enter].



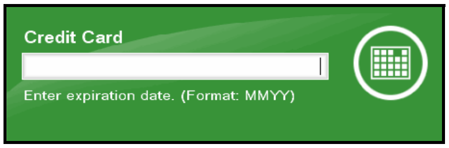
Credit/Debit Card

Enter or swipe the card number.

Figure 4-14: Credit/Debit Card Number Prompt

> *If you swipe the credit card, Xstore automatically captures the card number and expiration date. If you manually enter the credit card number, Xstore prompts for the expiration date. Xstore may display additional prompts based on your system's configuration such as a prompt for the Card Identification Data (CID) number or the customer's zip code.*

3. If prompted, enter the expiration date in MM/YY format and then press [Enter].

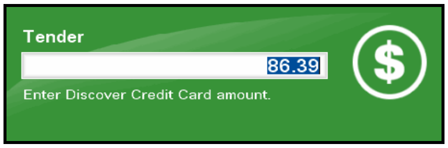


Credit Card

Enter expiration date. (Format: MMYY)

Figure 4-15: Credit Card Expiration Date Prompt

4. At the tender amount prompt, enter the tender amount, or accept the default amount due, and then press [Enter].



Tender

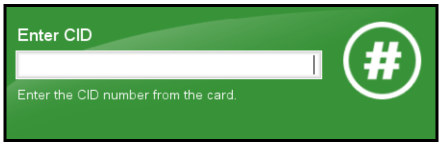
86.39

Enter Discover Credit Card amount.

Figure 4-16: Tender Amount Prompt

> **About Prepaid Cards:**
>
> *When tendering a transaction with a prepaid credit card, if the amount remaining on the customer's prepaid card is less than the amount owed, the transaction is credited with the remainder of the prepaid card balance. Another tender is then required to complete the sale. If the transaction is cancelled, the original amount is returned to the prepaid card.*

5. If prompted, enter the CID number found on the card:



Enter CID

Enter the CID number from the card.

Figure 4-17: Enter CID Prompt

- American Express Card

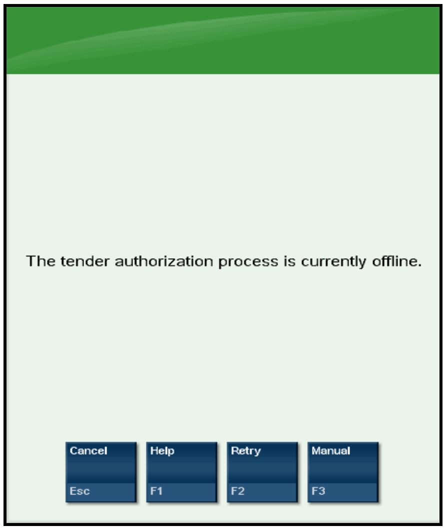
  Enter the 4-digit CID number (Verification Code). The CID can be found on the FRONT of the card, above the Credit Card number on either the right or the left side of the card number.

- Discover Card/MasterCard/Visa Card

  Enter the 3-digit CID number (Verification Code). The CID can be found on the BACK of the card. The full Credit Card number is located in the signature box and at the end of this number is the CID.

You may be prompted to wait while the credit card is processed.

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



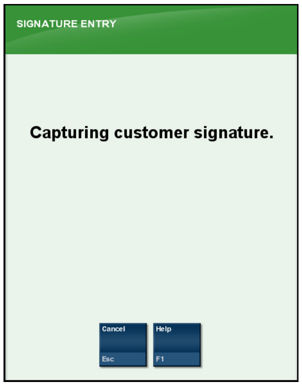
The tender authorization process is currently offline.

Figure 4-18: Tender Authorization Offline Prompt

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

7. To authorize the card manually, follow the instructions and enter the authorization number.

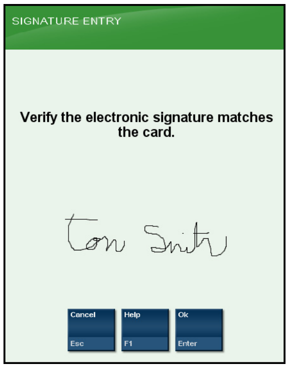
8. If applicable, wait while the customer signs the signature capture device.



Capturing customer signature.

Depending upon your store policy, the customer may not be prompted for a signature based on a store-defined transaction total limit.

9. If applicable, verify the customer's signature matches the signature on the credit card.



Verify the electronic signature matches the card.

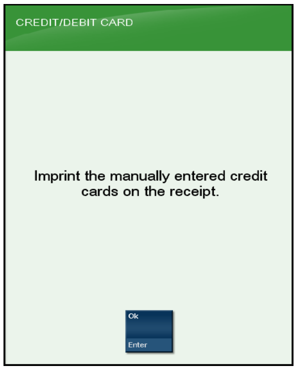
Figure 4-19: Electronic Signature

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54 for more information about sending email receipts.

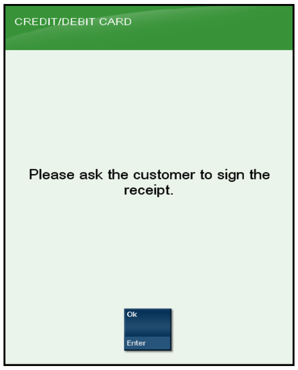
10. If prompted, select **Yes** to confirm the sale is complete.

11. If the credit card information was entered manually, a prompt displays asking you to imprint the manually entered credit card(s) on the receipt. Press [Enter] to continue.



Imprint the manually entered credit cards on the receipt.

Depending upon your system's configuration, you may see an additional prompt if the customer did not sign on the PIN pad device.

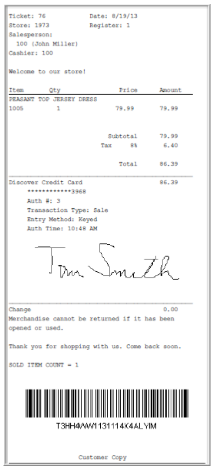


Please ask the customer to sign the receipt.

Figure 4-20: Prompt to Sign Receipt

12. Press [Enter] to complete the transaction.

13. If multiple receipts print, one is for the customer and one is for the store. The receipt with the customer signature line and credit card imprint area is for the store. The credit card type (Visa, MasterCard, etc.), credit card number (masked), and total amount charged appear on the receipt.



```
Ticket: 76            Date: 8/19/13
Store: 1973           Register: 1
Salesperson:
  100 (John Miller)
Cashier: 100

Welcome to our store!

Item       Qty              Price      Amount
PEASANT TOP JERSEY DRESS
1005         1              79.99       79.99


                         Subtotal       79.99
                       Tax     8%        6.40

                            Total       86.39
Discover Credit Card                    86.39
    ************3968
    Auth #: 3
    Transaction Type: Sale
    Entry Method: Keyed
    Auth Time: 10:48 AM

       Tom Smith

Change                                   0.00
Merchandise cannot be returned if it has been
opened or used.

Thank you for shopping with us. Come back soon.

SOLD ITEM COUNT = 1

          T3HH4WW1131114K4ALYIM


              Customer Copy
```

Debit Card

Debit cards are very similar to credit cards and many debit cards are also credit cards with popular credit card company logos. Debit cards differ from credit cards because they require a PIN number (personal identification number). The customer must enter the PIN number using a PIN pad device. The money is then deducted from the customer's primary account.

1. After all items have been entered or scanned, select **Add Tenders** or press [Enter]. Xstore displays the Sale Tender list.
2. Use the up and down arrow keys to select the **Credit/Debit** option and then press [Enter].
3. Swipe Debit card using the MSR or the PIN pad device.

> *Manual entry is not accepted.*
>
> *The order of steps 3 and 4 vary depending on the processor you are using. You may be prompted to enter the amount before swiping the card.*

4. If the customer's debit card can also be used as a credit card, the system prompts for the card type. The customer must select the **Debit** option on the PIN pad device and then press [Enter] to continue.
5. At the debit card amount prompt, enter the amount or accept the default amount due and then press [Enter].
6. After the customer swipes the debit card, the PIN pad device prompts the customer to enter the PIN number and then press [Enter]. Xstore displays a message while the customer enters the PIN number on the PIN pad device.

   The system processes the information and displays the **Sale Complete** message.

   The receipt indicates that the purchase was paid with a debit card and shows the amount tendered.

PayPal

PayPal is an online, mobile, phone, and email payment method.

1. The following options are available to tender with PayPal:

Table 4-1: *PayPal Tendering Options*

PayPal Option	Description
Swipe Card	From the Sale screen swipe the PayPal card, Xstore automatically reads it as a tender. You can swipe the card at any time during the transaction. When you are ready to tender select **Add Tenders** and proceed to step 4 on page 98. <OR> Select **Add Tenders** and then swipe or scan the PayPal card. Proceed to step 5 on page 98.

Table 4-1: *PayPal Tendering Options*

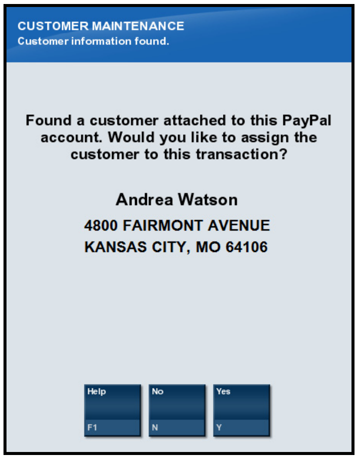
PayPal Option	Description
QR (Quick Response)	From the Sale screen scan the QR code from the customer's mobile device, Xstore automatically reads it as a tender. <OR> Select **Add Tenders** --> **Credit/Debit/QR code** and then scan the QR code. Proceed to step 5 on page 98.
Mobile Phone Number	Select **PayPal** on the PIN pad device. The PIN pad device prompts the customer to enter a **mobile phone number** and then press [Enter]. Proceed to step 5 on page 98.
Check-In	If the customer used PayPal's checking-in feature, see "PayPal Check-In" on page 100

2. The PIN pad device prompts the customer to enter the PIN number and then press [Enter].

An error message may display if the card has expired, the amount exceeds the spending limit, the customer did not sign up for point of sale, etc. You will be advised to have the customer use an alternative payment method.

The customer's PayPal card account may be set up to prompt for additional information such as zip code.

3. If the customer has a PayPal Loyalty Account, the following prompt displays after swiping the PayPal card:



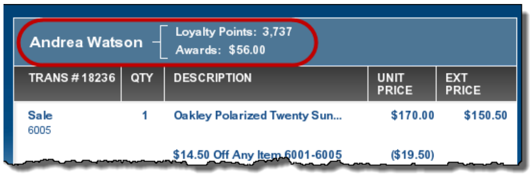
CUSTOMER MAINTENANCE
Customer information found.

Found a customer attached to this PayPal account. Would you like to assign the customer to this transaction?

Andrea Watson
4800 FAIRMONT AVENUE
KANSAS CITY, MO 64106

Figure 4-21: Customer Information Found

- ❑ Select **Yes** to assign the customer. The Loyalty information displays:



Andrea Watson — Loyalty Points: 3,737 Awards: $56.00

TRANS # 18236	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 6005	1	Oakley Polarized Twenty Sun...	$170.00	$150.50
		$14.50 Off Any Item 6001-6005	($19.50)	

Figure 4-22: PayPal Loyalty Information

- ❑ Select **No** to return to the Sale screen.

4. If you selected **Add Tenders**, select **PayPal Mobile Payment** from the list.

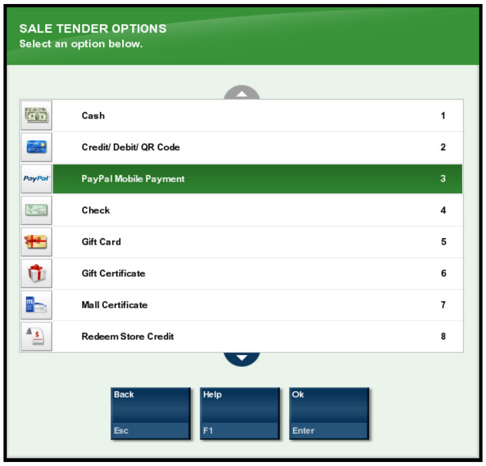
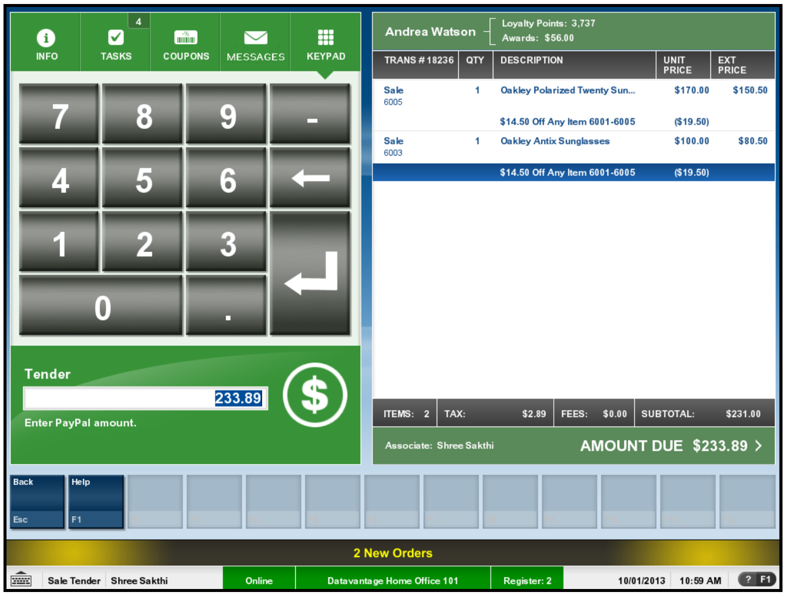


Figure 4-23: PayPal Mobile Payment Tender Option

5. The Tender prompt displays. Modify the PayPal tender amount if needed and then press [Enter].



Tender

233.89

Enter PayPal amount.

Andrea Watson — Loyalty Points: 3,737 Awards: $56.00

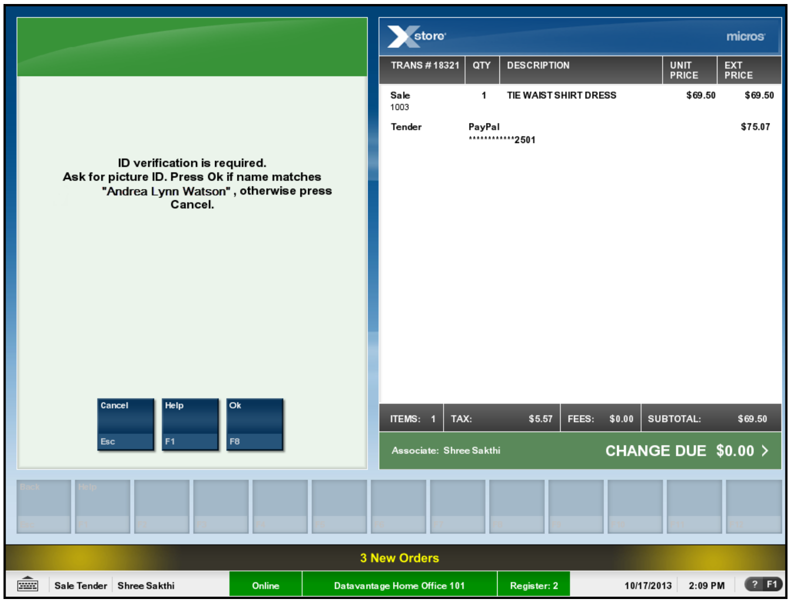
TRANS # 18236	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 6005	1	Oakley Polarized Twenty Sun...	$170.00	$150.50
		$14.50 Off Any Item 6001-6005	($19.50)	
Sale 6003	1	Oakley Antix Sunglasses	$100.00	$80.50
		$14.50 Off Any Item 6001-6005	($19.50)	

ITEMS: 2 TAX: $2.89 FEES: $0.00 SUBTOTAL: $231.00

Associate: Shree Sakthi AMOUNT DUE $233.89

Sale Tender | Shree Sakthi | Online | Datavantage Home Office 101 | Register: 2 | 10/01/2013 | 10:59 AM

6. The ID verification prompt displays. If the information matches, select **Ok**. If it does not, select **Cancel**.



ID verification is required.
Ask for picture ID. Press Ok if name matches "Andrea Lynn Watson" , otherwise press Cancel.

TRANS # 18321	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1003	1	TIE WAIST SHIRT DRESS	$69.50	$69.50
Tender	PayPal ************2501			$75.07

ITEMS: 1	TAX: $5.57	FEES: $0.00	SUBTOTAL: $69.50

Associate: Shree Sakthi

CHANGE DUE $0.00

Figure 4-24: PayPal ID Verification Prompt

7. The Sale Complete prompt may display. Select from the available options.

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

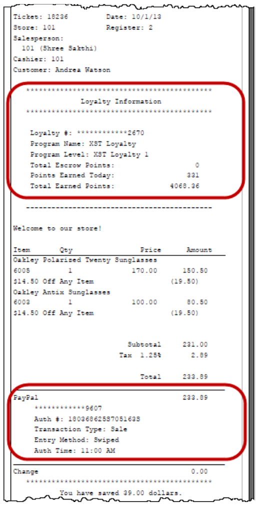
Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54 for more information about sending email receipts.

PayPal Wallet Receipt

Customers can elect to send their receipt to their PayPal wallet using the PIN pad device.

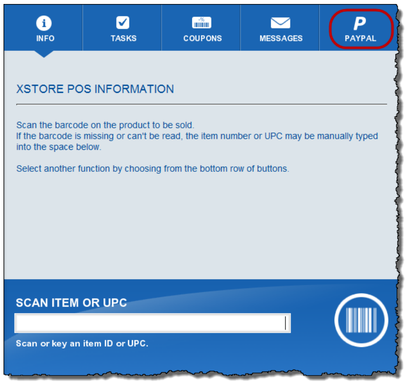
The receipt indicates PayPal was used to tender the sale. If the customer has a PayPal loyalty reward plan, the information prints on the receipt:



```
Ticket: 18236         Date: 10/1/13
Store: 101            Register: 2
Salesperson:
  101 (Shree Sakthi)
Cashier: 101
Customer: Andrea Watson

   ******************************************
              Loyalty Information
   ******************************************

    Loyalty #: ************2670
    Program Name: XST Loyalty
    Program Level: XST Loyalty 1
    Total Escrow Points:                  0
    Points Earned Today:                331
    Total Earned Points:            4068.36

   ------------------------------------------

Welcome to our store!

Item       Qty              Price      Amount
Oakley Polarized Twenty Sunglasses
6005        1              170.00     150.50
$14.50 Off Any Item                  (19.50)
Oakley Antix Sunglasses
6003        1              100.00      80.50
$14.50 Off Any Item                  (19.50)


                          Subtotal    231.00
                         Tax  1.25%     2.89

                             Total    233.89
PayPal                                233.89
     ************9607
     Auth #: 180368625S705163S
     Transaction Type: Sale
     Entry Method: Swiped
     Auth Time: 11:00 AM
Change                                  0.00
   ******************************************
          You have saved 39.00 dollars.
```

PayPal Check-In

1. To access a check-in customer either:
   - ☐ Select the **PayPal** tab located in the Message Window of the screen.



Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Scan or key an item ID or UPC.

Figure 4-25: PayPal Tab

<OR>

   - ☐ Select **Add Tender** --> **PayPal Mobile Payment**.

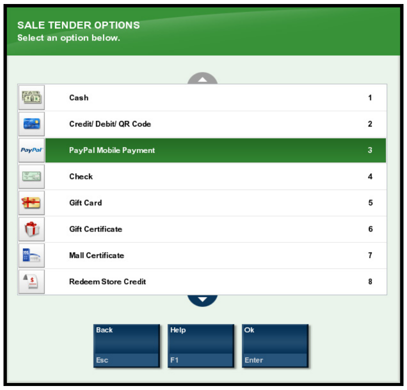
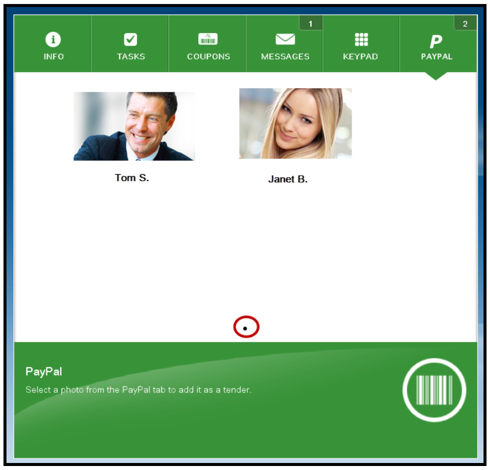


Figure 4-26: PayPal Tender Option

2. The **PayPal** tab displays. Verify the customer by photo, first name, and initial of last name. Select the customer's photo. Press [Enter].



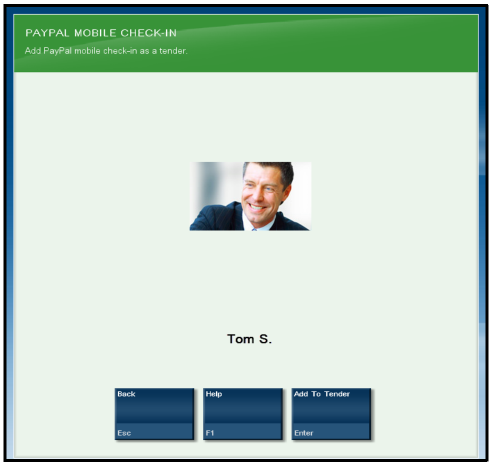
PayPal

Select a photo from the PayPal tab to add it as a tender.

Figure 4-27: PayPal Tab

Touch-screen users can swipe the page dot(s) (shown in figure above) to navigate multiple pages.

3. Select **Add To Tender**. Proceed to step 5 on page 98.


PAYPAL MOBILE CHECK-IN

Add PayPal mobile check-in as a tender.

Figure 4-28: PayPal Mobile Check In

Gift Certificate

Notes:

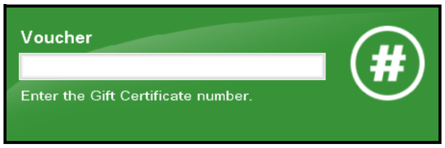
- The system records valid gift certificate numbers issued and their amounts. A warning displays if the number you enter is invalid.
- If your system is configured for gift certificate validation, it may access a remote authorization service or connect to the corporate system to validate the gift certificate number.
- When using a gift certificate to tender a transaction, Xstore first determines which currency the gift certificate is in. If this currency is different than your store’s local currency, then the foreign tender amount of the gift certificate is automatically converted to the local tender and amount using the current exchange rate on file. This localization is shown on the view port and printed on the receipt.

---

1. After all items are entered or scanned, select **Add Tenders** or press [Enter]. Xstore displays the Sale Tender list. Use the up and down arrow keys to select the **Gift Certificate** option and then press [Enter].

> *A similar type of tender that may be configured in your system is known as a* ***Mall Certificate****. It differs from a gift certificate in its ability to be used at any participating store, but it is processed as a gift certificate.*

2. Scan or enter the gift certificate number and press [Enter].



Enter the Gift Certificate number.

- ❑ If Xstore locates the gift certificate record, the gift certificate value is applied to the transaction automatically.
- ❑ If Xstore cannot locate the gift certificate record, Xstore prompts: Invalid Gift Certificate number entered. Select **Ok** and re-enter the voucher number. If needed, select **Esc** to return to the Sale Tender list.

3. The tender is processed as follows:

- ❑ If the gift certificate is worth more than the amount of the purchase, a store credit, gift card, cash, or other tender is issued as change for the remaining balance, depending upon your store’s policy.
- ❑ If the gift certificate does not cover the entire amount of the purchase, the screen automatically returns to the Sale Tender screen where you are prompted to choose another tender to make up the difference. Use the up and down arrow keys to select another tender and then press [Enter] to continue tendering the sale transaction.

4. At the Sale Complete prompt, press [Y] to print the receipt, or if applicable, receipts are sent in an email.

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54 for more information about sending email receipts.

The receipt shows the total due, the gift certificate number and amount, change due, balance due, and, if necessary, the tender type used to pay any balance due.

```
Welcome to our store!

Item        Qty                Price       Amount
COTTON JERSEY TIERED DRESS
1002         1                 70.00        63.00
10% Off Any non-Pric                       (7.00)


                             Subtotal       63.00
                           Tax     8%        5.04

                                Total       68.04
Gift Certificate                            50.00
     ***********0002
     Balance: 0.00
     Transaction Type: Sale
Cash                                        18.04

Change                                       0.00
   *******************************************
          You have saved 7.00 dollars.
   *******************************************

Merchandise cannot be returned if it has been
opened or used.

Thank you for shopping with us. Come back soon.

SOLD ITEM COUNT = 1

           T3HH4WW113111644ALYIM

               Customer Copy
```

Figure 4-29: Receipt Example - Gift Certificate Tender

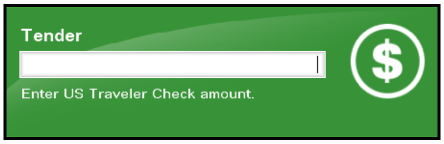
If prompted, insert the gift certificate into the printer for franking and follow the prompts to continue.

Traveler's Check

A traveler's check is a type of tender that is issued to an individual by a financial institution and can be exchanged for merchandise. Traveler's checks are issued in set denominations for example, $10.00, $20.00, $50.00, and $100.00.

1. After all items have been entered or scanned, select **Add Tenders** or press [Enter]. Xstore displays the Sale Tender list. Use the up and down arrow keys to select the **Traveler's Check** option and then press [Enter].

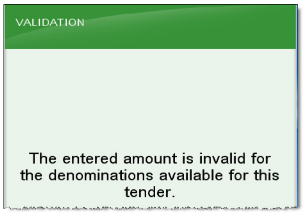
2. Enter the traveler's check amount and then press [Enter].



Enter US Traveler Check amount.

Figure 4-30: Traveler's Check Amount Prompt

Traveler's checks are issued in specific and pre-determined denominations. The system displays a message if you enter an invalid amount for this tender type.



The entered amount is invalid for the denominations available for this tender.

3. The traveler's check value is applied to the transaction:
   - If the traveler's check is worth more than the amount of the purchase, a store credit, gift card, cash, or other tender is issued as change for the remaining balance, depending upon your store policy.
   - If the traveler's check does not cover the entire amount of the purchase, the screen automatically returns to the Sale Tender screen where you are prompted to choose another tender to make up the difference. Use the up and down arrow keys to select another tender and then press [Enter] to continue tendering the sale transaction.
4. At the Sale Complete prompt, press [Y] to print the receipt.

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54 for more information about sending email receipts.

If prompted, place the traveler's check into the printer for franking and follow the prompts to continue.

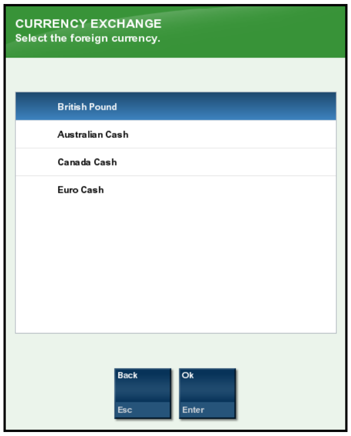
The receipt indicates that the purchase was paid with a traveler’s check and shows the amount of the check.

```
Welcome to our store!

Item       Qty                Price      Amount
DRAWSTRING PEASANT DRESS
1008         1               89.50       89.50


                          Subtotal       89.50
                       Tax      8%        7.17

                             Total       96.67

US Traveler Check                       100.00

Change
Cash                                    (3.33)
Merchandise cannot be returned if it has been
opened or used.

Thank you for shopping with us. Come back soon.

SOLD ITEM COUNT = 1

          T3HH4WW13111664ALYIY


                Customer Copy
```

Foreign Currency

When sales are tendered in a foreign currency, the amount entered is automatically converted to your local currency. Any change due to the customer displays in local currency.

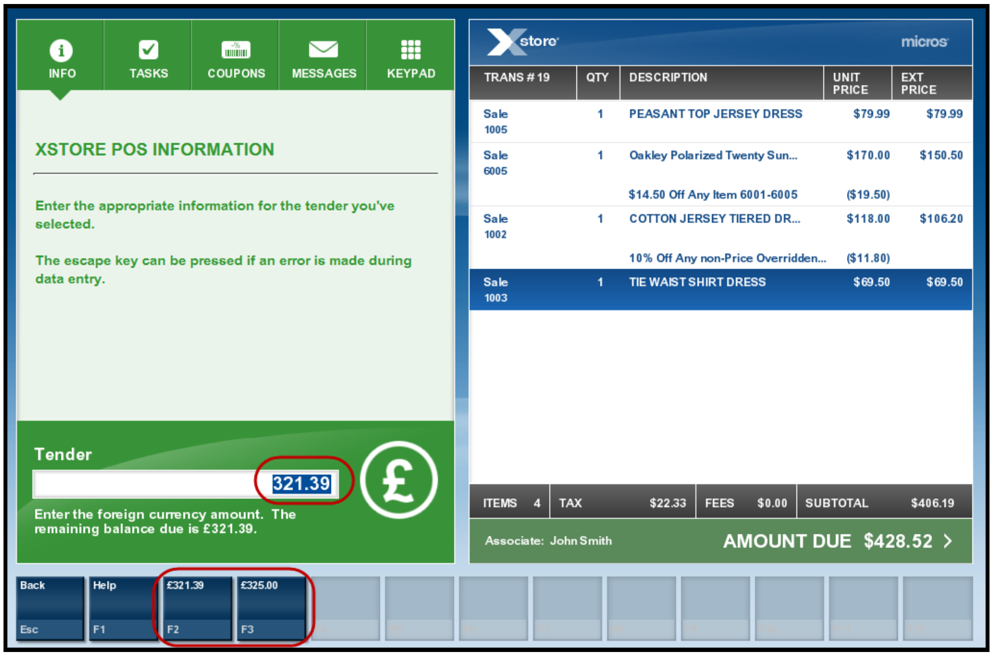
1. After all items have been entered or scanned, select **Add Tenders** or press [Enter]. Xstore displays the Sale Tender list. Use the up and down arrow keys to select the **Foreign Currency** option and then press [Enter].
2. Xstore displays a list of the foreign tender types accepted at your store. Use the up and down arrow keys to select the type of foreign currency received and then press [Enter].



CURRENCY EXCHANGE
Select the foreign currency.

Figure 4-31: List of Foreign Currency Types Accepted

3. Enter the foreign currency amount you received from the customer and then press [Enter], or select one of the Quick Cash buttons from the menu. The prompt shows the foreign tender amount required to fulfill the balance owed.



XSTORE POS INFORMATION

Enter the appropriate information for the tender you've selected.

The escape key can be pressed if an error is made during data entry.

Tender: 321.39

Enter the foreign currency amount. The remaining balance due is £321.39.

TRANS # 19	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	$79.99	$79.99
Sale 6005	1	Oakley Polarized Twenty Sun...	$170.00	$150.50
		$14.50 Off Any Item 6001-6005	($19.50)	
Sale 1002	1	COTTON JERSEY TIERED DR...	$118.00	$106.20
		10% Off Any non-Price Overridden...	($11.80)	
Sale 1003	1	TIE WAIST SHIRT DRESS	$69.50	$69.50

ITEMS 4 TAX $22.33 FEES $0.00 SUBTOTAL $406.19

Associate: John Smith AMOUNT DUE $428.52

Figure 4-32: Foreign Currency Amount Prompt/Quick Cash Buttons

The foreign currency amount you enter is converted to the local currency and shown on the View Port.

If the foreign currency amount does not cover the entire purchase amount, you must select another tender type and enter the additional amount to cover the remaining balance.

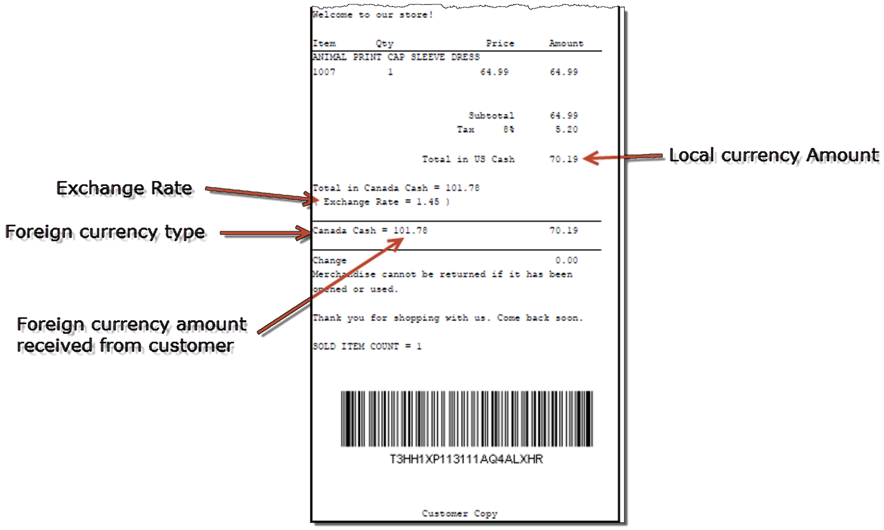
4. At the Sale Complete prompt, press [Y] to print the receipt.

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54 for more information about sending email receipts.

5. If the customer would like to receive the change due as foreign currency, follow the instructions in "Foreign Currency as Change" on page 107).

The receipt indicates which foreign currency was tendered in the transaction. Also included are the total currency tendered, the exchange rate, the converted amount in local currency, and change due in local currency.



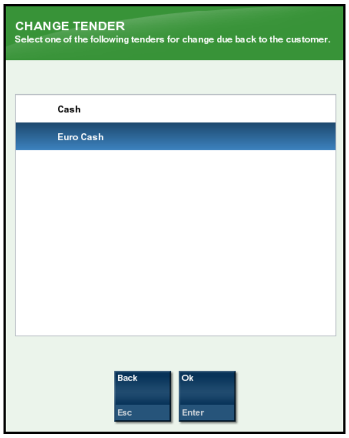
```
Welcome to our store!

Item        Qty                Price      Amount
ANIMAL PRINT CAP SLEEVE DRESS
1007         1                 64.99       64.99


                            Subtotal       64.99
                          Tax     8%        5.20

                    Total in US Cash       70.19

Total in Canada Cash = 101.78
( Exchange Rate = 1.45 )

Canada Cash = 101.78                       70.19

Change                                      0.00
Merchandise cannot be returned if it has been
opened or used.

Thank you for shopping with us. Come back soon.

SOLD ITEM COUNT = 1


            T3HH1XP113111AQ4ALXHR


                  Customer Copy
```

Figure 4-33: Receipt Example - Foreign Currency with Local Change

Foreign Currency as Change

Xstore can be configured to provide certain foreign currency as change when a customer tenders with foreign currency.

1. If your store allows change to be given in foreign currency, the system prompts with a list of any foreign tenders that were used in the transaction as well as the local currency. Select from the list and press [Enter].

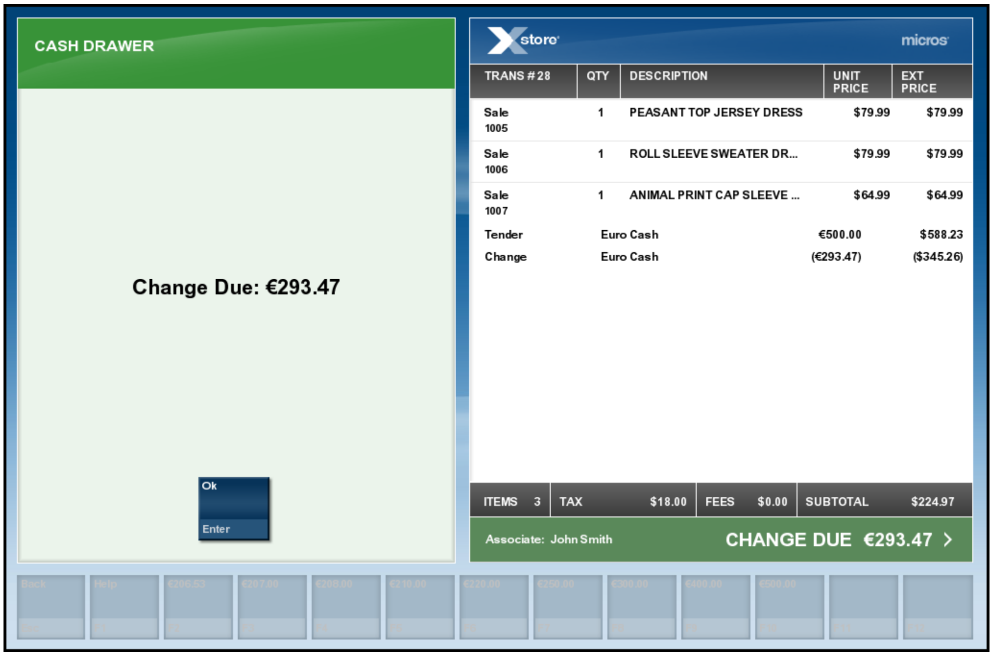


CHANGE TENDER

Select one of the following tenders for change due back to the customer.

If the amount due exceeds the cash change limit, Xstore will prompt for the tender your home office has configured. For example, your store may be configured to issue a store credit when the amount exceeds the cash change limit.

- ❑ If there is enough Foreign Cash in the till, a prompt displays indicating the amount of foreign currency due.



Change Due: €293.47

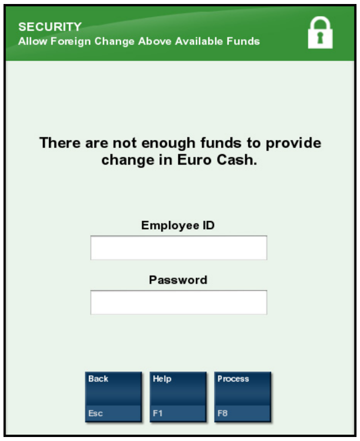
TRANS # 28	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	$79.99	$79.99
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99
Sale 1007	1	ANIMAL PRINT CAP SLEEVE ...	$64.99	$64.99
Tender		Euro Cash	€500.00	$588.23
Change		Euro Cash	(€293.47)	($345.26)

ITEMS 3 TAX $18.00 FEES $0.00 SUBTOTAL $224.97

Associate: John Smith CHANGE DUE €293.47

Figure 4-34: Change Due

- ❑ If there is ***not*** enough Foreign Cash Currency in the till, the transaction will either require a manager’s override or you will have to select a different currency.



There are not enough funds to provide change in Euro Cash.

Employee ID

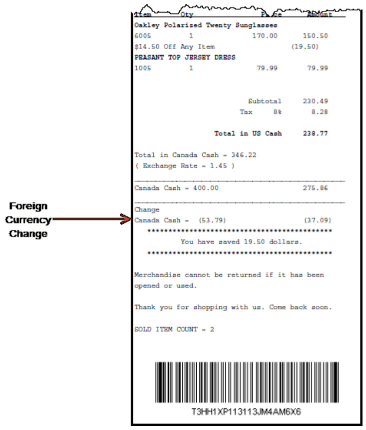
Password

Figure 4-35: Not Enough Funds - Override Allowed

  - ❍ If a manager override is allowed, a manager must enter an **Employee ID** and **Password** to override.
  - ❍ If a manager override is not allowed, select the **Back** button to display the cash currency list available to provide as change.

2. Close the cash drawer to continue and press [Enter].

3. At the Sale Complete prompt, press [Y] to print the receipt. The receipt indicates the currency provided as change.



```
Item         Qty               P  ce      Amount
Oakley Polarized Twenty Sunglasses
6005          1               170.00      150.50
$14.50 Off Any Item                      (19.50)
PEASANT TOP JERSEY DRESS
1005          1                79.99       79.99


                            Subtotal      230.49
                          Tax     8%        8.28

                      Total in US Cash    238.77

Total in Canada Cash = 346.22
( Exchange Rate = 1.45 )
------------------------------------------------
Canada Cash = 400.00                      275.86
------------------------------------------------
Change
Canada Cash =  (53.79)                   (37.09)
   ****************************************
          You have saved 19.50 dollars.
   ****************************************

Merchandise cannot be returned if it has been
opened or used.

Thank you for shopping with us. Come back soon.

SOLD ITEM COUNT = 2

T3HH1XP113113JM4AM6X6
```

Foreign Currency Change

Figure 4-36: Foreign Currency with Foreign Change Receipt

If you made a mistake and selected the wrong foreign tender, a tender exchange will need to be performed. See "Tender Exchange" on page 473.

Redeem Store Credit

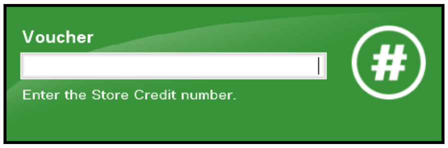
Notes:

- The system maintains a record of valid store credit numbers and their amounts. A warning message displays if the store credit number is invalid.
- If your system is configured for corporate store credit validation, the system connects to the corporate system and validates the store credit number.
- When a store credit is used to tender a transaction, Xstore first determines which currency the store credit is in. If this currency is different than your store's local currency, then the foreign tender amount of the store credit is automatically converted to the local tender and amount using the current exchange rate on file. This localization is shown on the view port and printed on the receipt.

1. When all items have been entered or scanned, press [Enter] or select **Add Tenders**.

2. Use the up and down arrow keys to select the **Redeem Store Credit** option and then press [Enter].

3. Scan or type the store credit serial number found on the credit document and then press [Enter].



Enter the Store Credit number.

Figure 4-37: Store Credit Number Prompt

4. Xstore retrieves the store credit amount from the database and applies the store credit value to the transaction:
    - ❑ If the store credit is worth more than the amount of the purchase, a store credit, gift card, cash, or other tender is issued as change for the remaining balance, depending upon your store’s policy.
    - ❑ If the store credit does not cover the entire amount of the purchase, the screen automatically returns to the Sale Tender screen where you are prompted to choose another tender to make up the difference. Use the up and down arrow keys to select another tender and then press [Enter] to continue tendering the sale transaction.
5. At the Sale Complete prompt, press [Y] to print the receipt.

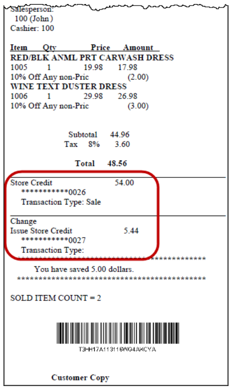
Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, “Email Receipt Options” on page 54 for more information about sending email receipts.

If prompted, press [Enter] to close the Remember to sign the store credit voucher message.

If prompted, insert the store credit document into the printer for franking and follow the prompts to continue.

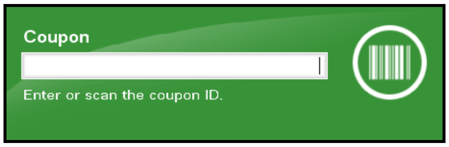
The receipt shows the total due, the store credit number (masked) and amount, balance due and, if necessary, the tender type used to pay the balance due. In this example, change due was issued as another store credit.



```
Salesperson:
 100 (John)
Cashier: 100

Item     Qty          Price    Amount
RED/BLK ANML PRT CARWASH DRESS
1005      1          19.98     17.98
10% Off Any non-Pric            (2.00)
WINE TEXT DUSTER DRESS
1006      1          29.98     26.98
10% Off Any non-Pric            (3.00)


              Subtotal    44.96
              Tax    8%    3.60

                Total     48.56
Store Credit                54.00
   ***********0026
   Transaction Type: Sale
Change
Issue Store Credit           5.44
   ***********0027
   Transaction Type:
   ********************************************
       You have saved 5.00 dollars.
   ********************************************

SOLD ITEM COUNT = 2

              T3HH17A113116WG4AKCYA

          Customer Copy
```

Coupon Tender

1. When all items have been entered or scanned in a sale transaction, press [Enter] or select **Add Tenders**. Use the up and down arrow keys to select the **Coupon** tender option and then press [Enter].
2. Scan or type the coupon serial number found on the coupon and then press [Enter].

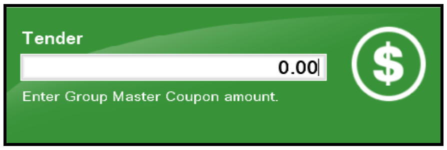


Coupon

Enter or scan the coupon ID.

Figure 4-38: Coupon ID Prompt

3. Depending upon the coupon type, you may be prompted to enter the coupon value. If prompted, enter the coupon amount and press [Enter].



Tender

0.00

Enter Group Master Coupon amount.

Figure 4-39: Coupon Amount Prompt

4. Xstore applies the coupon value to the transaction:
   - If the coupon is worth more than the amount of the purchase, a store credit, gift card, cash, or other tender may be issued as change for the remaining balance, depending upon your store policy.
   - If the coupon does not cover the entire amount of the purchase, the system automatically returns to the Sale Tender screen where you are prompted to choose another tender to make up the difference. Use the up or down arrow keys to select another tender and then press [Enter] to continue tendering the sale transaction.
5. At the Sale Complete prompt, press [Y] to print the receipt.

Email Receipts

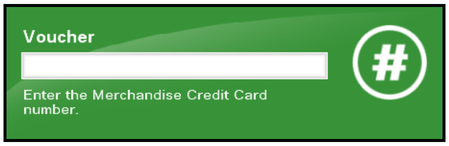
If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54 for more information about sending email receipts.

If prompted, insert the coupon into the printer for franking and follow the prompts to continue.

The receipt shows the total due, the coupon number and amount, change due, balance due and, if necessary, the tender type used to pay any balance due.

Redeem Merchandise Credit Card

1. When all items have been entered or scanned in a sale transaction, press [Enter] or select **Add Tenders**. Use the up and down arrow keys to select the **Redeem Merch Credit Card** tender option and then press [Enter].
2. At the merchandise credit card number prompt, enter the card number and press [Enter].



Voucher

Enter the Merchandise Credit Card number.

Figure 4-40: Merchandise Credit Card Number Prompt

3. At the merchandise credit card amount prompt, enter the amount or accept the default amount due and then press [Enter].
    - The system maintains a record of valid merchandise credit card numbers and their amounts. A warning message displays if the merchandise credit card is invalid.
    - If your system is configured for corporate merchandise credit card validation, the system may access a remote authorization service or a corporate system to validate the merchandise credit card.
4. The information is processed, and when complete, a prompt displays asking if the sale is complete. Press [Y] for Yes to continue and complete the sale.

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54 for more information about sending email receipts.

The receipt indicates that the purchase was paid with a merchandise credit card, shows the amount tendered, and the change received.

House Account

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

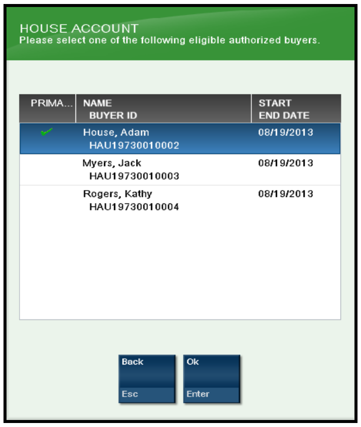
A customer cannot over tender (pay more than the amount total) using a house account as payment.

1. When all items have been entered or scanned in a sale transaction, press [Enter] or select **Add Tenders**. Use the up and down arrow keys to select the **House Account** tender option and then press [Enter].

Notes:

- If there is no customer assigned to the transaction, you are prompted to add one. Select **Yes** if prompted.
- If the customer does not have an active House Account set up, this tender will not be available.
- If a House Account payment is part of the sales transaction, the House Account tender option will not be available.
- If the customer's House Account has been closed, this tender is not available.
- If the customer's House Account is on hold, this tender is not available.

2. The system displays a list of authorized buyers associated with this House Account. Select the authorized buyer from the list and press [Enter].

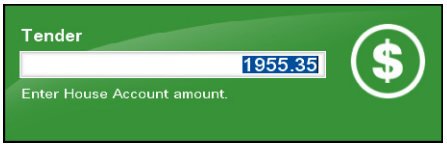


HOUSE ACCOUNT
Please select one of the following eligible authorized buyers.

PRIMA...	NAME BUYER ID	START END DATE
✓	House, Adam HAU19730010002	08/19/2013
	Myers, Jack HAU19730010003	08/19/2013
	Rogers, Kathy HAU19730010004	08/19/2013

Figure 4-41: House Account Authorized Buyer List

3. Enter the amount to be charged to the House Account and press [Enter] to continue.



Tender

1955.35

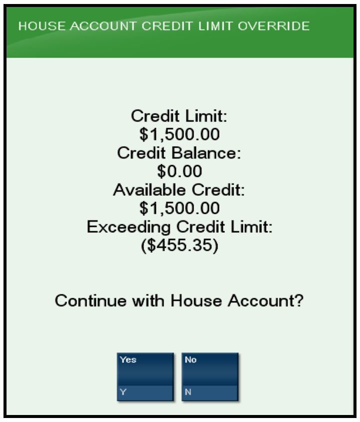
Enter House Account amount.

Figure 4-42: House Account Amount Prompt

Based on the amount entered in the House Account Amount Prompt, you may have the following options:

❑ If the amount is within the account limit, skip to step 5 on page 115.

- If the amount exceeds the account limit, but is within the override limit,



HOUSE ACCOUNT CREDIT LIMIT OVERRIDE

Credit Limit:
$1,500.00
Credit Balance:
$0.00
Available Credit:
$1,500.00
Exceeding Credit Limit:
($455.35)

Continue with House Account?

Figure 4-43: House Account Over-Limit Prompt

  - Select **Yes** to use the House Account tender and continue with step 5 on page 115.

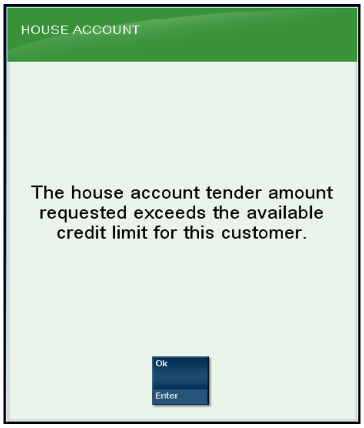
    <OR>

  - Select **No** to tender the transaction with a lower House Account amount and the balance with a different tender, then continue with step 5 on page 115.

    <OR>

  - Select **No** to use a different tender for the transaction, then continue with step 5 on page 115.

- If the amount exceeds the account limit and is greater than the override limit, the transaction cannot be tendered for the full amount using the House Account. Press [Enter] to close the prompt. Tender the transaction with a lower House Account amount and the balance with a different tender, or use a different tender for the transaction.



HOUSE ACCOUNT

The house account tender amount requested exceeds the available credit limit for this customer.

Figure 4-44: Requested Amount Exceeds Credit Limit Prompt

4. If prompted, ask the customer to sign on the PIN pad device and press [Enter] after verifying the customer's signature.

5. At the Sale Complete prompt, press [Y] to print the receipt.

> **Email Receipts**
>
> *If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54 for more information about sending email receipts.*

The receipt indicates that the purchase was paid with a House Account, shows the amount tendered, the authorized buyer, and other information as required based on your store policy.

```
Item          Qty                Price        Amount
BLK WHITE CAP SLEEVE DRESS
1004           1                 69.50         69.50


                             Subtotal         69.50
                           Tax      8%         5.57

                                Total         75.07

House Account                                 75.07
     HA1973001000002
     Picked Up By: Adam House

          Adam House


Change                                         0.00
Merchandise cannot be returned if it has been
opened or used.

Thank you for shopping with us. Come back soon.

SOLD ITEM COUNT = 1


            T3HH4VWW131116E4ALYIJ


                  Customer Copy
```

Figure 4-45: House Account Tender Receipt

Gift Card

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

2. At the card number prompt, scan or type the gift card number and then press [Enter].

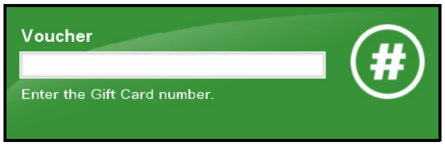
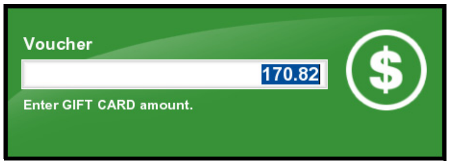


Figure 4-46: Gift Card Number Prompt

3. At the gift card amount prompt, enter the amount to be charged to this gift card or accept the default for the total transaction amount and then press [Enter].



Enter GIFT CARD amount.

Figure 4-47: Gift Card Amount Prompt

4. The system processes the information:
   - ❑ If the amount entered exceeds the available gift card balance, you are notified that the amount requested exceeds the approved amount on the card.

     You can accept the amount to reduce the card balance to zero and then choose another tender to complete the transaction, or you can re-tender using a different tender. (The gift card tender must be voided to replace it with another tender).
   - ❑ If the balance of the gift card matches or exceeds the requested amount, the Sale Complete prompt displays.
   - ❑ If the tender authorization is currently offline, you can manually process the gift card just as you would a credit card. See step 6 on page 93.
5. At the Sale Complete prompt, press [Y] to print the receipt.

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54 for more information about sending email receipts.

The receipt indicates that the purchase was paid with a gift card and shows the amount tendered.

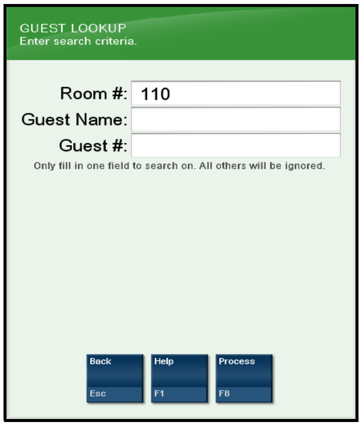
```
Welcome to our store!

Item        Qty                 Price       Amount
PEASANT TOP JERSEY DRESS
1005         1                  79.99        79.99
ROLL SLEEVE SWEATER DRESS
1006         1                  79.99        79.99


                               Subtotal     159.98
                             Tax     8%      12.80

                                  Total     172.78
GIFT CARD                                   172.78
     ************0012
     Auth #: 12331
     Balance: 0.00
     Transaction Type: Sale
Change                                        0.00
Merchandise cannot be returned if it has been
opened or used.

Thank you for shopping with us. Come back soon.

Sold Item Count = 2

                 T3HH18W1131113I4AN910

                     Customer Copy
```

The receipt may be configured to display the new balance available on the card.

Room Charge

A Room Charge is a tender type used in hotels. Select the Room Charge tender option in a sale transaction to apply the total of the transaction to the guest's room bill.

1. When all items have been entered or scanned, use the up and down arrow keys to select the **Room Charge** tender option and then press [Enter].
2. At the Guest Lookup form, enter lookup information in one of the fields. Any additional information you enter into another field is ignored. Select **Process** to search.



GUEST LOOKUP
Enter search criteria.

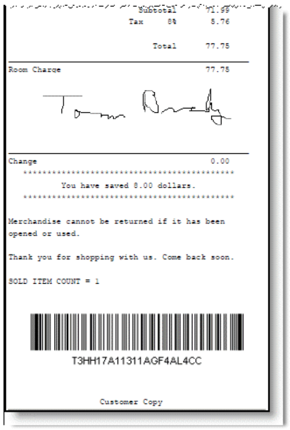
Room #: 110
Guest Name:
Guest #:

Only fill in one field to search on. All others will be ignored.

Figure 4-48: Guest Lookup Form

3. Select the guest's name from the Guest Selection list and press [Enter].
4. When prompted, enter the amount to be charged to the guest's room bill or accept the default for the total transaction amount, then press [Enter] to continue.
5. When prompted, ask the guest to sign for the room charge and complete the sale transaction.

   The receipt indicates that the purchase was charged to the guest's room bill and shows the amount tendered.



```
                       Subtotal         71.99
                    Tax      8%          5.76

                          Total         77.75
Room Charge                             77.75

Change                                   0.00
   ****************************************
          You have saved 8.00 dollars.
   ****************************************

Merchandise cannot be returned if it has been
opened or used.

Thank you for shopping with us. Come back soon.

SOLD ITEM COUNT = 1

              T3HH17A11311AGF4AL4CC

                  Customer Copy
```

Figure 4-49: Receipt Example - Room Charge Tender

Return Tenders (Refunds)

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. To tender a return, refer to the section for the appropriate tender type indicated below.

Depending on your store policy, returns may be pro-rated for discounts.

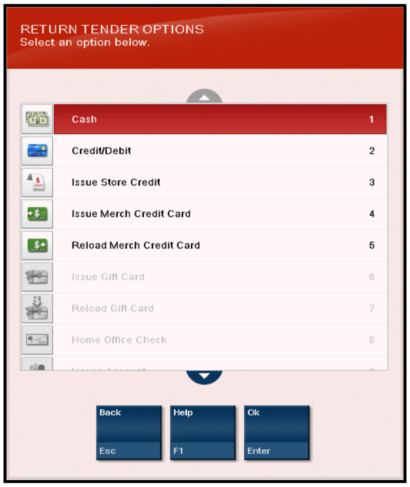
Tender Type	Refer to
Cash	"Cash" on page 119
Mail Check Refund	"Mail Check Refund - Home Office Check" on page 120
Credit Card	"Credit Card" on page 122
PayPal	"Refund PayPal" on page 126
Debit card	"Debit Card" on page 125
Issue Store Credit	"Issue Store Credit" on page 128
Issue/Reload Merchandise Card	"Issue/Reload Merchandise Credit Card" on page 129
Issue/Reload Gift Card	"Issue/Reload Gift Card" on page 130
Refund Room Charge	"Refund Room Charge" on page 130
House Account	"Refund House Account" on page 131

Notes: About verified return tenders

- Verified returns always are processed in your local currency.
- If the originating currency is different than your local currency, the refund amount is automatically converted into your local base currency, using the current currency exchange rate stored in the system.
- These exchanged values are used as the refund amount for the return transaction.

Cash

1. When all items have been entered or scanned in a return transaction, press [Enter] or select **Add Tenders**. Use the up and down arrow keys to select the **Cash** option and then press [Enter].



RETURN TENDER OPTIONS
Select an option below.

Cash	1
Credit/Debit	2
Issue Store Credit	3
Issue Merch Credit Card	4
Reload Merch Credit Card	5
Issue Gift Card	6
Reload Gift Card	7
Home Office Check	8

Figure 4-50: Return Tender List - Cash Option

2. Depending upon the configuration of your system, the Cash Refund Amount prompt may default to the total amount for the return transaction. Enter the amount of cash to be returned to the customer and then press [Enter].

Tender
75.60
Enter Cash amount.

Figure 4-51: Cash Refund Amount Prompt

If the Tender you are using contains decimal points, enter dollar amounts as dollars and cents without decimal point. For example, for $10.00 you would enter 1000. Xstore automatically supplies a decimal point in the correct position. If your store requires manager approval for cash refunds over a pre-set amount, you must obtain manager approval for the refund.

The refund amount may not exceed the transaction amount. Press [Enter] to close the prompt "Over tendering a refund transaction is not allowed."

3. At the Sale Complete prompt, press [Y] to print the receipt.

> **Email Receipts**
>
> *If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54 for more information about sending email receipts.*

4. If you decide to complete the sale, Xstore opens the cash drawer to allow you to refund money to the customer.

   If configured, a prompt displays reminding you to close the cash drawer. After the cash drawer is closed, the sale receipt is printed or sent in an email and the system is ready for the next transaction.

```
Welcome to our store!

Item        Qty                Price      Amount
COTTON JERSEY TIERED DRESS
1002          1               (70.00)     (70.00)
Did Not Like


                            Subtotal     (70.00)
                         Tax      8%      (5.60)

                               Total     (75.60)

Cash                                     (75.60)

Change                                     0.00
Merchandise cannot be returned if it has been
opened or used.

Thank you for shopping with us. Come back soon.

RETURNED ITEM COUNT = 1

            T3HH4WW131116Y4ALYI7

                Customer Copy
```

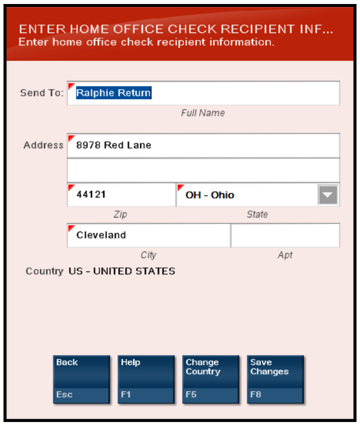
Figure 4-52: Return Receipt Example - Cash Tender Refund

Mail Check Refund - Home Office Check

A mail check refund may be used when a customer returns an item that was paid with a personal check, but the waiting period has not yet elapsed for the check to clear the bank. After the check has cleared, a refund check is mailed to the customer.

1. When all items have been entered or scanned in a sale transaction, press [Enter] or select **Add Tenders**. Use the up and down arrow keys to select the **Home Office Check** option and then press [Enter].

2. Verify the recipient's information is correct and select **Save Changes** to continue.



ENTER HOME OFFICE CHECK RECIPIENT INF...
Enter home office check recipient information.

Send To: Ralphie Return
Full Name

Address 8978 Red Lane

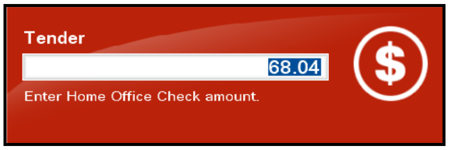
Zip 44121
State OH - Ohio

City Cleveland
Apt

Country US - UNITED STATES

Figure 4-53: Home Office Check Information

3. Depending upon the configuration of your system, the Home Office Check Amount prompt may default to the total amount for the return transaction. Enter the amount to be returned to the customer and then press [Enter].



Tender

68.04

Enter Home Office Check amount.

Figure 4-54: Home Office Check Amount Prompt

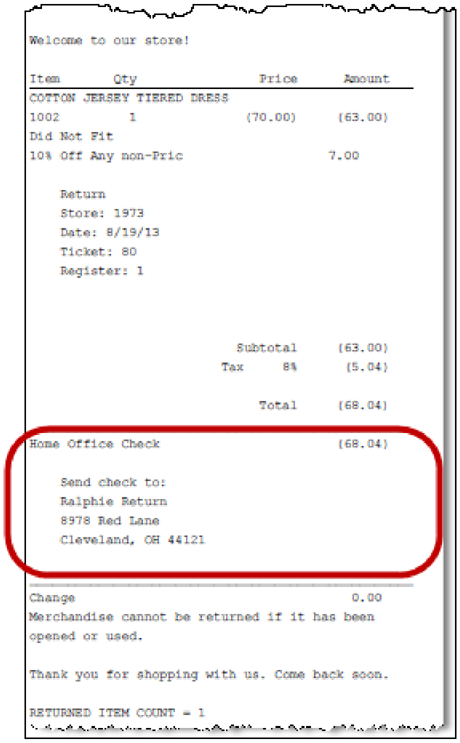
The refund amount may not exceed the transaction amount. Press [Enter] to close the prompt "Over tendering a refund transaction is not allowed."

4. At the Sale Complete prompt, press [Y] to print the receipt.

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54 for more information about sending email receipts.

The system prints receipts as required.



```
Welcome to our store!

Item        Qty                  Price       Amount
COTTON JERSEY TIERED DRESS
1002           1                (70.00)      (63.00)
Did Not Fit
10% Off Any non-Pric                       7.00

    Return
    Store: 1973
    Date: 8/19/13
    Ticket: 80
    Register: 1



                           Subtotal      (63.00)
                         Tax      8%      (5.04)

                              Total      (68.04)

Home Office Check                        (68.04)

    Send check to:
    Ralphie Return
    8978 Red Lane
    Cleveland, OH 44121


Change                                    0.00
Merchandise cannot be returned if it has been
opened or used.

Thank you for shopping with us. Come back soon.

RETURNED ITEM COUNT = 1
```

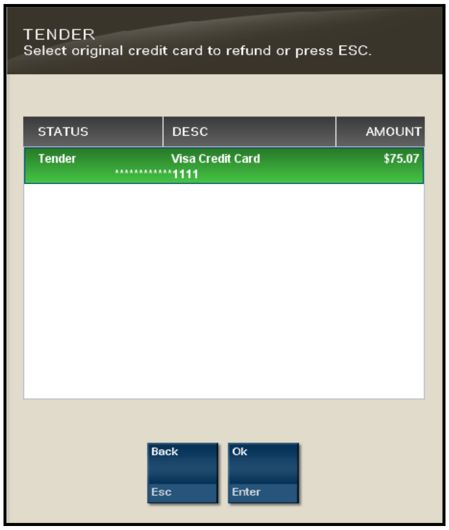
Figure 4-55: Return Receipt Example - Home Office Check Refund

Credit Card

If the customer used a credit card for the original sale transaction and you are performing a verified return, Xstore presents the original credit card as a return tender option. You can refund the return amount to the credit card or you can press [Esc] to return to the tender list and select a different tender type to complete the return transaction.

Verified Return (Original Receipt)

1. If the customer used a credit card to tender the original transaction, Xstore automatically displays the credit card information for the original transaction when you tender the return.



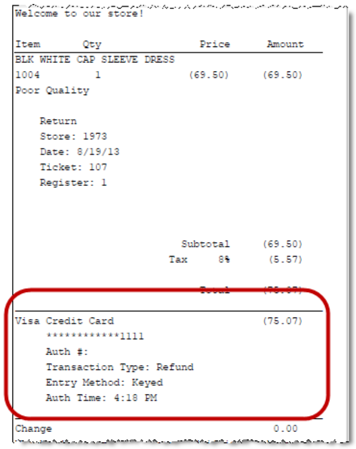
TENDER
Select original credit card to refund or press ESC.

STATUS	DESC	AMOUNT
Tender	Visa Credit Card ************1111	$75.07

Figure 4-56: Original Credit Card List

2. Either select a credit card from the list, or press [Esc] to choose a different tender for the refund:
   - ❑ If you select an original credit card from the list, Xstore processes the refund amount to the credit card and prompts you to confirm that the sale is complete. Press [Y] for Yes to complete the return transaction.
   - ❑ If you press [Esc], select a tender from the Return Tender list and follow the prompts to complete the return transaction. The prompts that are displayed depend upon the tender you select.

   The credit card type (Visa, MasterCard, etc.), credit card number (masked), and total amount refunded to the card appear on the receipt.



```
Welcome to our store!

Item       Qty                 Price       Amount
BLK WHITE CAP SLEEVE DRESS
1004         1                (69.50)      (69.50)
Poor Quality

    Return
    Store: 1973
    Date: 8/19/13
    Ticket: 107
    Register: 1



                           Subtotal       (69.50)
                         Tax      8%       (5.57)

                              Total       (75.07)

Visa Credit Card                           (75.07)
     ************1111
     Auth #:
     Transaction Type: Refund
     Entry Method: Keyed
     Auth Time: 4:18 PM

Change                                      0.00
```

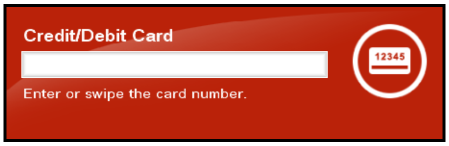
Figure 4-57: Return Receipt Example - Credit Card Tender Refund

Blind Return (No Original Receipt)

1. When all items have been entered or scanned, press [Enter] or select **Add Tenders**.
2. Use the up and down arrow keys to select the **Credit/Debit** card option and then press [Enter].

If your processor does not allow credit card keyboard entry or MSR swiping, instruct the customer to swipe the card on the PIN pad device and skip to step 4. Examples of processors that restrict keyboard and MSR entry include EFTLink and Tender Retail.

3. At the card number prompt, swipe the credit card using the MSR or enter the card number manually, pressing [Enter] to process.



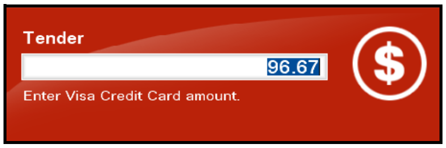
Credit/Debit Card

Enter or swipe the card number.

Figure 4-58: Credit/Debit Card Prompt

If you swipe the credit card, Xstore automatically captures the card number and expiration date. If you manually enter the credit card number, Xstore prompts for the expiration date.

4. At the refund amount prompt, enter the amount or accept the default amount to be returned to the customer, then press [Enter].



Tender

96.67

Enter Visa Credit Card amount.

Figure 4-59: Refund Amount Prompt

The refund amount may not exceed the transaction amount. Press [Enter] to close the prompt "Over tendering a refund transaction is not allowed."

5. Xstore processes the refund to the credit card and prompts if the sale is complete. At the Sale Complete prompt, press [Y] to print the receipt.

> **Email Receipts**
>
> *If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54 for more information about sending email receipts.*

The credit card type (Visa, MasterCard, etc.), credit card number (masked), and total amount refunded to the card appear on the receipt.

Debit Card

Depending upon your store policy, you may credit a customer's debit card during a return transaction. This process is similar to the steps for crediting a customer's credit card with the following exceptions:

1. The customer is prompted to swipe the debit card through the PIN pad device. When the debit card is swiped, Xstore captures the card number and expiration date.
2. The customer is prompted to enter the PIN number and press a button on the PIN pad device. The authorization is completed after a few moments and the refund is applied to the customer's debit card.
3. The debit card number (masked) and total amount refunded to the account appear on the receipt.

Refund PayPal

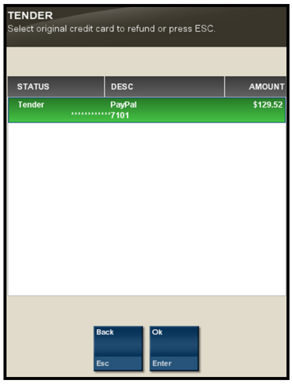
Tendering a refund with PayPal is basically the same as tendering a refund with a credit card.

1. The following chart describes the how to begin tendering a refund with PayPal based on the type of return (verified or blind):

Table 4-2: *PayPal Return Options*

<table>
<tr><th>Type of Return</th><th>Description</th></tr>
<tr><td>Verified Return (original receipt or credit card)</td><td>Select **Add Tenders**.

Xstore automatically displays the PayPal card information. Either select a PayPal account from the list, or press [Esc] to choose a different tender for the refund.



TENDER

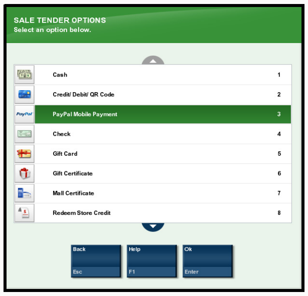
Select original credit card to refund or press ESC.

STATUS	DESC	AMOUNT
Tender	PayPal ************7101	$129.52

</td></tr>
<tr><td>Blind or Unverified Return (no original receipt)</td><td>From the Return screen, swipe the PayPal card or scan the QR code.

<OR>

Select **Add Tenders** --> **PayPal Mobile Payment** and then swipe the PayPal card or scan the QR code.

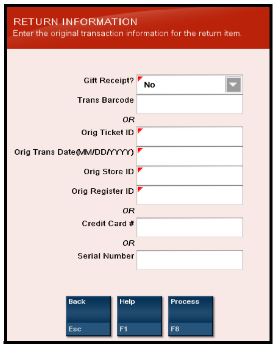


SALE TENDER OPTIONS

Select an option below.

</td></tr>
</table>

For a verified return, you can swipe the PayPal card or scan the QR code at the Return Information prompt and then enter the ***Item ID*** *to locate the original transaction. Refer to "With Original Receipt or Credit Card" on page 65.*

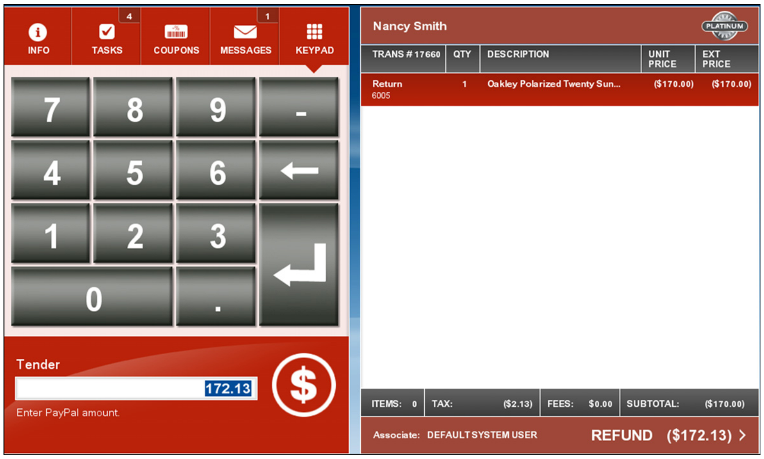


RETURN INFORMATION
Enter the original transaction information for the return item.

Gift Receipt? No
Trans Barcode
OR
Orig Ticket ID
Orig Trans Date(MM/DD/YYYY)
Orig Store ID
Orig Register ID
OR
Credit Card #
OR
Serial Number

2. At the refund amount prompt, enter the amount or accept the default amount to be returned to the customer, then press [Enter].

Figure 4-60: PayPal Refund Tender Amount



Tender
172.13
Enter PayPal amount.

Nancy Smith

TRANS # 17660	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Return 6005	1	Oakley Polarized Twenty Sun...	($170.00)	($170.00)

ITEMS: 0 TAX: ($2.13) FEES: $0.00 SUBTOTAL: ($170.00)

Associate: DEFAULT SYSTEM USER REFUND ($172.13)

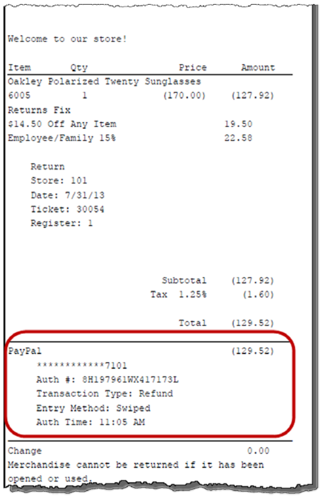
3. The Sale Complete prompt may display. Select from the available options.

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

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54 for more information about sending email receipts.

The PayPal information is included on the receipt:

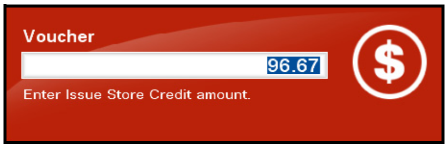


```
Welcome to our store!

Item        Qty                Price      Amount
Oakley Polarized Twenty Sunglasses
6005         1              (170.00)    (127.92)
Returns Fix
$14.50 Off Any Item                    19.50
Employee/Family 15%                    22.58

    Return
    Store: 101
    Date: 7/31/13
    Ticket: 30054
    Register: 1



                           Subtotal    (127.92)
                         Tax  1.25%      (1.60)

                              Total    (129.52)
PayPal                                 (129.52)
     ************7101
     Auth #: 8H197961WX417173L
     Transaction Type: Refund
     Entry Method: Swiped
     Auth Time: 11:05 AM
Change                                    0.00
Merchandise cannot be returned if it has been
opened or used.
```

Figure 4-61: PayPal Return Receipt

Issue Store Credit

1. When all items have been entered or scanned, use the up and down arrow keys to select the **Issue Store Credit** option and then press [Enter].
2. At the prompt for the Issue Store Credit amount, enter the amount to be applied to the store credit and press [Enter].



Voucher

96.67

Enter Issue Store Credit amount.

Figure 4-62: Issue Store Credit Amount Prompt

Depending upon the configuration of your system, this prompt may default to the total transaction amount. Or if the transaction total exceeds the maximum amount allowed for store credit, the prompt defaults to the maximum value and you are prompted to select another refund tender to complete the transaction.

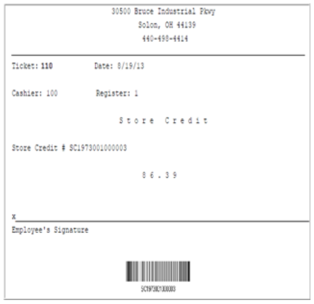
The refund amount may not exceed the transaction amount. Press [Enter] to close the prompt "Over tendering a refund transaction is not allowed."

3. If prompted, press [Enter] to close the "Remember to sign the store credit voucher" message.

4. At the Sale Complete prompt, press [Y] to print the receipt.

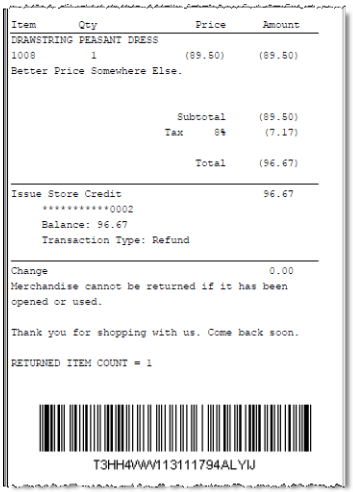
> **Email Receipts**
>
> *If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54 for more information about sending email receipts.*

The system prints receipts as required, including a Store Credit voucher.



```
         30500 Bruce Industrial Pkwy
              Solon, OH 44139
               440-498-4414
--------------------------------------------
Ticket: 110         Date: 8/19/13

Cashier: 100        Register: 1

                Store Credit

Store Credit # SC1973001000003

                   86.39


x___________________________________________
Employee's Signature

                SC1973001000003
```

Figure 4-63: Store Credit Voucher



```
Item       Qty              Price     Amount
--------------------------------------------
DRAWSTRING PEASANT DRESS
1008        1              (89.50)    (89.50)
Better Price Somewhere Else.


                        Subtotal      (89.50)
                      Tax     8%       (7.17)

                           Total      (96.67)
--------------------------------------------
Issue Store Credit                    96.67
     ***********0002
     Balance: 96.67
     Transaction Type: Refund
--------------------------------------------
Change                                 0.00
Merchandise cannot be returned if it has been
opened or used.

Thank you for shopping with us. Come back soon.

RETURNED ITEM COUNT = 1


        T3HH4VWV13111794ALYIJ
```

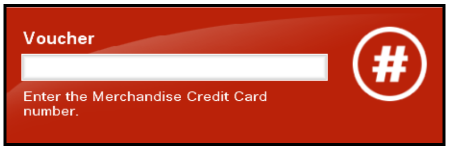
Figure 4-64: Store Credit Refund Receipt - Customer Copy

Issue/Reload Merchandise Credit Card

1. When all items have been entered or scanned, use the up and down arrow keys to select the **Issue Merch Credit Card** option or the **Reload Merch Credit Card** option and then press [Enter].

> *Select the **Issue Merch Credit Card** option to issue a new merchandise credit card. Select the **Reload Merch Credit Card** option to put the refund value onto the customer's current merchandise credit card.*

2. At the merchandise credit card number prompt, scan the card or enter the card number manually and press [Enter] to continue.



Voucher

Enter the Merchandise Credit Card number.

Figure 4-65: Merchandise Credit Card Number Prompt

3. At the prompt for the amount, enter the amount to be applied to the merchandise credit card (issue or reload) and then press [Enter].

   Xstore processes the information and the refund amount is applied to either a new card or to the customer's existing card.

4. At the Sale Complete prompt, press [Y] to print the receipt.

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54 for more information about sending email receipts.

The merchandise credit card number (masked) and total amount refunded to the card appear on the receipt.

Issue/Reload Gift Card

To issue a new gift card or to reload a customer's current gift card for a refund, follow the steps described in Issue/Reload Merchandise Credit Card above. The procedure is the same for both a gift card and for a merchandise credit card.

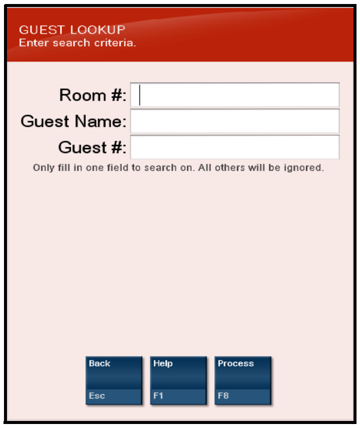
*Be sure to select the **Gift Card** option instead of **Merchandise Credit Card**.*

Refund Room Charge

A Room Charge is a tender type used in hotels. Select the Refund Room Charge tender option in a return transaction to remove the total of the transaction from the guest's room bill.

1. When all items have been entered or scanned in a return transaction, press [Enter] or select **Add Tenders**. Use the up and down arrow keys to select the **Refund Room Charge** option and then press [Enter].

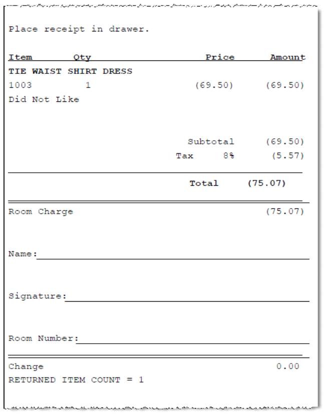
2. At the Guest Lookup form, enter the information to find the guest's room number. Only enter lookup information in one of the fields. Any additional information you enter into another field are ignored. Select **Process** to search.



GUEST LOOKUP
Enter search criteria.

Room #:
Guest Name:
Guest #:
Only fill in one field to search on. All others will be ignored.

3. Select the guest’s name from the Guest Selection list and press [Enter].
4. Enter the amount to be refunded to the guest’s room bill or accept the default for the total transaction amount, then press [Enter] to continue.
5. When prompted, select **Yes** to confirm that the transaction is complete.
6. Ask the customer to sign the receipt.



```
Place receipt in drawer.

Item        Qty                 Price      Amount
TIE WAIST SHIRT DRESS
1003          1                (69.50)     (69.50)
Did Not Like


                            Subtotal       (69.50)
                          Tax      8%       (5.57)
__________________________________________________
                              Total    (75.07)
==================================================
Room Charge                                (75.07)


Name:_____________________________________________


Signature:________________________________________


Room Number:______________________________________
==================================================
Change                                      0.00
RETURNED ITEM COUNT = 1
```

Figure 4-66: Refund Room Charge Receipt

The receipt indicates that the purchase was refunded to the guest’s room bill and shows the amount refunded.

Email Receipts

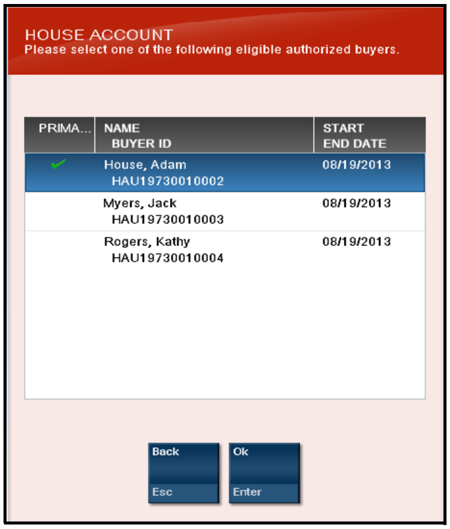
If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, “Email Receipt Options” on page 54 for more information about sending email receipts.

Refund House Account

This tender type is only available for customers with valid house accounts.

1. When all items have been entered or scanned, use the up and down arrow keys to select the **House Account** option from the Return Tender Options list and then press [Enter].

2. Select the Authorized Buyer from the list and press [Enter].



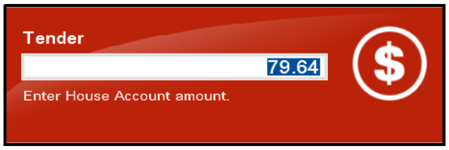
HOUSE ACCOUNT

Please select one of the following eligible authorized buyers.

PRIMA...	NAME BUYER ID	START END DATE
✓	House, Adam HAU19730010002	08/19/2013
	Myers, Jack HAU19730010003	08/19/2013
	Rogers, Kathy HAU19730010004	08/19/2013

Figure 4-67: House Account

3. At the refund amount prompt, enter the amount or accept the default amount to be applied to the House Account and press [Enter].



Tender

79.64

Enter House Account amount.

Figure 4-68: Refund House Account Prompt

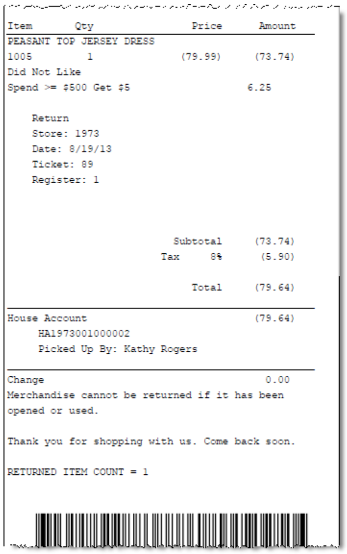
If you do not refund the total amount to the House Account, you are prompted to select another refund tender to complete the transaction.

4. If prompted, ask the customer to sign the receipt.

5. At the Sale Complete prompt, press [Y] to print the receipt.

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54 for more information about sending email receipts.



```
Item        Qty                 Price      Amount
PEASANT TOP JERSEY DRESS
1005          1                (79.99)     (73.74)
Did Not Like
Spend >= $500 Get $5                      6.25

    Return
    Store: 1973
    Date: 8/19/13
    Ticket: 89
    Register: 1


                             Subtotal      (73.74)
                           Tax      8%      (5.90)

                                Total      (79.64)
House Account                              (79.64)
     HA1973001000002
     Picked Up By: Kathy Rogers
Change                                      0.00
Merchandise cannot be returned if it has been
opened or used.

Thank you for shopping with us. Come back soon.

RETURNED ITEM COUNT = 1
```

Figure 4-69: Return Receipt: Refund to House Account Example

Split Tenders

A customer may use multiple tenders when paying for an item.

1. From the list of tenders, use the up and down arrow keys to select the first method of payment.
2. Enter the amount to be paid with this tender and then press [Enter].
3. After the first tender has been exchanged, the screen automatically returns to the Sale Tender list. Use the up and down arrow keys to select the second method of payment and then press [Enter].
4. Follow all prompts as required for the tender type chosen and then enter the amount of the remaining balance.

   The Sale Tender list will continue to display as long as there is an outstanding balance. You may select as many tender types as necessary to satisfy the total amount due.
5. At the Sale Complete prompt, press [Y] to print the receipt or press [N] for No to return to the previous screen.

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54 for more information about sending email receipts.

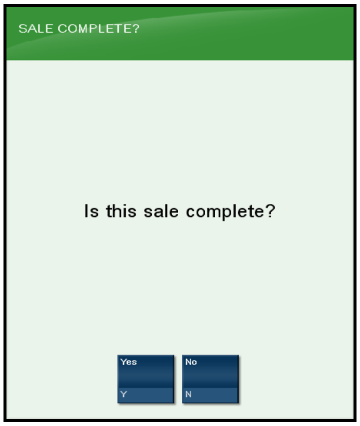
6. Depending upon the tender types chosen, a message may appear reminding you to close the cash drawer. Once the cash drawer has been closed, the system is ready for the next transaction.

Changing Tenders

To change tender amounts and delete tenders during the tendering process:

1. At the Sale Complete prompt, do one of the following:

- If you see this message, press [N] for No to return to the Sale Tender list.

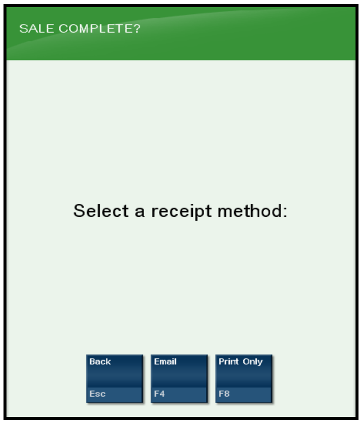


SALE COMPLETE?

Is this sale complete?

Figure 4-70: Sale Complete Prompt - No Email Options

- If you see this message, press [Esc] to return to the Sale Tender list.



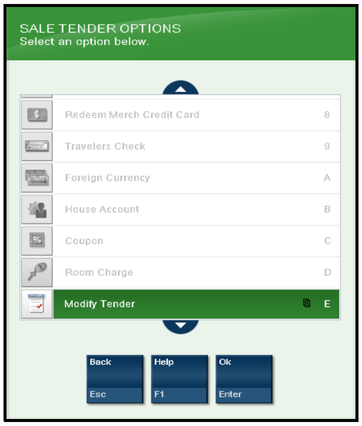
SALE COMPLETE?

Select a receipt method:

Figure 4-71: Sale Complete Prompt - Email Receipt Options

> *The background color of the Sale Complete prompt screens vary depending on what form you are in.*

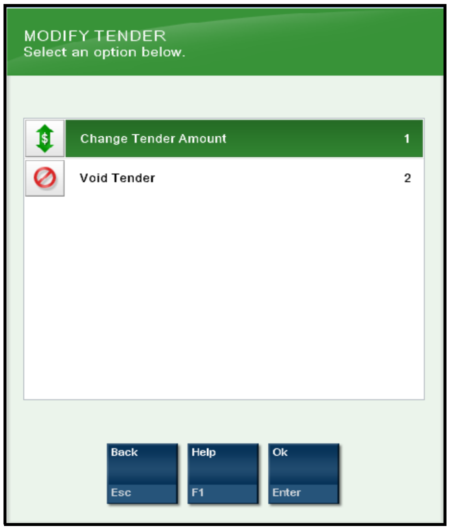
2. Use the up and down arrow keys to select the **Modify Tender** option and then press [Enter].



SALE TENDER OPTIONS
Select an option below.

Figure 4-72: Sale Tender List - Modify Tender Option

3. Use the up and down arrow keys to select a Modify Tender option from the menu:



MODIFY TENDER
Select an option below.

Figure 4-73: Modify Tender Options Menu

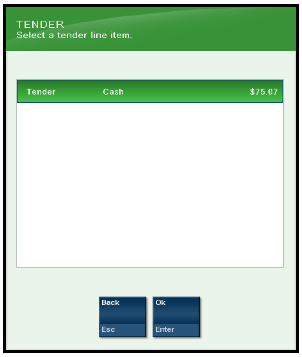
☐ Select the **Change Tender Amount** option to change the amount of a tender. See "Changing the Tender Amount" on page 135.

<OR>

☐ Select the **Void Tender** option to remove the tender from the sale. See "Voiding the Tender" on page 136.

Changing the Tender Amount

1. If you selected the **Change Tender Amount** option, select the tender to be changed from a list of tenders on the current transaction and press [Enter]. Refer to "Modify Tender Options Menu" on page 135.

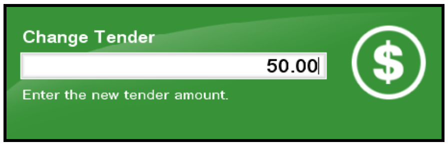


TENDER
Select a tender line item.

Tender Cash $76.07

If no tenders in the transaction can be modified, you must void the tender. Press [Enter] to close the prompt "No tender is allowed to be changed." See "Voiding the Tender" on page 136.

2. Enter the new amount for the selected tender and then press [Enter].



Change Tender

50.00

Enter the new tender amount.

Figure 4-74: New Tender Amount Prompt

You must enter a new tender amount greater than $0. If needed, use the **Void Tender** option to remove the tender type from the transaction and begin the tendering process again. Refer to "Modify Tender Options Menu" on page 135.

If the transaction still has a balance due, you must select another tender from the list of tenders to complete the transaction.

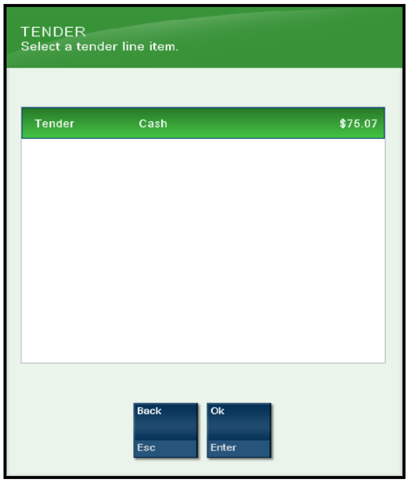
3. At the Sale Complete prompt, press [Y] to print the receipt.

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54 for more information about sending email receipts.

Voiding the Tender

1. If you selected the **Void Tender** option, select the tender to be voided from a list of tenders on the current transaction and press [Enter]. Refer to "Modify Tender Options Menu" on page 135.



TENDER

Select a tender line item.

Tender	Cash	$75.07

Figure 4-75: List of Tenders That Can Be Voided On The Current Transaction

2. Use the up and down arrow keys to select the tender you want to void, and then press [Enter]. Xstore removes the tender from the transaction.

If the transaction still has a balance due, you must select another tender from the list of tenders to complete the transaction.

3. Use the up and down arrow keys to select a new tender from the Sale Tender list and press [Enter]. The new tender replaces the one that you removed from the transaction.
4. Process the tender as usual. Once the tender has been processed, a prompt displays asking if the sale is complete. At the Sale Complete prompt, press [Y] to print the receipt.

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to Chapter 2, "Email Receipt Options" on page 54 for more information about sending email receipts.

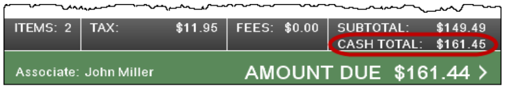
Currency Rounding

Currency Rounding refers to the process of rounding the cost of a purchase (which is to be paid for in cash) to the nearest multiple of the smallest denomination of currency. Rounding became necessary when low denomination coins in a currency were removed from circulation and are no longer available. Since it may not be possible to make exact change for a cash purchase, rounding the total bill to the lowest available denomination of coinage is required. For these tenders, Xstore automatically applies rounding rules that enforce the minimum denomination value that can be accepted or refunded.

If payment is being tendered using a credit card, debit card, or check, no rounding is necessary.

For example, in Australia, the 5 cent coin is the smallest-valued denomination currently in circulation. Because of this, all transaction amounts using Australian currency must be multiples of 5 cents. Xstore Currency Rounding performs the rounding required.

When Currency Rounding is in use, a Cash Total is displayed below the transaction Subtotal.

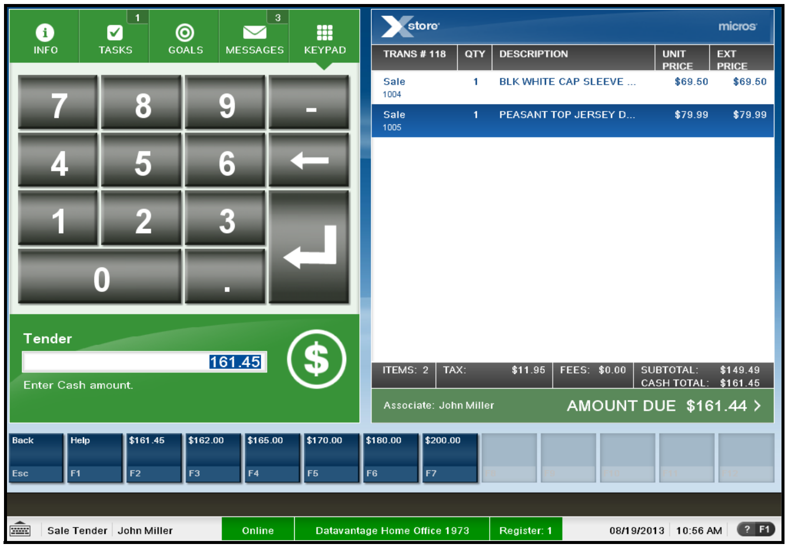


ITEMS: 2
TAX: $11.95
FEES: $0.00
SUBTOTAL: $149.49
CASH TOTAL: $161.45
Associate: John Miller
AMOUNT DUE $161.44 >

The Cash Total has been rounded to the nearest multiple of the Minimum Cash Denomination Value (for the base currency's cash tender).

For example, a tender with a Minimum Cash Denomination Value of 5 cents ($0.05) results in the following totals in a sale transaction:

- If the Transaction Total=$161.44, then the Cash Total is $161.45 (rounded up).



Tender
161.45
Enter Cash amount.

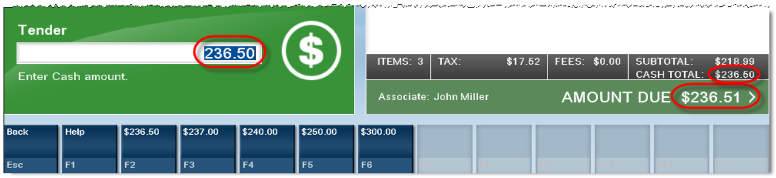
TRANS # 118	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1004	1	BLK WHITE CAP SLEEVE ...	$69.50	$69.50
Sale 1005	1	PEASANT TOP JERSEY D...	$79.99	$79.99

ITEMS: 2 TAX: $11.95 FEES: $0.00 SUBTOTAL: $149.49 CASH TOTAL: $161.45

Associate: John Miller AMOUNT DUE $161.44

Sale Tender John Miller Online Datavantage Home Office 1973 Register: 1 08/19/2013 10:56 AM

- If the Transaction Total=$236.51, then the Cash Total is $236.50 (rounded down).



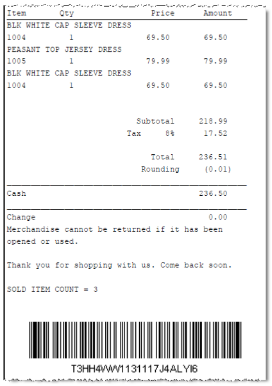
Tender
236.50
Enter Cash amount.

ITEMS: 3 TAX: $17.52 FEES: $0.00 SUBTOTAL: $218.99 CASH TOTAL: $236.50

Associate: John Miller AMOUNT DUE $236.51

If your system is configured to default to the Amount Due when prompting for a tender amount, the Cash Total amount appears in the *Enter Cash Amount* text field, where it may be accepted or edited. However, tenders can only be accepted (and refunded in return transactions) in amounts that are even multiples of its Minimum Cash Denomination Value.

These values are also printed on the receipt.



```
Item        Qty                  Price      Amount
BLK WHITE CAP SLEEVE DRESS
1004          1                  69.50       69.50
PEASANT TOP JERSEY DRESS
1005          1                  79.99       79.99
BLK WHITE CAP SLEEVE DRESS
1004          1                  69.50       69.50


                              Subtotal      218.99
                            Tax     8%       17.52

                                 Total      236.51
                              Rounding      (0.01)
__________________________________________________
Cash                                        236.50
__________________________________________________
Change                                        0.00
Merchandise cannot be returned if it has been
opened or used.

Thank you for shopping with us. Come back soon.

SOLD ITEM COUNT = 3

              T3HH4VWV131117J4ALYI6
```

Figure 4-76: Receipt with Currency Rounding

CHAPTER 5

Customer Maintenance

Overview

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.

These screens can also be accessed through the back office Customer Maintenance menu options.

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

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.

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**.

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

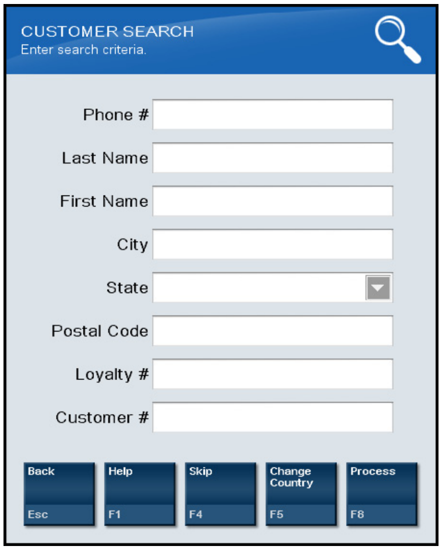
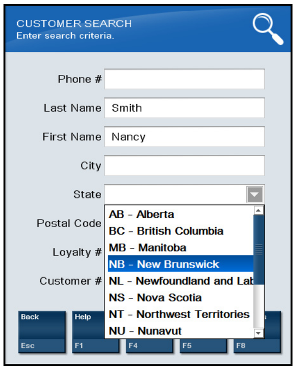


Figure 5-1: Customer Search Form

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.

*When applicable, use the **Change Country** menu option on the Customer Search screen to modify the drop-down State options and further refine your search. In this example, the search is for Nancy Smith and the country has been changed to Canada so that the drop-down options contain Canadian Provinces (New Brunswick).*



Last Name Smith
First Name Nancy

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

CUSTOMER SEARCH
Source: Relate

Miller, Nancy
3131 RALPH DRIVE
WARRENSVILLE HEIGHTS, OH 44128

Miller, Nancy
4739 STILL STREET
MANSFIELD, OH 44902

Figure 5-2: Customer Search Results

*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 Relate application and the customers are found there, Relate is indicated as the source. Customers may also be found in other configurable sources such as the Xstore database or Xcenter.*

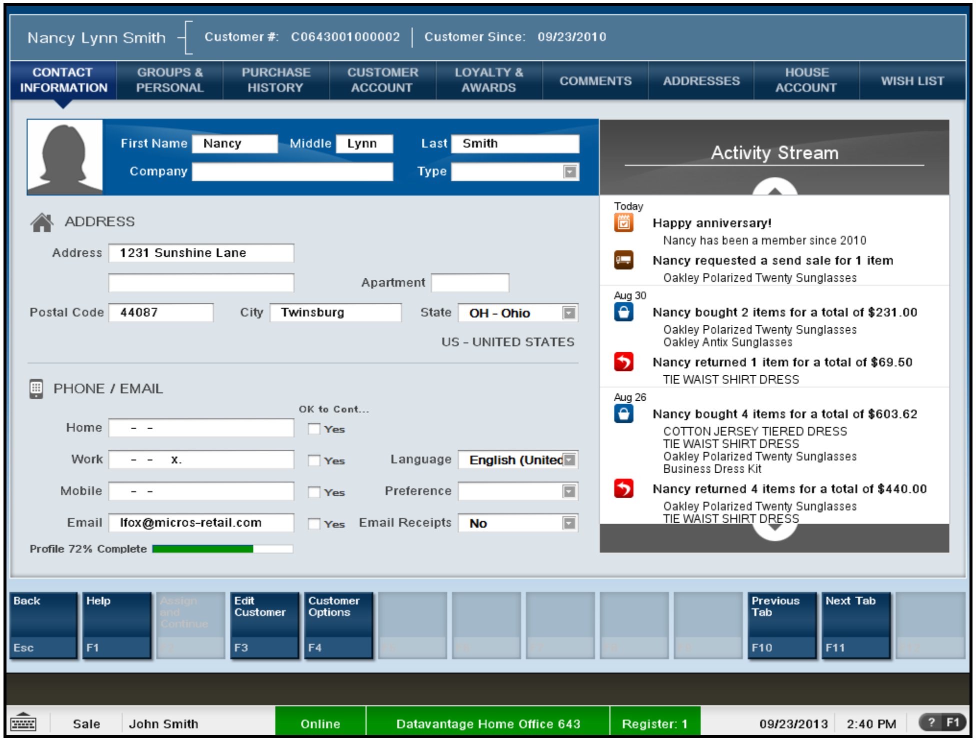
Depending upon your system's configuration, the system may automatically display the Customer Maintenance screen when only one name matches the search criteria, rather than showing a list with only one customer name.

3. Choose one of these options:

- ❑ **Back** – Returns to the Customer Search form.
- ❑ **Select & Continue** – Assigns the selected name to the sale transaction.
- ❑ **Select & View** – Opens the selected customer record for viewing, editing, or printing. Go to step 4 on page 142.
- ❑ **New** – Displays a form for adding a new customer record to the customer database.

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.



Nancy Lynn Smith

Customer #: C0643001000002

Customer Since: 09/23/2010

First Name: Nancy
Middle: Lynn
Last: Smith
Company:
Type:

Address: 1231 Sunshine Lane
Apartment:
Postal Code: 44087
City: Twinsburg
State: OH - Ohio
US - UNITED STATES

Home: - - ☐ Yes
Work: - - x. ☐ Yes
Mobile: - - ☐ Yes
Email: lfox@micros-retail.com ☐ Yes
Language: English (United
Preference:
Email Receipts: No

Profile 72% Complete

Today

Happy anniversary!
Nancy has been a member since 2010

Nancy requested a send sale for 1 item
Oakley Polarized Twenty Sunglasses

Aug 30

Nancy bought 2 items for a total of $231.00
Oakley Polarized Twenty Sunglasses
Oakley Antix Sunglasses

Nancy returned 1 item for a total of $69.50
TIE WAIST SHIRT DRESS

Aug 26

Nancy bought 4 items for a total of $603.62
COTTON JERSEY TIERED DRESS
TIE WAIST SHIRT DRESS
Oakley Polarized Twenty Sunglasses
Business Dress Kit

Nancy returned 4 items for a total of $440.00
Oakley Polarized Twenty Sunglasses
TIE WAIST SHIRT DRESS

Sale | John Smith | Online | Datavantage Home Office 643 | Register: 1 | 09/23/2013 | 2:40 PM

Figure 5-3: Customer Record

4. Choose one of these options:

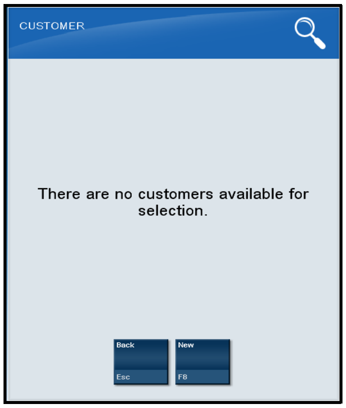
- ❑ **Back** – Returns to the Customer Search form.
- ❑ **Assign and Continue** - Associates the customer with the sale transaction.
- ❑ **Edit Customer** - Allows you to change information in the customer record. See "Edit Customer" on page 169.
- ❑ **Customer Options** – Displays a list of customer options. See "Additional Customer Options" on page 171. Options here include:
  - ❍ Add a new customer record to the customer database.
  - ❍ Print the customer record.
  - ❍ Enroll the customer in the loyalty program.
  - ❍ Maintain the customer's tax exemption information.
  - ❍ Create a House Account for the customer.
- ❑ **Previous Tab and Next Tab** - Provides navigation for the tabs on the screen:
  - ❍ **Contact Information Tab**: Displays the customer's address, contact, and loyalty card information. It also contains an activity stream of recent transactions.
  - ❍ **Groups & Personal Tab**: Displays information about the customer group, customer attributes, segment, tax exempt record, and personal data such as gender, anniversary date, etc.

- **Customer History Tab**: Displays sales history information about the customer
- **Customer Account Tab**: Displays information about the customer's accounts, including loyalty, and other transaction-related accounts.
- **Tasks Tab**: Displays customer related tasks and appointments.
- **Loyalty & Awards:** If your system is set up to use Relate, this tab displays loyalty award information.
- **Comments Tab**: Displays comments that have been entered about the customer.
- **Addresses Tab**: Displays the customer's primary address and any other addresses on file.
- **House Account Tab**: Displays information about the House Account associated with this customer. This tab is only active if the customer has a house account.
- **Wish List Tab**: If your system is set up to use Relate, this tab displays the customer's wish list items. Otherwise, this tab is not active.

See "Customer Information Tabs - Overview" on page 149 for more information about each tab.

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 5-4 below if there is no current record.



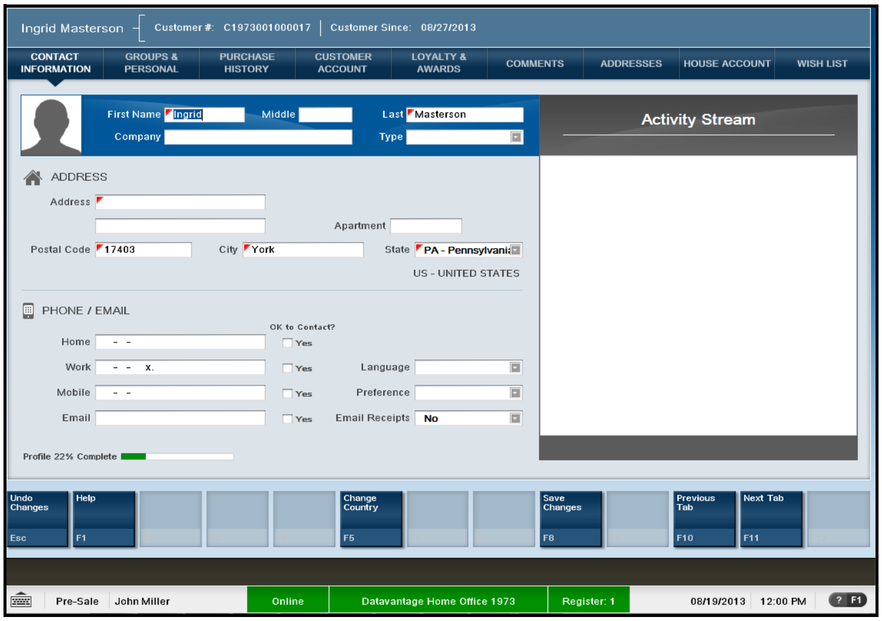
There are no customers available for selection.

Figure 5-4: Customer Not Found Message

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

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

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



Ingrid Masterson
Customer #: C1973001000017
Customer Since: 08/27/2013
First Name: Ingrid
Last: Masterson
Postal Code: 17403
City: York
State: PA - Pennsylvani
US - UNITED STATES
Email Receipts: No
Profile 22% Complete
Pre-Sale | John Miller | Online | Datavantage Home Office 1973 | Register: 1 | 08/19/2013 | 12:00 PM

Figure 5-5: Contact Information Tab

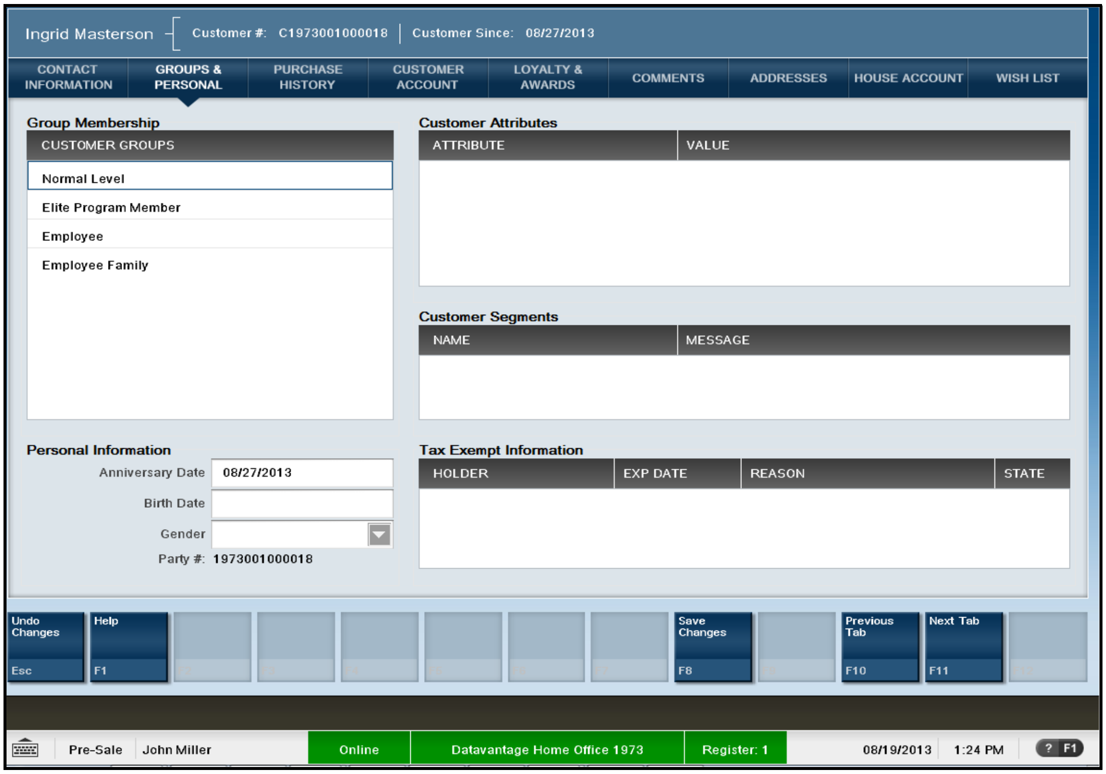
- ☐ Any field that requires an entry is marked with a red triangle ◤ in the upper left corner of the field.
- ☐ Any field that has a selectable list of options displays a down arrow ▼ on the right side of the field.

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

Table 5-1: *Contact Information Fields*

Field Name	Description
First name, middle initial, last name	The system automatically creates an initial cap for the first letter you type here if you don't press the [Shift] key when entering the customer's name.
Company	If you enter a company name here, the Organization Type field becomes active.
Type	Associated with Company entries; for example, Club, Company, School, etc. This field is only active after a Company name is entered.
Address	Two address lines are provided. This is the customer's primary address.
Apartment #	Optional field.
Postal Code	The system automatically supplies the city and state if it recognizes the Zip/Postal code that you enter.
City	Automatically populated if the system recognizes the Zip/Postal code that you entered first.
State/Province	If you begin typing, the system auto-fills the field with states/provinces defined for your store.
Country	Defaults to the country in which the store is located, but can be changed using the **Change Country**. Changing the country will alter the drop-down options in the State field.
Home, Work, Mobile, and Email	As you enter data in these fields, the associated contact permission check marks become active. Indicate whether or not it is okay to contact the customer by selecting the corresponding **Yes** box.
Language	The language code for the customer's preferred language.
Preference	The customer's preferred method of contact.
Email receipts	Yes indicates the customer would like to have email receipts automatically selected when purchasing items.

3. Select the **Groups & Personal** tab.



Ingrid Masterson | Customer #: C1973001000018 | Customer Since: 08/27/2013

Group Membership

CUSTOMER GROUPS
Normal Level
Elite Program Member
Employee
Employee Family

Personal Information

Anniversary Date: 08/27/2013

Birth Date:

Gender:

Party #: 1973001000018

Pre-Sale | John Miller | Online | Datavantage Home Office 1973 | Register: 1 | 08/19/2013 | 1:24 PM

Figure 5-6: Groups & Personal Tab Data Entry

- Select a **Group Membership**. A customer may be associated with one or more groups. If groups are not defined, no customer groups are listed in this section.
- Add **Personal Information**. The anniversary date will display as today's date.

Table 5-2: *Groups & Personal Tab Fields*

Field Name	Description
Group Membership	Select a membership if applicable. Your store may have badges such as silver assigned to various group memberships. The badge appears on the header of the Customer Maintenance Screen as well as the Customer Loyalty Banner on various sale screens.
Personal Information	Anniversary date, birth date, and gender. The gender will determine the avatar picture in the contact information tab.

Table 5-2: *Groups & Personal Tab Fields*

Field Name	Description
Customer Attributes [NON-EDITABLE]	Attribute categories are defined by the home office and provide additional information about the customer.
Tax Exempt Information	To add tax exempt information see "To Add or Maintain a Customer's Tax Exemptions" on page 173.
Customer Segments [NON-EDITABLE]	Segments are groupings that share common criteria. This information is provided by Relate. Identifying a customer with a segment may be helpful in customer analysis and in sale promotions.

4. To add a comment to your new customer you must select **100 Changes** first and re-open the Customer Maintenance screen. Select the **Comments** tab to add comments. See "Comments Tab" on page 162.
5. Select the **Addresses** tab to add and manage multiple addresses for the customer. See "Adding/Maintaining Multiple Customer Addresses" on page 182.
6. Select the **House Accounts** tab to create and maintain a house account. See "House Account Tab, New AccountMaintaining House Accounts" on page 175.
7. Select the **Wish List** tab to maintain a wish list. Depending on the configuration of your store this may not be available. See "Wish List Tab" on page 165.

> *The **non-editable** tabs are **Purchase History** and **Customer Account**. These tabs are populated with information automatically when the customer makes purchases.*
>
> *When you save the data, a prompt may display asking if the customer would like to join the loyalty program so you do not need to go the Loyalty & Awards tab.*

8. After completing all of the data entry for the new customer, select the **Save Changes** option to store the new customer record in the database.
9. Depending on your system's configuration, you may be prompted to ask the customer about joining a loyalty program. The prompt that displays depends on your system's configuration:
    - ☐ **Customer-Centric:** Your store does not provide a physical card to the customer. The loyalty number is automatically assigned by the system and associated with the customer record.
    - ☐ **Card-Centric:** Your store provides a physical card with a loyalty account number for the customer. The card's loyalty number may be entered manually or swiped in a device.

10. Based on the customer’s response to the loyalty registration prompt, take one of these actions:
    - **If Card-Centric configuration**: Enter the card number or swipe the loyalty card and select **Process** when prompted if the customer wants to join the loyalty program.
      <OR>
      If Customer-Centric configuration: Select **Yes** when prompted if the customer wants to join the loyalty program.
    - Select **Not Now** if the customer may join the loyalty program later.
    - Select **Never** if the customer is not interested in joining the loyalty program.
11. If you added the new customer record during a ***sale transaction*** (at the Sale screen), select the **Assign Customer To Tran** option to return to the sale. If you added the new customer during the ***Pre-Sale activity***, the system automatically assigns the new customer to the sale transaction.

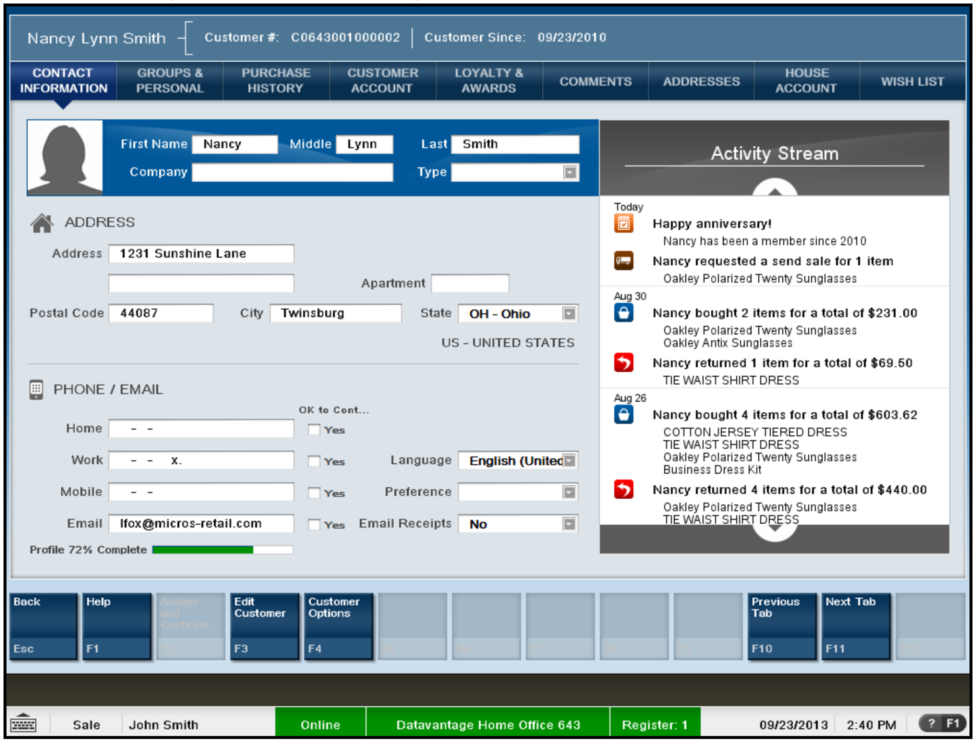
Viewing a Customer Record

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

1. The Customer record can be viewed when:
    - Associating a Customer to a sale prior to the sale (highlight Customer if applicable and then select the **Select & View** button menu option) or during the sale (select **Customer Options** --> **View Customer**).
    - Touch-screen user’s tap the Customer Loyalty Banner within a Sales Transaction. Tap the Customer Loyalty Banner in the Customer Maintenance form to return to the Sales Transaction. See “Customer Maintenance Touch-Screen Navigation” on page 6.

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

The customer record opens in a read-only mode.



Nancy Lynn Smith | Customer #: C0643001000002 | Customer Since: 09/23/2010

First Name: Nancy
Middle: Lynn
Last: Smith
Company:
Type:

Address: 1231 Sunshine Lane
Apartment:
Postal Code: 44087
City: Twinsburg
State: OH - Ohio
US - UNITED STATES

Home: - - ☐ Yes
Work: - - x. ☐ Yes
Mobile: - - ☐ Yes
Email: lfox@micros-retail.com ☐ Yes
Language: English (United
Preference:
Email Receipts: No
Profile 72% Complete

Today
Happy anniversary!
Nancy has been a member since 2010
Nancy requested a send sale for 1 item
Oakley Polarized Twenty Sunglasses

Aug 30
Nancy bought 2 items for a total of $231.00
Oakley Polarized Twenty Sunglasses
Oakley Antix Sunglasses
Nancy returned 1 item for a total of $69.50
TIE WAIST SHIRT DRESS

Aug 26
Nancy bought 4 items for a total of $603.62
COTTON JERSEY TIERED DRESS
TIE WAIST SHIRT DRESS
Oakley Polarized Twenty Sunglasses
Business Dress Kit
Nancy returned 4 items for a total of $440.00
Oakley Polarized Twenty Sunglasses
TIE WAIST SHIRT DRESS

Sale | John Smith | Online | Datavantage Home Office 643 | Register: 1 | 09/23/2013 | 2:40 PM

Figure 5-7: Customer Record in Read-Only Mode

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

2. Navigate between the tabbed sections on the customer record by selecting the **Previous Tab** and **Next Tab** menu options. See "Customer Information Tabs - Overview" on page 149 for more detail about the information found on each tab.

3. After you are finished viewing the customer record, select the **Back** option to return to the Customer Search form, or select the **Assign and Continue** option to return to the Register Sale screen where the customer's name is added to the sale transaction.

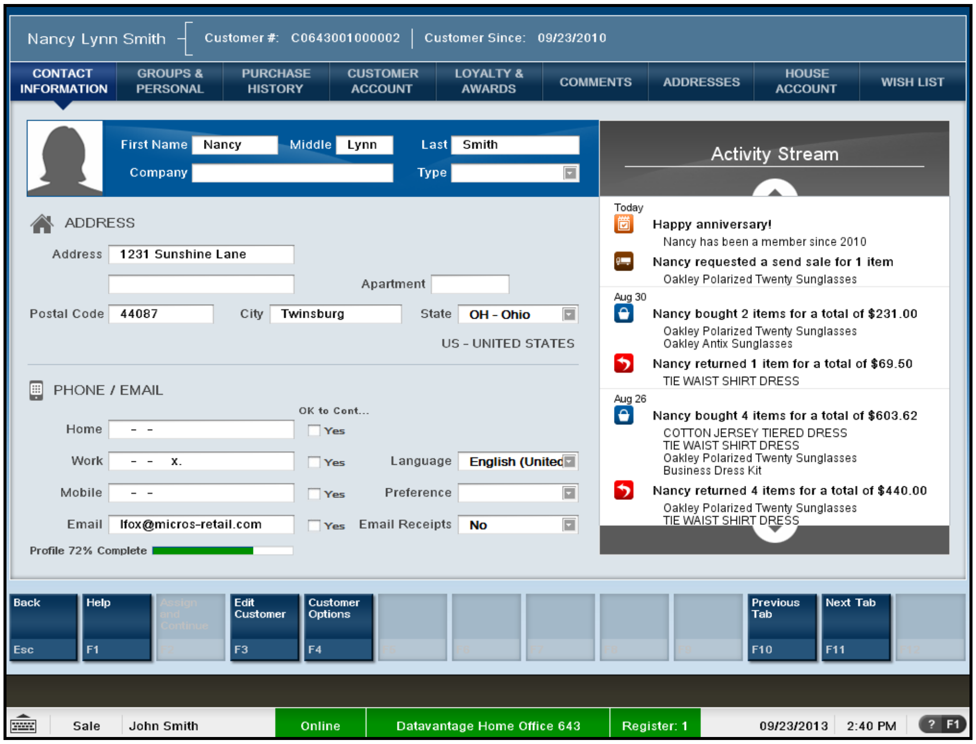
Customer Information Tabs - Overview

There are nine tabs on the Customer Maintenance window. This section provides an overview of the information available on each tab.

Contact Information Tab

This tab shows the customer name, address, phone and email information, contact preferences, activity stream, and profile completeness progress bar. Your store may be configured to display anniversary, birthday, and loyalty expiration messages.

*To edit information, select **Edit Customer** and see "Edit Customer" on page 169.*



Nancy Lynn Smith
Customer #: C0643001000002
Customer Since: 09/23/2010

First Name: Nancy
Middle: Lynn
Last: Smith
Company:
Type:

ADDRESS
Address: 1231 Sunshine Lane
Apartment:
Postal Code: 44087
City: Twinsburg
State: OH - Ohio
US - UNITED STATES

PHONE / EMAIL
OK to Cont...
Home: - - ☐ Yes
Work: - - x. ☐ Yes
Mobile: - - ☐ Yes
Email: lfox@micros-retail.com ☐ Yes
Language: English (United
Preference:
Email Receipts: No
Profile 72% Complete

Activity Stream

Today
Happy anniversary!
Nancy has been a member since 2010
Nancy requested a send sale for 1 item
Oakley Polarized Twenty Sunglasses

Aug 30
Nancy bought 2 items for a total of $231.00
Oakley Polarized Twenty Sunglasses
Oakley Antix Sunglasses
Nancy returned 1 item for a total of $69.50
TIE WAIST SHIRT DRESS

Aug 26
Nancy bought 4 items for a total of $603.62
COTTON JERSEY TIERED DRESS
TIE WAIST SHIRT DRESS
Oakley Polarized Twenty Sunglasses
Business Dress Kit
Nancy returned 4 items for a total of $440.00
Oakley Polarized Twenty Sunglasses
TIE WAIST SHIRT DRESS

Sale
John Smith
Online
Datavantage Home Office 643
Register: 1
09/23/2013
2:40 PM

Figure 5-8: Contact Information

This tab contains the following information:

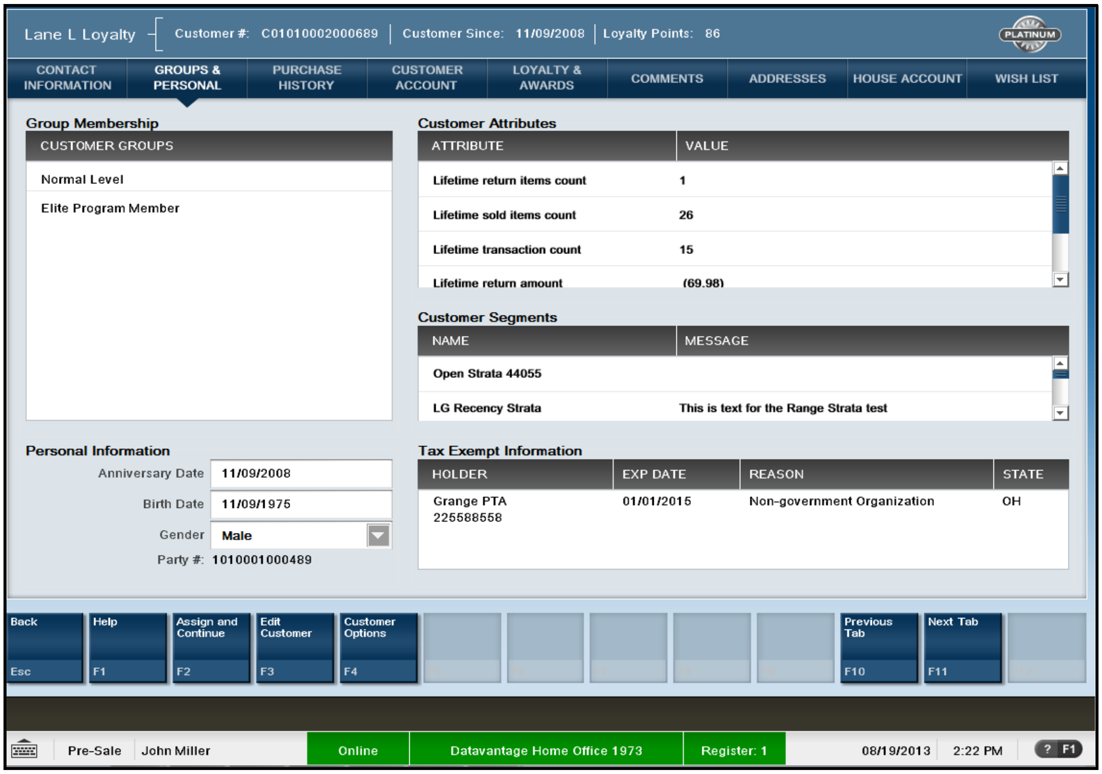
- **Address:** Basic identifying information about the customer.
- **Phone/Email:** The customer's preferences for being contacted by the store. This includes whether or not we have permission to contact the customer.
- **Language**: The language code for the customer's preferred language.
- **Preference:** The customer's preferred method of contact.
- **Email Receipts**: Yes indicates the customer would like to have email receipts as their default when purchasing items.
- **Activity Stream**: Lists the customer's recent transactions in chronological order by day, within the last 365 of activity. Each transaction is associated with an icon that represents the transaction type; sale or return.

- **Profile Completeness Progress Bar**: Indicates how complete the customer's profile is in its current state. Completeness is based on how much information has been taken from the customer and put into the customer profile.

Groups & Personal Tab

This tab lists any company-defined groups to which the customer belongs, and additional personal identifying information (party number and birth date, customer attributes, etc.).

> *To edit information select **Edit Customer** and see "Edit Customer" on page 169.*



Lane L Loyalty | Customer #: C01010002000689 | Customer Since: 11/09/2008 | Loyalty Points: 86

Group Membership

CUSTOMER GROUPS
Normal Level
Elite Program Member

Customer Attributes

ATTRIBUTE	VALUE
Lifetime return items count	1
Lifetime sold items count	26
Lifetime transaction count	15
Lifetime return amount	(69.98)

Customer Segments

NAME	MESSAGE
Open Strata 44055	
LG Recency Strata	This is text for the Range Strata test

Personal Information

Anniversary Date: 11/09/2008
Birth Date: 11/09/1975
Gender: Male
Party #: 1010001000489

Tax Exempt Information

HOLDER	EXP DATE	REASON	STATE
Grange PTA 225588558	01/01/2015	Non-government Organization	OH

Pre-Sale | John Miller | Online | Datavantage Home Office 1973 | Register: 1 | 08/19/2013 | 2:22 PM

Figure 5-9: Groups and Personal Information

The information categories on this screen include:

- **Group Membership:** Groups are defined by the store or home office and may be used for a variety of reasons. A customer may be associated with one or more groups. If groups are not defined, no customer groups are listed in this section.

> *Your store may have banners such as Silver assigned to the various group memberships. These banners appear on the Customer Maintenance header as well as the Customer Loyalty Banner on sale screens.*

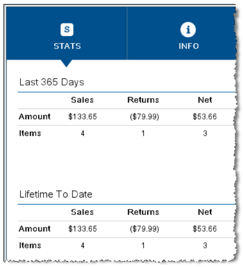
- **Personal Information:** Additional information beyond basic name and address. This information may be used as the store or organization determines. For example, a birthday card, gift, or discount coupon may be sent to the customer on his birthday. Your store may be configured so that the Birth Date field does not have a year associated with it.
- **Customer Attributes**: Attribute categories are defined by the home office and provide additional information about the customer.
- **Customer Segments:** Segments are groupings that share common criteria. This information is provided by Relate. Identifying a customer with a segment may be helpful in customer analysis and in sale promotions. This section is not shown if your organization does not have a loyalty program.
- **Tax Exempt Information:** If a customer has a tax exemption, that information is displayed in this section. A customer may have one or more exemptions, and they may be updated as required.

> *To update the customer's tax exemption record, select the **Customer Options** menu option and choose **Tax Exemptions** from the customer options list. Refer to "To Add or Maintain a Customer's Tax Exemptions" on page 173 for more information.*

Purchase History Tab

This tab shows a detailed sales transaction listing for the customer for the last 365[1] days.

The summary STATS view shows the last 365 days' sales/returns totals and the lifetime-to-date sales/returns totals.



Last 365 Days

	Sales	Returns	Net
Amount	$133.65	($79.99)	$53.66
Items	4	1	3

Lifetime To Date

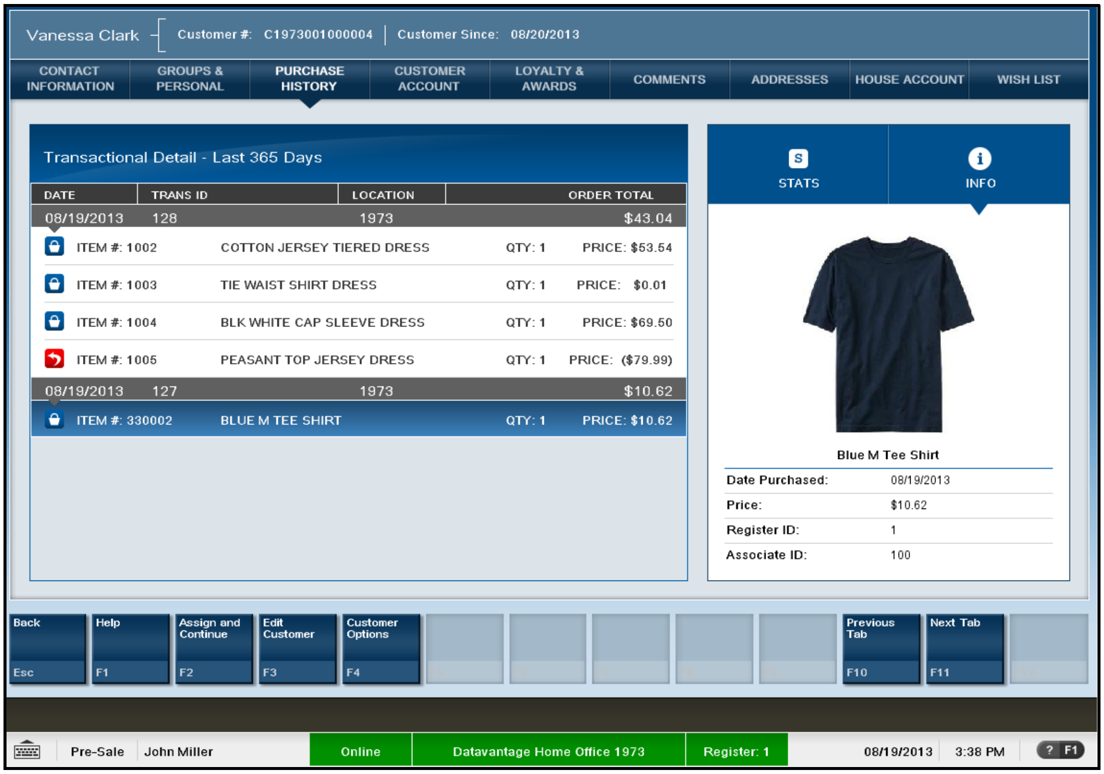
	Sales	Returns	Net
Amount	$133.65	($79.99)	$53.66
Items	4	1	3

---

[1] *The amount of historical retail data displayed in the transaction detail and summary lists is determined by the home office and may not be 365 days as shown in this example.*

If available, a picture displays with item details in the INFO tab (Figure 5-10).

Touch-screen users swipe left to collapse and right to expand the transaction detail list. See "Purchase History Tab Navigation" on page 7.



Vanessa Clark | Customer #: C1973001000004 | Customer Since: 08/20/2013

Transactional Detail - Last 365 Days

DATE	TRANS ID	LOCATION	ORDER TOTAL
08/19/2013	128	1973	$43.04

ITEM #: 1002	COTTON JERSEY TIERED DRESS	QTY: 1	PRICE: $53.54
ITEM #: 1003	TIE WAIST SHIRT DRESS	QTY: 1	PRICE: $0.01
ITEM #: 1004	BLK WHITE CAP SLEEVE DRESS	QTY: 1	PRICE: $69.50
ITEM #: 1005	PEASANT TOP JERSEY DRESS	QTY: 1	PRICE: ($79.99)

08/19/2013	127	1973	$10.62
ITEM #: 330002	BLUE M TEE SHIRT	QTY: 1	PRICE: $10.62

Blue M Tee Shirt

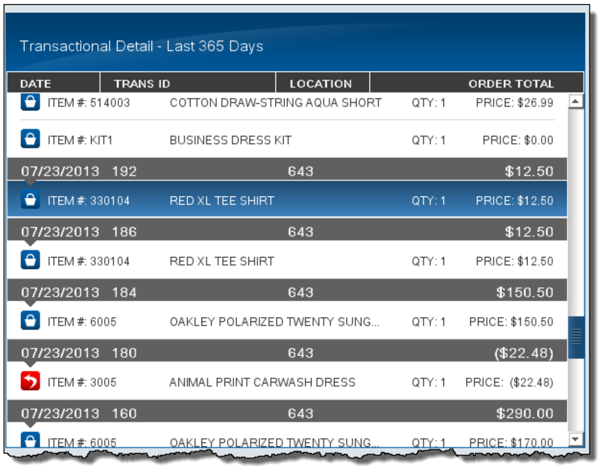
Date Purchased:	08/19/2013
Price:	$10.62
Register ID:	1
Associate ID:	100

Pre-Sale | John Miller | Online | Datavantage Home Office 1973 | Register: 1 | 08/19/2013 | 3:38 PM

Figure 5-10: Purchase History Information

Transaction History List

Transaction Detail - Last 365[2] Days: This is a listing of all of the customer's transactions in which the customer was assigned to a sale transaction in the last 365 days. Data shown here includes the transaction date, the transaction Id, the location where the item was purchased, the transaction total, the type of transaction, the item Id and description, the item quantity, and the item price.



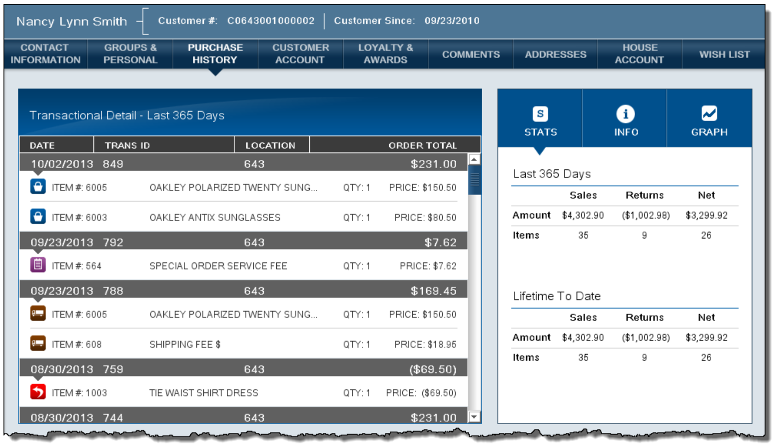
Transactional Detail - Last 365 Days

DATE	TRANS ID	LOCATION	ORDER TOTAL
ITEM #: 514003	COTTON DRAW-STRING AQUA SHORT	QTY: 1	PRICE: $26.99
ITEM #: KIT1	BUSINESS DRESS KIT	QTY: 1	PRICE: $0.00
07/23/2013	192	643	$12.50
ITEM #: 330104	RED XL TEE SHIRT	QTY: 1	PRICE: $12.50
07/23/2013	186	643	$12.50
ITEM #: 330104	RED XL TEE SHIRT	QTY: 1	PRICE: $12.50
07/23/2013	184	643	$150.50
ITEM #: 6005	OAKLEY POLARIZED TWENTY SUNG...	QTY: 1	PRICE: $150.50
07/23/2013	180	643	($22.48)
ITEM #: 3005	ANIMAL PRINT CARWASH DRESS	QTY: 1	PRICE: ($22.48)
07/23/2013	160	643	$290.00
ITEM #: 6005	OAKLEY POLARIZED TWENTY SUNG...	QTY: 1	PRICE: $170.00

Figure 5-11: Transaction Detail

STATS Tab

- **Lifetime To Date:** This is a summary of the customer's sales and returns for the customer's entire shopping history.
- **Last 365[2] Days:** This is a summary of the customer's sales and returns for the last 365[2] days.



Nancy Lynn Smith Customer #: C0643001000002 | Customer Since: 09/23/2010

Transactional Detail - Last 365 Days

DATE	TRANS ID	LOCATION	ORDER TOTAL
10/02/2013	849	643	$231.00
ITEM #: 6005	OAKLEY POLARIZED TWENTY SUNG...	QTY: 1	PRICE: $150.50
ITEM #: 6003	OAKLEY ANTIX SUNGLASSES	QTY: 1	PRICE: $80.50
09/23/2013	792	643	$7.62
ITEM #: 564	SPECIAL ORDER SERVICE FEE	QTY: 1	PRICE: $7.62
09/23/2013	788	643	$169.45
ITEM #: 6005	OAKLEY POLARIZED TWENTY SUNG...	QTY: 1	PRICE: $150.50
ITEM #: 608	SHIPPING FEE $	QTY: 1	PRICE: $18.95
08/30/2013	759	643	($69.50)
ITEM #: 1003	TIE WAIST SHIRT DRESS	QTY: 1	PRICE: ($69.50)
08/30/2013	744	643	$231.00

Last 365 Days

	Sales	Returns	Net
Amount	$4,302.90	($1,002.98)	$3,299.92
Items	35	9	26

Lifetime To Date

	Sales	Returns	Net
Amount	$4,302.90	($1,002.98)	$3,299.92
Items	35	9	26

Figure 5-12: Purchase History Tab - Stats

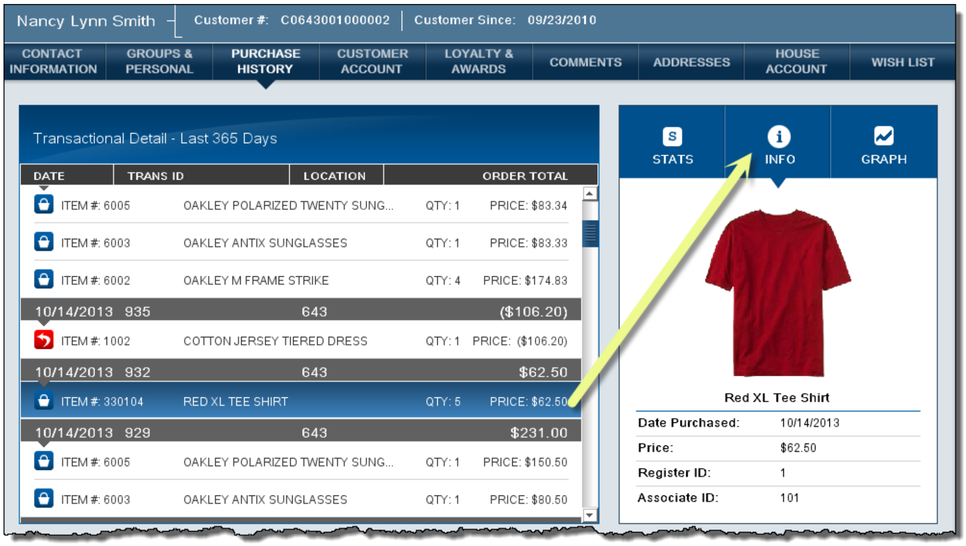
---

[2] *The amount of historical retail data displayed in the transaction detail and summary lists is determined by the home office and may not be 365 days as shown in this example.*

INFO Tab

Displays the following information for items selected in the transaction history list:

- Item Picture (if available)
- Item Description
- Date Purchased
- Price
- Register ID
- Associate ID



Nancy Lynn Smith
Customer #: C0643001000002
Customer Since: 09/23/2010

Transactional Detail - Last 365 Days

DATE	TRANS ID	LOCATION	ORDER TOTAL
ITEM #: 6005	OAKLEY POLARIZED TWENTY SUNG...	QTY: 1	PRICE: $83.34
ITEM #: 6003	OAKLEY ANTIX SUNGLASSES	QTY: 1	PRICE: $83.33
ITEM #: 6002	OAKLEY M FRAME STRIKE	QTY: 4	PRICE: $174.83
10/14/2013	935	643	($106.20)
ITEM #: 1002	COTTON JERSEY TIERED DRESS	QTY: 1	PRICE: ($106.20)
10/14/2013	932	643	$62.50
ITEM #: 330104	RED XL TEE SHIRT	QTY: 5	PRICE: $62.50
10/14/2013	929	643	$231.00
ITEM #: 6005	OAKLEY POLARIZED TWENTY SUNG...	QTY: 1	PRICE: $150.50
ITEM #: 6003	OAKLEY ANTIX SUNGLASSES	QTY: 1	PRICE: $80.50

Red XL Tee Shirt

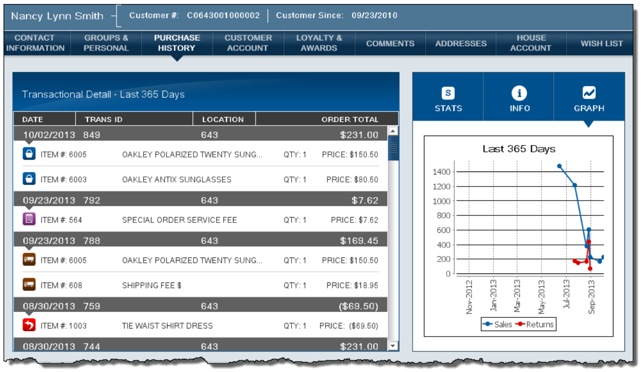
Date Purchased: 10/14/2013
Price: $62.50
Register ID: 1
Associate ID: 101

Figure 5-13: Purchase History Tab - Info

GRAPH Tab

This graph is based on the same time parameters used for the rolling transaction history. Sales dollars are down the left and the time line is across the bottom.

- **Blue line:** Sales
- **Red line:** Returns



Nancy Lynn Smith
Customer #: C0643001000002
Customer Since: 09/23/2010

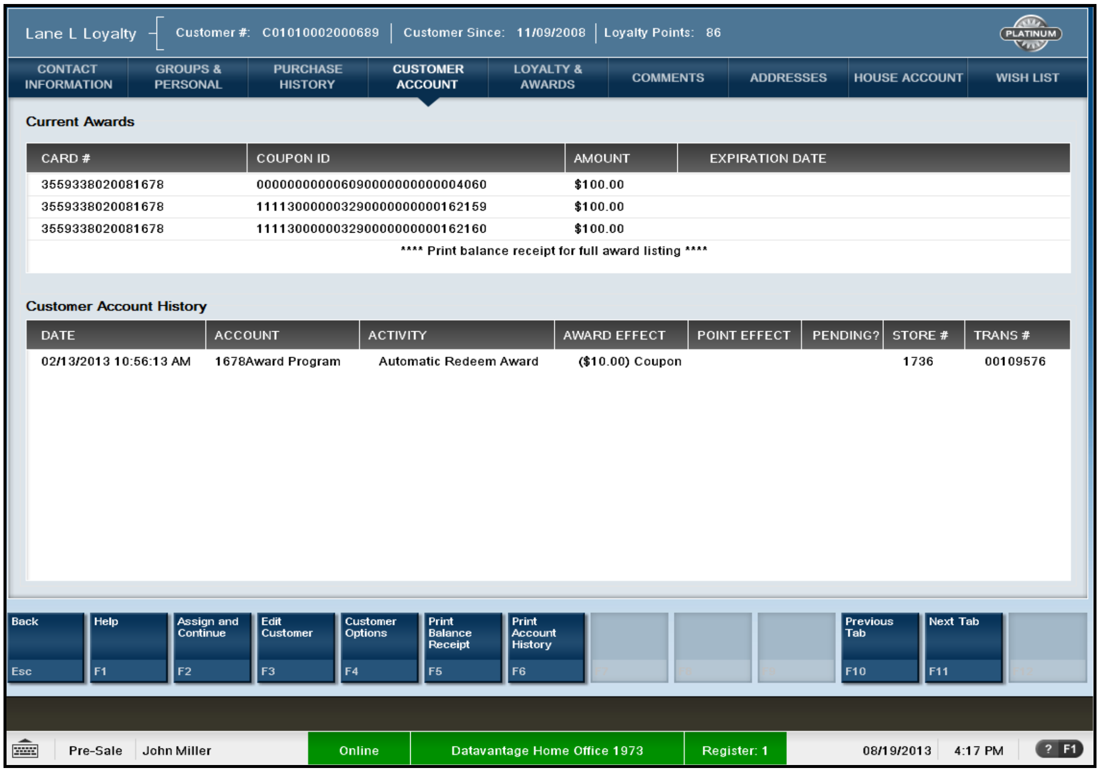
Transactional Detail - Last 365 Days

DATE	TRANS ID	LOCATION	ORDER TOTAL
10/02/2013	849	643	$231.00
ITEM #: 6005	OAKLEY POLARIZED TWENTY SUNG...	QTY: 1	PRICE: $150.50
ITEM #: 6003	OAKLEY ANTIX SUNGLASSES	QTY: 1	PRICE: $80.50
09/23/2013	792	643	$7.62
ITEM #: 564	SPECIAL ORDER SERVICE FEE	QTY: 1	PRICE: $7.62
09/23/2013	788	643	$169.45
ITEM #: 6005	OAKLEY POLARIZED TWENTY SUNG...	QTY: 1	PRICE: $150.50
ITEM #: 608	SHIPPING FEE $	QTY: 1	PRICE: $18.95
08/30/2013	759	643	($69.50)
ITEM #: 1003	TIE WAIST SHIRT DRESS	QTY: 1	PRICE: ($69.50)
08/30/2013	744	643	$231.00

Customer Account Tab

Your system's configuration determines the kind of information displayed on this tab. 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. See "No Loyalty Program" on page 158.

However, if your system is configured to use a loyalty program, only the customer's loyalty information is displayed, as seen in the following example.



Customer #: C01010002000689

Customer Since: 11/09/2008

Loyalty Points: 86

Current Awards

CARD #	COUPON ID	AMOUNT	EXPIRATION DATE
3559338020081678	000000000006090000000000004060	$100.00	
3559338020081678	111130000003290000000000162159	$100.00	
3559338020081678	111130000003290000000000162160	$100.00	

**** Print balance receipt for full award listing ****

Customer Account History

DATE	ACCOUNT	ACTIVITY	AWARD EFFECT	POINT EFFECT	PENDING?	STORE #	TRANS #
02/13/2013 10:56:13 AM	1678Award Program	Automatic Redeem Award	($10.00) Coupon			1736	00109576

Figure 5-14: Customer Account Information

There are two information sections on this screen:

- **Current Awards:** This area shows a list of the customer's current awards. For each award, the card number, the coupon ID (if applicable), amount of the award, and the expiration date are shown.

If the customer has more than 4 active awards, the first 3 awards display and the 4th row displays a message to print the balance receipt for full award listing. See page 157 for more information about printing the balance receipt.

- **Customer Account History:** This area lists updates to the customer's loyalty and award accounts. Information shown here includes:
    - ❑ **Date** - The date and time when the transaction took place.
    - ❑ **Account** - The last four numbers of the card for the loyalty account, followed by the name of the loyalty account.

- **Activity** - The type of activity:
    - Activated (Loyalty & Awards)
    - Deactivated (Loyalty & Awards)
    - Issue Points (Loyalty)
    - Return Points (Loyalty)
    - Void Points (Loyalty)
    - Issue Award (Loyalty)
    - Points Recovery (Loyalty)
    - Earn Points (Loyalty)
    - Points Balance Transfer (Loyalty)
    - Change Level (Loyalty)
    - Inquiry
    - Account Merge
    - Change Earn Date
    - Void Award Transaction (Award)
    - Automatic Redeem Award (Award)
    - Redeem Award (Award)
    - Issue Coupon (Award)
    - Issue Birthday Coupon (Award)
    - Issue Signup Coupon (Award)
    - Award Expiration (Award)
- **Award Effect** - The dollar effect on the account.
- **Point Effect** - The point effect on the account.
- **Pending?** - Shows a green check mark if the loyalty points shown are in escrow and still pending.
- **Store#** - The store number where the transaction took place.
- **Trans#** - The Xstore transaction number for the activity.

About the list of accounts...

Activity rows that have been voided show a line through the entire row.

If there are too many records to display, the list view displays the account name and a message indicating the loyalty/award account history request attempted to retrieve too many records.

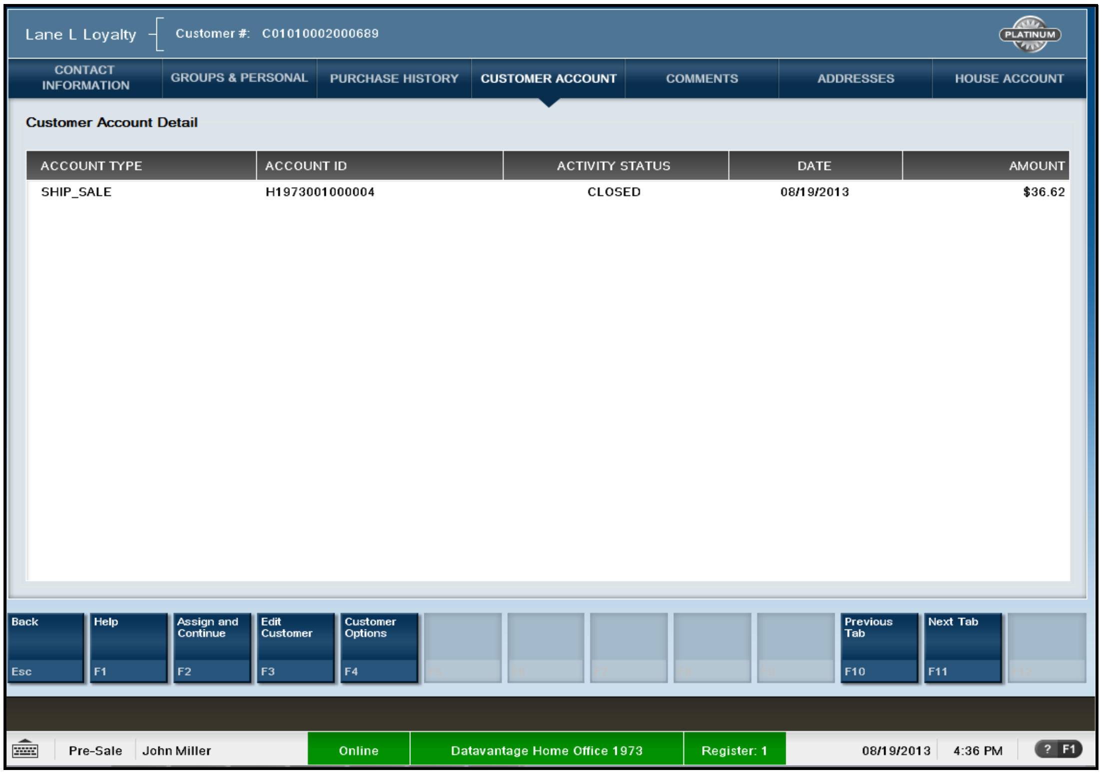
Customer Account Tab Menu Options

- **Print Balance Receipt** - This option prints a balance receipt on the receipt printer. Information on the receipt includes:
    - **Award Amount** - The amount, in currency, of the award.
    - **Expires** - The date when this award expires.
    - **Loyalty #** - The card number: all but the last four digits are masked.
    - **Program Name** - The name of the loyalty program.
    - **Program Level** - The level of the loyalty program.
    - **Total Escrow Points** - The total number of Escrow Points currently contained within the customer account.
    - **Total Earned Points** - The total number of points earned as reported by the CRM server.

- **Print Account History** - This option 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 Customer Account tab. See the *Xstore Reports Guide* for more information about this report.

No Loyalty Program

In the next example showing the Customer Account tab, the system is not configured for a loyalty program and the tab shows information about other types of accounts.



Customer Account Detail

ACCOUNT TYPE	ACCOUNT ID	ACTIVITY STATUS	DATE	AMOUNT
SHIP_SALE	H1973001000004	CLOSED	08/19/2013	$36.62

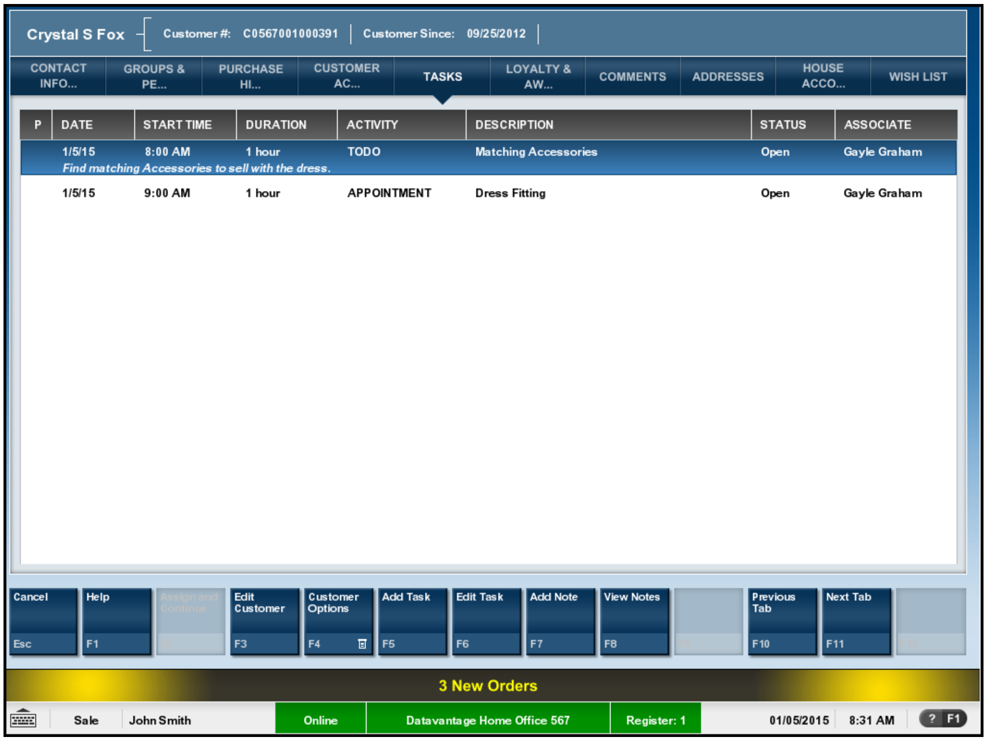
Figure 5-15: Customer Account Information: No Loyalty Program

Customer Account Detail - This area 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.

Tasks Tab

The Tasks tab displays all tasks associated with the customer.

> *Select a heading (**Priority** (**P**), **Date**, **Start Time**, etc.) to sort information by ascending or descending order.*



Crystal S Fox | Customer #: C0567001000391 | Customer Since: 09/25/2012

P	DATE	START TIME	DURATION	ACTIVITY	DESCRIPTION	STATUS	ASSOCIATE
	1/5/15 *Find matching Accessories to sell with the dress.*	8:00 AM	1 hour	TODO	Matching Accessories	Open	Gayle Graham
	1/5/15	9:00 AM	1 hour	APPOINTMENT	Dress Fitting	Open	Gayle Graham

3 New Orders

Sale | John Smith | Online | Datavantage Home Office 567 | Register: 1 | 01/05/2015 | 8:31 AM

Figure 5-16: Appointments Tab Information

The Task tab displays the following:

Table 5-3: *Task Tab Fields*

Field	Description
Priority (P)	The Importance of the task (**High** (!), **Medium** (none), or **Low** (↓).
Date	The date the task should be started.
Start Time	The time the task should begin.
Duration	The length of time for the task.
Activity	Type of task.

Table 5-3: *Task Tab Fields*

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

To view the information and further refine your list, see "Viewing Task Information" on page 409. Instructions for maintaining tasks are the same as using the My Task screen. Refer to the following:

- "Adding a Task" on page 412
- "Adding Notes" on page 414
- "Editing a Task" on page 415

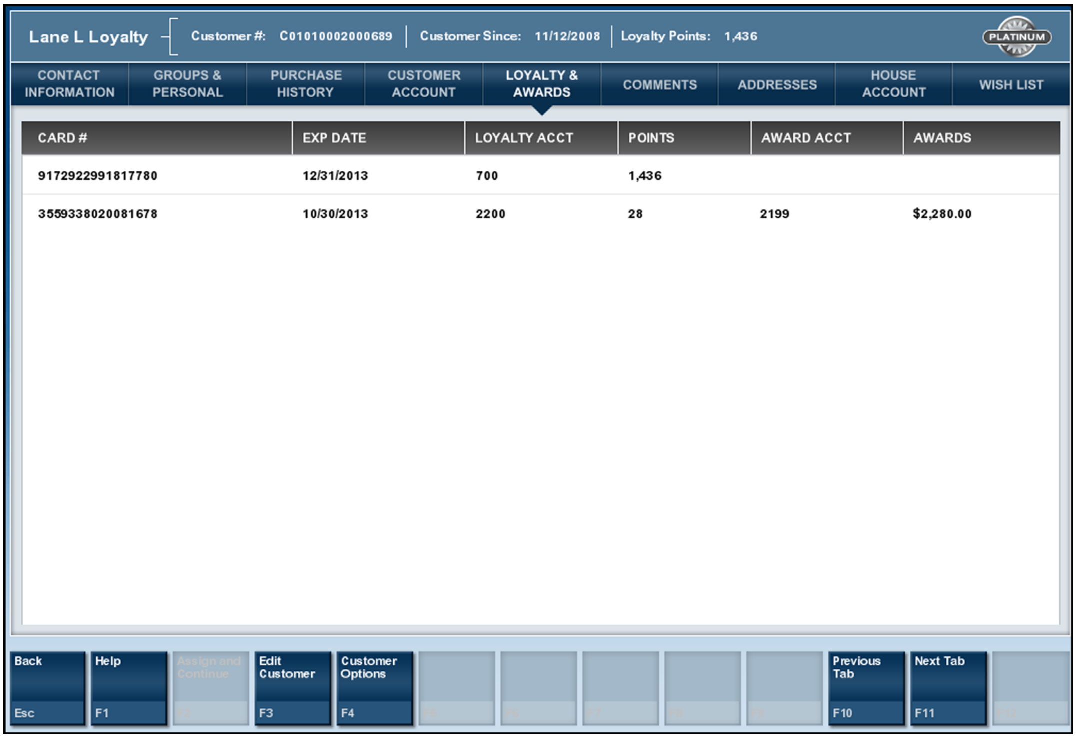
You cannot update the status of a task from the Customer Maintenance screen, you must use the My Tasks screen. See "Updating Task Progress" on page 415.

Loyalty & Awards Tab

If you are using Relate, this tab displays loyalty award information. Loyalty values are accumulated according to the rules for each individual program. Rules for assigning points and awards are defined in Relate CRM. Swiping or entering a loyalty card number during a transaction records the customer's participation in the program so that the loyalty values may be adjusted in the system.

Use this tab to view and inform your customer of the loyalty expiration date.

To enroll in a loyalty program, select ***Customer Options*** *and see "Additional Customer Options" on page 171.*



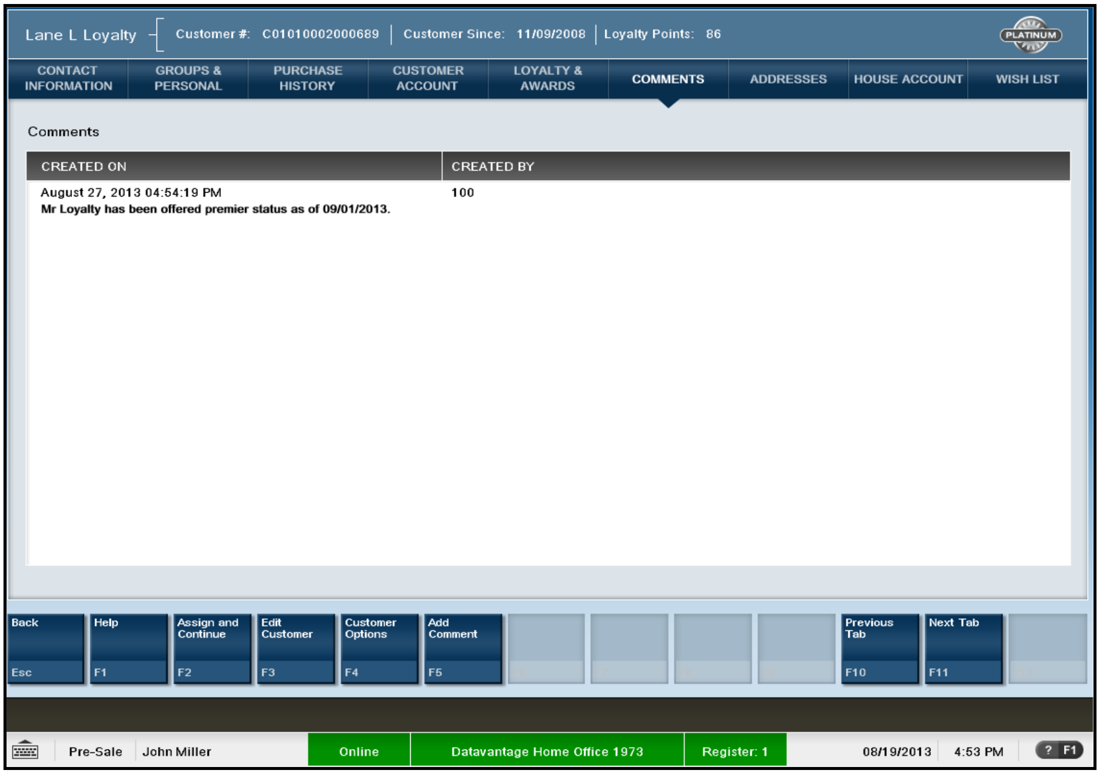
Lane L Loyalty Customer #: C01010002000689 | Customer Since: 11/12/2008 | Loyalty Points: 1,436

CARD #	EXP DATE	LOYALTY ACCT	POINTS	AWARD ACCT	AWARDS
9172922991817780	12/31/2013	700	1,436		
3559338020081678	10/30/2013	2200	28	2199	$2,280.00

Figure 5-17: Loyalty and Awards Tab

Comments Tab

The Comments tab shows any comments associated with this customer.



Lane L Loyalty | Customer #: C01010002000689 | Customer Since: 11/09/2008 | Loyalty Points: 86

Comments

CREATED ON	CREATED BY
August 27, 2013 04:54:19 PM **Mr Loyalty has been offered premier status as of 09/01/2013.**	100

Pre-Sale | John Miller | Online | Datavantage Home Office 1973 | Register: 1 | 08/19/2013 | 4:53 PM

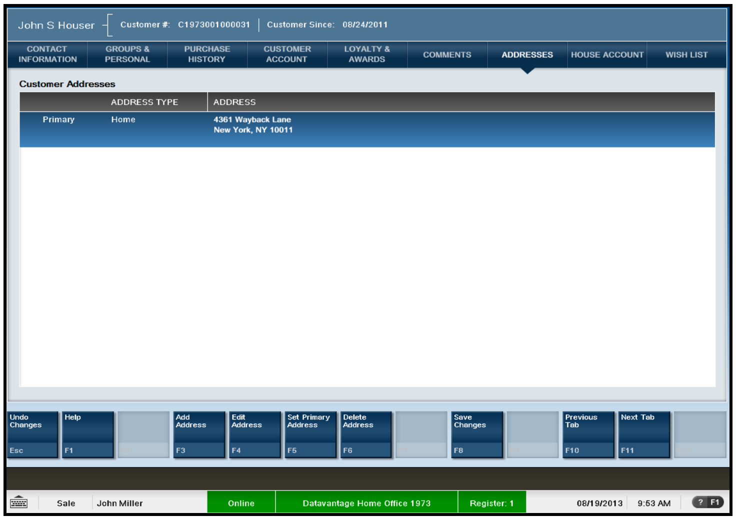
Figure 5-18: Comments Tab (Edit Mode)

*Select the **Add Comment** menu button option to add a new comment for this customer.*

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

Addresses Tab

This tab shows multiple addresses for the customer, and provides the ability to add new addresses as needed; for example, a work location or vacation home address. See "Adding/ Maintaining Multiple Customer Addresses" on page 182 for more information about the options available for adding/editing the address information.



John S Houser
Customer #: C1973001000031
Customer Since: 08/24/2011

Customer Addresses

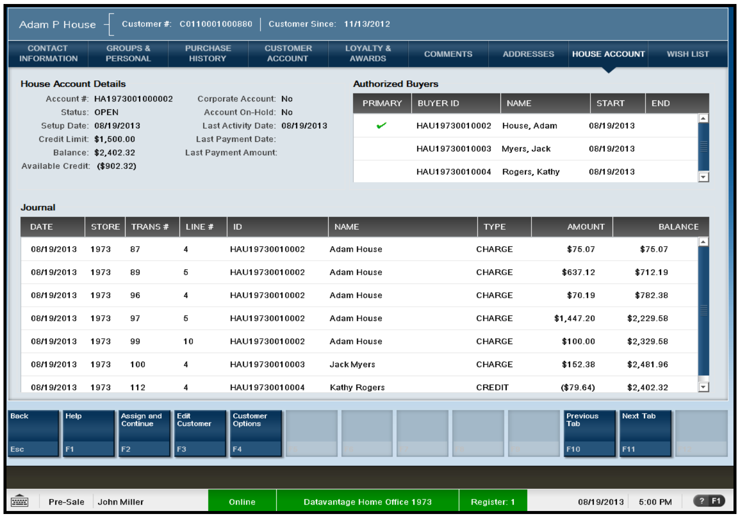
	ADDRESS TYPE	ADDRESS
Primary	Home	4361 Wayback Lane New York, NY 10011

Sale | John Miller | Online | Datavantage Home Office 1973 | Register: 1 | 08/19/2013 | 9:53 AM

Figure 5-19: Addresses Tab

House Account Tab

This tab shows information about a customer's House Account. This information is only available for customers who have set up a valid house account. To set up a House Account, if allowed per your store policy, see "To Create a House Account" on page 175. To maintain an existing House Account, see "House Account Tab, New AccountMaintaining House Accounts" on page 175.



Adam P House
Customer #: C0110001000880
Customer Since: 11/13/2012

House Account Details

Account #: HA1973001000002
Status: OPEN
Setup Date: 08/19/2013
Credit Limit: $1,500.00
Balance: $2,402.32
Available Credit: ($902.32)
Corporate Account: No
Account On-Hold: No
Last Activity Date: 08/19/2013
Last Payment Date:
Last Payment Amount:

Authorized Buyers

PRIMARY	BUYER ID	NAME	START	END
✓	HAU19730010002	House, Adam	08/19/2013	
	HAU19730010003	Myers, Jack	08/19/2013	
	HAU19730010004	Rogers, Kathy	08/19/2013	

Journal

DATE	STORE	TRANS #	LINE #	ID	NAME	TYPE	AMOUNT	BALANCE
08/19/2013	1973	87	4	HAU19730010002	Adam House	CHARGE	$75.07	$75.07
08/19/2013	1973	89	5	HAU19730010002	Adam House	CHARGE	$637.12	$712.19
08/19/2013	1973	96	4	HAU19730010002	Adam House	CHARGE	$70.19	$782.38
08/19/2013	1973	97	5	HAU19730010002	Adam House	CHARGE	$1,447.20	$2,229.58
08/19/2013	1973	99	10	HAU19730010002	Adam House	CHARGE	$100.00	$2,329.58
08/19/2013	1973	100	4	HAU19730010003	Jack Myers	CHARGE	$152.38	$2,481.96
08/19/2013	1973	112	4	HAU19730010004	Kathy Rogers	CREDIT	($79.64)	$2,402.32

Pre-Sale | John Miller | Online | Datavantage Home Office 1973 | Register: 1 | 08/19/2013 | 5:00 PM

Figure 5-20: House Account Tab

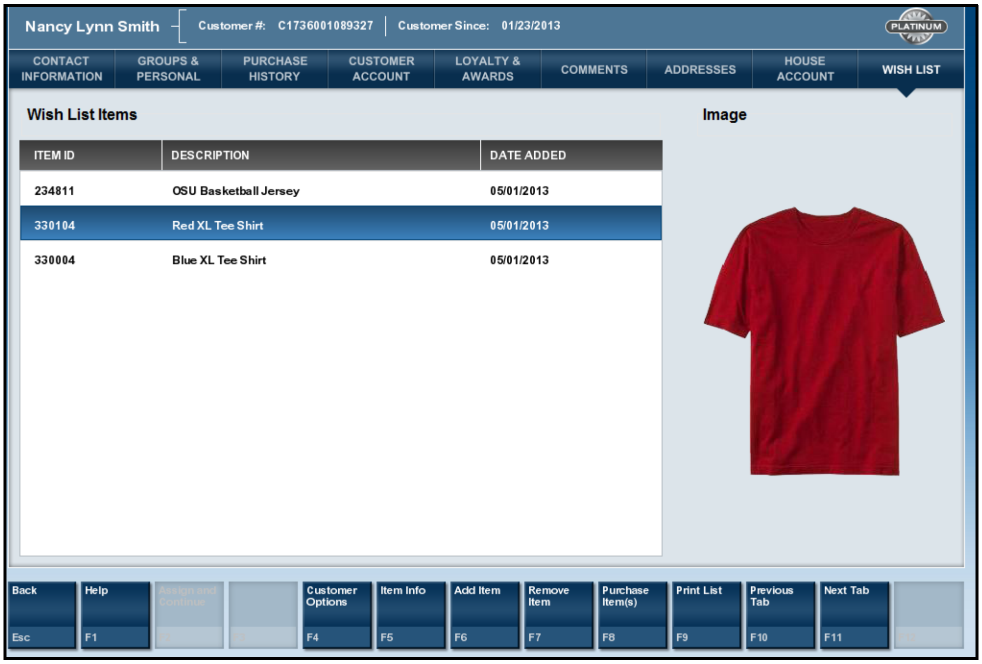
The information categories on this screen include:

- **House Account Details**
  - **Account #** - The House Account number.
  - **Status** - The status of the Account; OPEN, HOLD, CLOSED.
    - If HOLD or CLOSED, the account cannot be used for purchases.
    - If HOLD, payments may be made to the account.
    - If CLOSED, no payments may be made to the account
  - **Setup Date** - The date the account was created.
  - **Credit Limit** - The credit limit on the account.
  - **Balance** - The balance amount on the account.
  - **Available Credit** - The difference between the credit limit and the outstanding balance on the account that is available for purchases.
  - **Corporate Account** flag - If Yes, this is a corporate House Account and cannot be changed.
  - **Account on Hold** flag - If Yes this account cannot be used for purchases; however, payments can be made on the account.
  - **Last Activity Date** - The date of the most-recent activity on the account.
  - **Last Payment Date** - The date of the most-recent payment on the account.
  - **Last Payment Amount** - The most-recent payment amount on the account.
- **Authorized Buyers** - The names of the people authorized to use the House Account and the effective date the buyer can begin using the account. If applicable, the end date when the buyer no longer has access to the House Account is also shown. The green check mark indicates the primary authorized buyer for the account.
- **Journal Entries** - A record of all the House Account transactions.

See “To Create a House Account” on page 175 for more information about creating a new House Account. See “House Account Tab, New AccountMaintaining House Accounts” on page 175 for more information about editing an existing House Account.

Wish List Tab

If you are using Relate, this tab displays any items the customer has added to a personal wish list.



Nancy Lynn Smith

Customer #: C1736001089327

Customer Since: 01/23/2013

ITEM ID	DESCRIPTION	DATE ADDED
234811	OSU Basketball Jersey	05/01/2013
330104	Red XL Tee Shirt	05/01/2013
330004	Blue XL Tee Shirt	05/01/2013

Figure 5-21: Wish List Tab

The Wish List displays the following information:

- **Item ID** - The item number.
- **Description** - The item description.
- **Date Added** - Date the item was added to the wish list.
- **Image** - A picture of the item (if available).

To view additional information about the selected item, select **Item Info**.

Adding Wish List Items

> *If you are creating a new customer record, you must save the newly added customer before adding to the wish list. The Add Items button will not display until you save.*
>
> *If you attempt to add an item to a wish list that already exists, the system prompts with the following message "Sorry this item is already on the wish list, please select another item."*

To add items to a wish list:

1. From the Customer Maintenance Wish List tab:

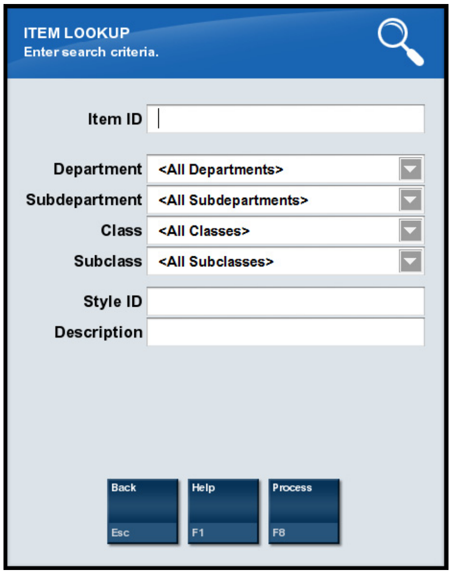
- ☐ Scan the item.

  <OR>

- ☐ Select **Add Items**.

  1) Enter your search criteria.

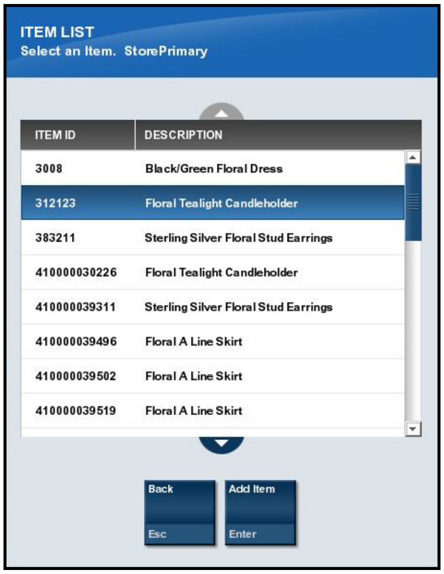
  2) Select **Process**.


ITEM LOOKUP
Enter search criteria.

Item ID
Department <All Departments>
Subdepartment <All Subdepartments>
Class <All Classes>
Subclass <All Subclasses>
Style ID
Description

Figure 5-22: Item Lookup Form

3) If several items match the criteria you entered, use the up and down arrow keys to highlight an item from the list. Select **Add Item**.



ITEM ID	DESCRIPTION
3008	Black/Green Floral Dress
312123	Floral Tealight Candleholder
383211	Sterling Silver Floral Stud Earrings
410000030226	Floral Tealight Candleholder
410000039311	Sterling Silver Floral Stud Earrings
410000039496	Floral A Line Skirt
410000039502	Floral A Line Skirt
410000039519	Floral A Line Skirt

Figure 5-23: Item List - Add Item

2. Verify the added item displays on the wish list. The newly added item will appear at the top of the list:

Nancy Lynn Smith Customer #: C1736001089327 Customer Since: 09/23/2010

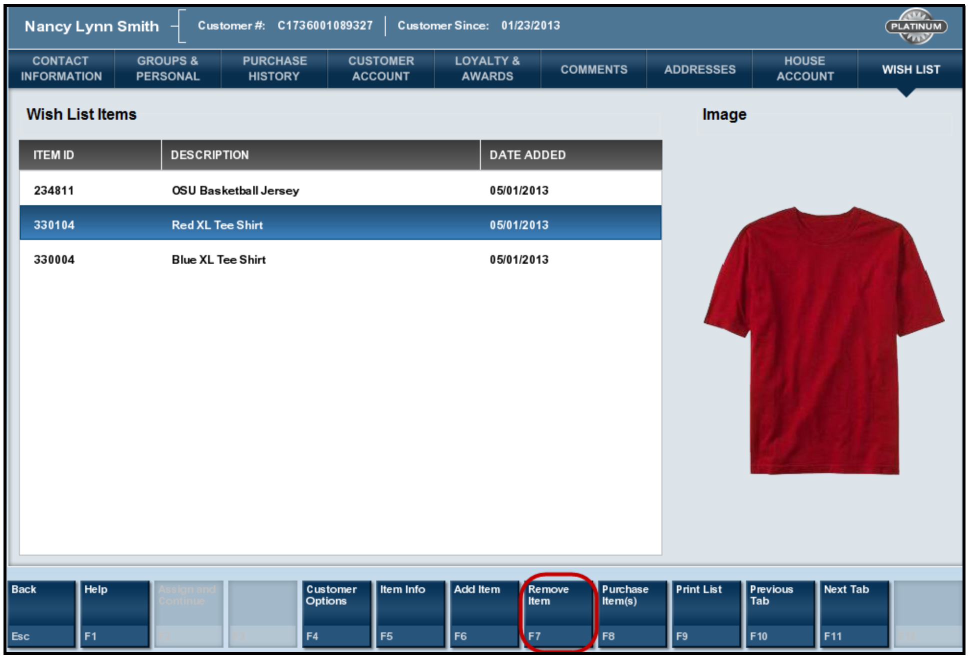
Wish List Items

ITEM ID	DESCRIPTION	DATE ADDED
312123	Floral Tealight Candleholder	10/09/2013
234811	OSU Basketball Jersey	05/01/2013
330104	Red XL Tee Shirt	05/01/2013
330004	Blue XL Tee Shirt	05/01/2013

Figure 5-24: Added Wish List Item

Removing Wish List Items

1. From the Customer Maintenance Wish List tab, select the item you wish to remove.
2. Select **Remove Item**.



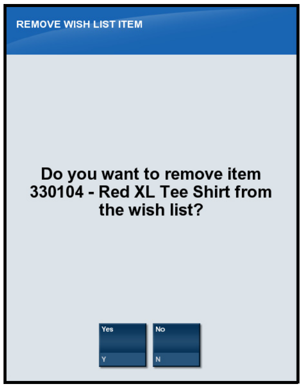
Nancy Lynn Smith | Customer #: C1736001089327 | Customer Since: 01/23/2013

Wish List Items

ITEM ID	DESCRIPTION	DATE ADDED
234811	OSU Basketball Jersey	05/01/2013
330104	Red XL Tee Shirt	05/01/2013
330004	Blue XL Tee Shirt	05/01/2013

Figure 5-25: Wish List Tab - Remove Item

3. The system displays a confirmation message.
   - Select **Yes** to remove the item from the customer's wish list.
   - Select **No** to return the customer to the wish list screen.

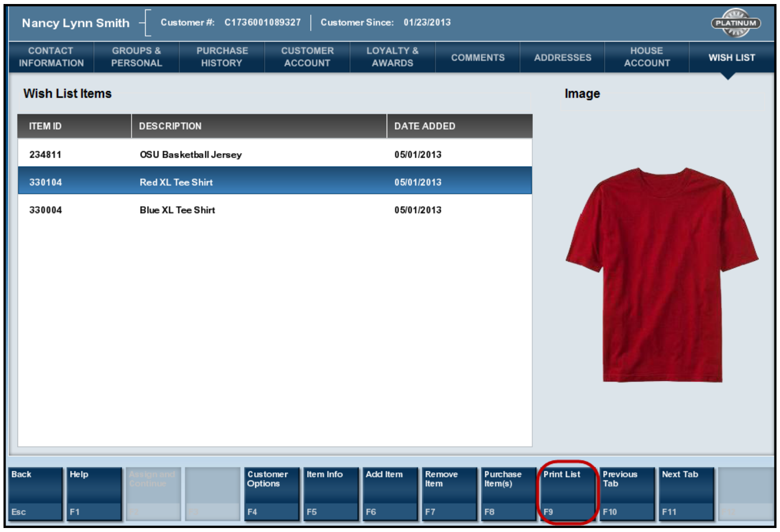


Do you want to remove item 330104 - Red XL Tee Shirt from the wish list?

Figure 5-26: Remove Wish List Item Confirmation

Printing a Wish List

From the Customer Maintenance Wish List tab, select **Print List**.



Nancy Lynn Smith

Customer #: C1736001089327

Customer Since: 01/23/2013

Wish List Items

ITEM ID	DESCRIPTION	DATE ADDED
234811	OSU Basketball Jersey	05/01/2013
330104	Red XL Tee Shirt	05/01/2013
330004	Blue XL Tee Shirt	05/01/2013

Figure 5-27: Wish List Tab - Print List

The Customer Wish List Report displays:

Customer Wish List Report

Customer Name: Smith, Nancy

Item ID	Description	Date Added
330004	Blue XL Tee Shirt	05/01/2013
330104	Red XL Tee Shirt	04/26/2013

Figure 5-28: Customer Wish List Report

For more detail about the Customer Wish List Report, see the *Xstore Reports Guide.*

Edit Customer

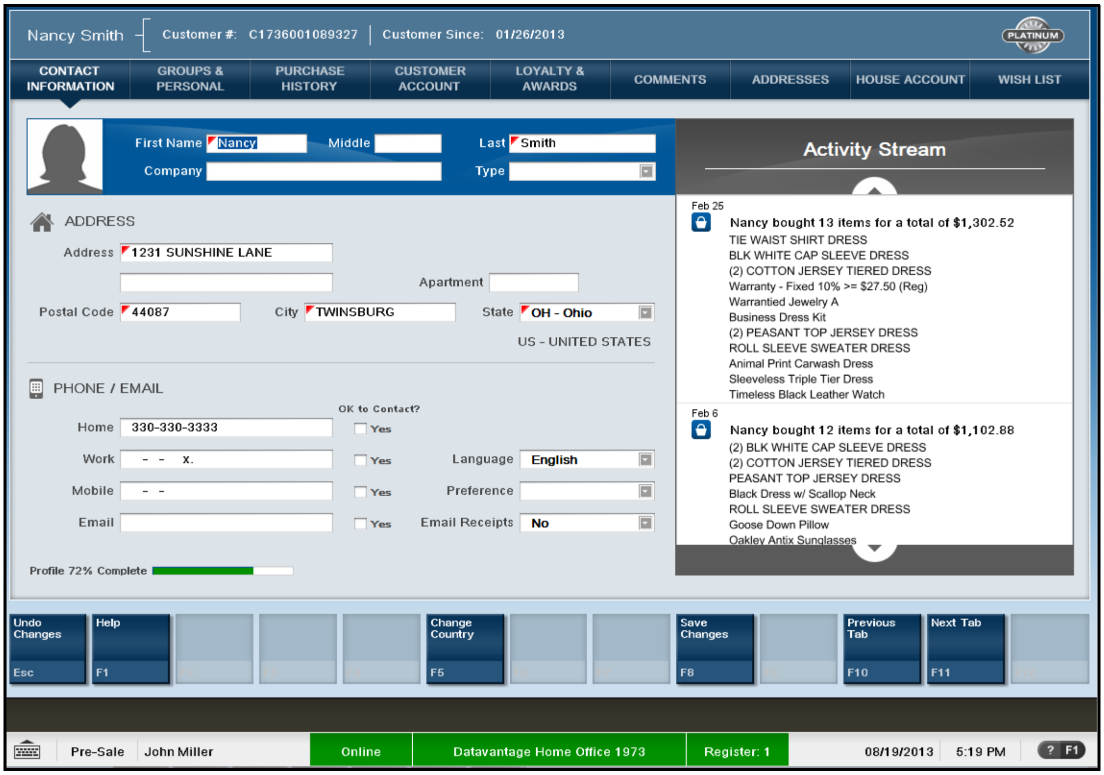
To edit a customer from the Customer Maintenance screen:

1. 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. Use the **Previous Tab** and **Next Tab** options to navigate to other tabs if needed.

Once you are in the edit mode (selected ***Edit Customer****), you can select other tabs and edit information. The non-editable tabs are* ***Purchase History*** *and* ***Customer Account****.*

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.



Nancy Smith
Customer #: C1736001089327
Customer Since: 01/26/2013

First Name: Nancy
Middle:
Last: Smith
Company:
Type:

ADDRESS
Address: 1231 SUNSHINE LANE
Apartment:
Postal Code: 44087
City: TWINSBURG
State: OH - Ohio
US - UNITED STATES

PHONE / EMAIL
OK to Contact?
Home: 330-330-3333 ☐ Yes
Work: - - x. ☐ Yes
Mobile: - - ☐ Yes
Email: ☐ Yes
Language: English
Preference:
Email Receipts: No

Profile 72% Complete

Feb 25
Nancy bought 13 items for a total of $1,302.52
TIE WAIST SHIRT DRESS
BLK WHITE CAP SLEEVE DRESS
(2) COTTON JERSEY TIERED DRESS
Warranty - Fixed 10% >= $27.50 (Reg)
Warrantied Jewelry A
Business Dress Kit
(2) PEASANT TOP JERSEY DRESS
ROLL SLEEVE SWEATER DRESS
Animal Print Carwash Dress
Sleeveless Triple Tier Dress
Timeless Black Leather Watch

Feb 6
Nancy bought 12 items for a total of $1,102.88
(2) BLK WHITE CAP SLEEVE DRESS
(2) COTTON JERSEY TIERED DRESS
PEASANT TOP JERSEY DRESS
Black Dress w/ Scallop Neck
ROLL SLEEVE SWEATER DRESS
Goose Down Pillow
Oakley Antix Sunglasses

Pre-Sale John Miller Online Datavantage Home Office 1973 Register: 1 08/19/2013 5:19 PM

Figure 5-29: Customer Maintenance Screen - Edit Mode

3. Select **Save Changes** to save the information to the database. Select the **Undo Changes** option if you decide not to keep the changes you made.

Additional Customer Options

Select the **Customer Options** menu option (see Figure 5-3 on page 142) to perform the activities described in this section. The system displays a list of customer maintenance options:

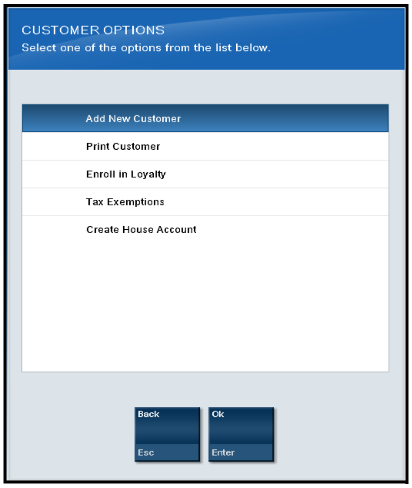


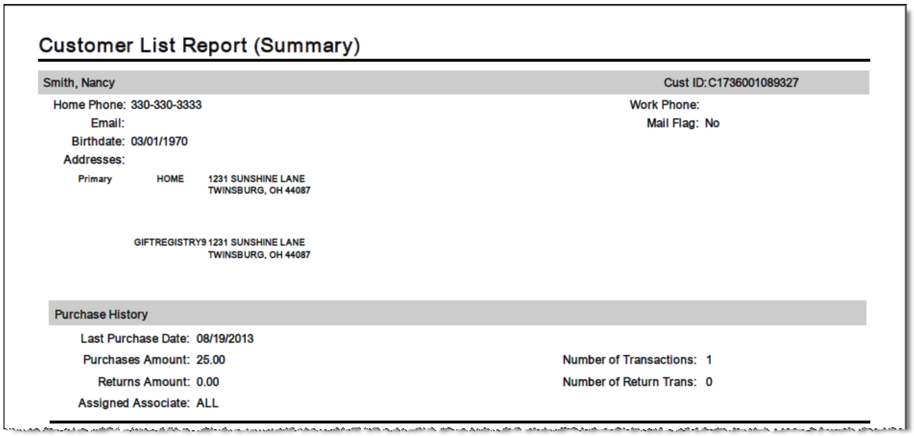
Figure 5-30: Customer Options List

To Add a New Customer

From the **Customer Options** menu, select **Add New Customer** to add a new customer record to the customer database. See Adding a New Customer Record, step 2 on page 144 for procedural information.

To Print a Customer Record

From the **Customer Options** menu, select **Print Customer** to print the customer record to a report printer.



Customer List Report (Summary)

Smith, Nancy Cust ID:C1736001089327

Home Phone: 330-330-3333
Email:
Birthdate: 03/01/1970
Addresses:
Primary HOME 1231 SUNSHINE LANE
TWINSBURG, OH 44087

GIFTREGISTRY9 1231 SUNSHINE LANE
TWINSBURG, OH 44087

Work Phone:
Mail Flag: No

Purchase History

Last Purchase Date: 08/19/2013
Purchases Amount: 25.00
Returns Amount: 0.00
Assigned Associate: ALL

Number of Transactions: 1
Number of Return Trans: 0

Figure 5-31: Customer List Report Summary

To Enroll the Customer in a Loyalty program

Many stores offer Loyalty Programs to their customers. A Loyalty Program typically offers benefits (such as savings) to the customer and provides the store with information about customer shopping preferences. The store may offer various levels of programs that are available to customers.

Some loyalty programs provide cards to their members and others do not. Xstore may be configured to handle either situation. If cards are provided, the card's number may be scanned or read with a device. Without a card, the system may be configured to automatically provide a loyalty number and associate it with the customer's record.

1. From the **Customer Options** menu, select **Enroll in Loyalty** (Figure 5-30 on page 171) to enroll the customer in the loyalty program.

> *The prompt that displays next depends upon your system's configuration.*
>
> *If you do not provide a physical card, the loyalty card number is automatically generated by the system and associated with the customer after you respond to the prompt.*
>
> *If your store provides a physical card, the system prompts you to swipe the card in a device so that the number can be read, or to enter the loyalty number that is on the card.*

2. The system prompts you to ask the customer about enrollment:
   - ❑ If the customer decides ***not*** to enroll now, select **Not Now**.
   - ❑ If the customer indicates no intention to enroll at any time, select **Never**.
   - ❑ If the customer decides to enroll in a loyalty program:
     - ❍ Select **Yes** if your store does *not* provide a physical card.

       <OR>
     - ❍ Swipe the loyalty card or enter the loyalty number found on the card and select **Process** if your store does give the customer a physical card.
3. Select the **Save Changes** option to save the loyalty card information to the customer's record.

About Loyalty programs

Loyalty values are accumulated according to the rules for each individual program. Rules for assigning points and awards are defined in Relate. Swiping or entering a loyalty card number during a transaction records the customer's participation in the program so that the loyalty values may be adjusted in the system.

A customer's current loyalty account information is displayed on the Loyalty and Awards tab in Customer Maintenance.

Customer #: C01010002000689 | Customer Since: 11/09/2008 | Loyalty Points: 86

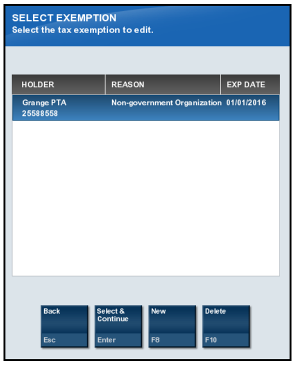
CARD #	LOYALTY ACCT	POINTS	AWARD ACCT	AWARDS
9172922991817780	700	86		
3559338020081678	2200	28	2199	$2,409.00

Figure 5-32: Loyalty Program Record in Customer Maintenance

To Add or Maintain a Customer’s Tax Exemptions

1. From the **Customer Options** menu, select **Tax Exemptions** (Figure 5-30 on page 171) to manage the customer’s tax exemptions.

- ❑ If the customer has a tax exemption record on file, the system displays a list of the customer’s tax exemptions:
  - ❍ To **edit** a tax exemption, select it in the list and press [Enter]. The system displays the tax exemption record information. Make changes as needed and then select **Save Changes**. You can review the changes in the **Tax Exempt Information** area on the **Groups & Personal** tab.
  - ❍ To **remove** this tax exemption, select **Delete**. The record is removed and will no longer be available for transactions.



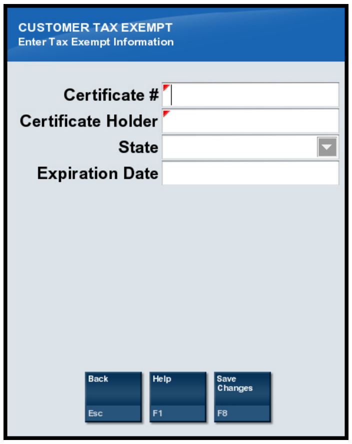
SELECT EXEMPTION
Select the tax exemption to edit.

HOLDER	REASON	EXP DATE
Grange PTA 25588558	Non-government Organization	01/01/2016

*Make sure you have selected the correct record before selecting the **Delete** option. There is no confirmation prompt associated with this action.*

  - ❍ To **add** a new tax exemption, select **New** and go to step 2 below.

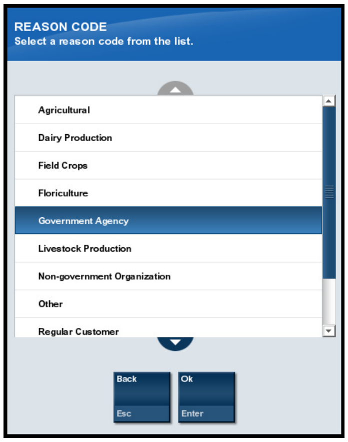
2. Xstore displays a form for entering the required information for the tax exemption. Complete the fields as required and select **Save Changes**.



CUSTOMER TAX EXEMPT
Enter Tax Exempt Information

Figure 5-33: Customer Tax Exempt Form

3. When prompted, select the tax exempt reason from the list and press [Enter].

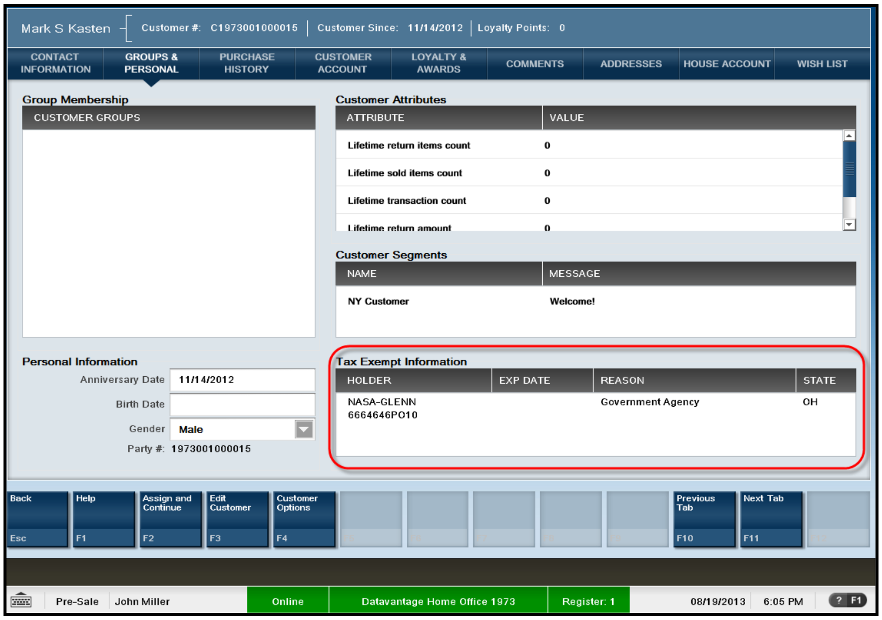


REASON CODE
Select a reason code from the list.

- Agricultural
- Dairy Production
- Field Crops
- Floriculture
- Government Agency
- Livestock Production
- Non-government Organization
- Other
- Regular Customer

Figure 5-34: List of Reasons for a New Tax Exemption

The new tax exemption is added to the customer's record and is listed in the **Tax Exempt Information** area on the **Groups & Personal** tab.



Mark S Kasten | Customer #: C1973001000015 | Customer Since: 11/14/2012 | Loyalty Points: 0

Group Membership

CUSTOMER GROUPS

Customer Attributes

ATTRIBUTE	VALUE
Lifetime return items count	0
Lifetime sold items count	0
Lifetime transaction count	0
Lifetime return amount	0

Customer Segments

NAME	MESSAGE
NY Customer	Welcome!

Personal Information
Anniversary Date: 11/14/2012
Birth Date:
Gender: Male
Party #: 1973001000015

Tax Exempt Information

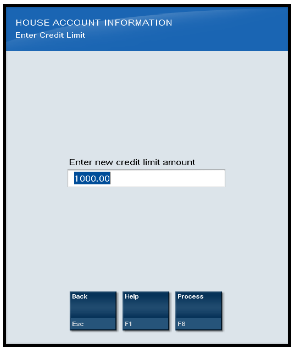
HOLDER	EXP DATE	REASON	STATE
NASA-GLENN 6664646PO10		Government Agency	OH

Figure 5-35: Customer Tax Exemption List on Customer Record

To Create a House Account

The House Account tab is disabled if the customer does not have a House Account.

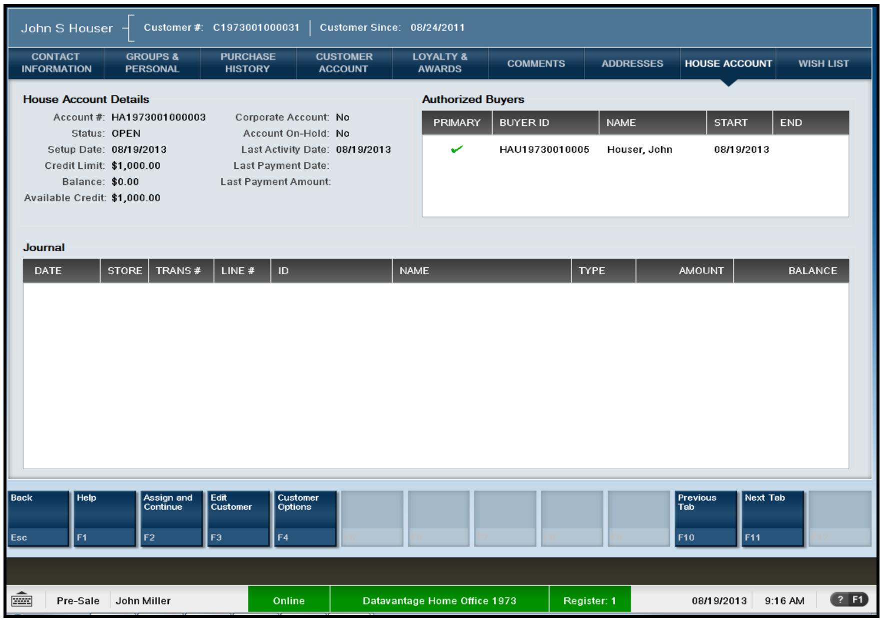
1. From the **Customer Options** menu, select **Create House Account** (Figure 5-30 on page 171) to set up a House Account for the customer.
2. The House Account Credit Limit prompt defaults to the pre-defined limit based on the corporate policy. Modify the amount if needed and select **Process**.



HOUSE ACCOUNT INFORMATION
Enter Credit Limit

Enter new credit limit amount: 1000.00

Select the House Account tab to view the House Account information.



John S Houser | Customer #: C1973001000031 | Customer Since: 08/24/2011

House Account Details

Account #: HA1973001000003
Status: OPEN
Setup Date: 08/19/2013
Credit Limit: $1,000.00
Balance: $0.00
Available Credit: $1,000.00
Corporate Account: No
Account On-Hold: No
Last Activity Date: 08/19/2013
Last Payment Date:
Last Payment Amount:

Authorized Buyers

PRIMARY	BUYER ID	NAME	START	END
✓	HAU19730010005	Houser, John	08/19/2013	

Journal

DATE	STORE	TRANS #	LINE #	ID	NAME	TYPE	AMOUNT	BALANCE

Pre-Sale | John Miller | Online | Datavantage Home Office 1973 | Register: 1 | 08/19/2013 | 9:16 AM

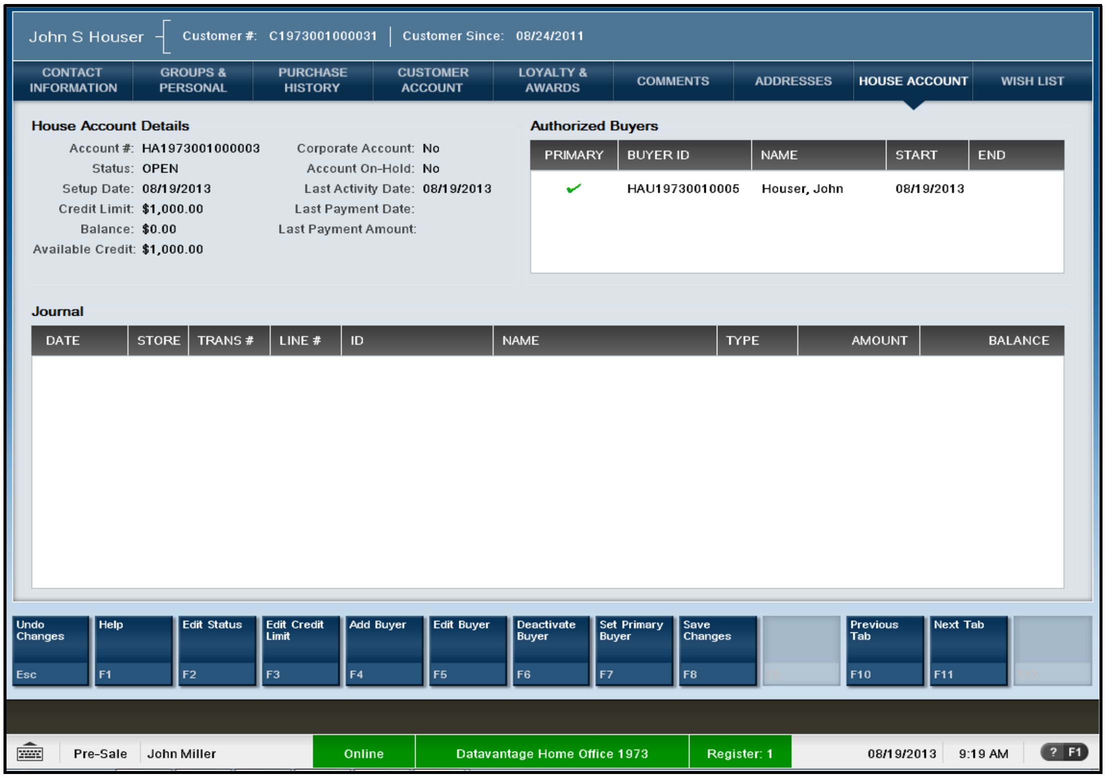
Figure 5-36: House Account Tab, New AccountMaintaining House Accounts

By default, the customer is added as the Primary authorized buyer.

Customer records always open in a read-only mode and cannot be edited unless you change to the editing mode. Use the **Edit Customer** option to make changes to the House Account as needed.

Corporate House Accounts cannot be modified.

1. Select **Edit Customer** and navigate to the House Account tab to view the edit options available for House Accounts.



House Account Details

Account #: HA1973001000003
Status: OPEN
Setup Date: 08/19/2013
Credit Limit: $1,000.00
Balance: $0.00
Available Credit: $1,000.00
Corporate Account: No
Account On-Hold: No
Last Activity Date: 08/19/2013
Last Payment Date:
Last Payment Amount:

Authorized Buyers

PRIMARY	BUYER ID	NAME	START	END
✓	HAU19730010005	Houser, John	08/19/2013	

Journal

DATE	STORE	TRANS #	LINE #	ID	NAME	TYPE	AMOUNT	BALANCE

Figure 5-37: House Account Tab - Edit Mode

2. Select an option from the menu to edit the House Account.

   House Account edit options include:

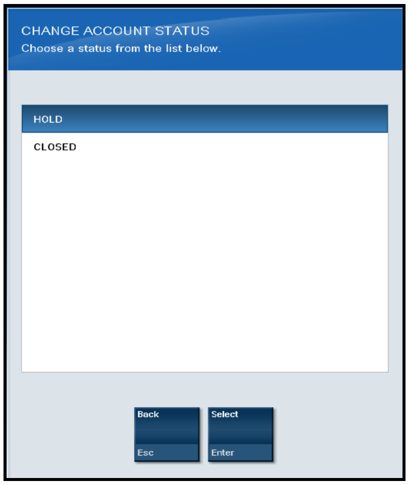
   ❑ Changing the house account status. See "To Change the Account Status" on page 177.

   ❑ Changing the limit on the account. See "To Change the Account Limit" on page 178.

   ❑ Adding a new authorized buyer, removing an authorized buyer, changing the primary authorized buyer, and editing authorized buyer information. See "To Update Authorized Buyer Information" on page 178.

To Change the Account Status

1. At the House Account tab, select **Edit Status**.
2. Select a new status from the Change Account Status list, then press [Enter] to save the change:



CHANGE ACCOUNT STATUS

Choose a status from the list below.

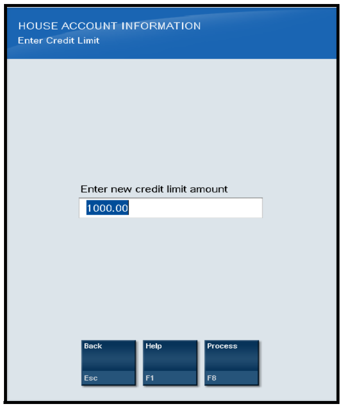
Figure 5-38: Change Account Status List (Currently in OPEN status)

The options available in this list will vary, depending on the current status of the House 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.

To Change the Account Limit

1. At the House Account tab, select **Edit Credit Limit**.
2. Enter the new credit limit amount, then select **Process** to save the change.



HOUSE ACCOUNT INFORMATION
Enter Credit Limit

Enter new credit limit amount
1000.00

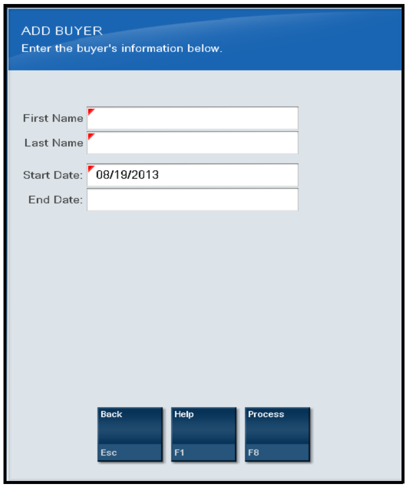
> *The prompt defaults to the current credit limit amount.*

3. To view the updated credit limit, select the House Account tab.

To Update Authorized Buyer Information

Adding a new authorized buyer

1. At the House Account tab, select **Add Buyer**.
2. Enter the new authorized buyer's information, then select **Process**.

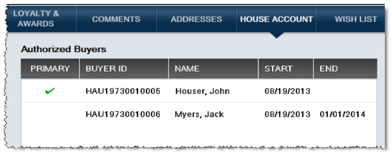


ADD BUYER
Enter the buyer's information below.

First Name
Last Name
Start Date: 08/19/2013
End Date:

> *First name, last name, and start date are required. End date is optional and determines when the buyer is no longer able to use this house account.*

The new authorized buyer's name is listed in the Authorized Buyers section of the screen.

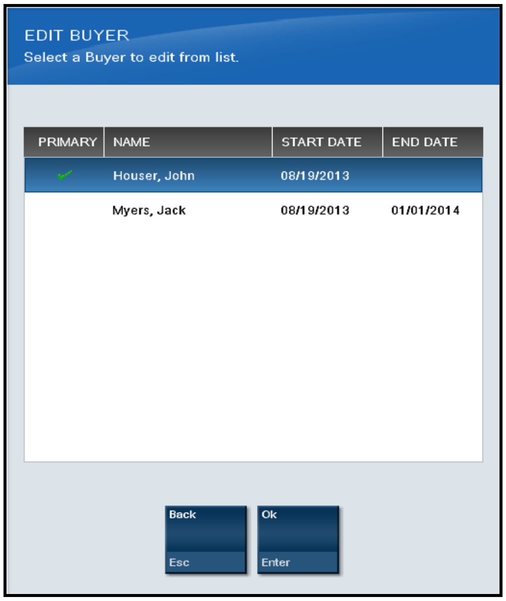


Authorized Buyers

PRIMARY	BUYER ID	NAME	START	END
✓	HAU19730010005	Houser, John	08/19/2013	
	HAU19730010006	Myers, Jack	08/19/2013	01/01/2014

Editing an authorized buyer

1. At the House Account tab, select **Edit Buyer**.
2. Select an authorized buyer from the list, then press [Enter].



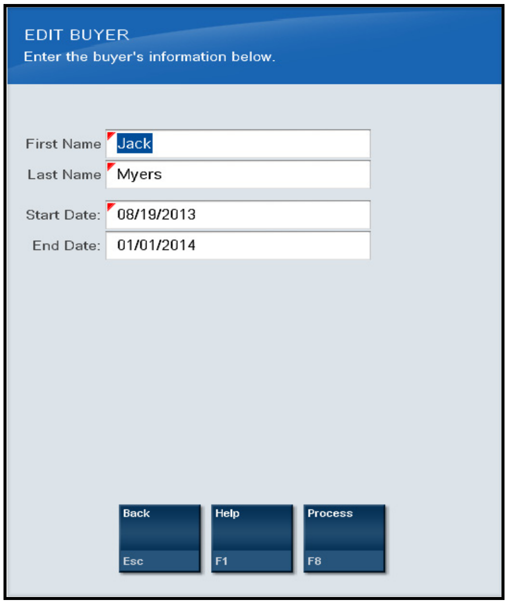
EDIT BUYER

Select a Buyer to edit from list.

PRIMARY	NAME	START DATE	END DATE
✓	Houser, John	08/19/2013	
	Myers, Jack	08/19/2013	01/01/2014

Figure 5-39: Authorized Buyer List

3. When prompted, edit the authorized buyer's information as needed, then select **Process**.



EDIT BUYER

Enter the buyer's information below.

First Name Jack

Last Name Myers

Start Date: 08/19/2013

End Date: 01/01/2014

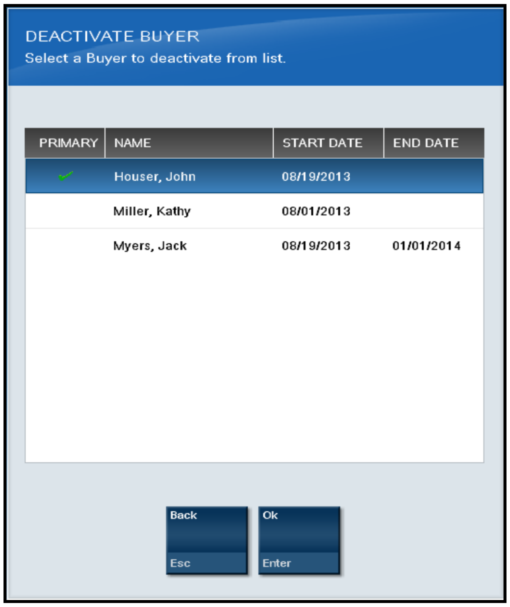
Figure 5-40: Edit Buyer Form

The updated authorized buyer's information is shown in the Authorized Buyers section of the screen.

Deactivating an authorized buyer

1. At the House Account tab, select **Deactivate Buyer**.

2. Select an authorized buyer from the list, then press [Enter].



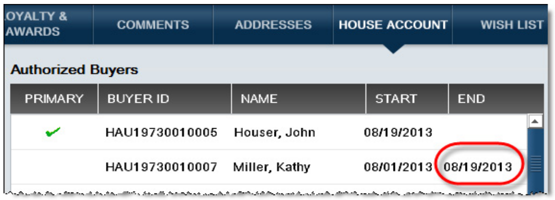
DEACTIVATE BUYER

Select a Buyer to deactivate from list.

PRIMARY	NAME	START DATE	END DATE
✓	Houser, John	08/19/2013	
	Miller, Kathy	08/01/2013	
	Myers, Jack	08/19/2013	01/01/2014

Figure 5-41: Deactivate Buyer List

The end date for the deactivated buyer is set to today's date and shown in the Authorized Buyers section of the screen.

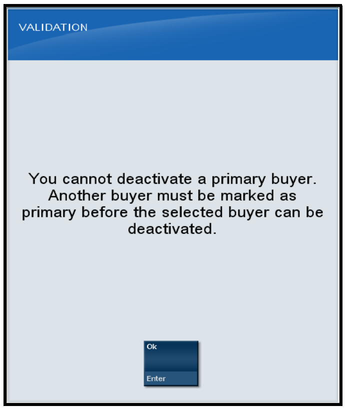


Authorized Buyers

PRIMARY	BUYER ID	NAME	START	END
✓	HAU19730010005	Houser, John	08/19/2013	
	HAU19730010007	Miller, Kathy	08/01/2013	08/19/2013

Figure 5-42: House Account Tab - Authorized Buyers Section

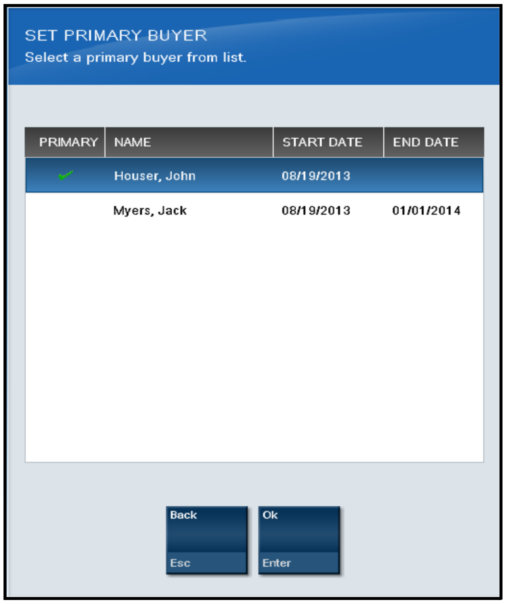
You cannot deactivate the current primary buyer. To deactivate the primary buyer, you must first designate a new primary buyer. See "Designating the primary buyer" on page 181 for procedural information.



You cannot deactivate a primary buyer. Another buyer must be marked as primary before the selected buyer can be deactivated.

Designating the primary buyer

1. At the House Account tab, select **Set Primary Buyer**.
2. Select an authorized buyer from the list, then press [Enter].



PRIMARY	NAME	START DATE	END DATE
✓	Houser, John	08/19/2013	
	Myers, Jack	08/19/2013	01/01/2014

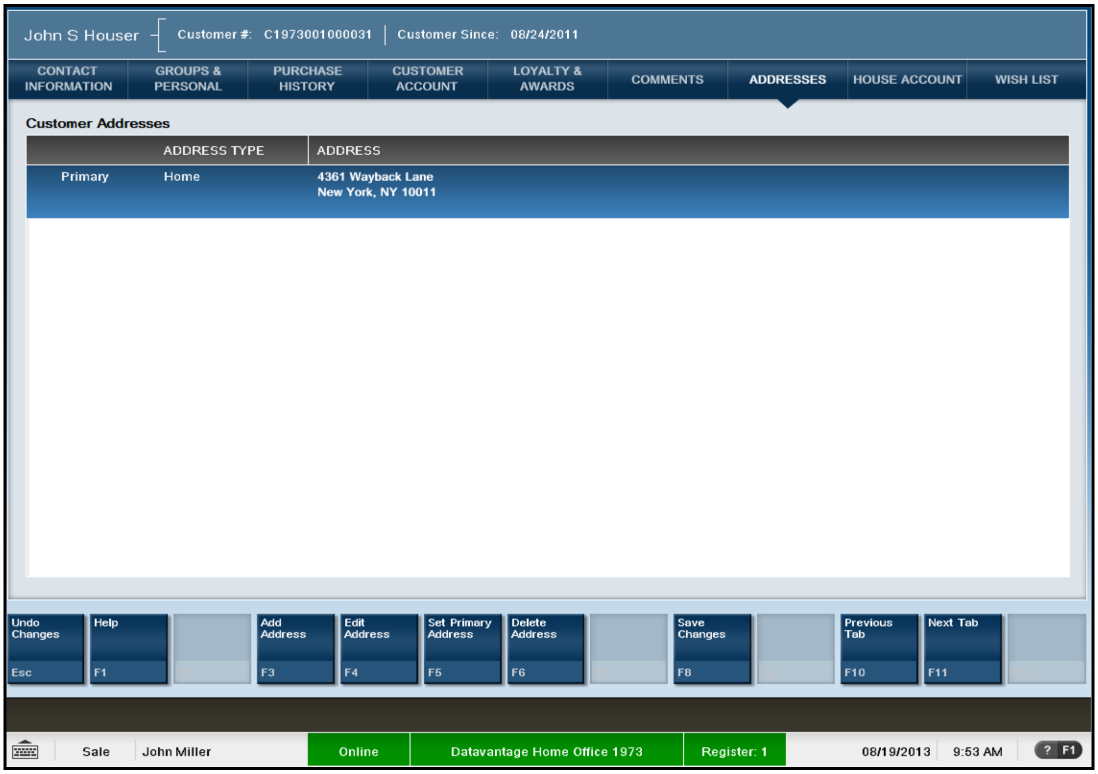
Figure 5-43: Set Primary Buyer List

At the House Account tab, the authorized buyer you selected is moved to the top of the Authorized Buyers list and shown with a green check mark. The list is resorted alphabetically below the primary buyer's name.

Adding/Maintaining Multiple Customer Addresses

Use the Addresses tab to add multiple addresses for a customer, and to designate a primary address to be used as the default address for the customer. The address added on the contact information tab defaults to the primary address.

1. At the Addresses tab, select **Edit Customer** to activate the menu options.
2. Edit the address information as needed:



John S Houser
Customer #: C1973001000031
Customer Since: 08/24/2011

Customer Addresses

	ADDRESS TYPE	ADDRESS
Primary	Home	4361 Wayback Lane New York, NY 10011

Sale
John Miller
Online
Datavantage Home Office 1973
Register: 1
08/19/2013
9:53 AM

Figure 5-44: Addresses Tab - Edit Options

- ❑ To add an address, see "Adding a new address" on page 183.
- ❑ To edit an address, see "Editing an address" on page 184.
- ❑ To define the primary address, see "Designating an address as the primary address" on page 184.
- ❑ To delete an address, see "Deleting an address" on page 185.

Adding a new address

1. At the Addresses tab, select the **Add Address** menu option.
2. Complete the fields as required on the Add Customer Address form:

ADD CUSTOMER ADDRESS

Enter the customer's address information below.

Address: 4567 Kelly Drive

Zip: 17403

State: PA - Pennsylvania

City: York

Apartment:

Country US - UNITED STATES

Type: Vacation

Figure 5-45: Add Customer Address Form

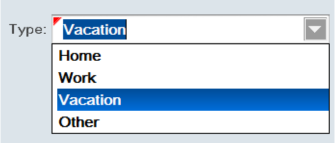
❑ Enter the address information as required.

> *The country address component defaults to the country where the store is located. If needed, select the* ***Change Country*** *menu option to select another country.*

CHANGE COUNTRY

Choose a country from the list below.

❑ Select the address type from the list.



Type: Vacation

Figure 5-46: Add Customer Address Form - Address Type List

3. Select **Process** to add the new address to the customer's record.
4. Select **Save Changes** to save the address information to the database.

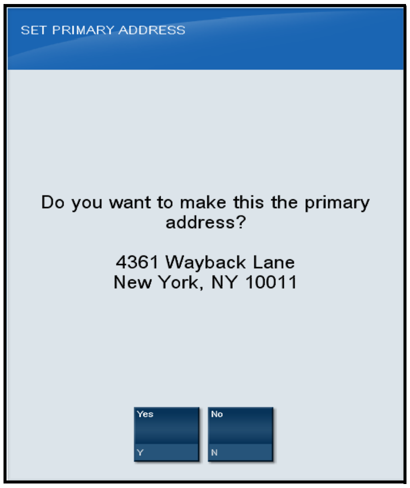
Editing an address

1. At the Addresses tab, select the address from the list of customer addresses on file.
2. Select the **Edit Address** menu option to display the Edit Customer Address form. The form is populated with the current address information.
3. Make your changes and select **Process** to add the updated address to the customer's record.
4. Select **Save Changes** to save the address information to the database.

Designating an address as the primary address

> *Only one address may be designated as the primary address.*

1. At the Addresses tab, select the address from the list of customer addresses on file.
2. Select the **Set Primary Address** menu option.
3. When prompted, select **Yes** to confirm you want to designate the address as primary.



SET PRIMARY ADDRESS

Do you want to make this the primary address?

4361 Wayback Lane
New York, NY 10011

Figure 5-47: Primary Address Confirmation Prompt

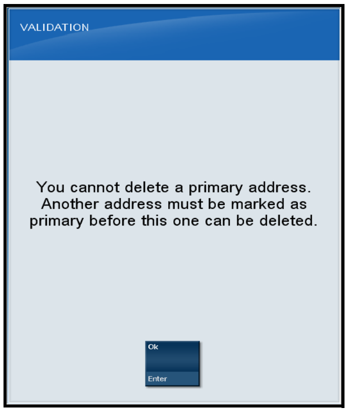
> *Select **No** if this is not the correct address. You will be returned to the list of customer addresses.*

The Primary label is now associated with the address and is shown at the top of the list of addresses.

4. Select **Save Changes** to save the address information to the database.

Deleting an address

You cannot delete a primary address.



You cannot delete a primary address. Another address must be marked as primary before this one can be deleted.

1. At the Addresses tab, select the address from the list of customer addresses on file.
2. Select the **Delete Address** menu option.
3. When prompted, select **Yes** to confirm you want to delete the address.

*Select **No** if this is not the correct address. You will be returned to the list of customer addresses.*

The address is no longer shown in the list of customer addresses.

4. Select **Save Changes** to remove the address information from the database.

CHAPTER 6

Searching for Items

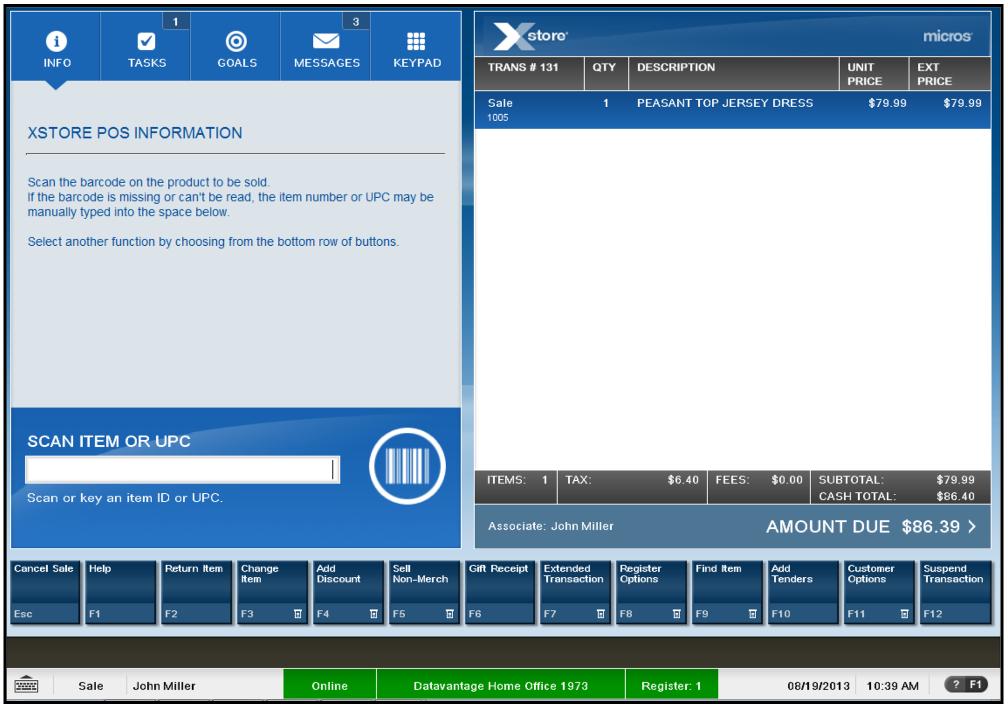
During a transaction you may need to search for a particular item.

- To search your store inventory, see Searching for Items Using Item Lookup below.
- To search other stores, see "Locating Items: Inventory Lookup" on page 196.
- To print a Rain Check, see "Printing a Rain Check" on page 198.
- Touch-screen or mouse users can search their store inventory using the "Searching for Items Using the Item Matrix" on page 199

Searching for Items Using Item Lookup

Use the item lookup function to search for an item based on many criteria (SKU, style, department, etc.) 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 menu.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Scan or key an item ID or UPC.

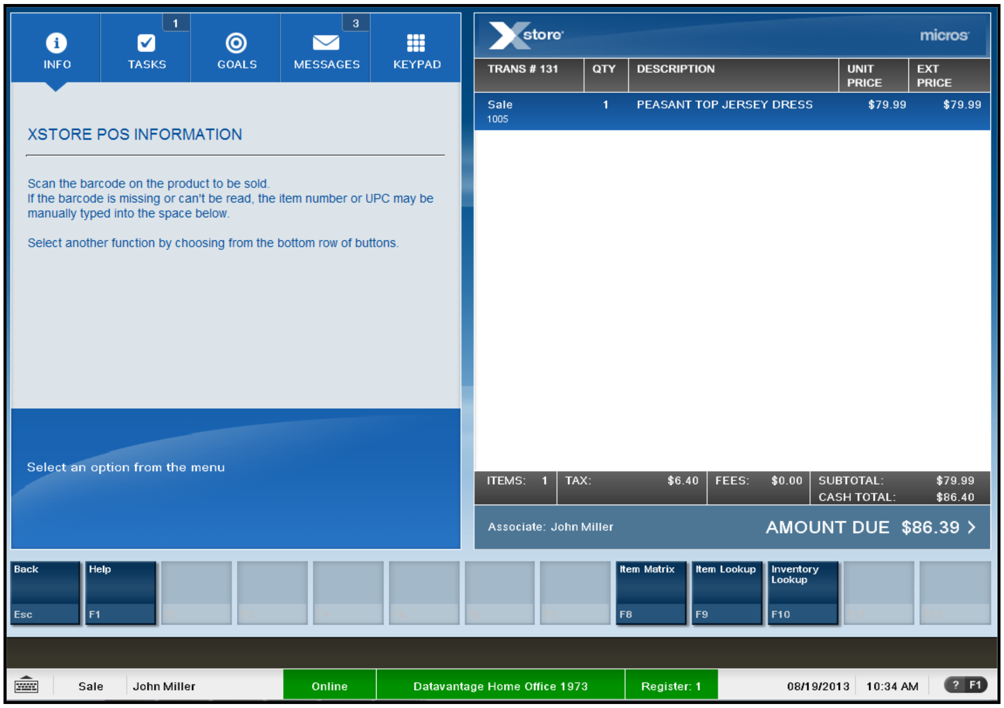
TRANS # 131	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	$79.99	$79.99

ITEMS: 1 TAX: $6.40 FEES: $0.00 SUBTOTAL: $79.99 CASH TOTAL: $86.40

Associate: John Miller AMOUNT DUE $86.39

Figure 6-1: Register Sale Screen

2. At the Item Finder menu, select **Item Lookup**.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Select an option from the menu

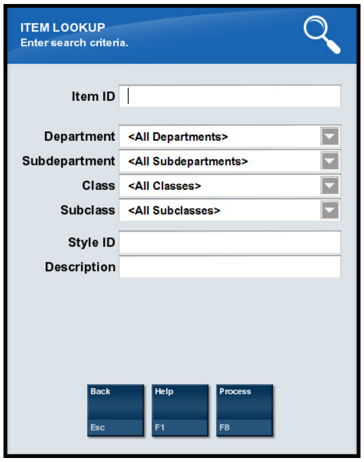
TRANS # 131	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	$79.99	$79.99

ITEMS: 1 TAX: $6.40 FEES: $0.00 SUBTOTAL: $79.99 CASH TOTAL: $86.40

Associate: John Miller AMOUNT DUE $86.39

Figure 6-2: Item Finder Menu

The Item Lookup form displays.

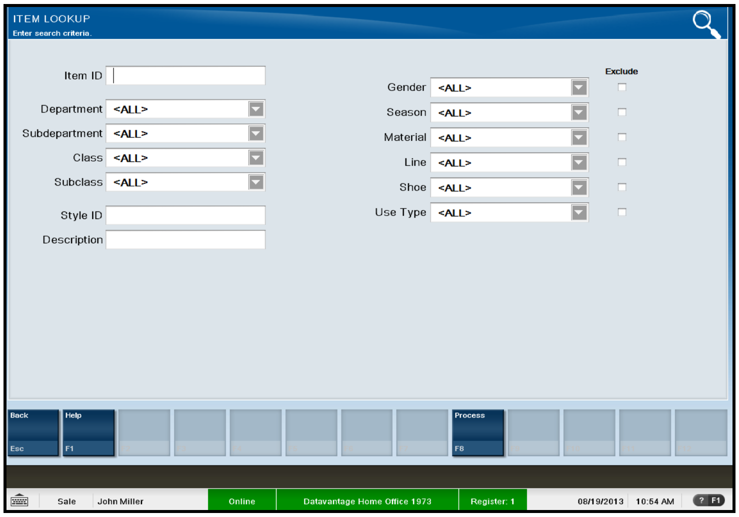


Item ID
Department <All Departments>
Subdepartment <All Subdepartments>
Class <All Classes>
Subclass <All Subclasses>
Style ID
Description

Figure 6-3: Item Lookup Form

Your store may be configured with advanced lookup options which provide the ability to specify Custom Groups and Details to further define your search criteria.

Select the exclude box to not include an item in your search.



Item ID
Department <ALL>
Subdepartment <ALL>
Class <ALL>
Subclass <ALL>
Style ID
Description

Exclude
Gender <ALL> ☐
Season <ALL> ☐
Material <ALL> ☐
Line <ALL> ☐
Shoe <ALL> ☐
Use Type <ALL> ☐

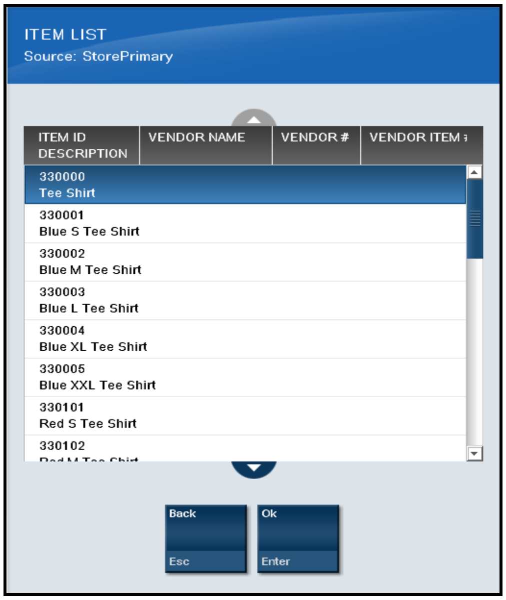
3. Enter your search criteria for an item: Item ID, Department, Subdepartment, Class, Subclass, Style ID, or Description. Press [Enter] or [Tab] to move between the fields.

To move to a previous field on the form, press and hold the [Shift] key as you press [Tab].

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

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.

5. If several items match the criteria you entered, use the up and down arrow keys to select an item from the list and press [Enter] to continue.



ITEM LIST
Source: StorePrimary

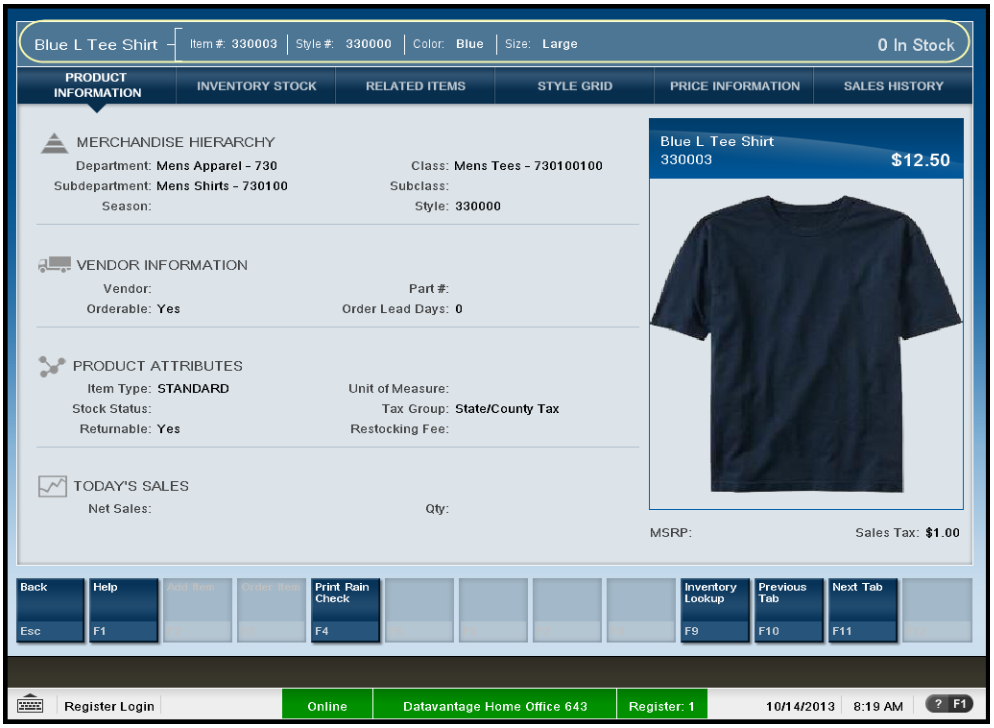
ITEM ID DESCRIPTION	VENDOR NAME	VENDOR #	VENDOR ITEM
330000 Tee Shirt			
330001 Blue S Tee Shirt			
330002 Blue M Tee Shirt			
330003 Blue L Tee Shirt			
330004 Blue XL Tee Shirt			
330005 Blue XXL Tee Shirt			
330101 Red S Tee Shirt			
330102			

Figure 6-4: Item Selection

6. Xstore displays detailed information about the selected item with the Product Information tab defaulted.

The static information area shows the item number, style number, color, and size. It also indicates how many are in stock (Figure 6-5 shows 0 in stock).

Product Information Tab



Blue L Tee Shirt Item #: 330003 Style #: 330000 Color: Blue Size: Large 0 In Stock

MERCHANDISE HIERARCHY

Department: Mens Apparel - 730

Class: Mens Tees - 730100100

Subdepartment: Mens Shirts - 730100

Subclass:

Season:

Style: 330000

VENDOR INFORMATION

Vendor:

Part #:

Orderable: Yes

Order Lead Days: 0

PRODUCT ATTRIBUTES

Item Type: STANDARD

Unit of Measure:

Stock Status:

Tax Group: State/County Tax

Returnable: Yes

Restocking Fee:

TODAY'S SALES

Net Sales:

Qty:

Blue L Tee Shirt 330003 $12.50

MSRP:

Sales Tax: $1.00

Figure 6-5: Item Detail Screen- Product Information Tab

Additional functions at this screen may include the following:

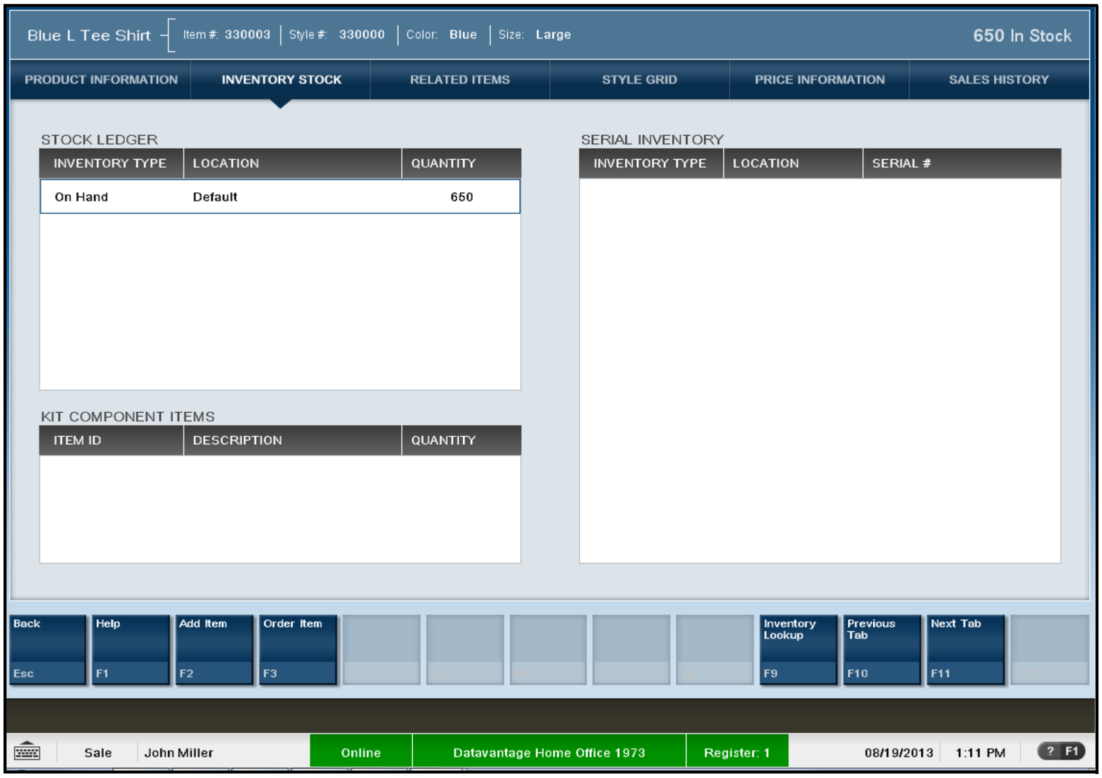
- **Add Item** - You can add the displayed item to the current sale in progress. This option is only available if item lookup was accessed from a sale transaction.
- **Order Item** - You can place an order for the displayed item. This option is only available for items that can be ordered and if item lookup was accessed from a sale transaction. See "Order Transactions via Locate" on page 361 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" on page 198.
- **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.

7. When finished viewing the item's information, press [Esc] to return to the Item Lookup form.

8. To exit the Item Lookup form, press [Esc] to return to the Sale screen and continue the transaction.

Inventory Stock Tab

The Inventory Stock tab shows the quantity and type of inventory.



Blue L Tee Shirt | Item #: 330003 | Style #: 330000 | Color: Blue | Size: Large — 650 In Stock

STOCK LEDGER

INVENTORY TYPE	LOCATION	QUANTITY
On Hand	Default	650

KIT COMPONENT ITEMS

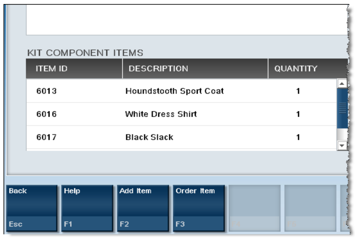
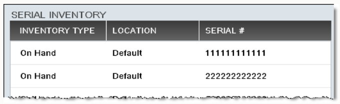
ITEM ID	DESCRIPTION	QUANTITY

SERIAL INVENTORY

INVENTORY TYPE	LOCATION	SERIAL #

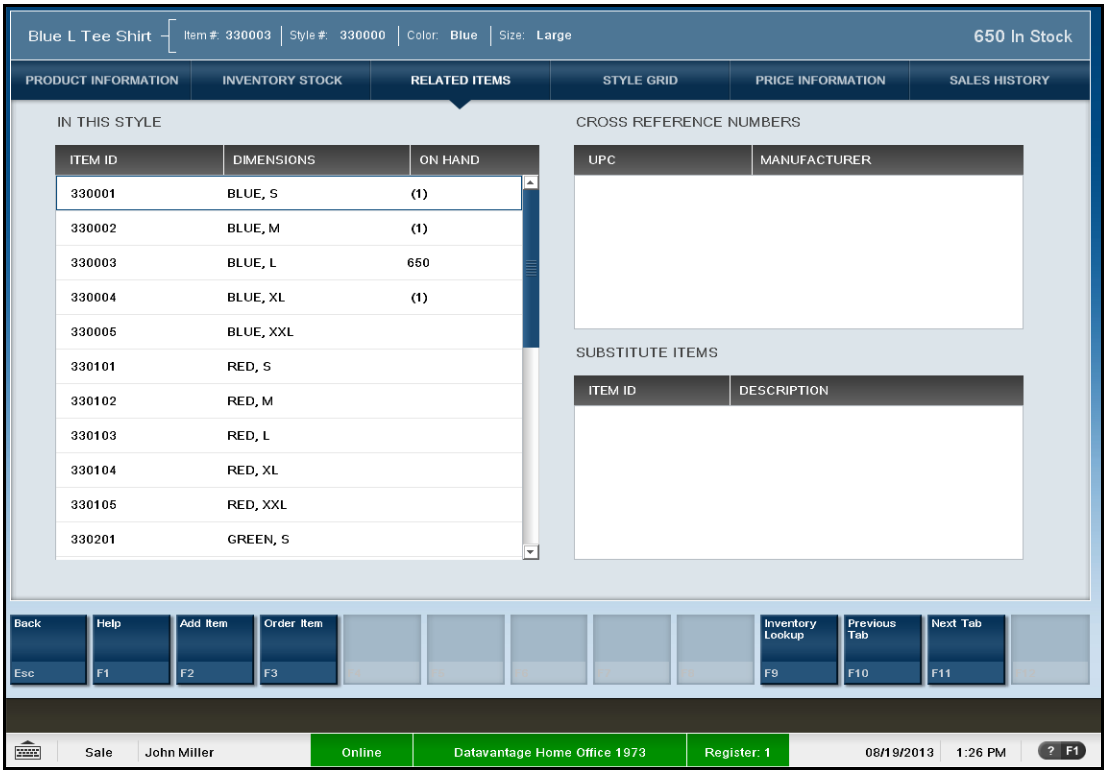
Sale | John Miller | Online | Datavantage Home Office 1973 | Register: 1 | 08/19/2013 | 1:11 PM

Figure 6-6: Inventory Stock Tab

<table>
<tr>
<td>If there are any kit components they will display in the ***Kit Component Items*** section of the screen.</td>
<td>
KIT COMPONENT ITEMS
<table>
<tr><th>ITEM ID</th><th>DESCRIPTION</th><th>QUANTITY</th></tr>
<tr><td>6013</td><td>Houndstooth Sport Coat</td><td>1</td></tr>
<tr><td>6016</td><td>White Dress Shirt</td><td>1</td></tr>
<tr><td>6017</td><td>Black Slack</td><td>1</td></tr>
</table>
</td>
</tr>
<tr>
<td>If the item is serialized, the information is shown in the ***Serial Inventory*** section of the screen. No quantity is shown because it is assumed a serialized item has a quantity of one.</td>
<td>
SERIAL INVENTORY
<table>
<tr><th>INVENTORY TYPE</th><th>LOCATION</th><th>SERIAL #</th></tr>
<tr><td>On Hand</td><td>Default</td><td>111111111111</td></tr>
<tr><td>On Hand</td><td>Default</td><td>222222222222</td></tr>
</table></td>
</tr>
</table>

Related Items Tab

The **In this Style** section of this tab shows items of the same style but with different characteristics (e.g. size, color, width) for the selected item. The list displays the item number, dimensions, and the number on hand for the related item.


Blue L Tee Shirt | Item #: 330003 | Style #: 330000 | Color: Blue | Size: Large | 650 In Stock

IN THIS STYLE

ITEM ID	DIMENSIONS	ON HAND
330001	BLUE, S	(1)
330002	BLUE, M	(1)
330003	BLUE, L	650
330004	BLUE, XL	(1)
330005	BLUE, XXL	
330101	RED, S	
330102	RED, M	
330103	RED, L	
330104	RED, XL	
330105	RED, XXL	
330201	GREEN, S	

CROSS REFERENCE NUMBERS

UPC	MANUFACTURER

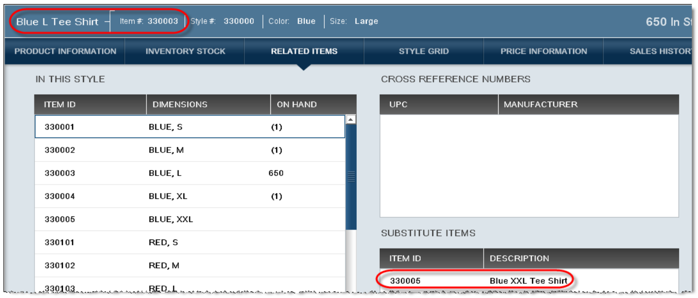
SUBSTITUTE ITEMS

ITEM ID	DESCRIPTION

Sale | John Miller | Online | Datavantage Home Office 1973 | Register: 1 | 08/19/2013 | 1:26 PM

Figure 6-7: Related Items Tab

The **Substitute Items** section of this tab shows the item ID and description for items cross-referenced to the selected item when applicable. (For example, this feature may be used to show alternate items for discontinued items).


Blue L Tee Shirt | Item #: 330003 | Style #: 330000 | Color: Blue | Size: Large | 650 In S

IN THIS STYLE

ITEM ID	DIMENSIONS	ON HAND
330001	BLUE, S	(1)
330002	BLUE, M	(1)
330003	BLUE, L	650
330004	BLUE, XL	(1)
330005	BLUE, XXL	
330101	RED, S	
330102	RED, M	
330103	RED, L	

CROSS REFERENCE NUMBERS

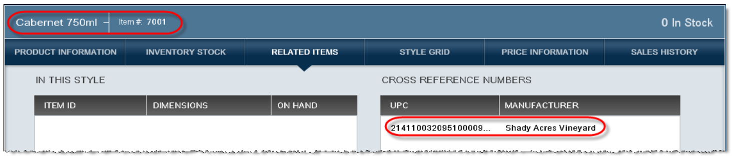
UPC	MANUFACTURER

SUBSTITUTE ITEMS

ITEM ID	DESCRIPTION
330005	Blue XXL Tee Shirt

Figure 6-8: Substitute Items Section

The **Cross Reference Numbers** section of this tab shows the UPC and Manufacturer cross-referenced to the selected item when applicable.


Cabernet 750ml | Item #: 7001 | 0 In Stock

IN THIS STYLE

ITEM ID	DIMENSIONS	ON HAND

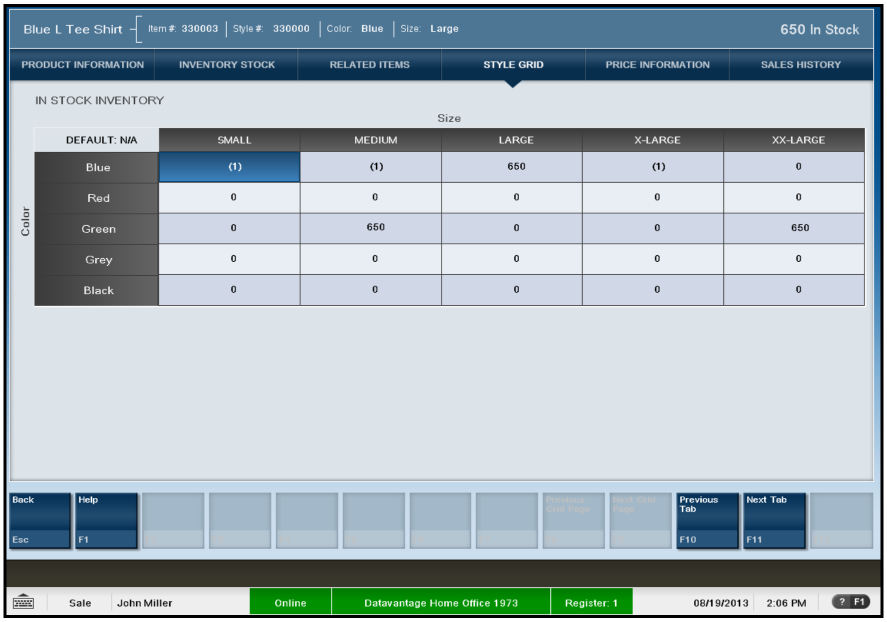
CROSS REFERENCE NUMBERS

UPC	MANUFACTURER
214110032095100009...	Shady Acres Vineyard

Figure 6-9: Cross Reference Numbers Section

Style Grid Tab

The Style Grid tab shows inventory information in a grid format and includes the on-hand quantities for the item with the specified characteristics. This is a view-only screen.


Blue L Tee Shirt Item #: 330003 Style #: 330000 Color: Blue Size: Large
650 In Stock

IN STOCK INVENTORY

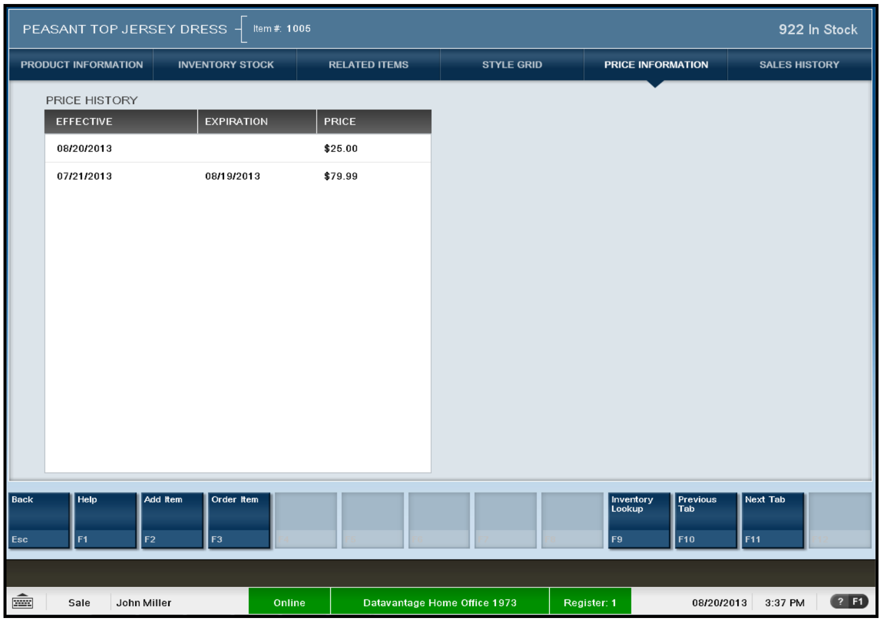
Size

DEFAULT: N/A	SMALL	MEDIUM	LARGE	X-LARGE	XX-LARGE
Blue	(1)	(1)	650	(1)	0
Red	0	0	0	0	0
Green	0	650	0	0	650
Grey	0	0	0	0	0
Black	0	0	0	0	0

Figure 6-10: Style Grid Tab

Price Information Tab

The price information tab shows a list of previous prices for the item and includes the effective date and expiration date of the price.


PEASANT TOP JERSEY DRESS Item #: 1005
922 In Stock

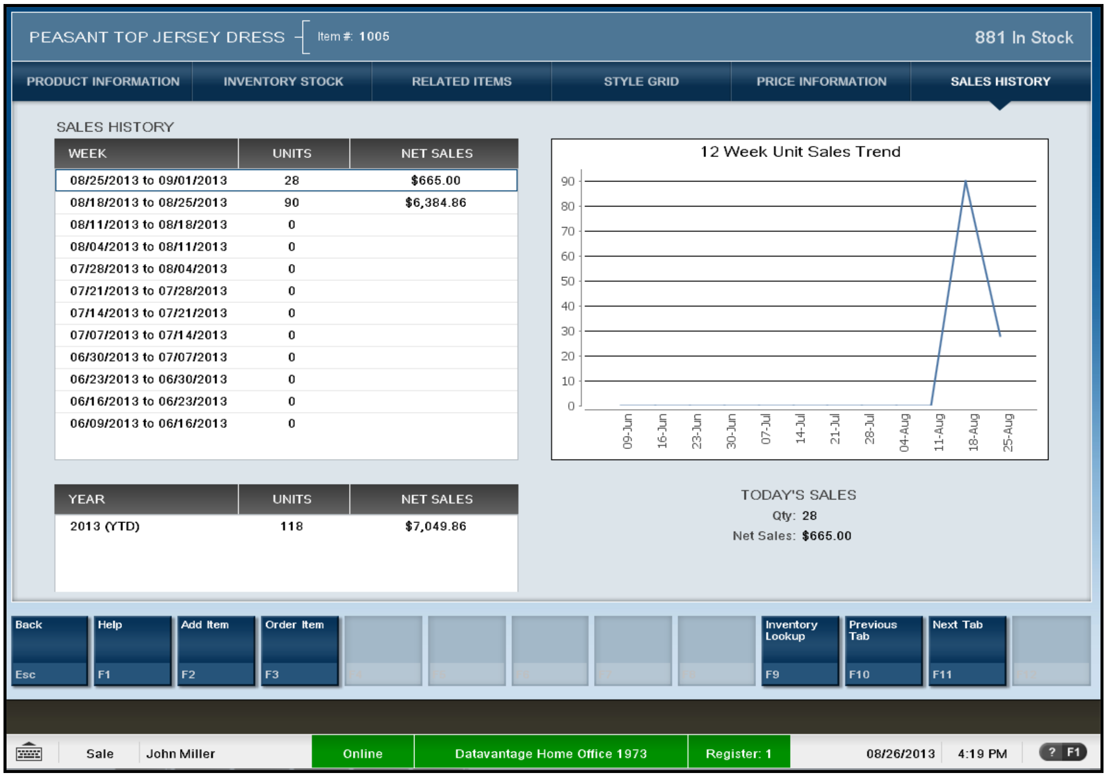
PRICE HISTORY

EFFECTIVE	EXPIRATION	PRICE
08/20/2013		$25.00
07/21/2013	08/19/2013	$79.99

Figure 6-11: Price Information Tab

Sales History Tab

The Sales History tab shows the past several weeks of sales in a graphic form and as a list under Sales History.



SALES HISTORY

WEEK	UNITS	NET SALES
08/25/2013 to 09/01/2013	28	$665.00
08/18/2013 to 08/25/2013	90	$6,384.86
08/11/2013 to 08/18/2013	0	
08/04/2013 to 08/11/2013	0	
07/28/2013 to 08/04/2013	0	
07/21/2013 to 07/28/2013	0	
07/14/2013 to 07/21/2013	0	
07/07/2013 to 07/14/2013	0	
06/30/2013 to 07/07/2013	0	
06/23/2013 to 06/30/2013	0	
06/16/2013 to 06/23/2013	0	
06/09/2013 to 06/16/2013	0	

YEAR	UNITS	NET SALES
2013 (YTD)	118	$7,049.86

TODAY'S SALES

Qty: 28

Net Sales: $665.00

Figure 6-12: Sales History Tab

The **Sales History** section of the screen lists the number of units sold in the past 12* weeks where the week at the top of the list is the current week. The Unit Sales Trend for the same period of time as the Sales History list is shown in a graph format.

(**The number of weeks shown may be different for your store*).

The **Year-To-Date Sales History** section of the screen shows the number of units sold this year compared to the number of units sold last year and the year before that when applicable. This is a rolling year calculation.

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 6-1 on page 188).
2. At the Item Finder menu, select **Inventory Lookup** (Figure 6-2 on page 188). The system prompts for the Inventory Locator criteria.
3. Enter the information as needed and select **Process** to perform the inventory locator search:

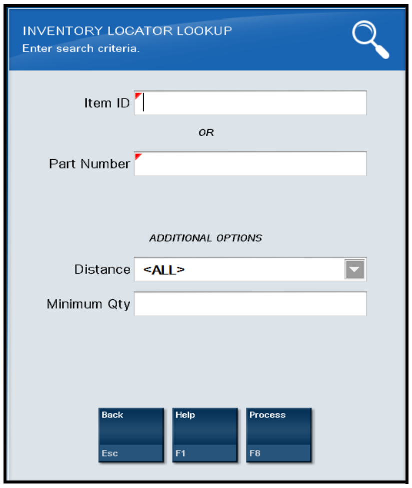


Figure 6-13: Inventory Locator Lookup Form

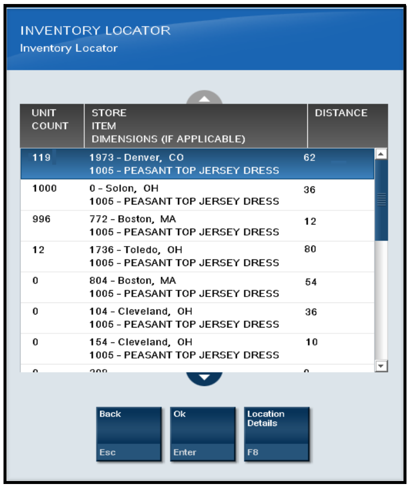
REQUIRED Information:

- **Item ID/Part Number** - You must enter either an item ID or Part Number.

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).
- **Minimum 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 returns a list of locations matching the search criteria.

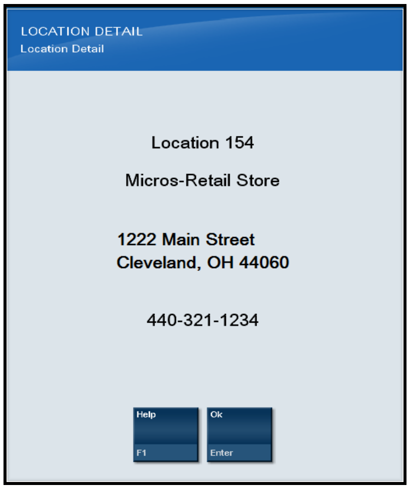


UNIT COUNT	STORE ITEM DIMENSIONS (IF APPLICABLE)	DISTANCE
119	1973 - Denver, CO 1005 - PEASANT TOP JERSEY DRESS	62
1000	0 - Solon, OH 1005 - PEASANT TOP JERSEY DRESS	36
996	772 - Boston, MA 1005 - PEASANT TOP JERSEY DRESS	12
12	1736 - Toledo, OH 1005 - PEASANT TOP JERSEY DRESS	80
0	804 - Boston, MA 1005 - PEASANT TOP JERSEY DRESS	54
0	104 - Cleveland, OH 1005 - PEASANT TOP JERSEY DRESS	36
0	154 - Cleveland, OH 1005 - PEASANT TOP JERSEY DRESS	10

Figure 6-14: Inventory Locator Results

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

5. To view detail information about a store in the list such as the address and phone number, select the store in the list and the **Location Details** option (Figure 6-14 above). Press [Enter] to close the prompt.



Location 154

Micros-Retail Store

1222 Main Street
Cleveland, OH 44060

440-321-1234

Figure 6-15: Location Detail Prompt

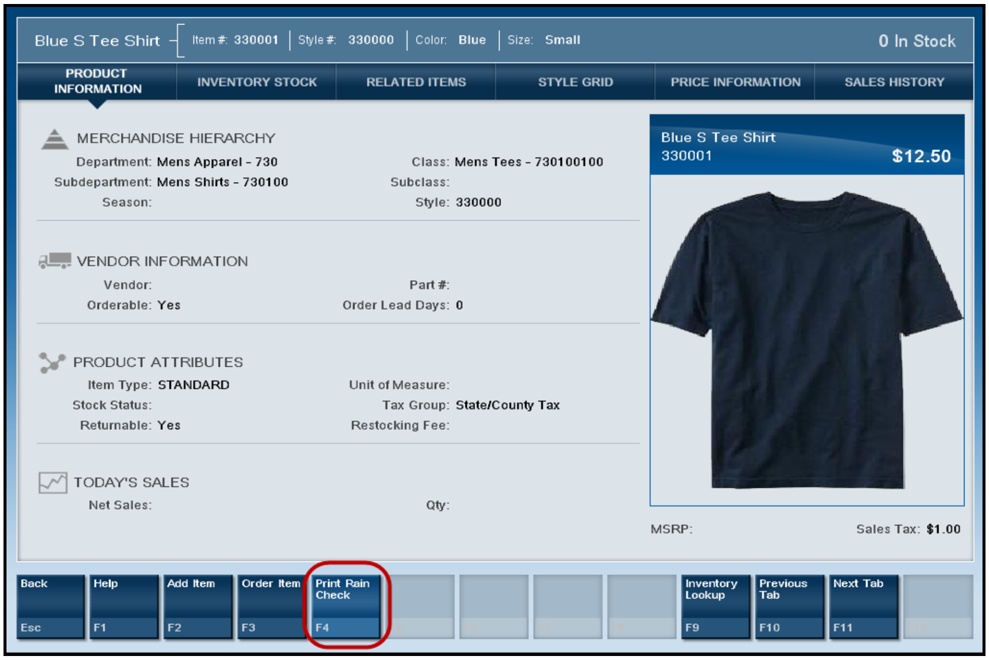
Printing a Rain Check

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. From the Item Lookup Product Information tab (see “Product Information Tab” on page 191), select **Print Rain Check**.

> *If the Print Rain Check button is grayed out, rain checks are not allowed to be printed for that item.*
>
> *You cannot print multiple items on one rain check.*
>
> *Rain Checks cannot be printed for non-merchandise items.*



Blue S Tee Shirt Item #: 330001 Style #: 330000 Color: Blue Size: Small 0 In Stock

MERCHANDISE HIERARCHY

Department: Mens Apparel - 730
Class: Mens Tees - 730100100
Subdepartment: Mens Shirts - 730100
Subclass:
Season:
Style: 330000

VENDOR INFORMATION

Vendor:
Part #:
Orderable: Yes
Order Lead Days: 0

PRODUCT ATTRIBUTES

Item Type: STANDARD
Unit of Measure:
Stock Status:
Tax Group: State/County Tax
Returnable: Yes
Restocking Fee:

TODAY'S SALES

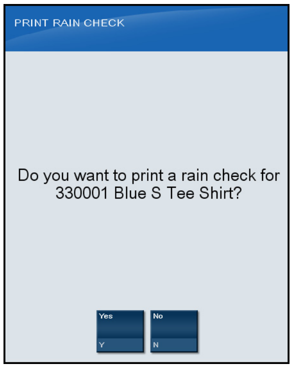
Net Sales:
Qty:

Blue S Tee Shirt
330001
$12.50

MSRP:
Sales Tax: $1.00

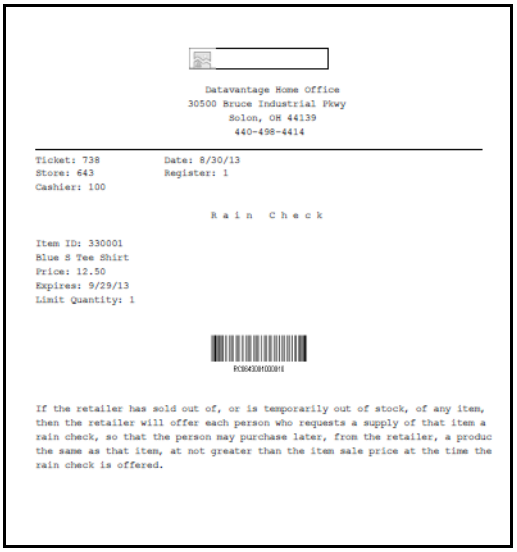
Figure 6-16: Item Lookup - Print Rain Check

2. A confirmation prompt displays. Select **Yes** to print the rain check. Select **No** to return to the Sale screen.



PRINT RAIN CHECK

Do you want to print a rain check for 330001 Blue S Tee Shirt?



```
                    Datavantage Home Office
                  30500 Bruce Industrial Pkwy
                       Solon, OH 44139
                        440-498-4414
Ticket: 738           Date: 8/30/13
Store: 643            Register: 1
Cashier: 100

                       Rain Check

Item ID: 330001
Blue S Tee Shirt
Price: 12.50
Expires: 9/29/13
Limit Quantity: 1


If the retailer has sold out of, or is temporarily out of stock, of any item,
then the retailer will offer each person who requests a supply of that item a
rain check, so that the person may purchase later, from the retailer, a produc
the same as that item, at not greater than the item sale price at the time the
rain check is offered.
```

Figure 6-17: Printed Rain Check Example

The bar code contains the Rain Check ID.

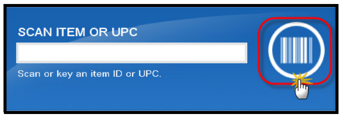
Searching for Items Using the Item Matrix

To use the optional item matrix function you must have a touch-screen or a mouse.

Use the item matrix to select a department (or the highest level in your merchandise hierarchy) from the item grid and then drill down through the merchandise hierarchy to locate a specific item. The merchandise hierarchy levels are color-coded to help you navigate through the different levels. When the item is located, it is added to the sale transaction.

1. At the Sale screen, select the **Find Item** button from the Register Sale menu (Figure 6-1 on page 188).
2. At the Item Finder menu, select **Item Matrix** (Figure 6-2 on page 188).

Touch-screen users select the bar code icon to invoke the Item Matrix.



3. The Item Matrix screen at the Department Level shows the departments in your store. Select the department where the item is located.

Figure 6-18: Item Matrix Screen - Department Level

4. Continue drilling down through the merchandise hierarchy until you find the item you want to sell. Select the item and it is added to the transaction.

Select the bread crumbs at the top of the item Matrix to look at previous screens.

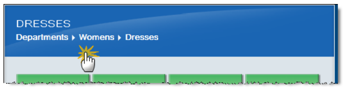


Figure 6-19: Item Matrix Screen - Item Level

5. Once the item is added to the transaction, the same item edit options that are available when you add an item by scanning, entering an item Id, or adding an item from item lookup can be used to modify the item as needed.

CHAPTER 7

Discounts and Awards

Overview

You can apply a discount to a single line item, multiple line items, or entire transactions. You can also apply an award to the transaction.

Transaction-level discounts are applied in the same manner as a line item discount. A transaction discount is applied equally to each eligible item in the transaction, a line item discount is applied to a single item, and a group discount is applied to a group of selected items in a transaction. Discounts may be specified as either amounts (e.g. $5.00 off) or percentages (e.g. 10% off) for both item and transaction discounts.

Adding a Discount/Award to an Item or Transaction

1. After adding an item or items at the Register Sale screen, select the **Add Discount** option on the Register Sale menu.

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

2. Select the discount type and press [Enter], or press the number on the keyboard associated with the option:

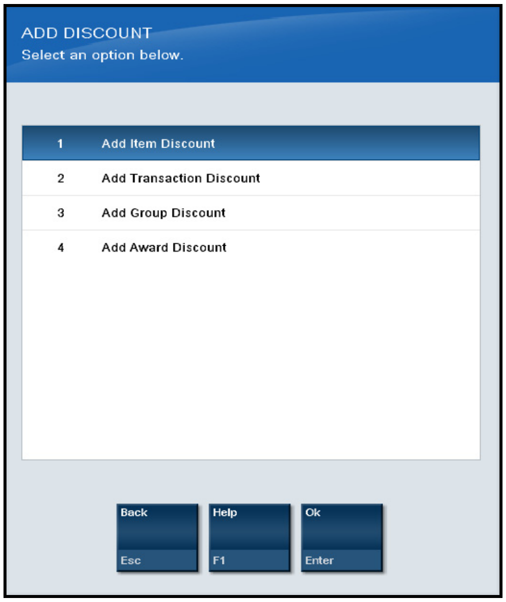


Figure 7-1: Discount Type Options

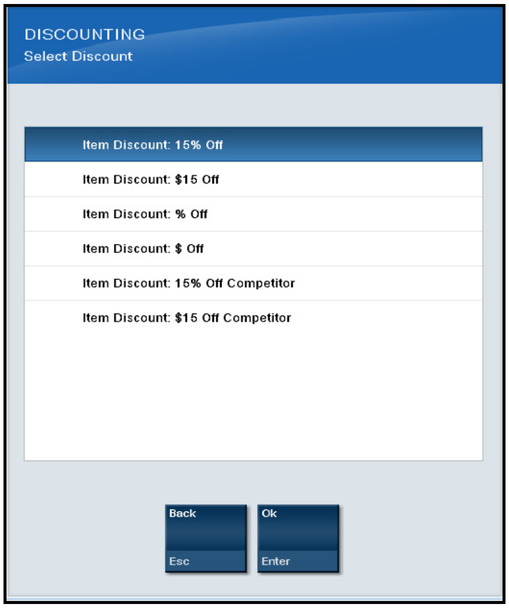
> *Because each Xstore menu is configurable, the discount options shown on your system may be different than the options shown here.*

- ☐ If you chose an item discount, continue with Item Level Discounts, step 1 on page 203.
- ☐ If you chose a transaction discount, continue with Transaction Level Discounts, step 1 on page 206.
- ☐ If you chose a group discount, continue with Group Discounts, step 1 on page 207.
- ☐ If you chose to apply an award, continue with Award Discounts, step 1 on page 209.

Item Level Discounts

...continued from step 2 on page 202

1. If there are multiple items in the transaction, Xstore prompts you to select the item to be discounted. If there is only one item in the transaction, skip to step 3 below.
2. If prompted, select the item to be modified and press [Enter] to display the list of item discount options.



DISCOUNTING

Select Discount

Item Discount: 15% Off

Item Discount: $15 Off

Item Discount: % Off

Item Discount: $ Off

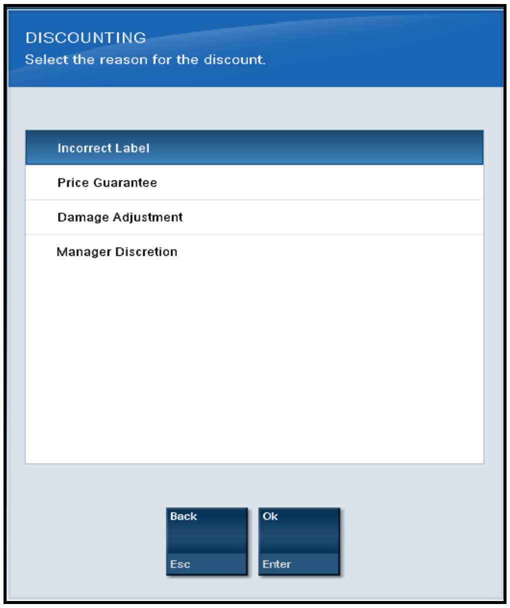
Item Discount: 15% Off Competitor

Item Discount: $15 Off Competitor

Figure 7-2: Item Discount Options

3. Select the discount to be applied to the selected item and press [Enter] to continue.

4. If prompted, select a reason for the discount and press [Enter] to continue.



DISCOUNTING

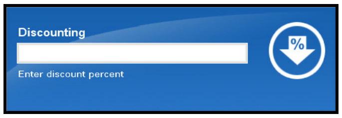
Select the reason for the discount.

Figure 7-3: Discount Reason List

Additional Discount Prompts

Depending upon the discount option and/or reason you chose, you may be prompted for additional information or provided with additional information about the discount. Some examples are shown below:

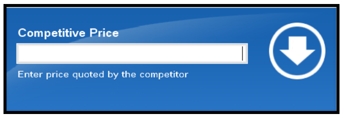
- You may be prompted for the discount amount or percent. For a percentage, enter a number to represent the discount percentage. Do not enter a decimal point or percent sign. For example, 50 = 50% off and 25 = 25% off.



Discounting

Enter discount percent

- If you choose to discount the item based on a competitor's price you may be prompted to enter the price quoted by the other retailer.



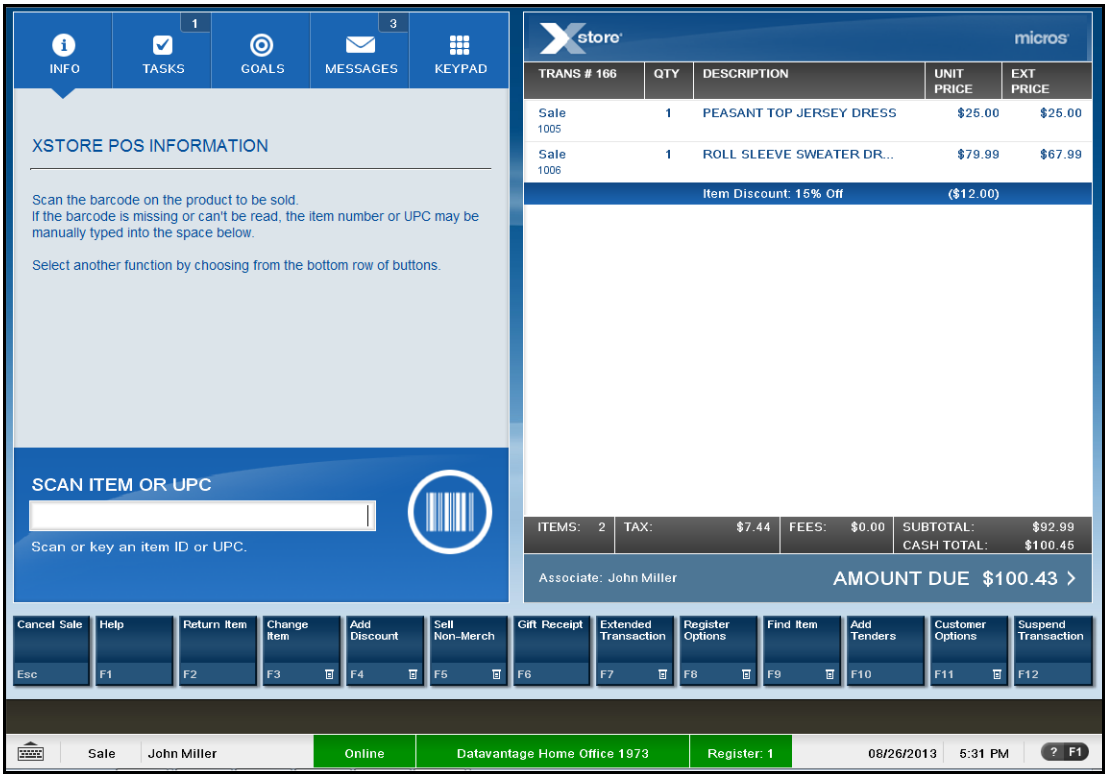
Competitive Price

Enter price quoted by the competitor

- You may be prompted with a message indicating the selected discount cannot be applied to the item. You must select **Ok** to continue.
- You may be prompted with a message to confirm that the discount type you selected was added. You must select **Ok** to continue.

5. Enter the required information and press [Enter] to discount the selected item.

6. The item discount information is displayed on the View Port.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Scan or key an item ID or UPC.

TRANS # 166	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$67.99
		Item Discount: 15% Off	($12.00)	

ITEMS: 2 TAX: $7.44 FEES: $0.00 SUBTOTAL: $92.99
CASH TOTAL: $100.45

Associate: John Miller AMOUNT DUE $100.43

Figure 7-4: Sale Screen with Line Item Discount

To remove a line item discount, you must void the discount. See "Voiding an Item" on page 221 for more information.

Transaction Level Discounts

...continued from step 2 on page 202

1. For transaction-level discounts, Xstore displays a list of transaction discount options.

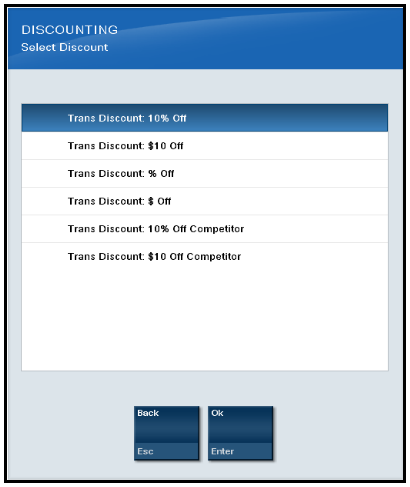
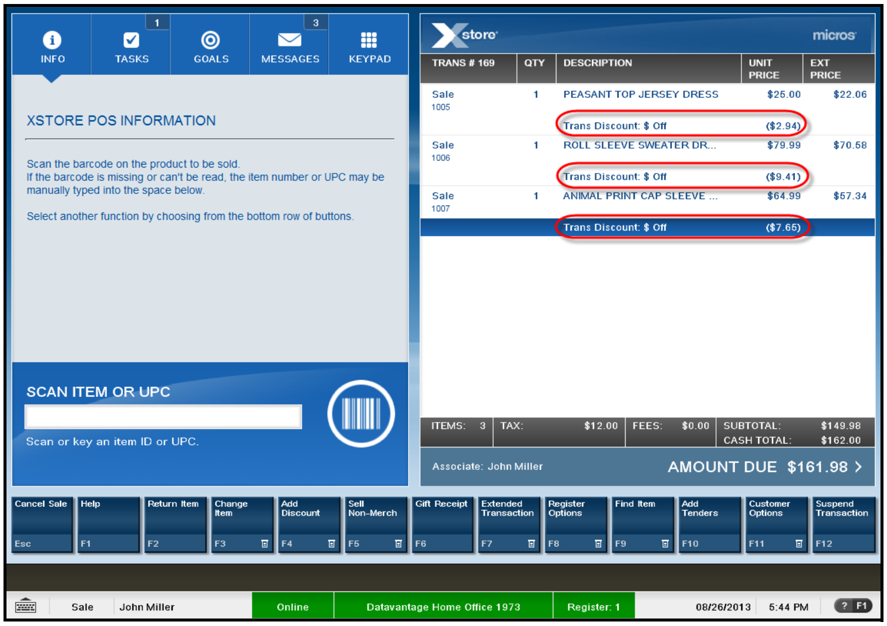


Figure 7-5: Transaction Discount Options

2. Select the discount to be applied to the transaction and press [Enter] to continue.
3. If prompted, select a reason for the discount and press [Enter] to continue.
4. Depending upon the discount option and /or reason you chose, you may be prompted for additional information as shown in "Additional Discount Prompts" on page 204.

   Enter the required information and press [Enter] to discount the sale transaction.

5. The transaction discount information is displayed on the View Port. In the example below a $20 total discount has been distributed across the 3 items.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Scan or key an item ID or UPC.

TRANS # 169	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$22.06
		Trans Discount: $ Off	($2.94)	
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$70.58
		Trans Discount: $ Off	($9.41)	
Sale 1007	1	ANIMAL PRINT CAP SLEEVE ...	$64.99	$57.34
		Trans Discount: $ Off	($7.65)	

ITEMS: 3 TAX: $12.00 FEES: $0.00 SUBTOTAL: $149.98 CASH TOTAL: $162.00

Associate: John Miller AMOUNT DUE $161.98

Sale John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 5:44 PM

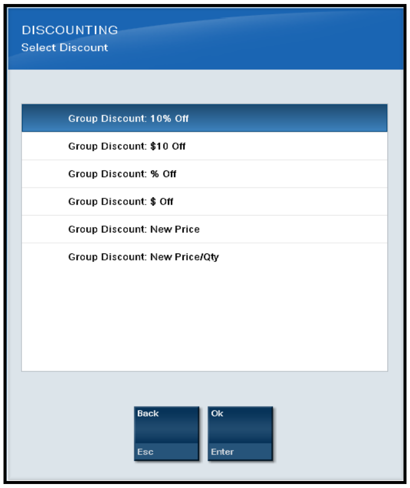
Figure 7-6: Sales Screen with Transaction Level Discount

Group Discounts

...continued from step 2 on page 202

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.

1. For group-level discounts, Xstore displays a list of group discount options as defined by your store:

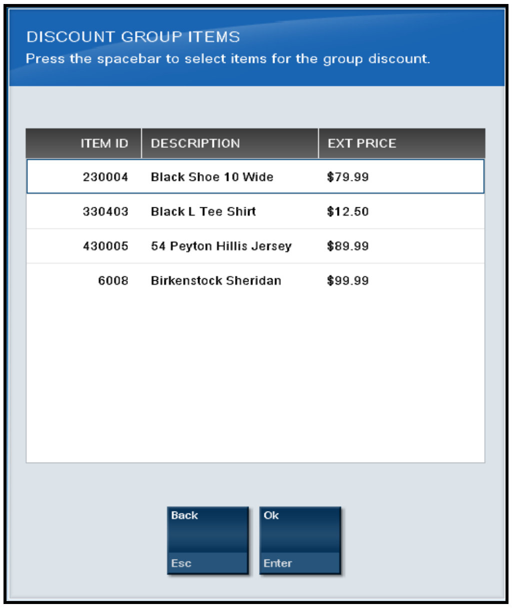


DISCOUNTING
Select Discount

Figure 7-7: Group Discount Options

2. Select the discount to be applied to the item group and press [Enter] to continue.

3. Xstore displays a list of the items on the transaction that are eligible for a group discount.



DISCOUNT GROUP ITEMS

Press the spacebar to select items for the group discount.

ITEM ID	DESCRIPTION	EXT PRICE
230004	Black Shoe 10 Wide	$79.99
330403	Black L Tee Shirt	$12.50
430005	54 Peyton Hillis Jersey	$89.99
6008	Birkenstock Sheridan	$99.99

Figure 7-8: Items Eligible For Group Discount

4. Select each item to be included in the group discount.

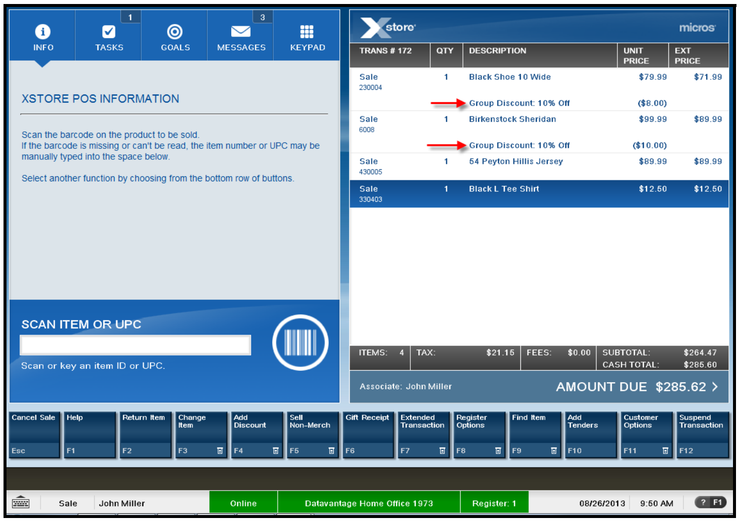
5. When you have selected all the items for the group discount, press [Enter] to continue.

6. If prompted, select a reason for the discount and press [Enter] to continue.

7. Depending upon the discount option and/or reason you chose, you may be prompted for additional information as shown in "Additional Discount Prompts" on page 204.

8. Enter the required information and press [Enter] to apply the discount to the selected items in the group.

The item discount information is displayed on the View Port. In this example, the shoes were eligible for the 10% group discount, and the shirts were not part of the discount group.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Scan or key an item ID or UPC.

TRANS # 172	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 230004	1	Black Shoe 10 Wide	$79.99	$71.99
		Group Discount: 10% Off	($8.00)	
Sale 6008	1	Birkenstock Sheridan	$99.99	$89.99
		Group Discount: 10% Off	($10.00)	
Sale 430005	1	54 Peyton Hillis Jersey	$89.99	$89.99
Sale 330403	1	Black L Tee Shirt	$12.50	$12.50

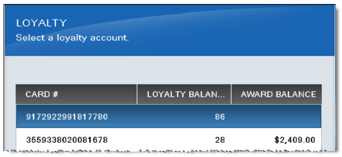
ITEMS: 4 TAX: $21.15 FEES: $0.00 SUBTOTAL: $264.47 CASH TOTAL: $285.60

Associate: John Miller AMOUNT DUE $285.62

Award Discounts

...continued from step 2 on page 202

If the customer that you assign to the transaction is already in a loyalty program and has multiple accounts, you may be prompted to select a loyalty account for the sale transaction.

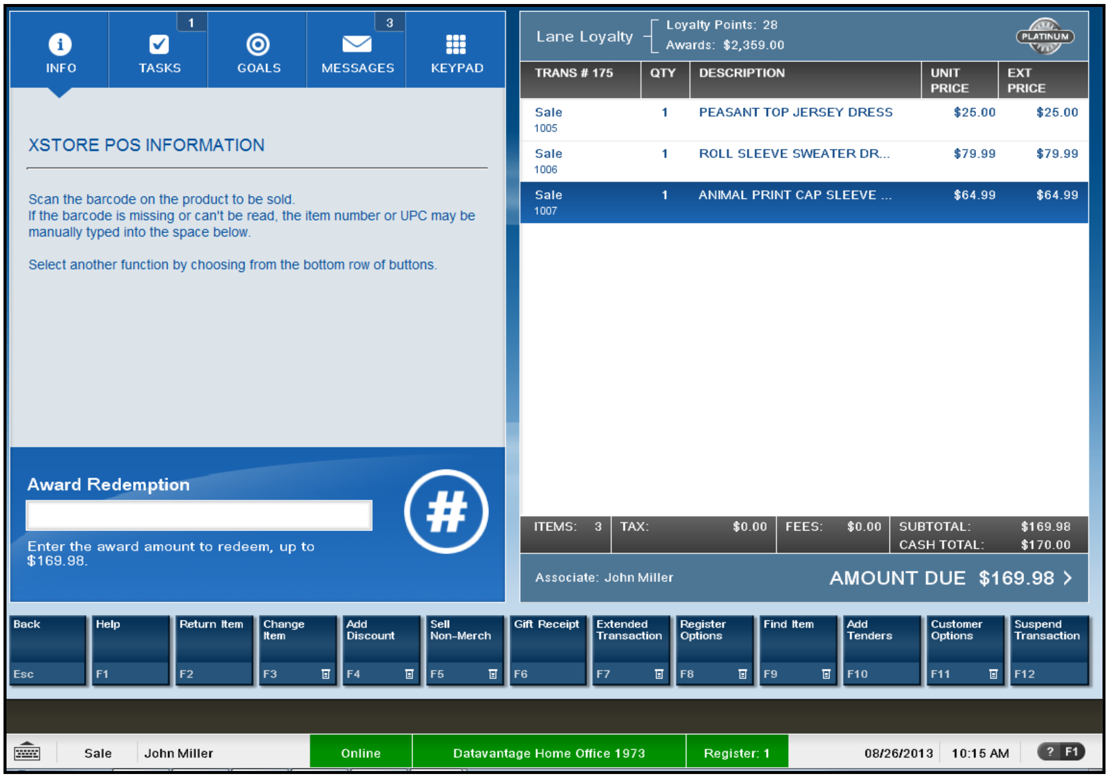

LOYALTY

Select a loyalty account.

CARD #	LOYALTY BALAN...	AWARD BALANCE
9172922991817780	86	
3559338020081678	28	$2,409.00

The View Port displays any points or awards that have been earned to date. If the customer wishes to redeem any awards, select the **Add Award Discount** option to discount the transaction using the customer's award value.

1. For award discounts, enter the award amount to be applied to the transaction and press [Enter].



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Award Redemption

Enter the award amount to redeem, up to $169.98.

Lane Loyalty
Loyalty Points: 28
Awards: $2,359.00

TRANS # 175	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99
Sale 1007	1	ANIMAL PRINT CAP SLEEVE ...	$64.99	$64.99

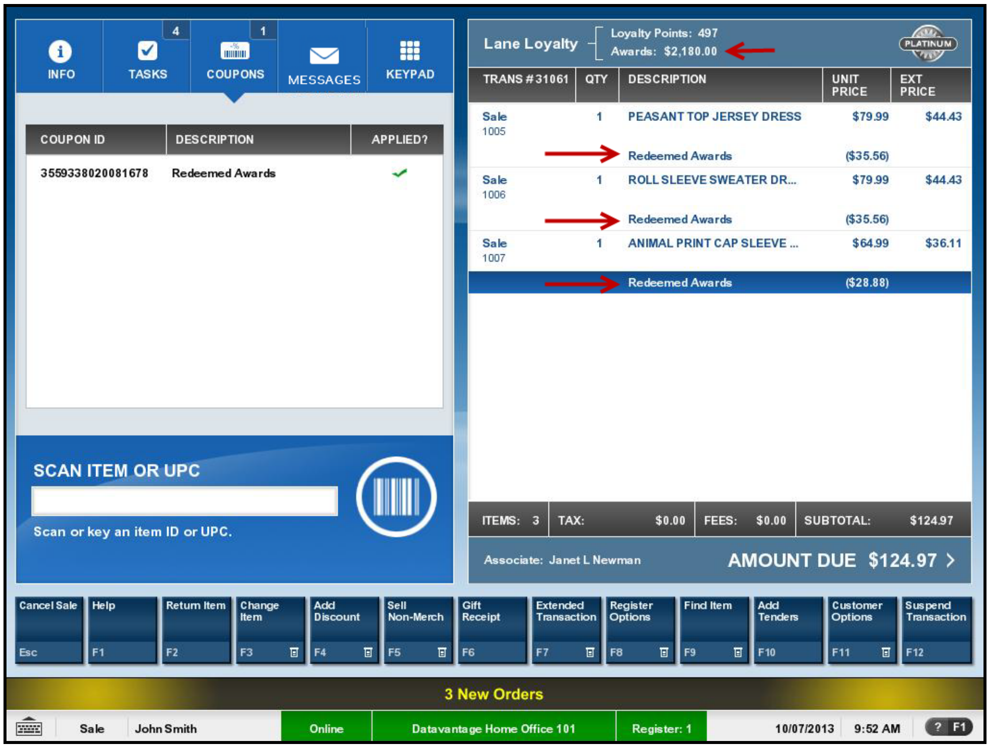
ITEMS: 3 TAX: $0.00 FEES: $0.00 SUBTOTAL: $169.98 CASH TOTAL: $170.00

Associate: John Miller AMOUNT DUE $169.98

Sale John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 10:15 AM ? F1

Figure 7-9: Redeem Award Prompt

2. The discount information is displayed on the View Port and the Coupon tab. The example below shows a $100 award discount distributed across the 3 items. The customer's award totals have been adjusted accordingly:



Loyalty Points: 497
Awards: $2,180.00

COUPON ID	DESCRIPTION	APPLIED?
3559338020081678	Redeemed Awards	✓

TRANS #31061	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	$79.99	$44.43
		Redeemed Awards	($35.56)	
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$44.43
		Redeemed Awards	($35.56)	
Sale 1007	1	ANIMAL PRINT CAP SLEEVE ...	$64.99	$36.11
		Redeemed Awards	($28.88)	

ITEMS: 3 TAX: $0.00 FEES: $0.00 SUBTOTAL: $124.97

Associate: Janet L Newman AMOUNT DUE $124.97

Figure 7-10: Transaction with Award Applied

Award Coupon List

Depending upon your system's configuration, the customer's awards may be displayed as shown in Figure 7-9 on page 209, or the awards may be displayed in the form of coupons that may be individually selected from a list.

If prompted with a coupon list:

Use the up and down arrow keys to navigate among the coupons.

Press the [Spacebar] to select and deselect a coupon.

You may select more than one coupon to apply to the transaction.

About the Award Coupon List

If your system displays customer awards in the form of a coupon list, you may select one or more coupons from which the awards are applied to the transaction. The system may be configured two ways:

- ☐ **If you allow partial awards**

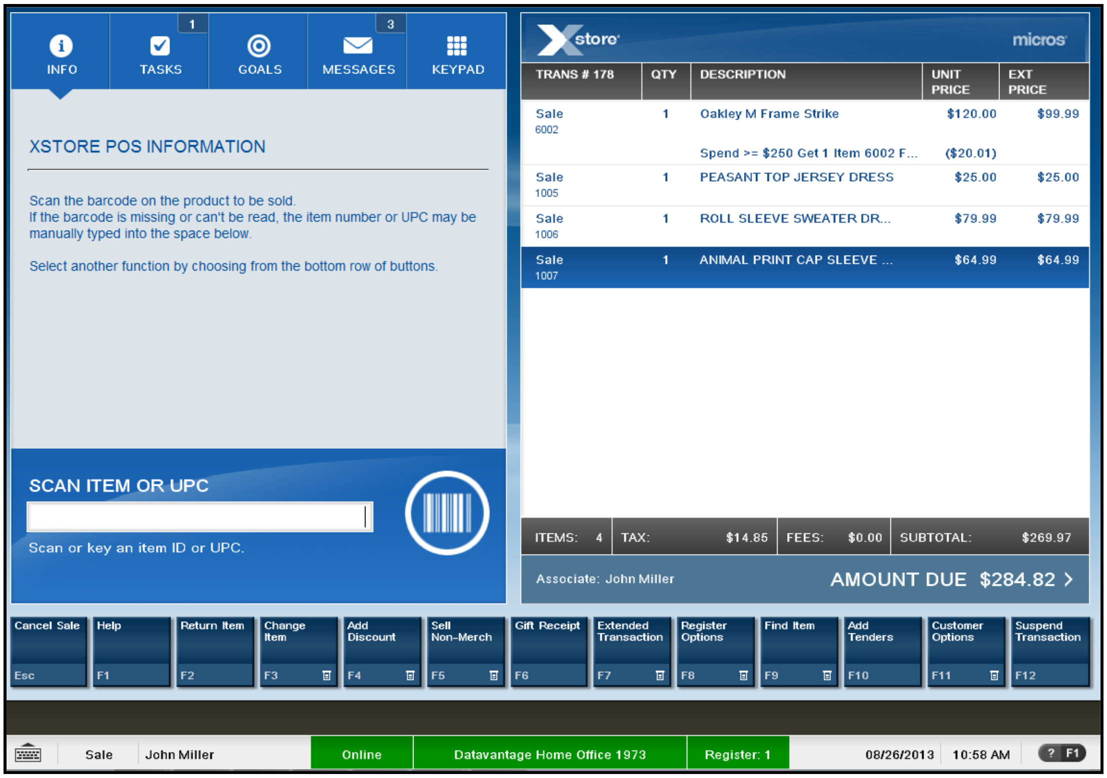
  The system automatically reduces the value of the selected coupon by the amount applied to the current transaction, up to the total amount due. For example, if $14.98 is applied from a $50.00 coupon, the coupon’s remaining value is reduced to $35.02 and it may be applied to a different transaction later.

- ☐ **If you do not allow partial awards**
  - ❍ The system automatically applies the entire value of the coupon, regardless of the amount due on the transaction. The coupon is removed from the list after it is applied to a transaction and may not be used again. For example, if the amount due is $25.00 and a $30.00 coupon is selected, the $5.00 difference cannot be used in a future transaction.
  - ❍ If you select more than one coupon and the combined total exceeds the amount due on the sale, a message displays. Press [Enter] and the system returns to the list of coupons where you may select a different one.

Deal Pricing Discounts

Deal pricing discounts are automatically applied to items that have been scanned and are included in the discount. No user interaction is required to apply a deal to a transaction. Once the trigger items are added to the sale, Xstore applies the appropriate discount. There are many variations of deal discounts; for example, buy one get one free, or buy three items and get 10% off.

Figure 7-11 shows deal item (Spend >= $250 Get 1 Item 6002 For $99.99) displayed in the View Port.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Scan or key an item ID or UPC.

TRANS # 178	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 6002	1	Oakley M Frame Strike	$120.00	$99.99
		Spend >= $250 Get 1 Item 6002 F...	($20.01)	
Sale 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99
Sale 1007	1	ANIMAL PRINT CAP SLEEVE ...	$64.99	$64.99

ITEMS: 4 TAX: $14.85 FEES: $0.00 SUBTOTAL: $269.97

Associate: John Miller AMOUNT DUE $284.82

Sale John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 10:58 AM

Figure 7-11: Spend >= $250 Get 1 Item 6002 For $99.99 Example

In the figure example above, spend $250 or more and get a pair of Oakley M Frame Strike sunglasses (item 6002) for $99.99, regularly $120.

- ❑ The ***trigger*** = spend $250 or more
- ❑ The ***deal*** = get Item 6002 for $99.99

CHAPTER 8

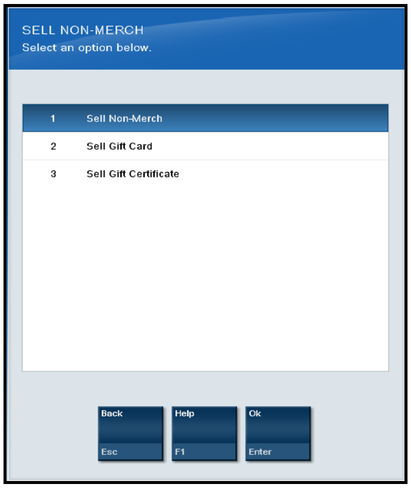
Modifying a Sale Transaction

Overview

During a transaction you may need to make modifications prior to tendering the sale. This chapter explains:

Adding Non-Merchandise Items to the Sale

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

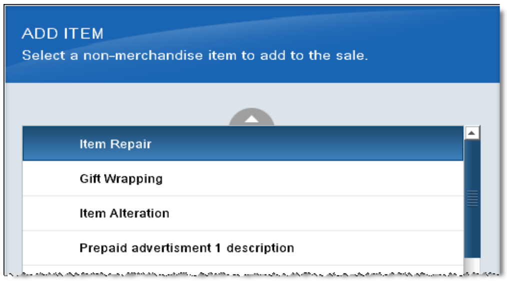


SELL NON-MERCH
Select an option below.

Figure 8-1: List of Non-Merchandise Options

> *Because each Xstore 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) on the focus bar.*

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.



ADD ITEM
Select a non-merchandise item to add to the sale.

Figure 8-2: 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.

Enter Price

Enter the item price.
2006
Gift Wrapping

Figure 8-3: Prompt For Price

As you enter required information, Xstore adds the non-merchandise item to the sale and the non-merchandise information is shown on the View Port.

Modifying Customer Information

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

If you have a touch-screen monitor and wish to remove a customer from the transaction:

- *From the Customer Loyalty Banner, completely swipe from left to right. An Unassign button displays.*
- *Tap the Unassign button to remove the customer.*
- *Tap anywhere else to cancel the remove process.*

If the Unassign button is not accessed within a few seconds, the button no longer displays automatically.

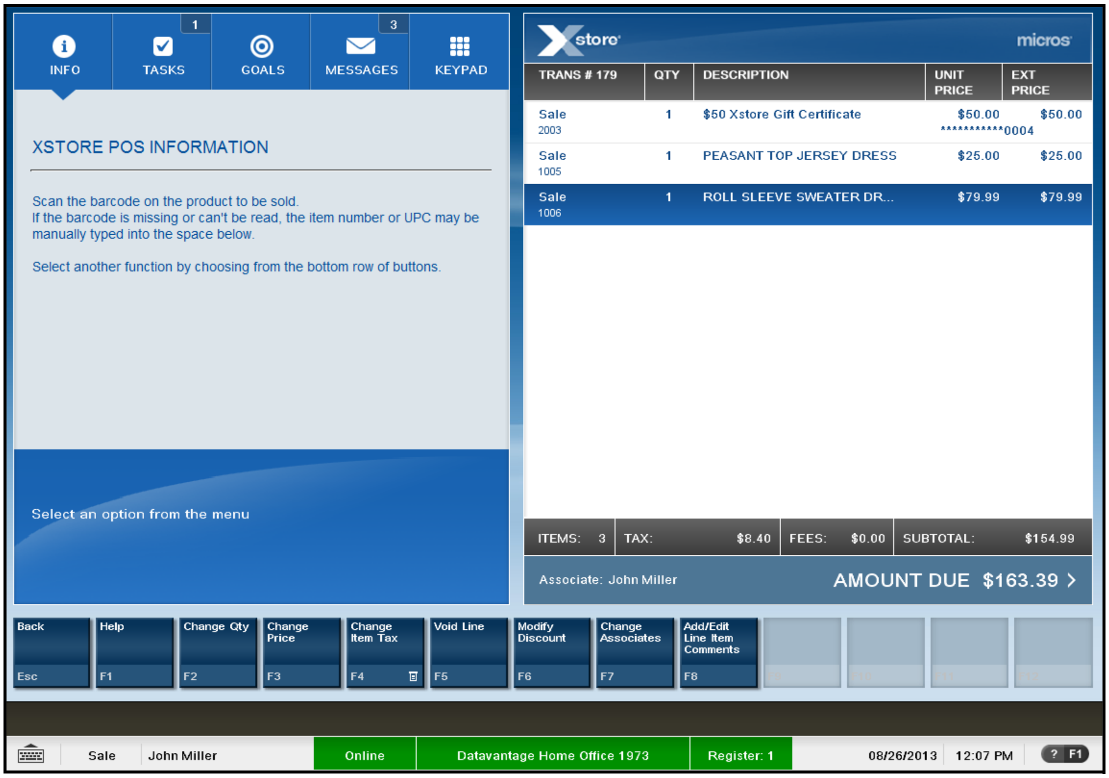
1. From the sale menu, select **Customer Options.**
2. Select **Remove Customer**. The transaction sale screen displays with the customer removed.

*To add a different customer to the transaction, select **Customer Options** --> **Assign Customer**.*

*Touch-screen users, tap the **Customer Loyalty Banner** to search for and add a different customer. Once the customer is assigned, tap the **Customer Loyalty Banner** to view the Customer Maintenance Screen if needed.*

Modifying Line Items in a Sale

1. From the sale menu, select **Change Item** to change or modify a line item (if you have proper security).
2. Select an option from the Change Item menu.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Select an option from the menu

TRANS # 179	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 2003	1	$50 Xstore Gift Certificate	$50.00 ***********0004	$50.00
Sale 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99

ITEMS: 3 TAX: $8.40 FEES: $0.00 SUBTOTAL: $154.99

Associate: John Miller AMOUNT DUE $163.39

Figure 8-4: Change Item Menu Options

The following options are available:

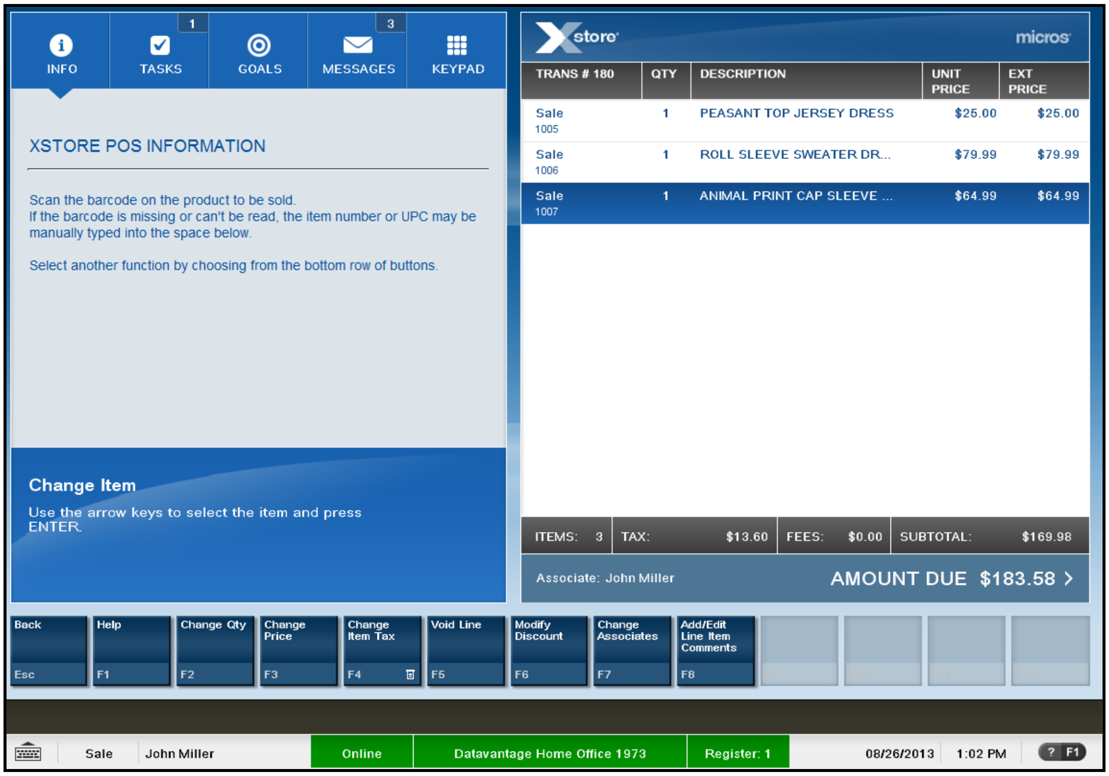
- Change the item quantity — See "Changing the Item Quantity" on page 217.
- Change the item price — See "Changing the Item Price" on page 219.
- Change the item tax — See "Changing Item Taxes" on page 227.
- Void a line item — See "Voiding an Item" on page 221.
- Change the commissioned associate — See "Changing the Commissioned Associate" on page 223.
- Add/Edit line item comments — See "Adding/Editing a Line Item Comment" on page 226.
- 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/Award to an Item or Transaction" on page 201.

Changing the Item Quantity

Large quantities of items can be quickly entered into the system by using the change quantity function.

> *Touch-screen users tap the quantity area of an item and go to step 4 on page 218. Your store may be configured to make an audio sound when you tap the quantity area.*

1. Once an item has been added to a sale transaction, the item information is displayed in the View Port area. Select the **Change Item** option from the Sale menu.
2. Select the **Change Quantity** option from the Change Item menu.
3. If there are multiple items in the transaction, Xstore prompts you to select the item to be modified. Select the item to be modified and press [Enter] to display the Enter Quantity prompt.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Change Item

Use the arrow keys to select the item and press ENTER.

TRANS # 180	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99
Sale 1007	1	ANIMAL PRINT CAP SLEEVE ...	$64.99	$64.99

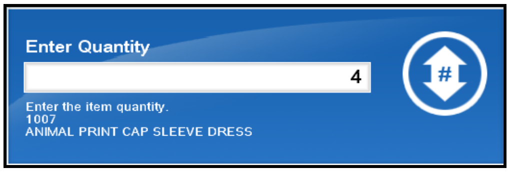
ITEMS: 3 TAX: $13.60 FEES: $0.00 SUBTOTAL: $169.98

Associate: John Miller AMOUNT DUE $183.58

Sale John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 1:02 PM

Figure 8-5: Select Item to Modify Prompt

4. Enter the new item quantity and press [Enter]. Xstore updates the item quantity and amount on the View Port.



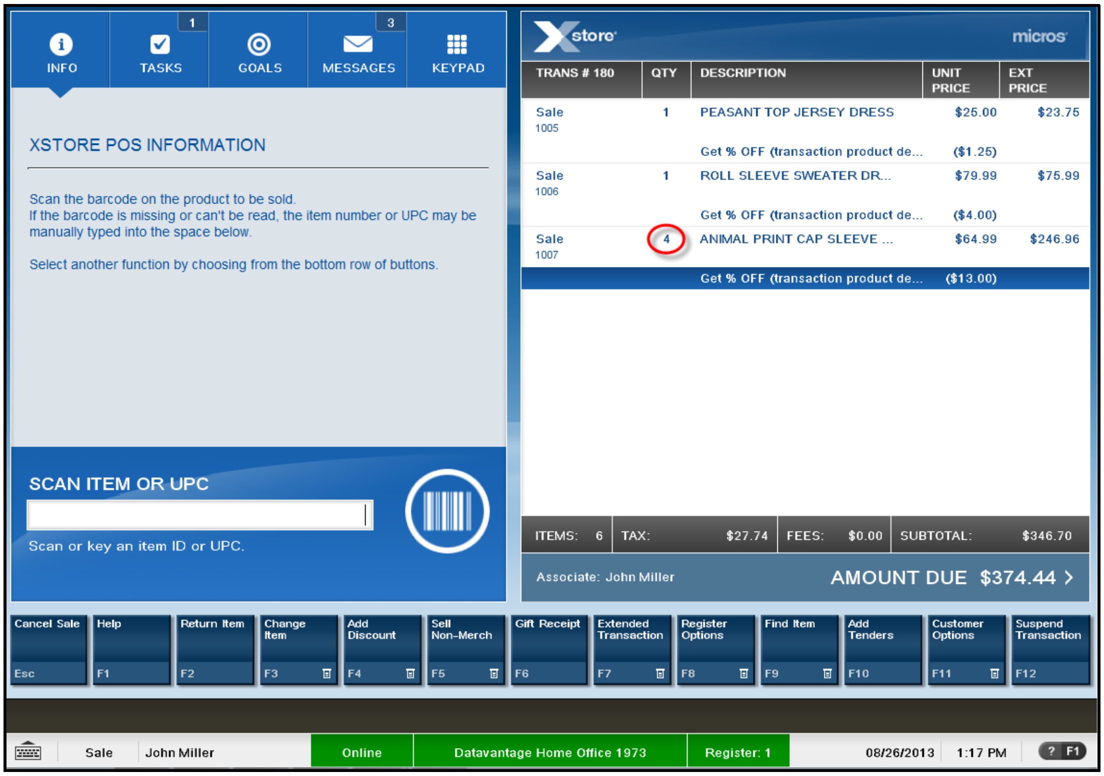
Enter Quantity: 4

Enter the item quantity.
1007
ANIMAL PRINT CAP SLEEVE DRESS

Figure 8-6: Enter Quantity Prompt

> *Check to be sure that the Enter Quantity prompt correctly identifies the item that you want to change.*

5. Continue processing the transaction at the Sale screen.



Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Scan or key an item ID or UPC.

TRANS # 180	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$23.75
		Get % OFF (transaction product de...	($1.25)	
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$75.99
		Get % OFF (transaction product de...	($4.00)	
Sale 1007	4	ANIMAL PRINT CAP SLEEVE ...	$64.99	$246.96
		Get % OFF (transaction product de...	($13.00)	

ITEMS: 6 TAX: $27.74 FEES: $0.00 SUBTOTAL: $346.70

Associate: John Miller AMOUNT DUE $374.44 >

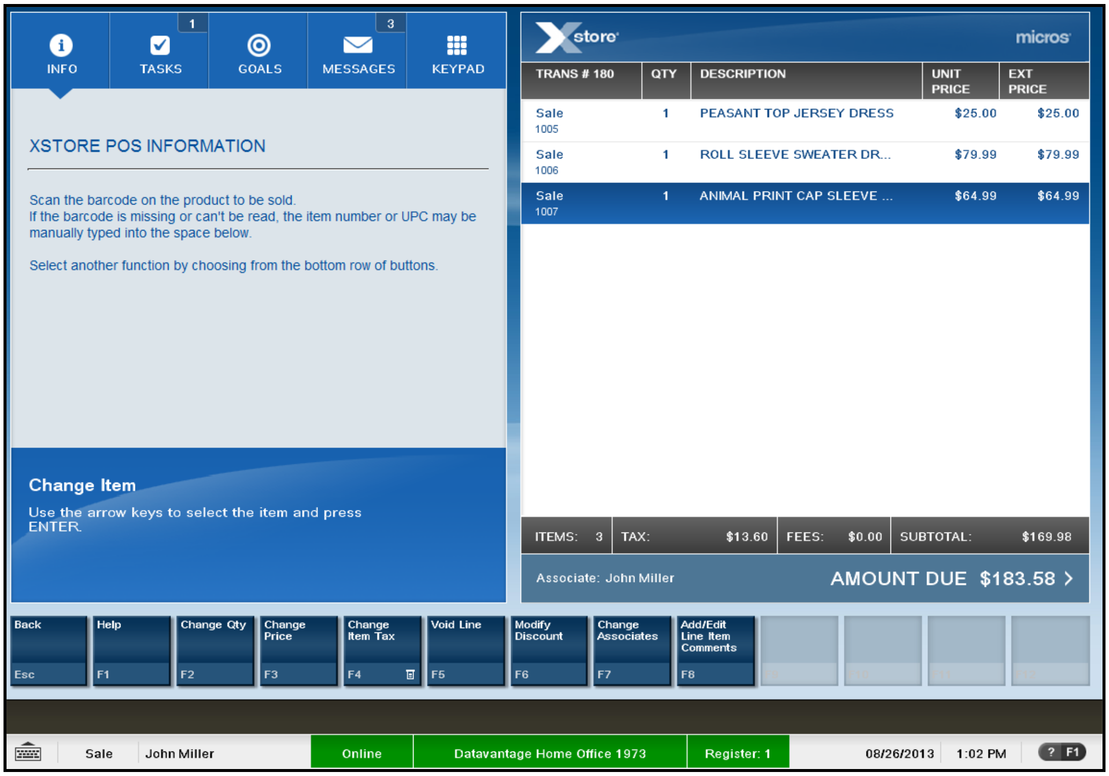
Sale John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 1:17 PM

Figure 8-7: Sale Screen (With Changed Item Quantity)

Changing the Item Price

Touch-screen users tap the item price area and go to step 4 on page 220.

1. Once an item has been added to a sale transaction, the item information is displayed in the View Port area. Select the **Change Item** option from the Sale menu.
2. Select the **Change Price** option from the Change Item menu.
3. If there are multiple items in the transaction, Xstore prompts you to select the item to be modified. Select the item to be modified and press [Enter].



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Change Item

Use the arrow keys to select the item and press ENTER.

TRANS # 180	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99
Sale 1007	1	ANIMAL PRINT CAP SLEEVE ...	$64.99	$64.99

ITEMS: 3 TAX: $13.60 FEES: $0.00 SUBTOTAL: $169.98

Associate: John Miller AMOUNT DUE $183.58

Sale John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 1:02 PM

Figure 8-8: Select Item to Modify Prompt

4. When prompted, enter the new price for the item and press [Enter] to continue.

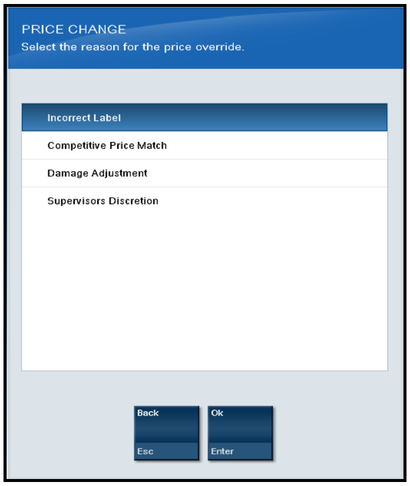
Enter Price

Enter the item price.
1007
ANIMAL PRINT CAP SLEEVE DRESS

Figure 8-9: Enter Price Prompt

Check to be sure that the item you selected is identified in the ***Enter Price*** *prompt.*

5. If prompted, select a reason for the price change from the list and press [Enter] to continue. Xstore updates the item's price on the View Port.



PRICE CHANGE
Select the reason for the price override.

Figure 8-10: Price Change Reason List

6. Continue processing the transaction at the Sale screen.

Voiding an Item

Once an item is entered and displays on the View Port it can be removed only by performing a line void. The line void function removes the selected item from the sale transaction. This process also applies to removing discounts and other line items from the sale.

Touch-screen users:

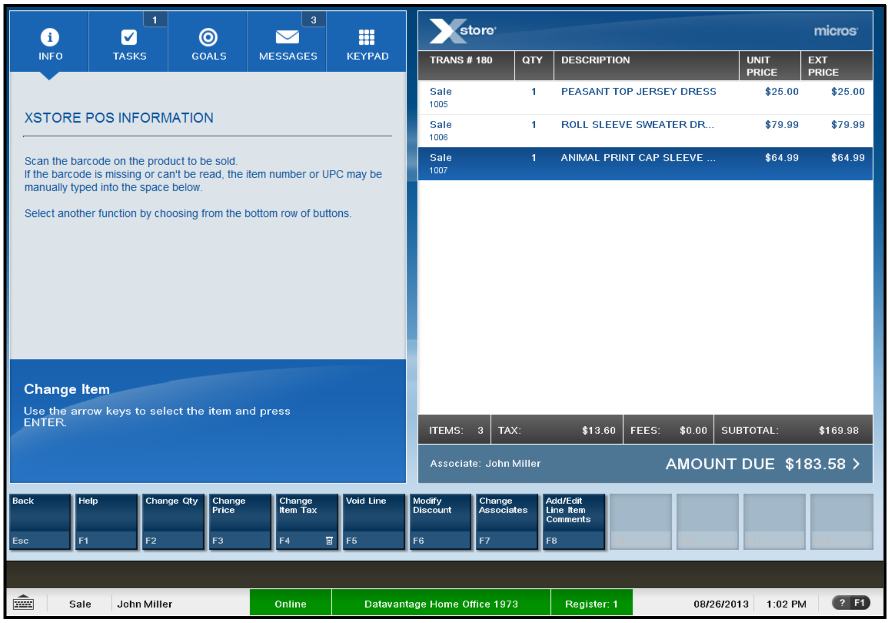
Completely swipe the item you wish to void from left to right. A void button displays.

Tap the Void button to remove the line item.

- *To cancel the void, tap anywhere within the transaction screen, other than the void button. The void button no longer displays.*
- *If the void button is not used within a few seconds, it no longer displays.*
- *If the void button is visible, but you swipe a different item (to void a different item) the void button that was originally called no longer displays, and the newly called void button should appear.*

If prompted, type the reason for the void and select ***Ok****.*

1. Once an item has been added to a sale transaction, the item information is displayed in the View Port area. Select the **Change Item** option from the Sale menu.
2. Select the **Void Line** option from the Change Item menu.
3. If there are multiple items in the transaction, Xstore prompts you to select the item to be modified. Select the item to be voided and press [Enter].



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

TRANS # 180	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99
Sale 1007	1	ANIMAL PRINT CAP SLEEVE ...	$64.99	$64.99

ITEMS: 3 TAX: $13.60 FEES: $0.00 SUBTOTAL: $169.98

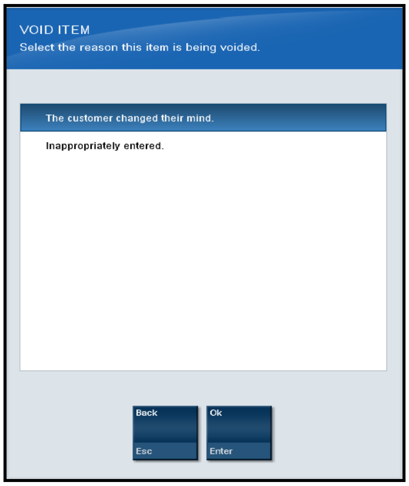
Associate: John Miller AMOUNT DUE $183.58

Change Item

Use the arrow keys to select the item and press ENTER.

Figure 8-11: Select Item to Modify Prompt

4. If prompted, select the reason you are voiding the line item and press [Enter] to continue. Xstore removes the item from the View Port.

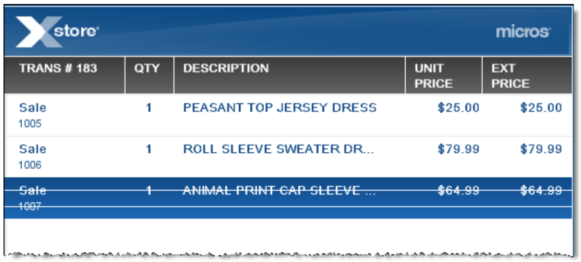


VOID ITEM
Select the reason this item is being voided.

The customer changed their mind.
Inappropriately entered.

Figure 8-12: Void Item Reasons

Your system may be set up to display voided line items with cross-through lines (as shown in the figure here) rather than removing the item from the View Port.



TRANS # 183	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99
~~Sale~~ ~~1007~~	~~1~~	~~ANIMAL PRINT CAP SLEEVE ...~~	~~$64.99~~	~~$64.99~~

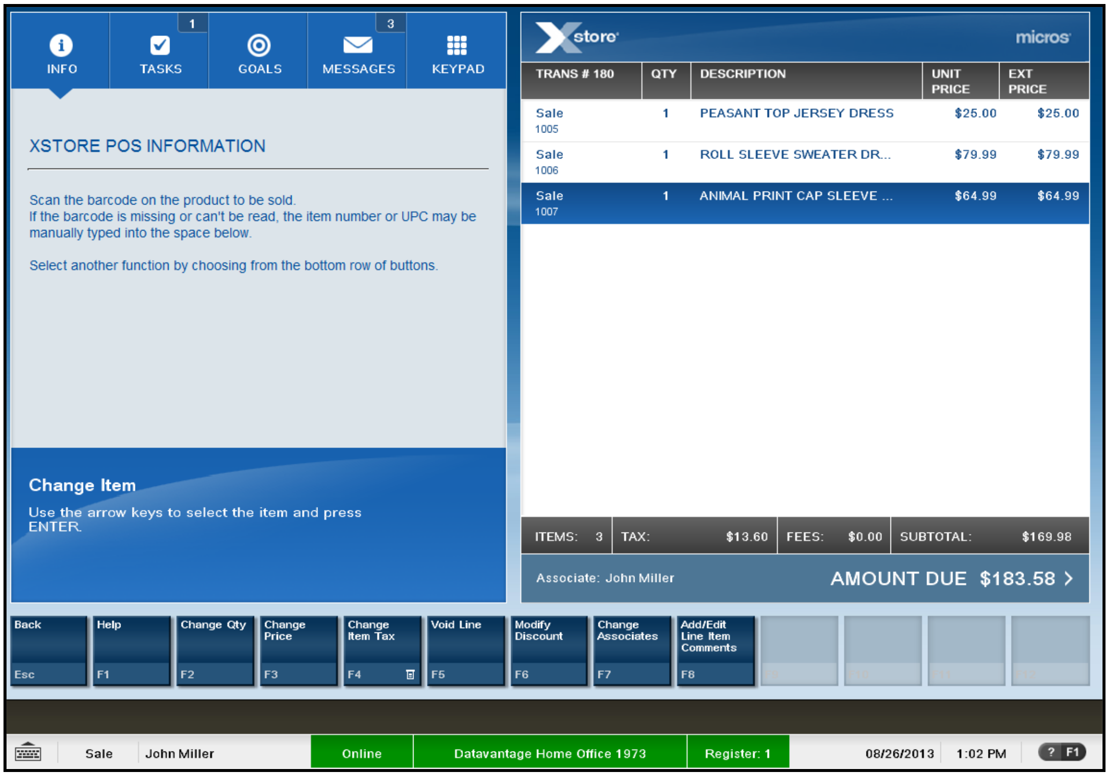
5. Continue processing the transaction at the Sale screen.

Changing the Commissioned Associate

The Change Associates function allows you to change the commissioned employee ID during a transaction. This allows items sold by multiple sales associates to be rung up on the same receipt, thereby giving credit for commissions and goal tracking to the appropriate associates.

Touch-screen users tap the associate area in the transaction View Port and go to step 4 on page 224.

1. Once an item has been added to a sale transaction, the item information is displayed in the View Port area. Select the **Change Item** option from the Sale menu.
2. Select the **Change Associates** option from the Change Item menu.
3. If there are multiple items in the transaction, Xstore prompts you to select the item to be modified. Select the item to be modified and press [Enter].



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Change Item

Use the arrow keys to select the item and press ENTER.

TRANS # 180	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99
Sale 1007	1	ANIMAL PRINT CAP SLEEVE ...	$64.99	$64.99

ITEMS: 3 TAX: $13.60 FEES: $0.00 SUBTOTAL: $169.98

Associate: John Miller AMOUNT DUE $183.58

Sale John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 1:02 PM

Figure 8-13: Select Item to Modify Prompt

4. Xstoredisplays a list of associates:

- ☐ Use the up and down arrow keys to select the name of the commissioned associate and press the [Spacebar] to add the associate(s) to the sale. Press [Enter] to continue.

COMMISSIONED ASSOCIATE

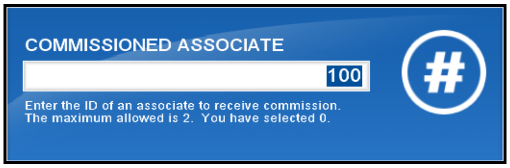
Press the spacebar to select commissioned associates. The maximum allowed is 2.

NAME	IN	EMP ID
Miller, John		100
Sakthi, Shree		101
Clark, Vanessa		1973001000002

Figure 8-14: Commissioned Associate List

<OR>

- ☐ Select the **Select By Associate ID** option to scan or enter the commissioned associate's ID and press [Enter].



COMMISSIONED ASSOCIATE

100

Enter the ID of an associate to receive commission. The maximum allowed is 2. You have selected 0.

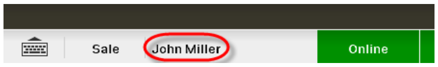
Figure 8-15: Commissioned Associate Prompt

Depending upon your store policy, you may select or enter one or more commissioned associates to be associated with the selected line item.

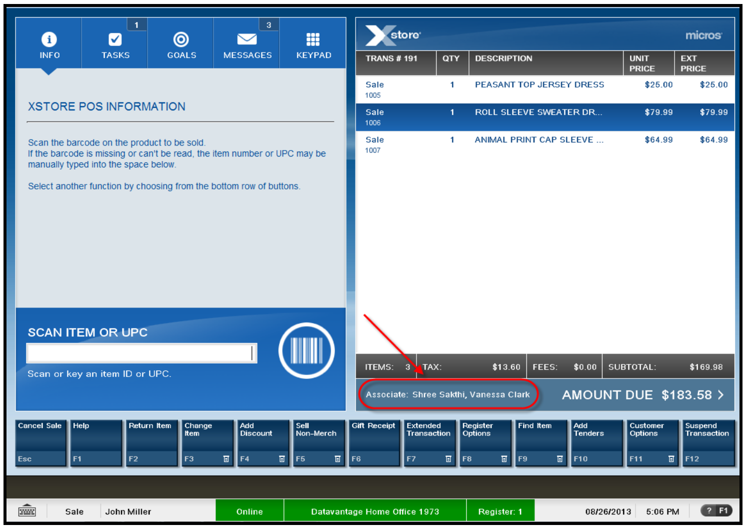
5. Press [Enter] to return to the Sale screen and continue the transaction. The name of the newly-applied commissioned associate(s) is associated with this item.

To view the commissioned associate or associates who are associated with each line item on the transaction, select the item. With an item selected, the names are displayed in the View Port.

Example: Trans # 191*, Cashier is*



In Figure 8-16 below, there are two commissioned associates for the selected line item (item 1006).



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Scan or key an item ID or UPC.

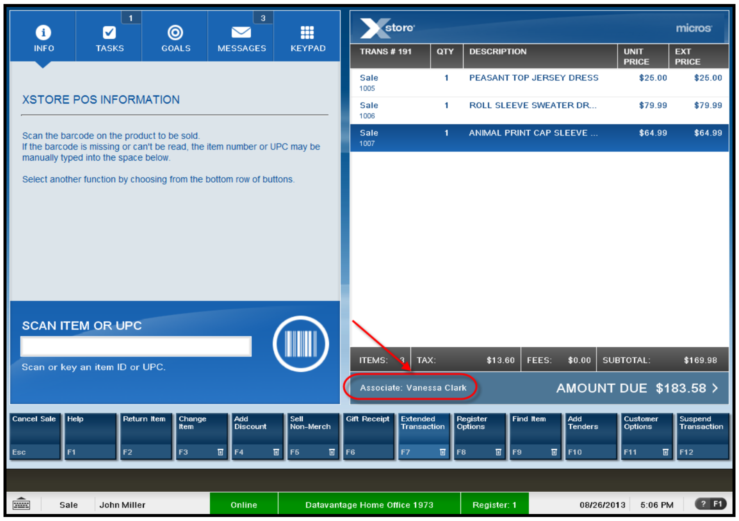
TRANS # 191	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99
Sale 1007	1	ANIMAL PRINT CAP SLEEVE ...	$64.99	$64.99

ITEMS: 3 TAX: $13.60 FEES: $0.00 SUBTOTAL: $169.98

Associate: Shree Sakthi, Vanessa Clark AMOUNT DUE $183.58

Figure 8-16: Trans# 191, Item 1006 Selected

In Figure 8-17 below, there is one commissioned associate for the selected line item (1007).



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Scan or key an item ID or UPC.

TRANS # 191	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99
Sale 1007	1	ANIMAL PRINT CAP SLEEVE ...	$64.99	$64.99

ITEMS: 3 TAX: $13.60 FEES: $0.00 SUBTOTAL: $169.98

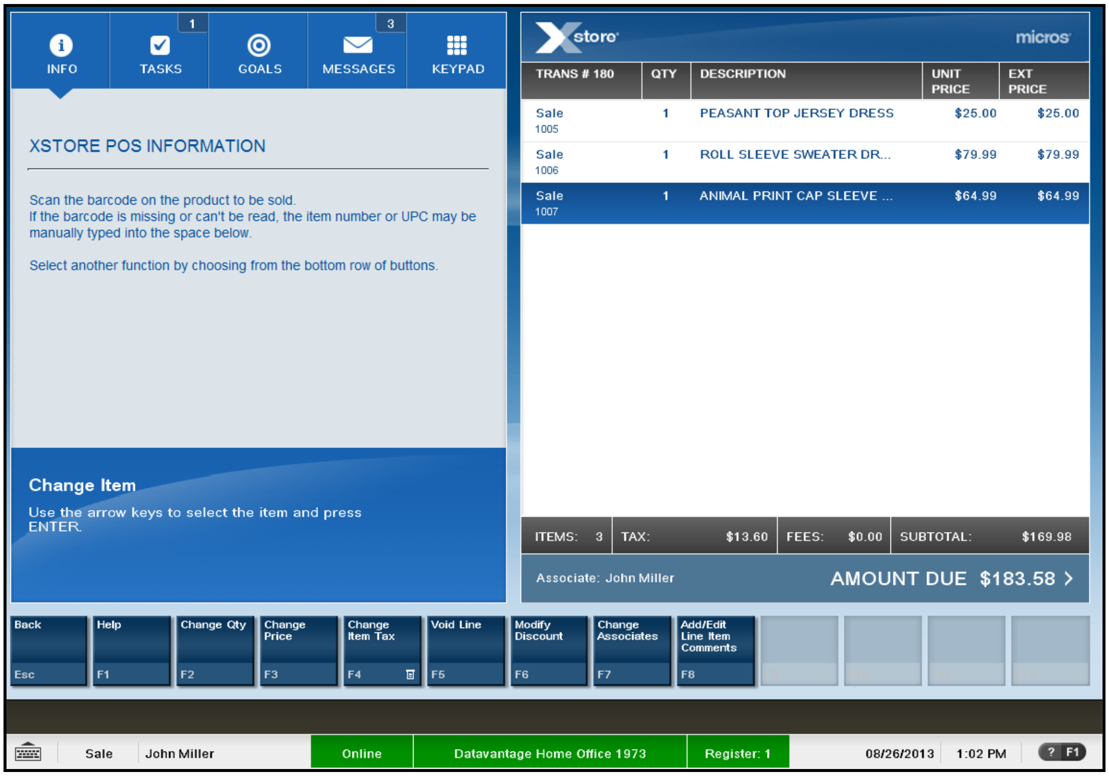
Associate: Vanessa Clark AMOUNT DUE $183.58

Figure 8-17: Trans# 191, Item 1007 Selected

Adding/Editing a Line Item Comment

Use the **Add/Edit Line Item Comments** function to associate a comment with a specific item in a transaction.

1. Once an item has been added to a sale transaction, the item information is displayed in the View Port area. Select the **Change Item** option from the Sale menu.
2. Select the **Add/Edit Line Item Comments** option from the Change Item menu.
3. If there are multiple items in the transaction, Xstore prompts you to select the item to be modified. Select the item to be modified and press [Enter].



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Change Item

Use the arrow keys to select the item and press ENTER.

TRANS # 180	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99
Sale 1007	1	ANIMAL PRINT CAP SLEEVE ...	$64.99	$64.99

ITEMS: 3 TAX: $13.60 FEES: $0.00 SUBTOTAL: $169.98

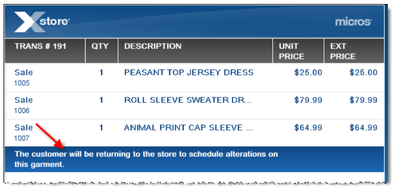
Associate: John Miller AMOUNT DUE $183.58

Sale John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 1:02 PM

Figure 8-18: Select Item to Modify Prompt

4. Xstore displays a comment form where you can type a new comment, or edit an existing comment to be associated with the selected item. Type or edit a comment and press [Enter] to continue.

If you are editing an existing comment, you must select the comment line on the View Port rather than the item with which it is associated.



TRANS # 191	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99
Sale 1007	1	ANIMAL PRINT CAP SLEEVE ...	$64.99	$64.99

The customer will be returning to the store to schedule alterations on this garment.

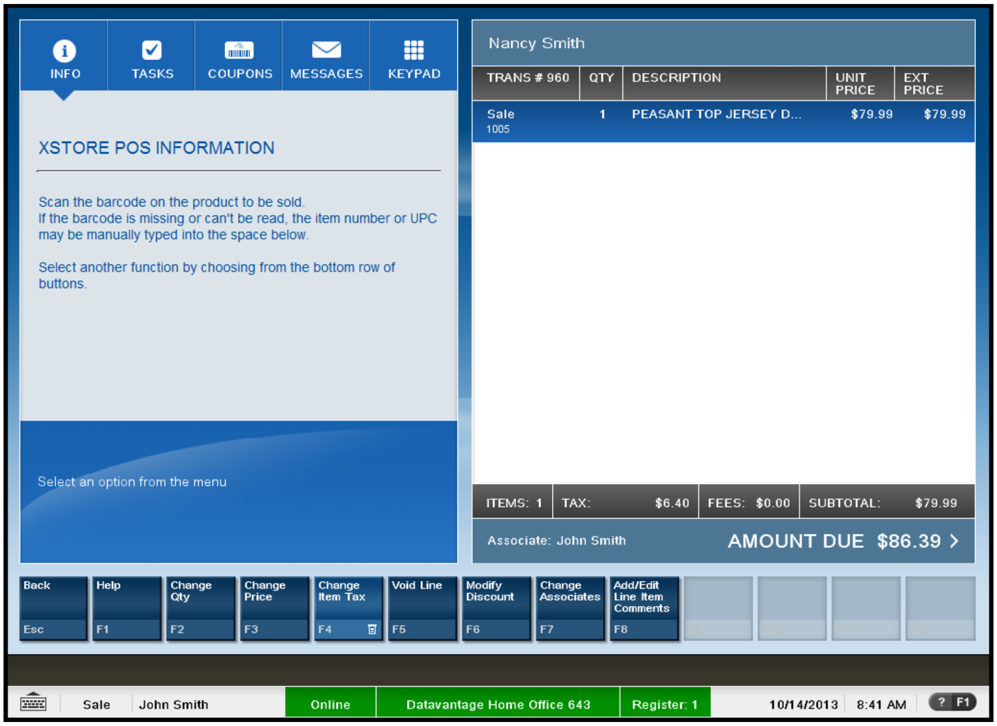
5. The system returns to the Sale screen and the comment is associated with the item.

Changing Item Taxes

> *Because each Xstore 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.*

Taxes can be modified for the entire transaction or for any individual item in the transaction. This section provides information about changing the tax at the item level. Use the **Change Item** option to modify the tax status of just the selected item, for example, to change it from taxed to tax-exempt.

1. Once an item has been added to a sale transaction, the item information is displayed in the View Port area. Select the **Change Item** option from the Sale menu.
2. Select the **Change Item Tax** option from the Change Item menu.
3. Select an option from the Item Tax menu:



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Select an option from the menu

Nancy Smith

TRANS # 960	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY D...	$79.99	$79.99

ITEMS: 1 TAX: $6.40 FEES: $0.00 SUBTOTAL: $79.99

Associate: John Smith AMOUNT DUE $86.39

Sale John Smith Online Datavantage Home Office 643 Register: 1 10/14/2013 8:41 AM

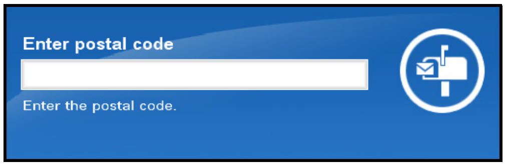
Figure 8-19: Item Tax Menu Options

- ❑ **Change Item Tax Location**—See "Changing the Item Tax Location" on page 228.
- ❑ **Exempt Item Tax**—See "Changing the Item to Tax Exempt" on page 229.
- ❑ **Change Item Tax Dollars**—See "Changing the Item Tax Dollar Amount" on page 232.
- ❑ **Change Trans Tax Percent**—See "Changing the Item Tax Percentage" on page 233.

Changing the Item Tax Location

...continued from step 3 above.

1. Select the **Change Item Tax Location** option from the Item Tax menu (Figure 8-19).
2. If there are multiple items in the transaction, Xstore prompts you to select the item to be modified. Select the item to be modified and press [Enter].
3. Xstore prompts for the postal code of the new tax location. Enter the postal code and press [Enter].



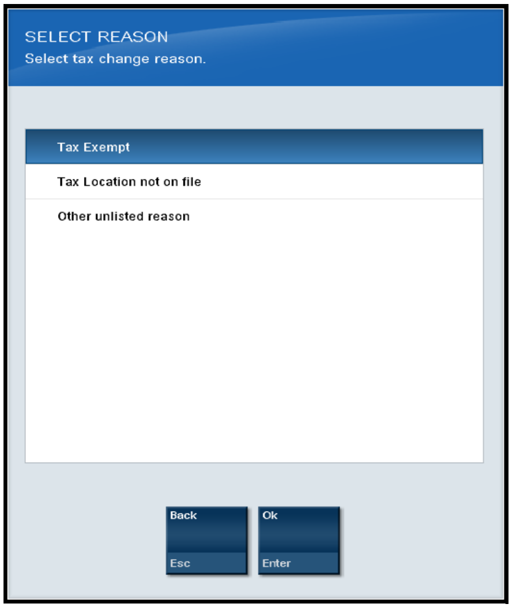
Enter postal code

Enter the postal code.

Figure 8-20: Postal Code Prompt

If the postal code entered here is not on file, the taxes for the current location are used.

4. If prompted for a specific tax location, use the up and down arrow keys to select the tax location to be modified and press [Enter].
5. Xstore prompts you to select the reason for the tax location change. Use the up and down arrow keys to select the reason and press [Enter] to continue.



SELECT REASON

Select tax change reason.

Tax Exempt

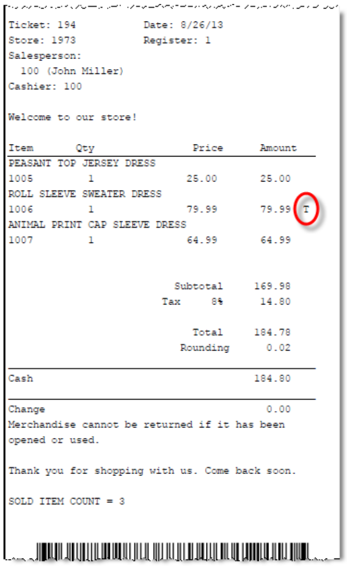
Tax Location not on file

Other unlisted reason

Figure 8-21: List of Tax Change Reasons

6. The system returns to the Sale screen. Continue processing the transaction and after all items have been added, select **Add Tenders** to complete the sale.

7. When the transaction is complete, the system prints receipts as required.



```
Ticket: 194           Date: 8/26/13
Store: 1973           Register: 1
Salesperson:
  100 (John Miller)
Cashier: 100

Welcome to our store!

Item       Qty              Price      Amount
---------------------------------------------
PEASANT TOP JERSEY DRESS
1005         1             25.00       25.00
ROLL SLEEVE SWEATER DRESS
1006         1             79.99       79.99 T
ANIMAL PRINT CAP SLEEVE DRESS
1007         1             64.99       64.99


                        Subtotal      169.98
                      Tax     8%       14.80

                           Total      184.78
                        Rounding        0.02
---------------------------------------------
Cash                                  184.80
---------------------------------------------
Change                                  0.00
Merchandise cannot be returned if it has been
opened or used.

Thank you for shopping with us. Come back soon.

SOLD ITEM COUNT = 3
```

Figure 8-22: Sample Receipt with Modified Item Tax

On a printed receipt, the letter "T" next to an item signifies that the tax for that item has been changed.

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to "Email Receipt Options" on page 54 for more information about sending email receipts.

Changing the Item to Tax Exempt

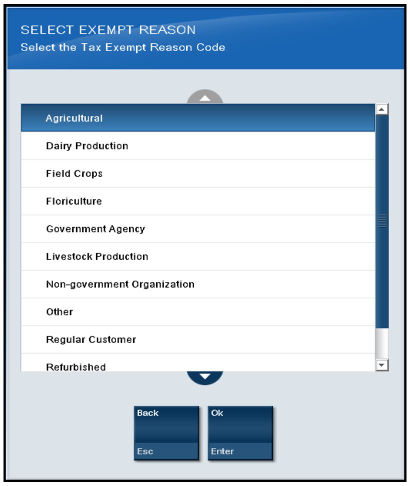
...continued from step 3 on page 227.

1. Select the **Exempt Item Tax** option from the Item Tax menu (Figure 8-19 on page 227).
2. If there are multiple items in the transaction, Xstore prompts you to select the item to be modified. Select the item to be modified and press [Enter].
3. If applicable, Xstore displays a list of the current taxes on the item and prompts you to select the tax to change. Use the up and down arrow keys to select a tax to change and press [Enter].

4. Customer association is required:

- If a customer has not been associated with the sale, enter the customer information when prompted. Continue with step 5.
- If a customer is associated with the sale, but does not have a current tax exempt form on file, continue with step 5 below.
- If a customer is associated with the sale and has a current tax exempt form on file, you are prompted to select the tax exempt identifier from the list of exemptions on file for this customer. Skip to step 7 on page 231.

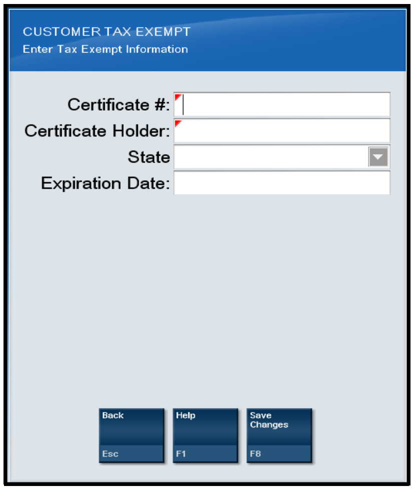
5. If prompted, select the reason for the item tax exemption.



SELECT EXEMPT REASON
Select the Tax Exempt Reason Code

Figure 8-23: Tax Exempt Reasons

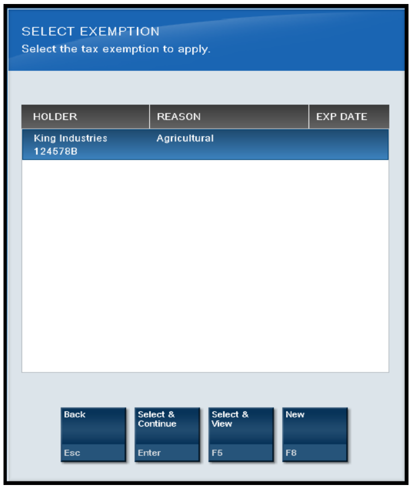
6. If the customer does not have a current tax exempt form on file, Xstore displays the Customer Tax Exempt form. Enter the customer's tax exempt information in all fields as required and select **Save Changes**. Skip to step 8 on page 231.



CUSTOMER TAX EXEMPT
Enter Tax Exempt Information

Figure 8-24: Customer Tax Exempt Form

7. If the customer has at least one current tax exempt form on file, Xstore displays a list of the tax exemptions on file for this customer.



SELECT EXEMPTION

Select the tax exemption to apply.

HOLDER	REASON	EXP DATE
King Industries 124578B	Agricultural	

Figure 8-25: List of Tax Exemptions On File for Customer

- Select a Tax Exemption from the list and press [Enter] to apply the selected tax exemption to the item. Continue with step 8 on page 231.

  <OR>

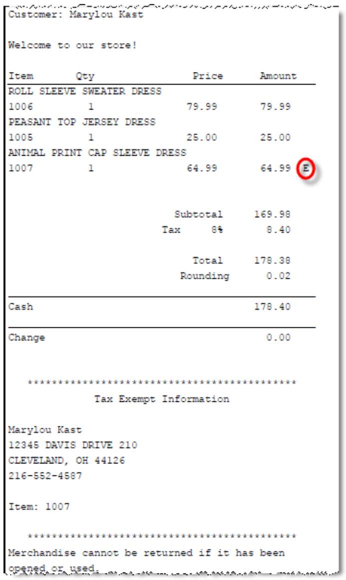
- Select the **Select & View** option to review the tax exemption details. You can edit the information here as needed. You may make changes if the current information is incorrect. Select **Save Changes**. The system applies the selected tax exemption to the item and returns to the Sale screen. Continue with step 8 below.

  <OR>

- Select the **New** option to create a new tax exemption record for this customer. Go back to step 5 on page 230.

8. Continue processing the transaction at the Sale screen. Tender the sale after all items have been added to complete the transaction.

9. When the transaction is complete, the system prints receipts as required.



```
Customer: Marylou Kast

Welcome to our store!

Item        Qty                 Price       Amount
ROLL SLEEVE SWEATER DRESS
1006         1                  79.99        79.99
PEASANT TOP JERSEY DRESS
1005         1                  25.00        25.00
ANIMAL PRINT CAP SLEEVE DRESS
1007         1                  64.99        64.99 E


                              Subtotal      169.98
                            Tax      8%       8.40

                                 Total      178.38
                              Rounding        0.02

Cash                                        178.40

Change                                        0.00


   *******************************************
              Tax Exempt Information

Marylou Kast
12345 DAVIS DRIVE 210
CLEVELAND, OH 44126
216-552-4587

Item: 1007

   *******************************************
Merchandise cannot be returned if it has been
opened or used.
```

Figure 8-26: Tax Exempt Receipt Example

The letter "E" printed next to the item indicates that this item has been exempted from the tax.

Email Receipts

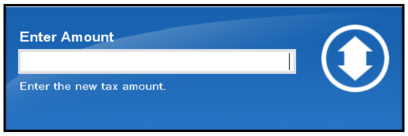
If your store issues email receipts, additional/different prompts display. Refer to "Email Receipt Options" on page 54 for more information about sending email receipts.

Changing the Item Tax Dollar Amount

...continued from step step 3 on page 227.

1. Select the **Change Item Tax $** option from the Item Tax menu (Figure 8-19 on page 227).
2. If there are multiple items in the transaction, Xstore prompts you to select the item to be modified. Select the item to be modified and press [Enter].
3. If applicable, Xstore displays a list of the current taxes on the item and prompts you to select the tax to change. Use the up and down arrow keys to select the tax to change and press [Enter].

4. Xstore prompts you to enter the new tax dollar amount for the selected item. Enter the amount and press [Enter] to continue.

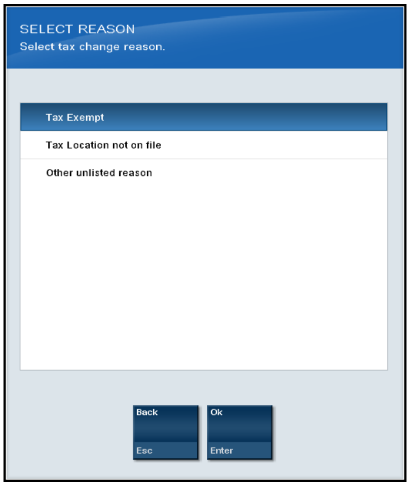


Enter Amount

Enter the new tax amount.

Figure 8-27: Tax Amount Prompt

5. Depending upon your store policy, you may be prompted for a reason for the tax change. Use the up and down arrow keys to select a reason for the tax change and press [Enter].



SELECT REASON
Select tax change reason.

- Tax Exempt
- Tax Location not on file
- Other unlisted reason

Figure 8-28: List of Tax Change Reasons

6. The system returns to the Sale screen and you may continue processing the transaction. Select **Add Tenders** after all items have been added and you are ready to complete the transaction.

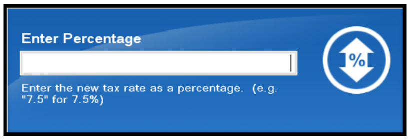
   On the receipt, the letter “T” next to an item signifies that the tax for that item has been changed. See Figure 8-22 on page 229.

Changing the Item Tax Percentage

...continued from step step 3 on page 227.

1. Select the **Change Item Tax %** option from the Item Tax menu (Figure 8-19 on page 227).
2. If there are multiple items in the transaction, Xstore prompts you to select the item to be modified. Select the item to be modified and press [Enter].
3. If applicable, Xstore displays a list of the current taxes on the item and prompts you to select the tax to change. Use the up and down arrow keys to select the tax to change and press [Enter].

4. Xstore prompts you to enter the new tax rate as a percentage for the selected item. Enter the percentage and press [Enter] to continue.

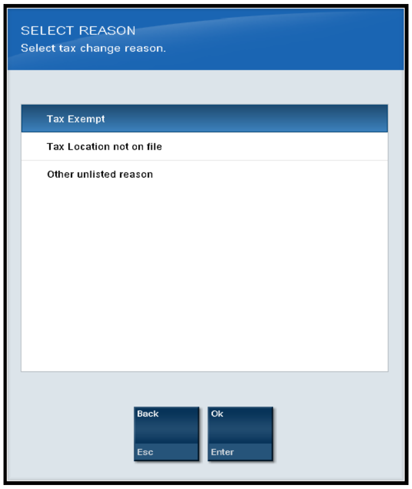


Enter Percentage

Enter the new tax rate as a percentage. (e.g. "7.5" for 7.5%)

Figure 8-29: Tax Percentage Prompt

5. Depending upon your store policy, you may be prompted for a reason for the tax change. Use the up and down arrow keys to select a reason for the tax change and press [Enter].



SELECT REASON
Select tax change reason.

- Tax Exempt
- Tax Location not on file
- Other unlisted reason

Figure 8-30: List of Tax Change Reasons

6. The system returns to the Sale screen and you may continue processing the transaction. Select **Add Tenders** after all items have been added and you are ready to complete the transaction.

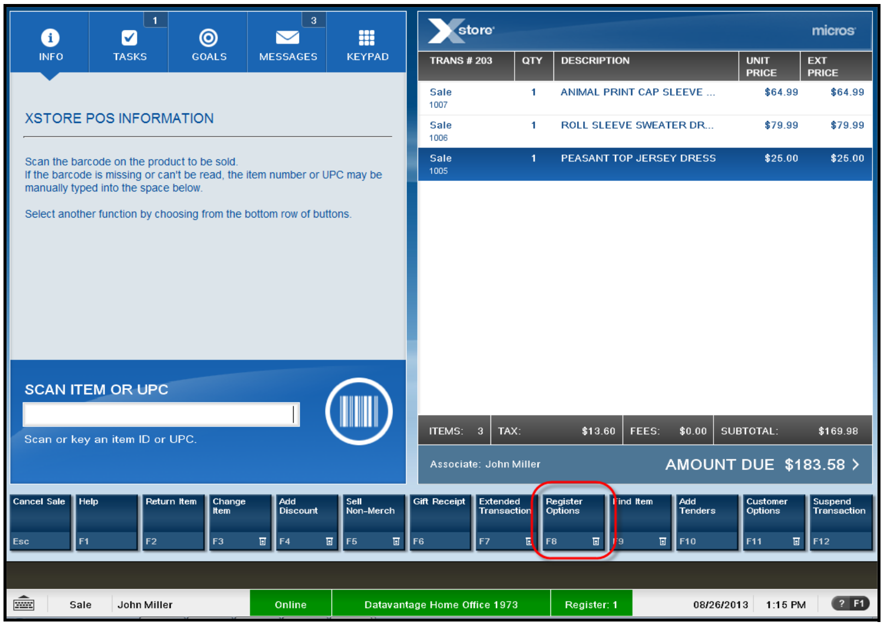
   On the receipt, the letter "T" next to an item signifies that the tax for that item has been changed. See Figure 8-22 on page 229.

Changing Transaction Taxes

> *Because each Xstore 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.*

Use the **Change Transaction Tax** option to modify the tax status of the entire transaction; for example, from taxed to tax exempt or vice versa.

1. After an item has been added to a sale transaction, the item information is displayed in the View Port area. Select **Register Options** from the Sale screen menu.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Scan or key an item ID or UPC.

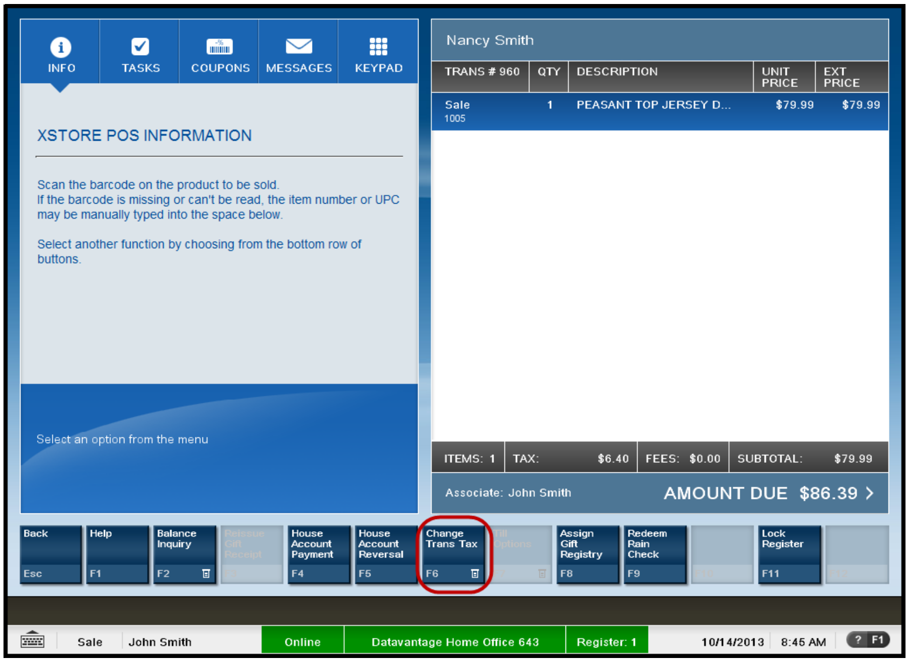
TRANS # 203	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1007	1	ANIMAL PRINT CAP SLEEVE ...	$64.99	$64.99
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99
Sale 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00

ITEMS: 3 TAX: $13.60 FEES: $0.00 SUBTOTAL: $169.98

Associate: John Miller AMOUNT DUE $183.58

Figure 8-31: Sale Screen Menu - Register Options Button

2. Select the **Change Trans Tax** option from the Register Options menu.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Select an option from the menu

Nancy Smith

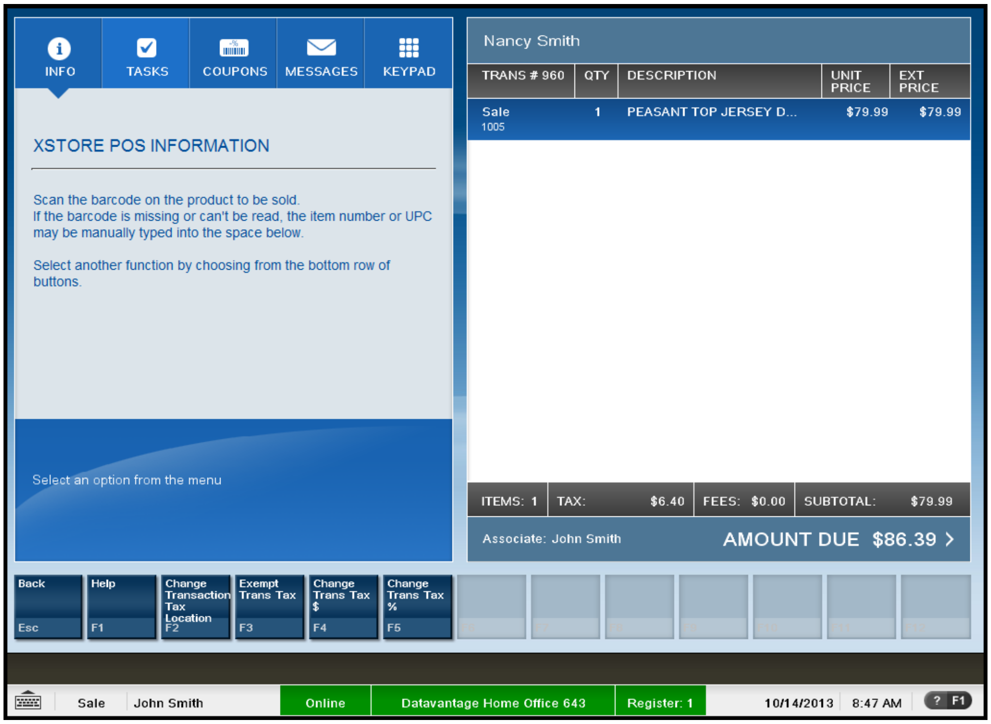
TRANS # 960	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY D...	$79.99	$79.99

ITEMS: 1 TAX: $6.40 FEES: $0.00 SUBTOTAL: $79.99

Associate: John Smith AMOUNT DUE $86.39

Figure 8-32: Register Options- Change Trans Tax Option

3. Select an option from the Transaction Tax menu:



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Select an option from the menu

Nancy Smith

TRANS # 960	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY D...	$79.99	$79.99

ITEMS: 1 TAX: $6.40 FEES: $0.00 SUBTOTAL: $79.99

Associate: John Smith AMOUNT DUE $86.39

Figure 8-33: Transaction Tax Menu Options

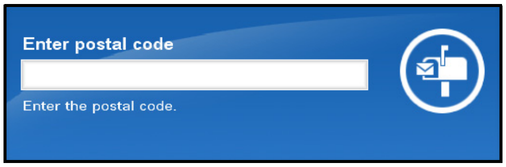
- **Change Transaction Tax Location** — See Changing the Transaction Tax Location below.
- **Exempt Trans Tax** — See "Changing the Transaction to Tax Exempt" on page 238.
- **Change Transaction Tax $** — See "Changing the Transaction Tax Dollar Amount" on page 241.
- **Change Transaction Tax %** — See "Changing the Transaction Tax Percent" on page 242.

Changing the Transaction Tax Location

...continued from step 3 on page 236.

1. Select the **Change Transaction Tax Location** option from the Transaction Tax menu (Figure 8-33 on page 236).

2. Xstore prompts for the postal code of the new tax location. Enter the postal code and press [Enter].



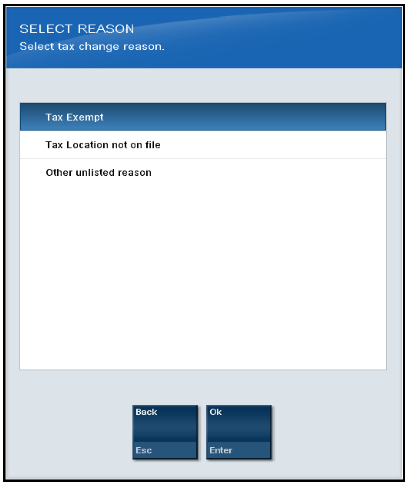
Enter postal code

Enter the postal code.

Figure 8-34: Postal Code Prompt

If the postal code entered here is not on file, the taxes for the current location are used.

3. If prompted for a specific tax location, use the up and down arrow keys to select the tax location to be modified and press [Enter].
4. Xstore prompts you to select the reason for the tax location change. Use the up and down arrow keys to select the reason and press [Enter] to continue.



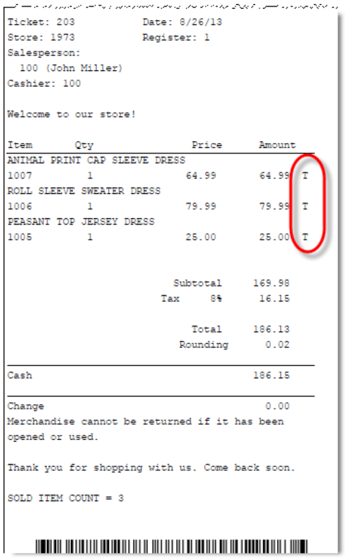
SELECT REASON

Select tax change reason.

Figure 8-35: List of Tax Change Reasons

5. Press [Esc] to return to the Sale Options menu. Press [Esc] again to return to the Sale screen and continue processing the transaction.

6. When the transaction is complete, the system prints receipts as required.



```
Ticket: 203          Date: 8/26/13
Store: 1973          Register: 1
Salesperson:
  100 (John Miller)
Cashier: 100

Welcome to our store!

Item       Qty              Price      Amount
ANIMAL PRINT CAP SLEEVE DRESS
1007         1              64.99      64.99  T
ROLL SLEEVE SWEATER DRESS
1006         1              79.99      79.99  T
PEASANT TOP JERSEY DRESS
1005         1              25.00      25.00  T


                         Subtotal     169.98
                       Tax     8%      16.15

                            Total     186.13
                          Rounding      0.02

Cash                                  186.15

Change                                  0.00
Merchandise cannot be returned if it has been
opened or used.

Thank you for shopping with us. Come back soon.

SOLD ITEM COUNT = 3
```

Figure 8-36: Sample Receipt, Transaction Tax Changed

> *The printed receipts show a letter "T" next to all items indicating that the tax has been changed for all items in this transaction.*

Changing the Transaction to Tax Exempt

...continued from step 3 on page 236.

1. Select the **Exempt Trans Tax** option from the Transaction Tax menu (Figure 8-33 on page 236).
2. Customer association is required:
   - ❑ If a customer has not been associated with the sale, enter the customer information when prompted. Continue with step 3 below.
   - ❑ If a customer is associated with the sale, but does not have a current tax exempt form on file, continue with step 3 below.
   - ❑ If a customer is associated with the sale and has a current tax exempt form on file, you are prompted to select the tax exempt identifier from the list of exemptions on file for this customer. Skip to step 5 on page 240.

3. If prompted, select the reason for the tax exemption.

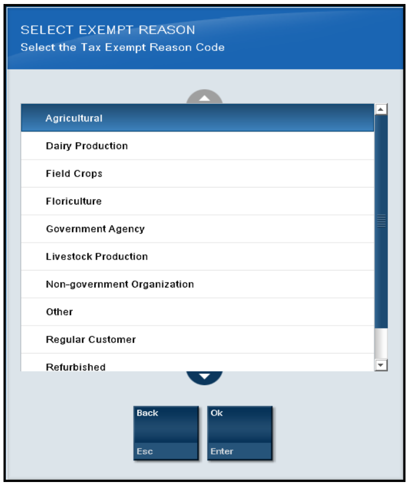


Figure 8-37: Tax Exempt Reasons

4. If the customer does not have a current tax exempt form on file, Xstore displays the Customer Tax Exempt form. Enter the customer's tax exempt information in all fields as required and select **Save Changes**. Skip to step 6 on page 240.

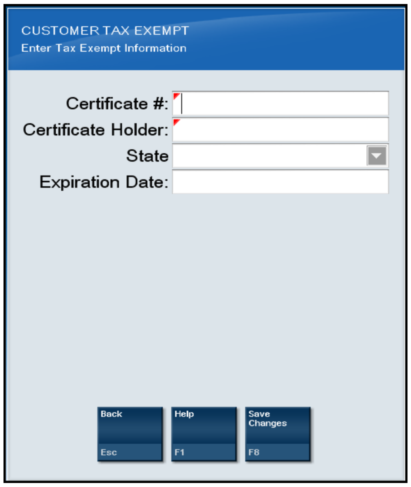
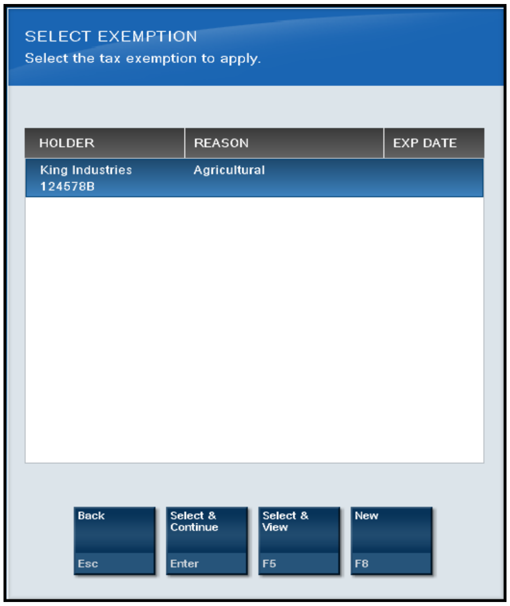


Figure 8-38: Customer Tax Exempt Form

5. If the customer has at least one current tax exempt form on file, Xstore displays a list of the tax exemptions on file for this customer.



SELECT EXEMPTION
Select the tax exemption to apply.

HOLDER	REASON	EXP DATE
King Industries 124578B	Agricultural	

Figure 8-39: List of Tax Exemptions On File for Customer

- Select a Tax Exemption from the list and press [Enter] to apply the selected tax exemption to the item. Continue with step 6 on page 240.

  <OR>

- Select the **Select & View** option to review the tax exemption details. You can edit the information here as needed. You may make changes if the current information is incorrect. Select **Save Changes**. The system applies the selected tax exemption to the item and returns to the Sale screen. Continue with step 6 below.

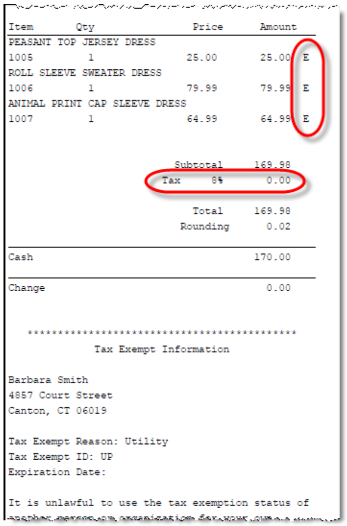
  <OR>

- Select the **New** option to create a new tax exemption record for this customer. Go back to step 3 on page 239.

6. When you have applied the tax exemption to the transaction, press [Esc] to return to the Register Options menu and press [Esc] again to return to the Sale screen and continue processing the transaction.

To confirm that the tax exemption has been applied to the transaction, the View Port displays the letter "E" next to the item price.

7. When the transaction is complete, the system prints receipts as required.



```
Item        Qty               Price        Amount
PEASANT TOP JERSEY DRESS
1005          1               25.00         25.00  E
ROLL SLEEVE SWEATER DRESS
1006          1               79.99         79.99  E
ANIMAL PRINT CAP SLEEVE DRESS
1007          1               64.99         64.99  E


                           Subtotal        169.98
                         Tax      8%         0.00

                              Total        169.98
                           Rounding          0.02

Cash                                       170.00

Change                                       0.00


   ******************************************
              Tax Exempt Information

Barbara Smith
4857 Court Street
Canton, CT 06019

Tax Exempt Reason: Utility
Tax Exempt ID: UP
Expiration Date:

It is unlawful to use the tax exemption status of
```

Figure 8-40: Tax Exempt Transaction Receipt Example

The "E" printed next to all items indicates that each item in this transaction has been exempted from the tax.

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to "Email Receipt Options" on page 54 for more information about sending email receipts.

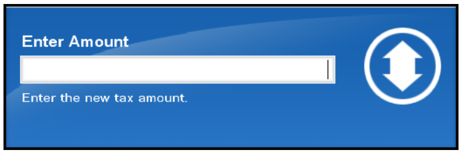
Changing the Transaction Tax Dollar Amount

...continued from step 3 on page 236.

1. Select the **Change Trans Tax $** option from the Transaction Tax menu (Figure 8-33 on page 236).

2. If applicable, Xstore displays a list of the current taxes on the transaction and prompts you to select the tax to change. Use the up and down arrow keys to select the tax to change and press [Enter].

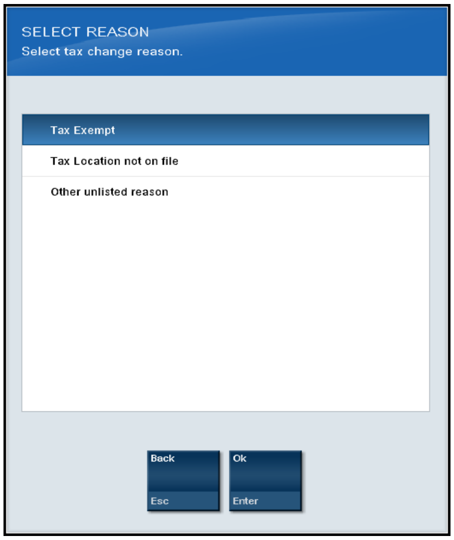
3. Xstore prompts you to enter the new tax dollar amount. Enter the amount and press [Enter] to continue.


Enter Amount

Enter the new tax amount.

Figure 8-41: Tax Amount Prompt

4. Depending upon your store policy, you may be prompted for a reason for the tax change. Use the up and down arrow keys to select a reason for the tax change and press [Enter].


SELECT REASON

Select tax change reason.

- Tax Exempt
- Tax Location not on file
- Other unlisted reason

Figure 8-42: List of Tax Change Reasons

5. Press [Esc] to return to the Register Options menu. Press [Esc] again to return to the Sale screen and continue processing the transaction.

6. When the transaction is complete, the system prints receipts as required by your store policy. The printed receipts show a "T" next to each item in the transaction indicating the tax has been modified for all items. See Figure 8-36 on page 238.

Email Receipts

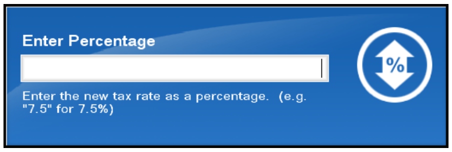
If your store issues email receipts, additional/different prompts display. Refer to "Email Receipt Options" on page 54 for more information about sending email receipts.

Changing the Transaction Tax Percent

...continued from step 3 on page 236.

1. Select the **Change Trans Tax %** option from the Transaction Tax menu (Figure 8-33 on page 236).

2. If applicable, Xstore displays a list of the current taxes on the transaction and prompts you to select the tax to change. Use the up and down arrow keys to select the tax to change and press [Enter].
3. Xstore prompts you to enter the new tax rate as a percentage. Enter the percentage and press [Enter] to continue.

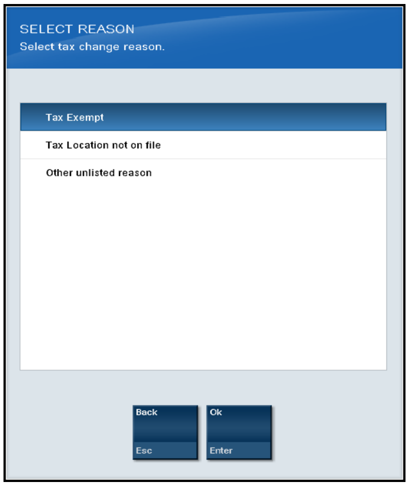


Enter Percentage

Enter the new tax rate as a percentage. (e.g. "7.5" for 7.5%)

Figure 8-43: Tax Percentage Prompt

4. Depending upon your store policy, you may be prompted for a reason for the tax change. Use the up and down arrow keys to select a reason for the tax change and press [Enter].



SELECT REASON

Select tax change reason.

Tax Exempt

Tax Location not on file

Other unlisted reason

Figure 8-44: List of Tax Change Reasons

5. Press [Esc] to return to the Sale Options menu and press [Esc] again to return to the Sale screen and continue processing the transaction.
6. When the transaction is complete, the system prints receipts as required by your store policy. The printed receipts show a “T” next to each item in the transaction indicating the tax has been modified for all items. See Figure 8-36 on page 238.

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to “Email Receipt Options” on page 54 for more information about sending email receipts.

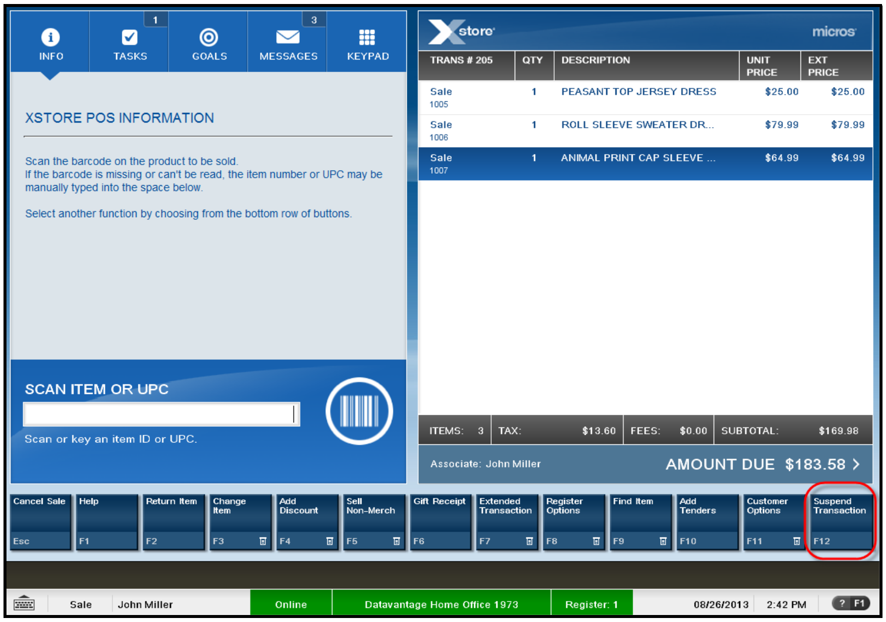
Suspending/Resuming a Transaction

> *Because each Xstore 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.*

During the course of conducting a transaction you may need to temporarily cancel, or suspend, any further processing until later the same day. You can do this by using the **Suspend** option on the Register Options menu before you have added any tenders to the transaction. When you are ready to continue processing the transaction, use the **Resume** option to complete it. Resuming a transaction creates a new transaction number for it.

Suspending a Transaction

1. Select the **Suspend Transaction** option at the Register Sale screen at any time before tendering.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Scan or key an item ID or UPC.

TRANS # 205	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99
Sale 1007	1	ANIMAL PRINT CAP SLEEVE ...	$64.99	$64.99

ITEMS: 3 TAX: $13.60 FEES: $0.00 SUBTOTAL: $169.98

Associate: John Miller AMOUNT DUE $183.58

Figure 8-45: Suspend Transaction Option

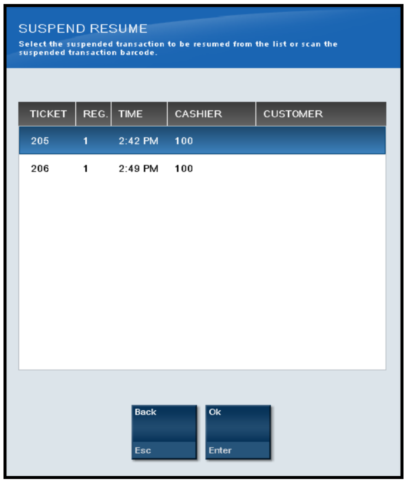
The system may print a receipt for the suspended transaction. This receipt is clearly labeled as a Suspended Transaction and can be used when the customer returns to continue with this transaction. The barcode on the receipt may be scanned to resume the transaction.

2. After saving the information from the suspended transaction, the system returns to the Sale menu. You can enter new transactions and perform other menu options.

Resuming a Transaction

1. When you are ready to continue processing a suspended transaction, select the **Resume Transaction** option at the Register Sale screen. The **Resume Transaction** menu option is available before you add any items in a new transaction.

   The system displays a list of transactions that are currently suspended.



SUSPEND RESUME

Select the suspended transaction to be resumed from the list or scan the suspended transaction barcode.

TICKET	REG.	TIME	CASHIER	CUSTOMER
205	1	2:42 PM	100	
206	1	2:49 PM	100	

Figure 8-46: List of Suspended Transactions

2. Select the transaction you want to resume and press [Enter] to continue.

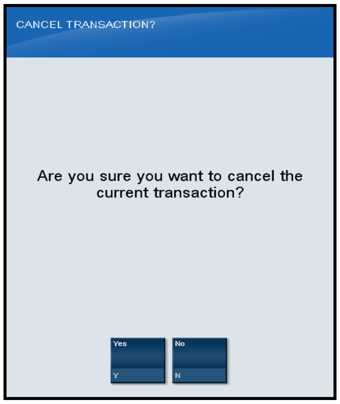
> *If you have the customer's Suspended Transaction receipt, you can scan the barcode to retrieve the transaction from the database.*

3. The system returns to the Sale screen and you may continue processing the resumed transaction.

Cancelling a Sale

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

1. During the sale, press [Esc] until you have returned to the initial Sale screen. At the Register Sale screen select **Cancel Sale**, or press [Esc]. Xstore prompts to confirm that you want to cancel the sale if there are any items on the transaction.

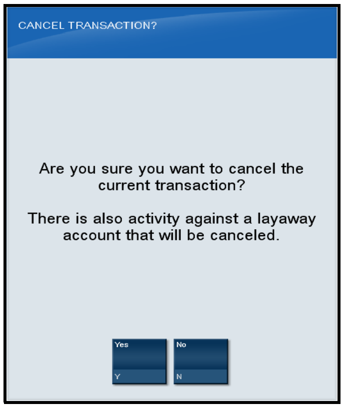


CANCEL TRANSACTION?

Are you sure you want to cancel the current transaction?

2. Press [Y] for **Yes** to verify that you want to cancel the current transaction.

If other transaction types are associated with this sale (for example, a layaway setup), you are notified that cancelling the current transaction also cancels the associated account setup or activity.



CANCEL TRANSACTION?

Are you sure you want to cancel the current transaction?

There is also activity against a layaway account that will be canceled.

3. Your store policy may require that you select a reason for cancelling the transaction. If prompted, use the up and down arrow keys to select a reason and press [Enter] to continue.

   Xstore is now ready to begin a new sale transaction.

CHAPTER 9

Send Sale Transactions

Overview

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.

> *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 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 *Xstore 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 **Extended Transaction** menu option.
2. From the Extended Transaction menu, select the **Send Sale** option. You must have security privileges to add a send sale to a transaction.
3. Select the **New Send Sale** option.
4. 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.

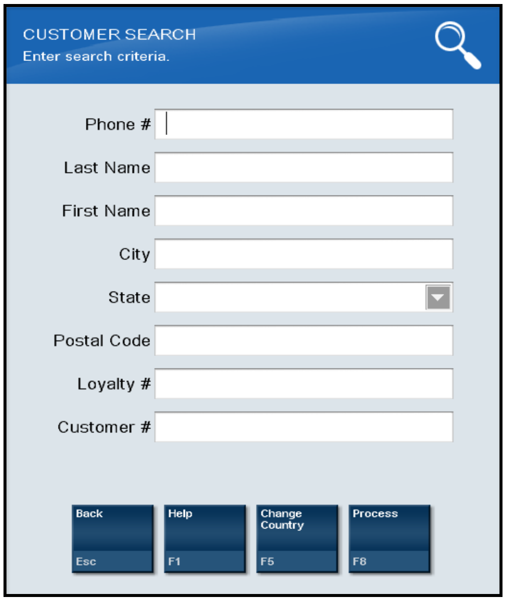
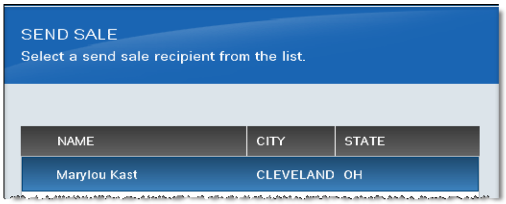


Figure 9-1: Customer Search Form - Sale Customer

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 5 on page 249.

- If a customer is assigned to the sale, the shipping destination prompt is displayed. Continue with step 5 on page 249.
- If the customer associated with the transaction has shipped items using the send sale process previously, a list of past recipients is displayed.

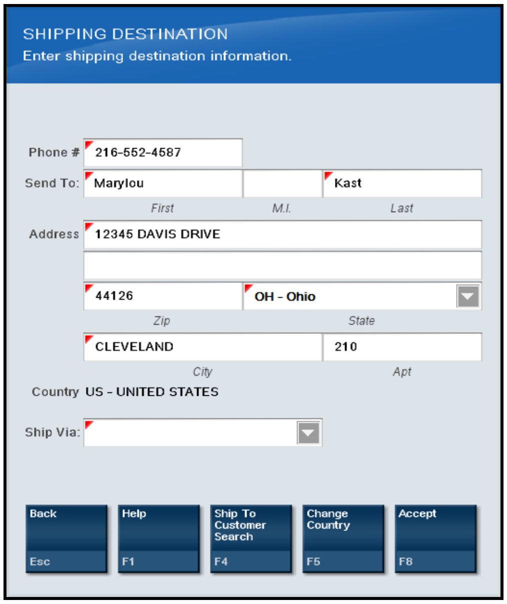


NAME	CITY	STATE
Marylou Kast	CLEVELAND	OH

  - ☐ 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 5 on page 249.

5. 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.



SHIPPING DESTINATION
Enter shipping destination information.

Phone # 216-552-4587
Send To: Marylou (First) (M.I.) Kast (Last)
Address 12345 DAVIS DRIVE
44126 (Zip) OH - Ohio (State)
CLEVELAND (City) 210 (Apt)
Country US - UNITED STATES
Ship Via:

Figure 9-2: Shipping Destination Information Form - Auto-populated Customer Info

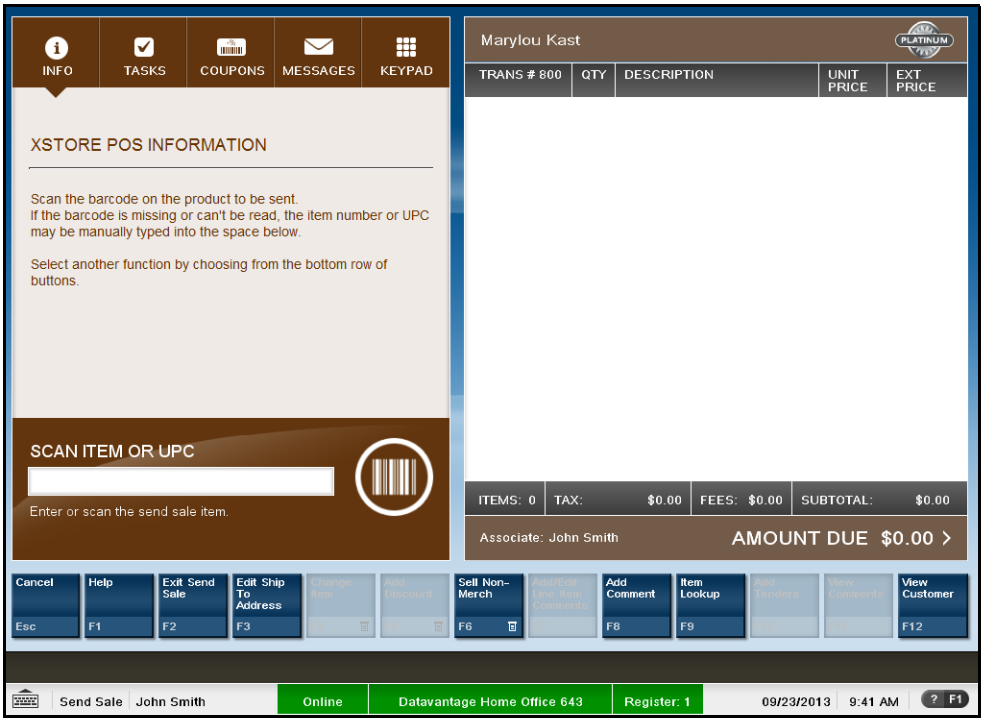
6. You have the following options on this form:
   - ❑ You can edit any of the address fields on the shipping destination form and then select the **Accept** option.
   - ❑ You can accept the information without making changes by selecting the **Accept** option.
   - ❑ You can search for another send sale recipient by selecting the **Ship To Customer Search** option.
   - ❑ 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.

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.*

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

> *To add Wish List item(s) to the Send Sale, select **View Customer** and then select the **Wish List** tab (see "Purchasing Wish List Item(s)" on page 43).*



XSTORE POS INFORMATION

Scan the barcode on the product to be sent.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Enter or scan the send sale item.

Figure 9-3: 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.

Notes: Send Sale Item Menu Options

- Select **Item Lookup** to look up items or styles if you do not know the item ID.
- Select the **Change Item** option if you want to change any of the information (quantity, price, tax, etc.) about an item after you have added it.
- Select the **Add Discount** option to add a discount to an item.
- Select the **Add/Edit Line Item Comments** option to associate a comment with a send sale item. Be sure to select the correct item that has the comment.

- 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.

The procedures for each send sale menu option shown above can be found in Chapter 8, "Modifying a Sale Transaction" on page 213. The graphics contain different background colors but the screens are essentially the same.

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

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

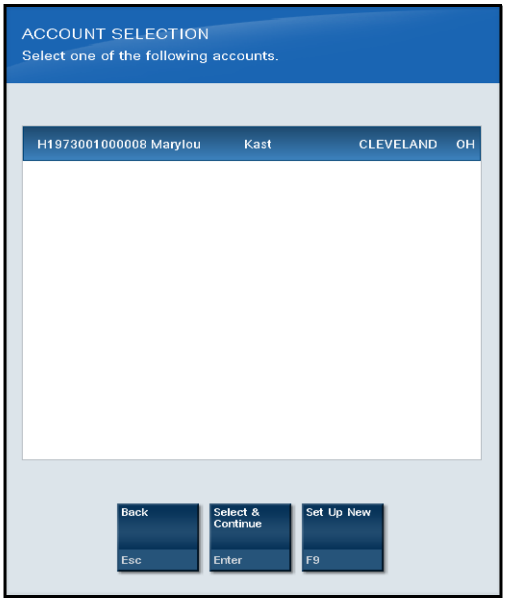
- ❑ If everything is correct and the send sale is complete, continue with step 10 on page 252.
- ❑ If the customer would like to set up a send sale to a different recipient, continue with step 9 below.

9. In this current sale transaction you can also create another send sale to send items to a **different** recipient:

a. Select the **Exit Send Sale** menu option. You are returned to the Register Sale screen where you can begin the send sale process again for a new recipient.

b. Select **Extended Transaction** --> **Send Sale** --> **Edit Send Sale**.

The Account Selection list displays showing the current send sale accounts on the transaction.



ACCOUNT SELECTION

Select one of the following accounts.

H1973001000008 Marylou Kast CLEVELAND OH

Figure 9-4: Account Selection List

c. Select the **Set Up New** option.

d. The Shipping Destination Information form displays. Complete the form as required and select **Accept**.

e. Enter the send sale items for this recipient.

f. The system creates separate send sale accounts for each recipient.

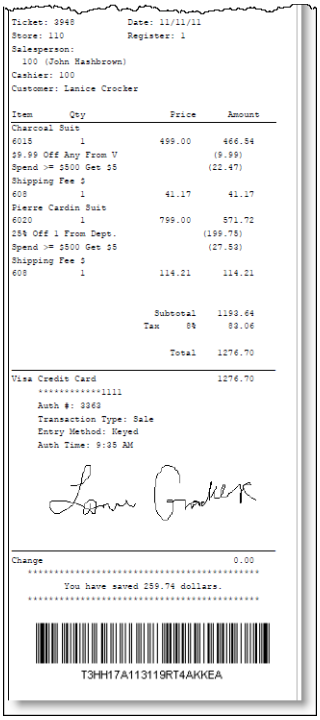
10. When you are finished adding send sale items, you have the following options to complete the transaction:

- ☐ 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.



```
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 9-5: Customer Receipt Sample

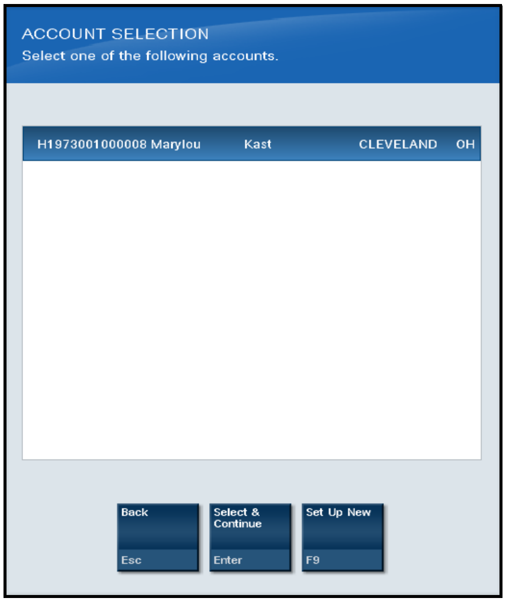
```
ket: 3948          ate: /11/1
Store: 110            Register: 1
Cashier: 100
Customer ID: C0101002001682
Customer Name: Lanice Crocker


Ship To:
  Ruth S Baum
  170 N CRESCENT DR APT 107
  Beverly Hills, CA 90210-5401
  123-457-898


          S e n d   S a l e   I D
       H 0 1 1 0 0 0 1 0 0 0 1 2 0

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)


               H0110001000120


                Customer Copy
```

Figure 9-6: 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** --> **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].



ACCOUNT SELECTION

Select one of the following accounts.

H1973001000008 Marylou Kast CLEVELAND OH

Figure 9-7: 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 on page 250.

CHAPTER 10

Layaway Transactions

Overview

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.

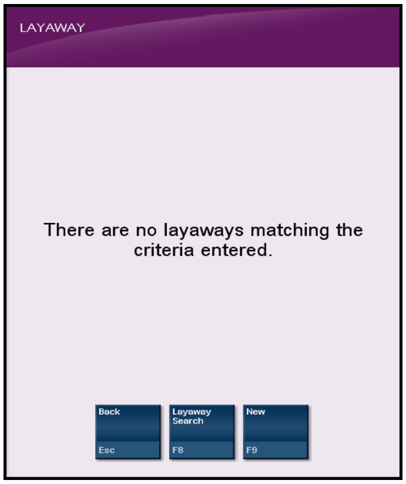
A layaway account is a customer account that includes one or more layaway items. A layaway account for which the customer does not pay the requisite amount within a given time frame is considered delinquent; the items in the layaway are restocked as saleable inventory and any non-refundable deposit or setup fees are kept by the store. Any refundable deposits or setup fees are reserved for the customer.

Layaway Transaction Processing

The system allows either Single or Multiple layaway accounts to be created. In a single layaway configuration, a customer may have only one active account, and all items purchased on a layaway basis are assigned to that account. In a multiple layaway configuration, a customer may have more than one layaway active account.

> *Because each Xstore 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.*

1. From the Sale screen, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Layaway** option.
3. If a customer has been associated with this transaction, the system may automatically search the database to locate any open layaway accounts for this customer.
    a. If no open layaway account is found, Xstore provides options to set up a new layaway or to perform another search.

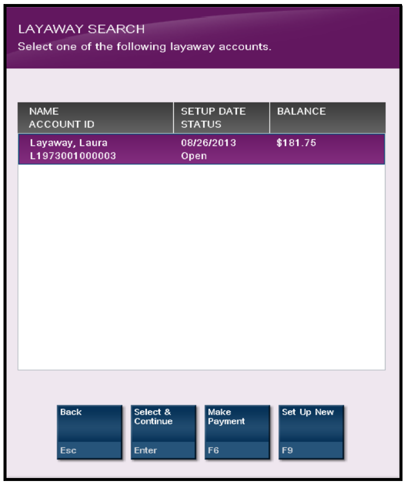


There are no layaways matching the criteria entered.

Figure 10-1: No Layaways Found Message

- To set up a new layaway, select the **New** option and continue with "Layaway Setup" on page 258.
- To search the database for an existing layaway account, select the **Layaway Search** option and enter the search criteria in the Layaway Search form.

b. If the customer has at least one open layaway account, Xstore displays a list of the open layaway accounts for this customer.



LAYAWAY SEARCH

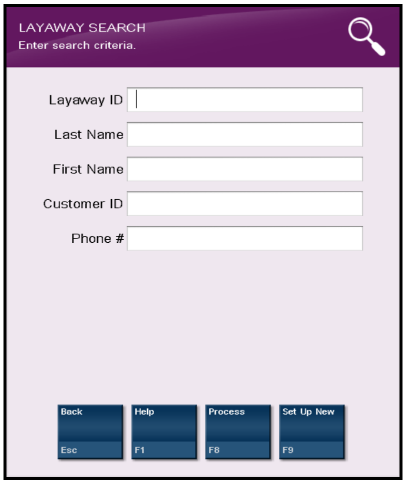
Select one of the following layaway accounts.

NAME ACCOUNT ID	SETUP DATE STATUS	BALANCE
Layaway, Laura L1973001000003	08/26/2013 Open	$181.75

Figure 10-2: Customer's Open Layaway Accounts

- ❍ To view layaway account information, select the **Select & Continue** option and continue with "Additional Options for Layaway Accounts" on page 273.
- ❍ To make a payment on the account, select the **Make Payment** option and continue with "Layaway Payment" on page 265.
- ❍ To set up a new account for this customer, select the **Set Up New** option and continue with "Layaway Setup" on page 258.

4. If a customer has not been associated with the sale at this point, you are prompted to enter layaway search information.



LAYAWAY SEARCH

Enter search criteria.

Layaway ID

Last Name

First Name

Customer ID

Phone #

Figure 10-3: Layaway Search Form

When a customer has not been assigned to the sale, and the system is set up for Single Layaway Accounts, you must select or create a customer before proceeding. Layaway accounts require customer association. Refer to Chapter 5, "Customer Maintenance" on page 139 for information about searching for and creating customer records.

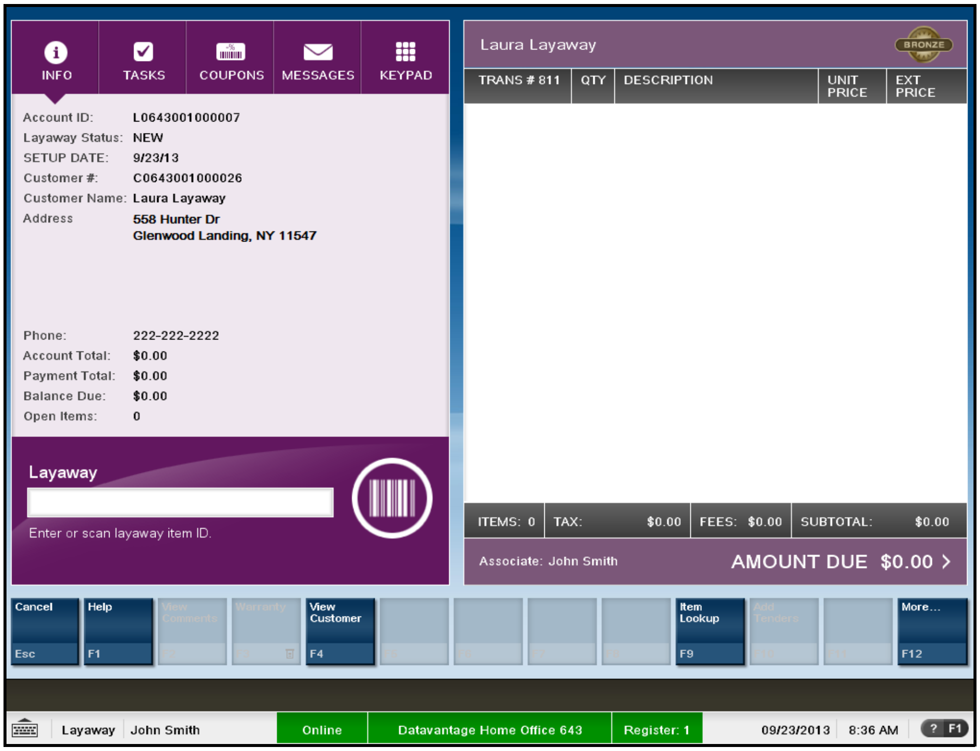
- To set up a new layaway, select the **Set Up New** option and continue with "Layaway Setup" on page 258.
- To search for a layaway account, enter the search criteria information and select **Process**.

Layaway Setup

1. Once a customer is associated with the layaway, the system prompts for the item ID to be added to the new layaway. Enter or scan the item to be added to the layaway.

*To add Wish List item(s) to the Layaway, select **View Customer** and then select the **Wish List** tab (see "Purchasing Wish List Item(s)" on page 43).*

You may need to select the ***More...*** menu button prior to selecting **View Customer**.



Account ID: L0643001000007
Layaway Status: NEW
SETUP DATE: 9/23/13
Customer #: C0643001000026
Customer Name: Laura Layaway
Address 558 Hunter Dr
Glenwood Landing, NY 11547
Phone: 222-222-2222
Account Total: $0.00
Payment Total: $0.00
Balance Due: $0.00
Open Items: 0

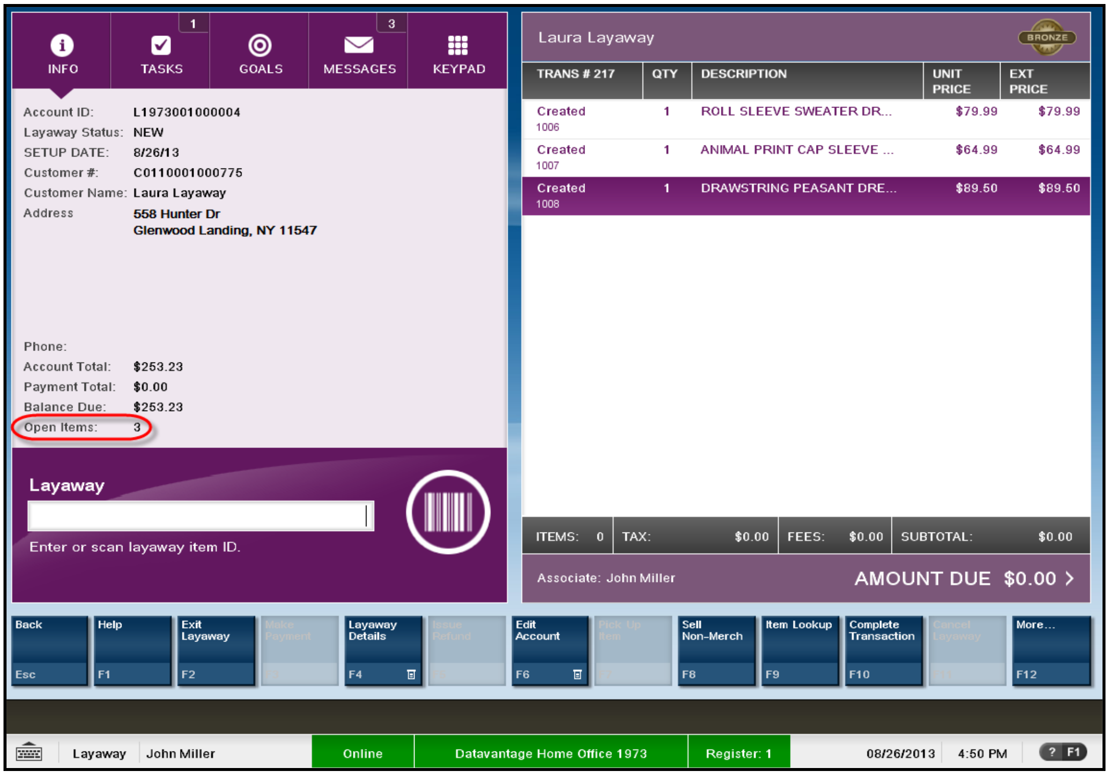
Enter or scan layaway item ID.

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00
Associate: John Smith AMOUNT DUE $0.00

Figure 10-4: Layaway Item Entry Screen

If an item cannot be added to a layaway, the system prompts with a message or reason the item is ineligible.

2. 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.
3. All items entered subsequently are also entered as layaway items as long as you remain in the layaway mode. Only layaway items and related layaway information are shown on the View Port.



Account ID: L1973001000004
Layaway Status: NEW
SETUP DATE: 8/26/13
Customer #: C0110001000775
Customer Name: Laura Layaway
Address 558 Hunter Dr
Glenwood Landing, NY 11547

Phone:
Account Total: $253.23
Payment Total: $0.00
Balance Due: $253.23
Open Items: 3

Layaway

Enter or scan layaway item ID.

Laura Layaway

TRANS # 217	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Created 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99
Created 1007	1	ANIMAL PRINT CAP SLEEVE ...	$64.99	$64.99
Created 1008	1	DRAWSTRING PEASANT DRE...	$89.50	$89.50

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

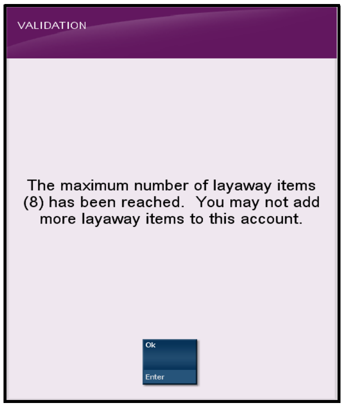
Associate: John Miller AMOUNT DUE $0.00 >

Layaway John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 4:50 PM

Figure 10-5: Layaway Items

The system displays a running total of the number of items added and the total amount in the information area of the screen.

If your store policy only allows a predetermined number of items on a Layaway Account, you are prompted when the maximum number of items you are adding exceeds this number. Press [Enter] to close the prompt.



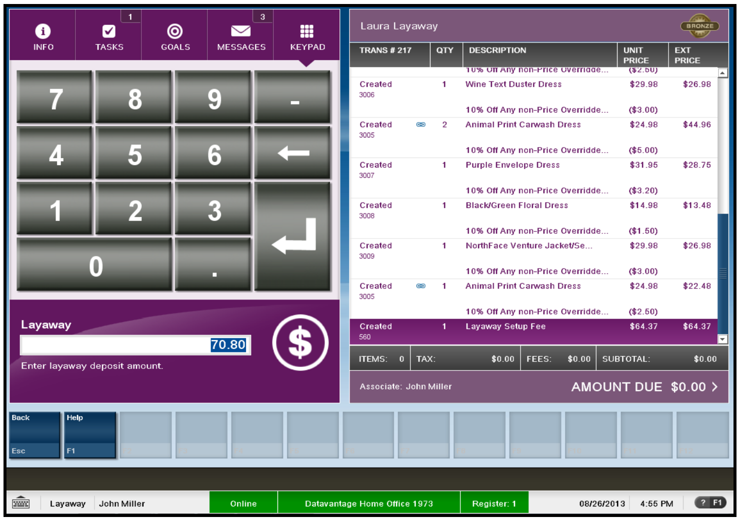
The maximum number of layaway items (8) has been reached. You may not add more layaway items to this account.

4. After you have entered all of the layaway items, select **Complete Transaction** or **Exit Layaway**:

- Select the **Exit Layaway** option if this customer is purchasing other items to take out of the store. When the layaway transaction is complete, the system returns to the sale screen.
- Select the **Complete Transaction** or **Add Tenders** option if this customer is not purchasing other items to take out of the store. When the layaway transaction is complete, the system automatically prompts for tender information.

5. Regardless of the action you chose in step 4 above, you are prompted to enter a deposit amount. The deposit amount may be entered and changed only when you are in the layaway mode.

*The **change amount** function available for regular sale items is not available for layaway items.*



Laura Layaway

TRANS # 217	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
		10% Off Any non-Price Overridde...	($2.50)	
Created 3006	1	Wine Text Duster Dress	$29.98	$26.98
		10% Off Any non-Price Overridde...	($3.00)	
Created 3005	2	Animal Print Carwash Dress	$24.98	$44.96
		10% Off Any non-Price Overridde...	($5.00)	
Created 3007	1	Purple Envelope Dress	$31.95	$28.75
		10% Off Any non-Price Overridde...	($3.20)	
Created 3008	1	Black/Green Floral Dress	$14.98	$13.48
		10% Off Any non-Price Overridde...	($1.50)	
Created 3009	1	NorthFace Venture Jacket/Se...	$29.98	$26.98
		10% Off Any non-Price Overridde...	($3.00)	
Created 3005	1	Animal Print Carwash Dress	$24.98	$22.48
		10% Off Any non-Price Overridde...	($2.50)	
Created 560	1	Layaway Setup Fee	$64.37	$64.37

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Miller AMOUNT DUE $0.00

Layaway 70.80

Enter layaway deposit amount.

Layaway John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 4:55 PM

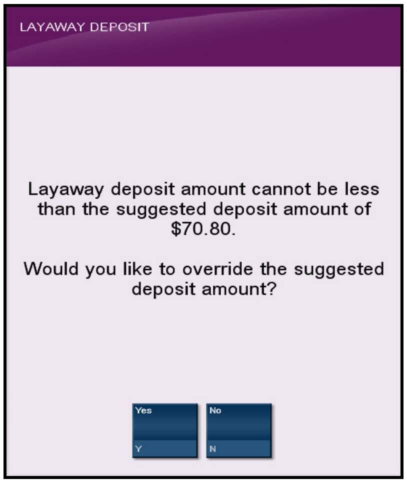
Figure 10-6: Deposit Amount Prompt

The system automatically does the following things:

- ❑ Checks the overall price of the items placed on layaway to ensure that it does not exceed the allowable total as determined by your store policy.
- ❑ Checks the number of items placed on layaway to ensure that it does not exceed the allowable item count as determined by your store policy.
- ❑ Assesses a layaway setup fee if required by your store policy.
- ❑ Prompts you to confirm the recommended deposit amount including any setup fee.

6. Enter or confirm the layaway deposit amount and press [Enter].

7. If you enter less than the recommended amount but more than the minimum amount, the system prompts you to confirm the deposit amount.



LAYAWAY DEPOSIT

Layaway deposit amount cannot be less than the suggested deposit amount of $70.80.

Would you like to override the suggested deposit amount?

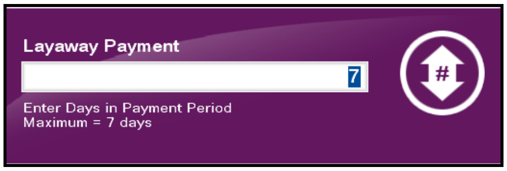
Figure 10-7: Prompt to Confirm Override of Suggested Deposit Amount

- Press [Y] to override the suggested deposit amount and to accept the deposit amount you entered.
- Press [N] to return to the deposit amount prompt and reenter the amount for the deposit.

If you enter less than the minimum amount required by your store policy, you must reenter a deposit amount.

If you do not have sufficient security privileges to override the suggested amount, a manager may need to do it for you.

8. If the system prompts for the number of days in the payment period, enter a number and press [Enter]. The number may not exceed the maximum number of days allowed by your layaway policy.



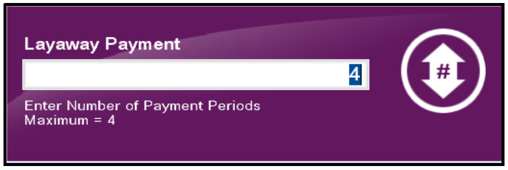
Layaway Payment

7

Enter Days in Payment Period
Maximum = 7 days

Figure 10-8: Number of Days in Payment Period Prompt

9. If the system prompts for the number of payment periods, enter the number of payments and press [Enter]. The number may not exceed the number of payment periods allowed by your layaway policy.



Layaway Payment

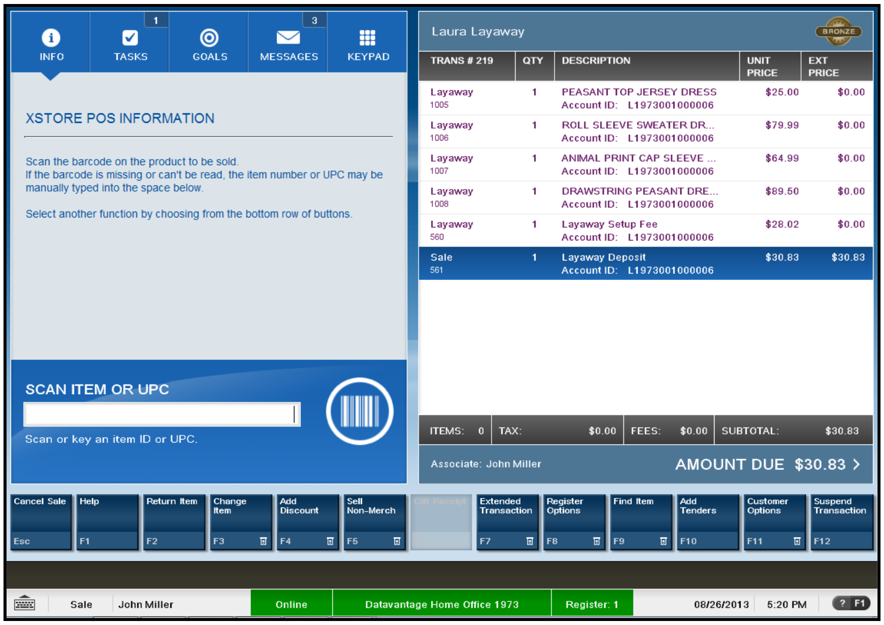
4

Enter Number of Payment Periods
Maximum = 4

Figure 10-9: Number of Payment Periods Prompt

10. The new layaway account setup is now complete:

- ❑ If you chose the **Exit Layaway** option in step 4 on page 260, the system returns to sale mode. You may continue the sale by adding regular sale items to the transaction, or you may tender and complete the sale.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Scan or key an item ID or UPC.

Laura Layaway

TRANS # 219	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Layaway 1005	1	PEASANT TOP JERSEY DRESS Account ID: L1973001000006	$25.00	$0.00
Layaway 1006	1	ROLL SLEEVE SWEATER DR... Account ID: L1973001000006	$79.99	$0.00
Layaway 1007	1	ANIMAL PRINT CAP SLEEVE ... Account ID: L1973001000006	$64.99	$0.00
Layaway 1008	1	DRAWSTRING PEASANT DRE... Account ID: L1973001000006	$89.50	$0.00
Layaway 560	1	Layaway Setup Fee Account ID: L1973001000006	$28.02	$0.00
Sale 561	1	Layaway Deposit Account ID: L1973001000006	$30.83	$30.83

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $30.83

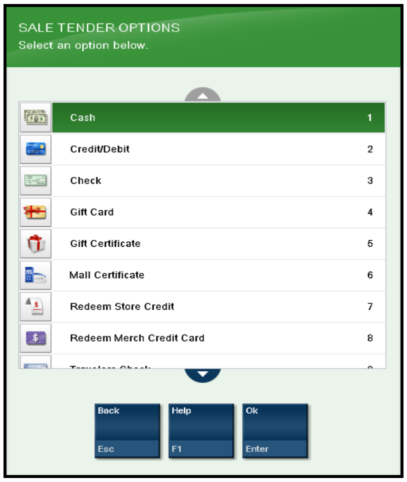
Associate: John Miller AMOUNT DUE $30.83

Sale John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 5:20 PM

Figure 10-10: Layaway Items Display on Selling Screen

- ❑ If you chose the **Complete Transaction** (or **Add Tenders**) option in step 4 on page 260, the system automatically prompts for tender information.

11. Select a tender from the list and press [Enter].



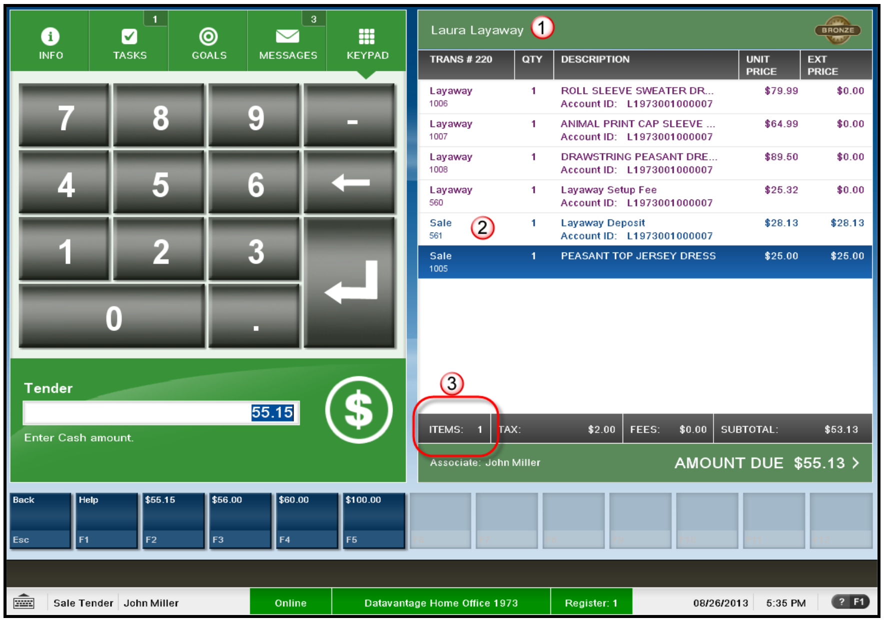
SALE TENDER OPTIONS
Select an option below.

Cash	1
Credit/Debit	2
Check	3
Gift Card	4
Gift Certificate	5
Mall Certificate	6
Redeem Store Credit	7
Redeem Merch Credit Card	8

Figure 10-11: Tender List

Refer to Chapter 4, "Processing Tenders" on page 83 for more information about tendering the transaction.

12. Enter a tender amount, select a Quick Cash button, or press [Enter] to accept the default balance due, if displayed.



Laura Layaway

TRANS # 220	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Layaway 1006	1	ROLL SLEEVE SWEATER DR... Account ID: L1973001000007	$79.99	$0.00
Layaway 1007	1	ANIMAL PRINT CAP SLEEVE ... Account ID: L1973001000007	$64.99	$0.00
Layaway 1008	1	DRAWSTRING PEASANT DRE... Account ID: L1973001000007	$89.50	$0.00
Layaway 560	1	Layaway Setup Fee Account ID: L1973001000007	$25.32	$0.00
Sale 561	1	Layaway Deposit Account ID: L1973001000007	$28.13	$28.13
Sale 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00

ITEMS: 1 TAX: $2.00 FEES: $0.00 SUBTOTAL: $53.13

Associate: John Miller AMOUNT DUE $55.13

Tender: 55.15

Enter Cash amount.

Sale Tender John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 5:35 PM

Figure 10-12: Prompt for Tender Amount - Cash Example

The sale transaction is now complete and the system updates inventory. Receipts with layaway information are printed as required by your store's policy.

About this screen:

***1** The customer information that was entered for the layaway is assigned to the sale.*

***2** The deposit amount is shown as a sale on the View Port.*

***3** The Sold Items section of the View Port shows an item count of one.*

This item count is used for items the customer is physically removing from the store. In this scenario, the customer has placed 3 items on layaway and purchased one other item to take home.

Layaway Payment

Because each Xstore 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.

1. From the Sale screen, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Layaway** option.
3. When the system displays the Layaway Search form, enter your search criteria and select **Process**, or scan the barcode on the customer’s layaway receipt. The search may be based on these fields:
    - Layaway ID
    - Customer Last Name and First Name
    - Customer ID
    - Customer Phone Number

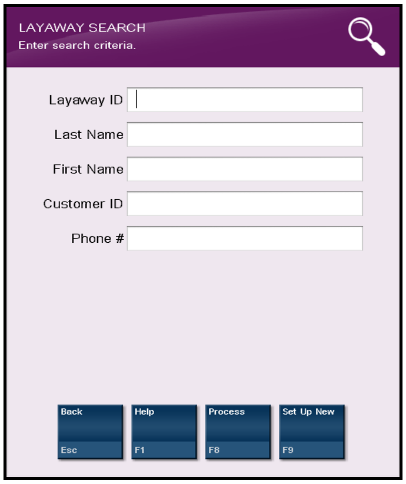
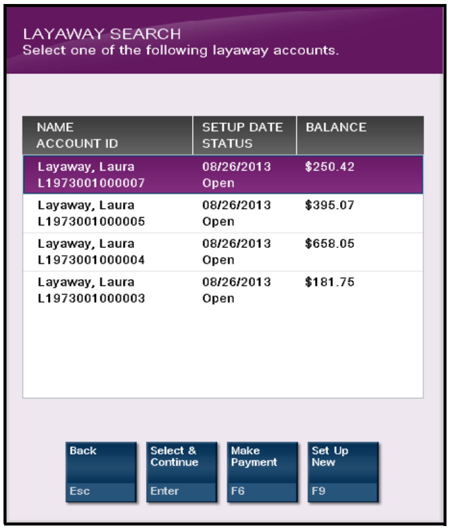


Figure 10-13: Layaway Search Form

If a customer is associated with the sale and has at least one open layaway account, the system may automatically display a list of open accounts for this customer.

The system displays a list of all layaways that match the criteria you entered, including the status of each.



LAYAWAY SEARCH

Select one of the following layaway accounts.

NAME ACCOUNT ID	SETUP DATE STATUS	BALANCE
Layaway, Laura L1973001000007	08/26/2013 Open	$250.42
Layaway, Laura L1973001000005	08/26/2013 Open	$395.07
Layaway, Laura L1973001000004	08/26/2013 Open	$658.05
Layaway, Laura L1973001000003	08/26/2013 Open	$181.75

Figure 10-14: Layaway Accounts List

4. Use the up and down arrow keys to highlight the layaway account you want to select from the list and select the **Make Payment** option.

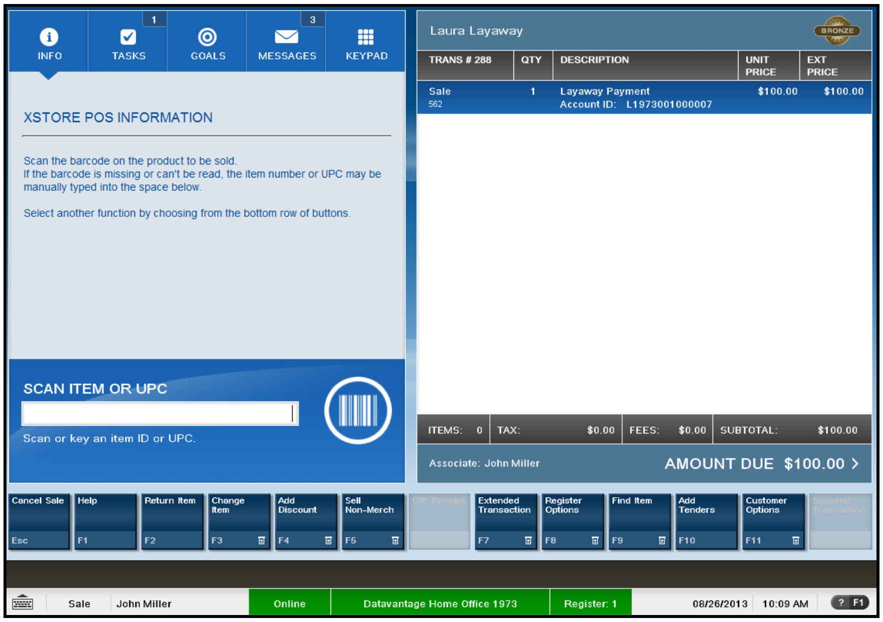
> *Since layaways MUST have a customer assigned at setup, the system assigns the layaway customer information to the sale automatically at this point if no customer was assigned at the start of this transaction.*

5. When the system prompts for the payment amount, enter the amount and press [Enter].
6. The system validates the payment against the minimum and recommended amounts. The payment amount must be greater than or equal to the recommended amount.
   - If you enter less than the recommended amount, the system prompts you to confirm the payment amount.
   - If the amount you entered was less than the minimum, you must reenter a payment amount.

> *You must have the proper security level to override a payment amount.*

7. When the payment amount is accepted, the system returns to the options available for a regular sale. You may change the layaway payment amount only by entering layaway

edit mode. The **Change Amount** function that is available for regular sale items is not available for layaway items.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Scan or key an item ID or UPC.

Laura Layaway

TRANS # 288	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 562	1	Layaway Payment Account ID: L1973001000007	$100.00	$100.00

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $100.00

Associate: John Miller AMOUNT DUE $100.00

Figure 10-15: Layaway Payment - Sale View Port

You may now continue selling regular items or tender the sale.

*If you try to modify a layaway line item in sale mode, the system prompts that all changes to layaway items must be done in layaway mode. You must select the **Layaway** menu option to return to the layaway mode.*

8. When you are ready to tender the transaction, select the **Add Tenders** option or press [Enter] without adding any more items.
9. Choose a payment tender from the tender list and select **Ok**.
10. Enter the tender amount and press [Enter].
11. The system prints receipts as required.

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to "Email Receipt Options" on page 54 for more information about sending email receipts.

The receipts for the sale include the layaway information. Payment is shown on the receipt, along with the layaway account number. Other layaway information (payment schedule, terms, amount left to pay, next payment due date and amount, etc.) may also be included on the receipt, depending on your system's configuration.

Layaway Pickup

1. From the Sale screen, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Layaway** option.
3. When the system displays the Layaway Search form, enter your search criteria and select **Process** or scan the customer's layaway receipt barcode. The search may be based on these fields:
    - Layaway ID
    - Customer name
    - Customer ID
    - Customer phone number

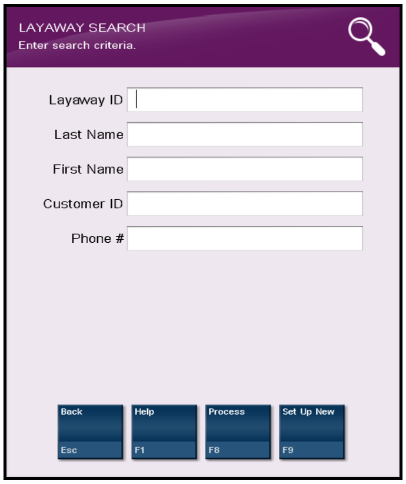
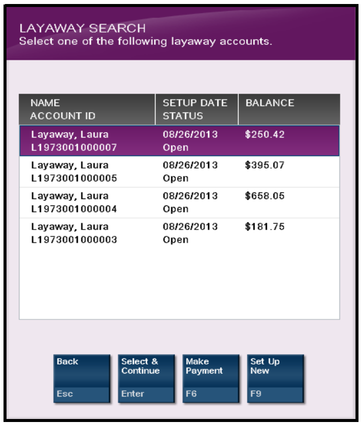


Figure 10-16: Layaway Search Form

> *If a customer is associated with the sale and has at least one open layaway account, the system may automatically display a list of open accounts for this customer.*

The system displays a list of all layaways that match the criteria you entered, including the status of each.

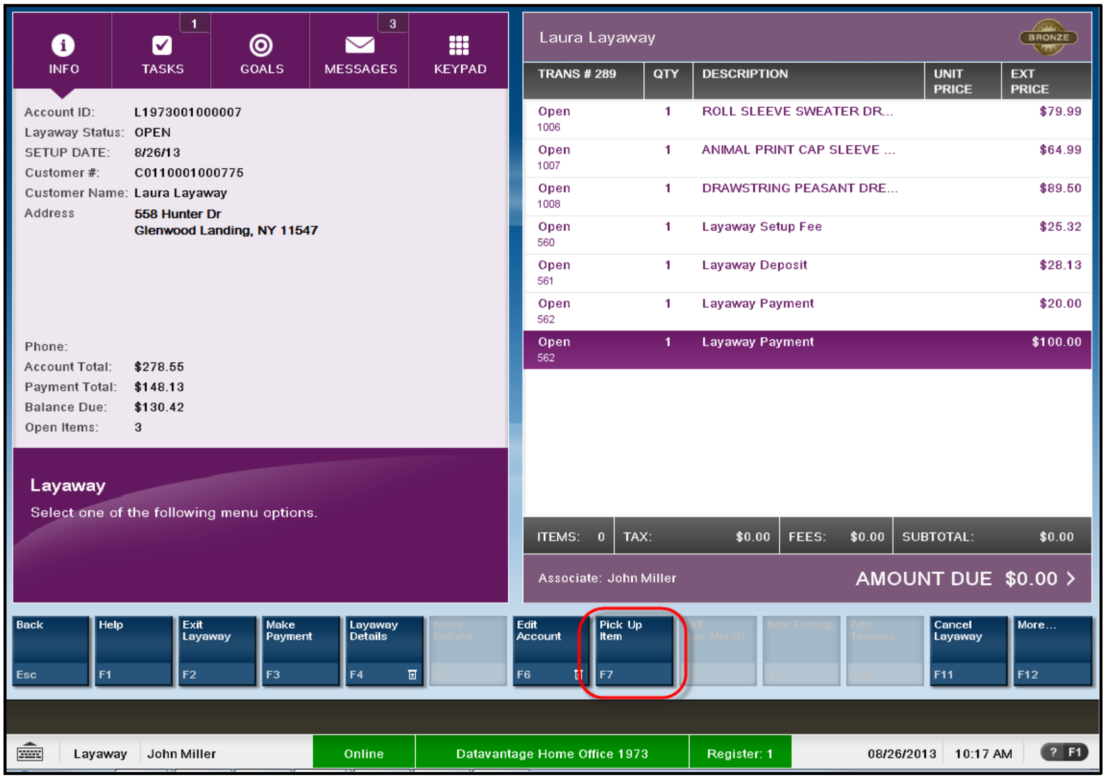


NAME ACCOUNT ID	SETUP DATE STATUS	BALANCE
Layaway, Laura L1973001000007	08/26/2013 Open	$250.42
Layaway, Laura L1973001000005	08/26/2013 Open	$395.07
Layaway, Laura L1973001000004	08/26/2013 Open	$658.05
Layaway, Laura L1973001000003	08/26/2013 Open	$181.75

4. Use the up and down arrow keys to highlight the layaway account you want to select from the list and select the **Select & Continue** option to view the layaway account information.

Since layaways MUST have a customer assigned at setup, the system assigns the layaway customer information to the sale automatically at this point if no customer was assigned at the start of this transaction.

5. Select the **Pick Up Item** option.



Account ID: L1973001000007
Layaway Status: OPEN
SETUP DATE: 8/26/13
Customer #: C0110001000775
Customer Name: Laura Layaway
Address 558 Hunter Dr
Glenwood Landing, NY 11547
Phone:
Account Total: $278.55
Payment Total: $148.13
Balance Due: $130.42
Open Items: 3

Layaway
Select one of the following menu options.

Laura Layaway

TRANS # 289	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Open 1006	1	ROLL SLEEVE SWEATER DR...		$79.99
Open 1007	1	ANIMAL PRINT CAP SLEEVE ...		$64.99
Open 1008	1	DRAWSTRING PEASANT DRE...		$89.50
Open 560	1	Layaway Setup Fee		$25.32
Open 561	1	Layaway Deposit		$28.13
Open 562	1	Layaway Payment		$20.00
Open 562	1	Layaway Payment		$100.00

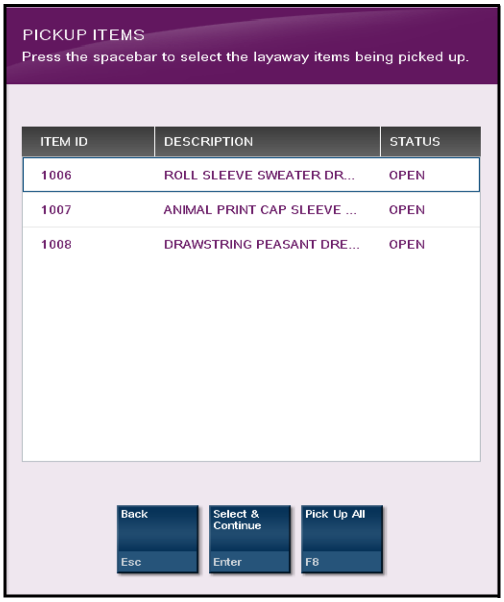
ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Miller AMOUNT DUE $0.00

Layaway John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 10:17 AM ? F1

Figure 10-17: Pick Up Layaway Item

6. The system displays the layaway items. Select item(s) for pickup. You can select all items in the list at once by selecting the **Pick Up All** option.



PICKUP ITEMS

Press the spacebar to select the layaway items being picked up.

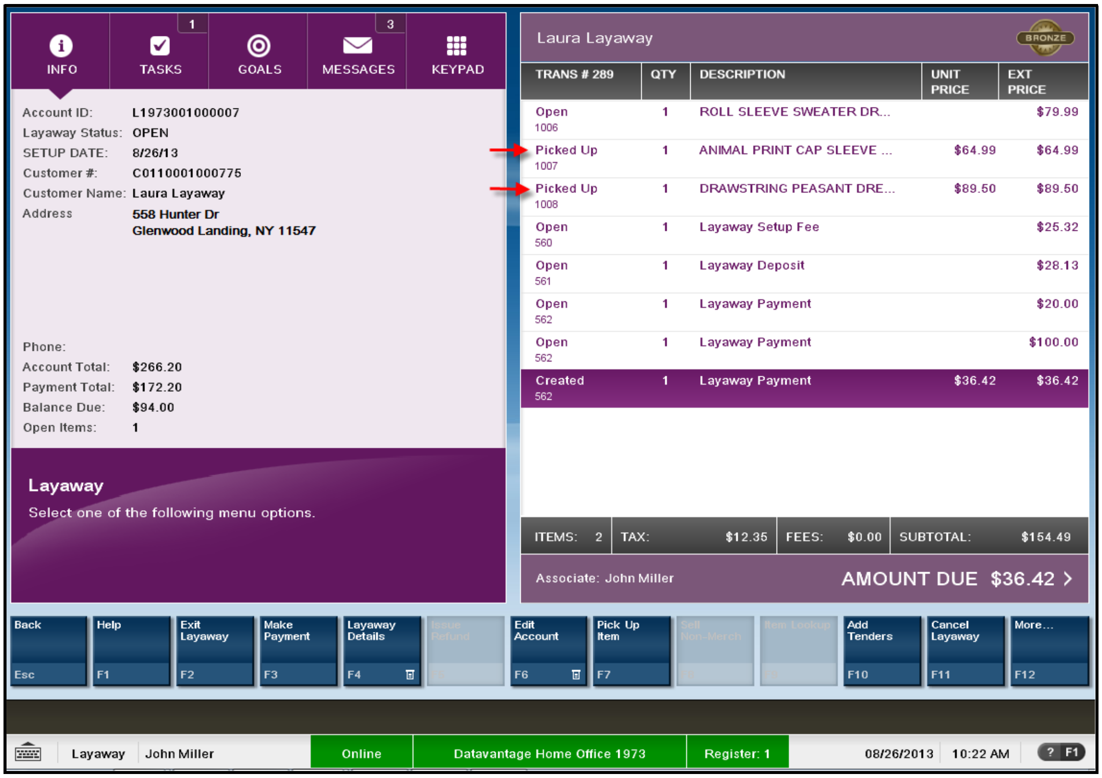
ITEM ID	DESCRIPTION	STATUS
1006	ROLL SLEEVE SWEATER DR...	OPEN
1007	ANIMAL PRINT CAP SLEEVE ...	OPEN
1008	DRAWSTRING PEASANT DRE...	OPEN

Figure 10-18: Pickup Items List

7. After you have selected all of the items to be picked up, press [Enter].

> *If you select an ineligible item, the system displays a message explaining why the item cannot be picked up. Items with Cancelled, Closed, or Picked status cannot be picked up.*

The system updates the item status on the screen to Picked Up as each item is selected for pickup. The status is permanently updated only when the transaction is successfully completed.



Account ID: L1973001000007
Layaway Status: OPEN
SETUP DATE: 8/26/13
Customer #: C0110001000775
Customer Name: Laura Layaway
Address 558 Hunter Dr
Glenwood Landing, NY 11547
Phone:
Account Total: $266.20
Payment Total: $172.20
Balance Due: $94.00
Open Items: 1

Layaway

Select one of the following menu options.

Laura Layaway

TRANS # 289	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Open 1006	1	ROLL SLEEVE SWEATER DR...		$79.99
Picked Up 1007	1	ANIMAL PRINT CAP SLEEVE ...	$64.99	$64.99
Picked Up 1008	1	DRAWSTRING PEASANT DRE...	$89.50	$89.50
Open 560	1	Layaway Setup Fee		$25.32
Open 561	1	Layaway Deposit		$28.13
Open 562	1	Layaway Payment		$20.00
Open 562	1	Layaway Payment		$100.00
Created 562	1	Layaway Payment	$36.42	$36.42

ITEMS: 2 TAX: $12.36 FEES: $0.00 SUBTOTAL: $154.49

Associate: John Miller AMOUNT DUE $36.42

Layaway John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 10:22 AM

Figure 10-19: Layaway Items Marked for Pickup

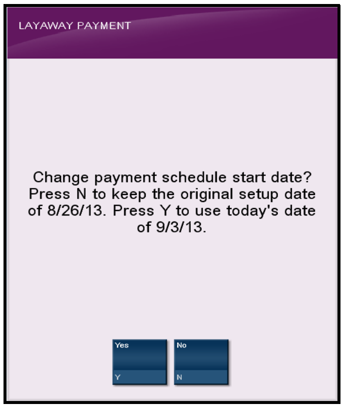
In the example shown in Figure 10-19 above, there are three items available for pickup and the customer has chosen to pick up two items. In this scenario, the two items for pickup are marked with Picked Up status, and the other item is marked with Open status.

> *Based on your store policy, item prices may be changed to match current sale prices. Any credits may be applied to other items on layaway or refunded if there are no other layaway items.*

8. After you have selected all of the layaway pickup items, select **Add Tenders** or **Exit Layaway**:

- Select the **Exit Layaway** option if this customer wants to purchase other items to take out of the store. When the layaway transaction is complete, the system returns to the sale screen where you can continue selling items.
- Select the **Add Tenders** option if this customer is not purchasing other items to take out of the store. When the layaway transaction is complete, the system automatically prompts for tender information.

If there are any open items remaining in the layaway, you may be prompted to set up a new layaway schedule for the open items. If prompted, enter the information as required. When prompted to change the schedule start date, you may keep the scheduled payment dates as currently set up, or you can change the scheduled payment dates.



Change payment schedule start date? Press N to keep the original setup date of 8/26/13. Press Y to use today's date of 9/3/13.

9. The system displays any remaining amount due to pick up the selected items. Select a tender from the tender list and choose **Ok**.

The minimum amount due is the balance for the items being picked up plus a specified percentage of any items remaining on layaway.

10. Enter the tender payment amount and press [Enter]. The system creates receipts for the transaction as required by your store policy.

Additional Options for Layaway Accounts

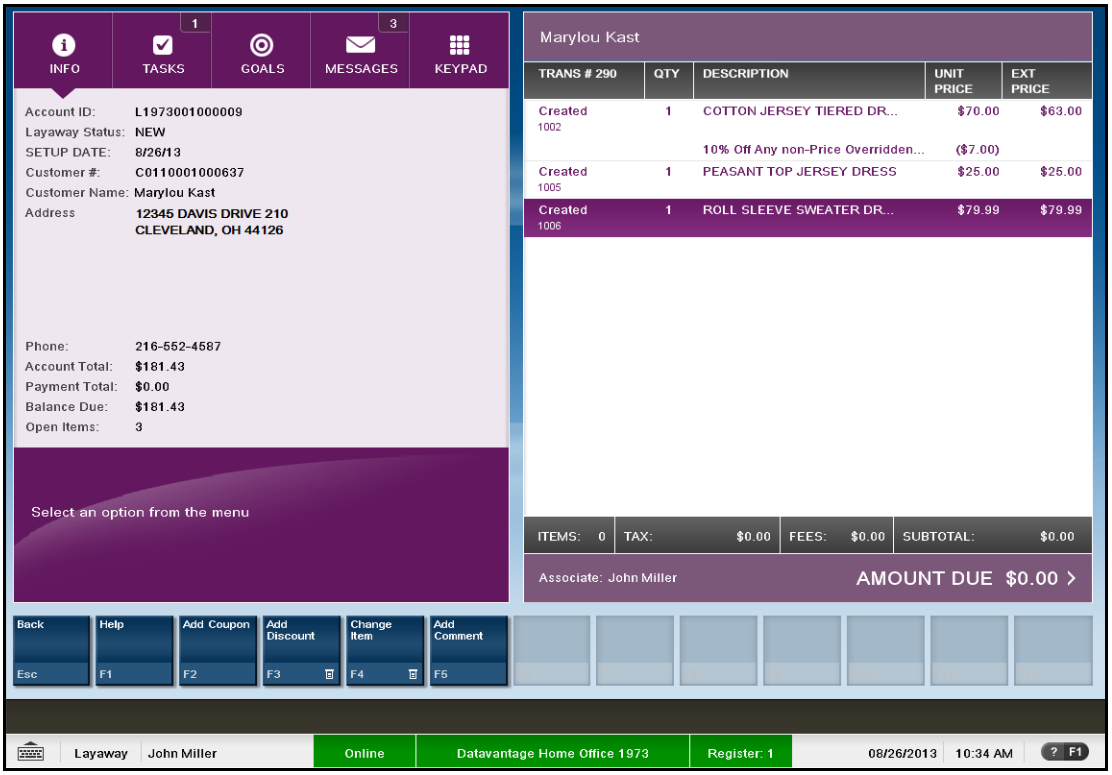
A layaway account may be modified during the initial creation of the layaway account until the setup has been completed.

Editing Items on a Layaway Account

> *The edit options shown here may differ from the options you have available due to system configuration and your store policy.*

While you are in the layaway mode during the setup of a new layaway account, select the **Edit Account** option.

Options for editing a layaway include adding a discount, adding a coupon, adding or editing a line item comment, and some additional options as shown on the Change Item menu.



Account ID: L1973001000009
Layaway Status: NEW
SETUP DATE: 8/26/13
Customer #: C0110001000637
Customer Name: Marylou Kast
Address 12345 DAVIS DRIVE 210
CLEVELAND, OH 44126
Phone: 216-552-4587
Account Total: $181.43
Payment Total: $0.00
Balance Due: $181.43
Open Items: 3

Select an option from the menu

Marylou Kast

TRANS # 290	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Created 1002	1	COTTON JERSEY TIERED DR...	$70.00	$63.00
		10% Off Any non-Price Overridden...	($7.00)	
Created 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00
Created 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Miller AMOUNT DUE $0.00

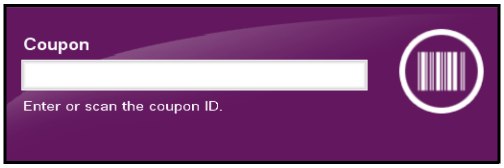
Layaway John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 10:34 AM

Figure 10-20: Edit Account Menu Options

Add Coupon

To add a coupon a layaway account:

1. From the Edit Account Menu Options, select **Add Coupon**.
2. Enter or Scan the Coupon ID. The system validates the coupon and if available, deducts the amount in the View Port.



Add Discount

To add a discount:

1. From the Edit Account Menu Options, select **Add Discount**.
2. Select **Add Item Discount** or **Add Group Discount**.

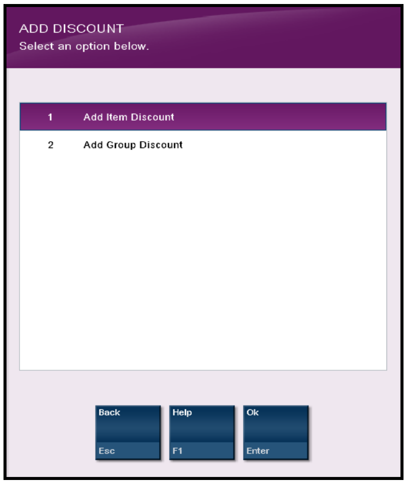


Figure 10-21: Discount List

- For Item Discount see “Item Level Discounts” on page 203.
- For Group Discount see “Group Discounts” on page 207.

When you go to the reference pages for Item and Group discounts the graphics show a different background color, but the steps are the same as adding discounts to a sale.

Change Item

To change a layaway item:

1. From the Edit Account Menu Options, select **Change Item**.
2. Select any of these options on the Change Item menu:

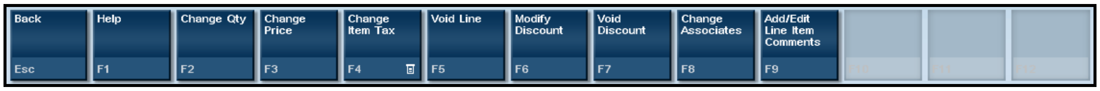


Figure 10-22: Change Item Menu Options

- ☐ Change Quantity
- ☐ Change Price
- ☐ Change Tax Rate/Tax Amount
- ☐ Void Line
- ☐ Add/Modify/Delete (Void) Discounts
- ☐ Change Commissioned Associates
- ☐ Add or Edit Line Item Comments

See "Modifying Line Items in a Sale" on page 216 for procedural details about editing items.

The instructions for modifying Line Items in a Sale contain graphics with a different background color than the Layaway screens. Although the colors are different, the instructions are the same.

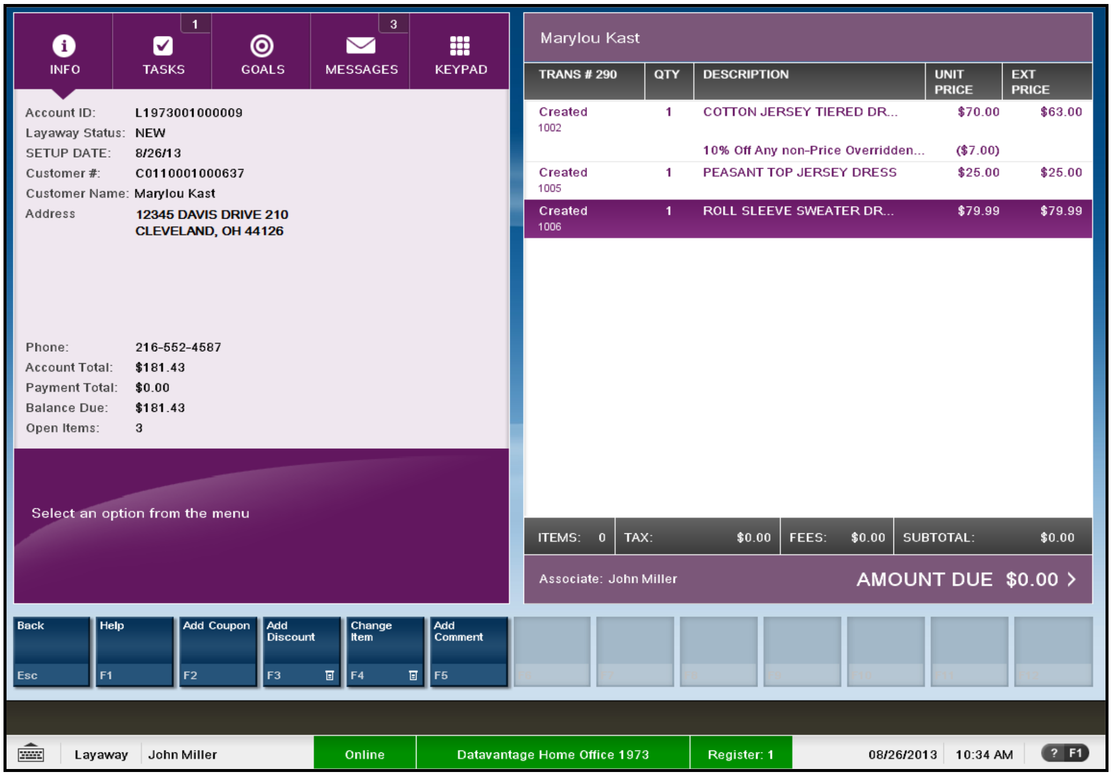
Add and View Layaway Comments

You may add a comment to a layaway account.

This differs from a line item comment which pertains only to a specific item on the layaway.

1. First, select the account for which you want to enter a comment. At the Register Sale screen, select **Extended Transaction** and **Layaway**. When the system displays the Layaway Search form, enter your criteria and select **Process**.
2. Select the **Edit Account** option.

3. At the Edit Account menu, select the **Add Comment** option.



Account ID: L1973001000009
Layaway Status: NEW
SETUP DATE: 8/26/13
Customer #: C0110001000637
Customer Name: Marylou Kast
Address 12345 DAVIS DRIVE 210
CLEVELAND, OH 44126

Phone: 216-552-4587
Account Total: $181.43
Payment Total: $0.00
Balance Due: $181.43
Open Items: 3

Select an option from the menu

Marylou Kast

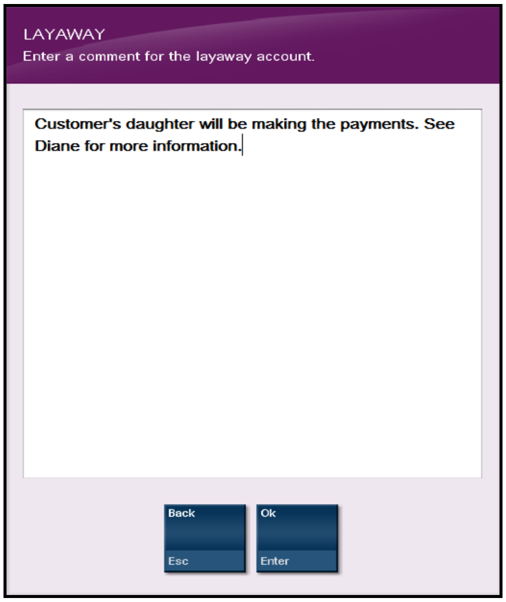
TRANS # 290	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Created 1002	1	COTTON JERSEY TIERED DR...	$70.00	$63.00
		10% Off Any non-Price Overridden...	($7.00)	
Created 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00
Created 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Miller AMOUNT DUE $0.00

Figure 10-23: Edit Account Menu Options

4. Enter the text of the comment and press [Enter].


LAYAWAY
Enter a comment for the layaway account.

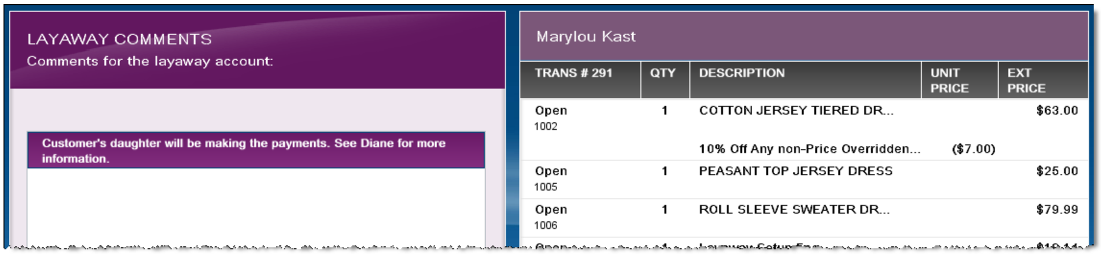
Customer's daughter will be making the payments. See Diane for more information.

Figure 10-24: Layaway Account Comment Entry Form

Comments are associated with the date they were entered, the employee number of the person entering comments, and the text of the comment. Previous comments cannot be changed. This detail information is also available in Layaway Maintenance (Back Office processing).

5. To view comments about the layaway account, select the **More** option on the Layaway Menu, and select the **View Comments** option.

The View Comments option is only active if a comment exists for the account you are viewing.



LAYAWAY COMMENTS

Comments for the layaway account:

Customer's daughter will be making the payments. See Diane for more information.

Marylou Kast

TRANS # 291	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Open 1002	1	COTTON JERSEY TIERED DR...		$63.00
		10% Off Any non-Price Overridden...	($7.00)	
Open 1005	1	PEASANT TOP JERSEY DRESS		$25.00
Open 1006	1	ROLL SLEEVE SWEATER DR...		$79.99

Figure 10-25: Layaway Comments

Add Items To An Existing Layaway

This is a configurable option and may not be allowed according to your store policy. If your store does not allow additional items to be added to an existing account at a later time, you must set up a new layaway account for the customer.

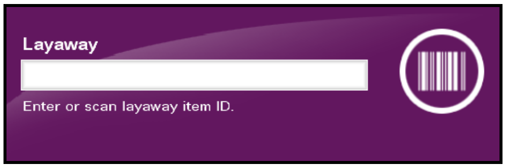
You may add additional items to an existing layaway account as long as you do not exceed the total number of items allowed on the account. If your layaway policy allows a customer to have multiple open layaway accounts, the system enforces this rule against the current layaway account being created or maintained.

The system displays a message when you attempt to exceed the number of items that are allowed on a layaway account.

You may not add a layaway item if the associated customer's account is delinquent.

1. At the Register Sale screen, select **Extended Transaction** and **Layaway**. When the system displays the Layaway Search form, enter your criteria and select **Process**.
2. If necessary, use the up and down arrow keys to scroll through the list of accounts. Select an open layaway account from the list, then choose the **Select & Continue** option.

3. Enter or scan an item ID and press [Enter].



Layaway

Enter or scan layaway item ID.

Figure 10-26: Enter New Item ID to the Layaway

The system adds the item and displays it in the View Port.

The system validates each item, including its suitability for inclusion in a layaway, and returns the description, price, and tax information.

4. Continue processing the layaway account as usual.

Gift Receipts for Layaway Items

Gift receipts are available for all **picked up** layaway items. See "Printing a Gift Receipt" on page 58 for more details.

Cancel a Layaway Account

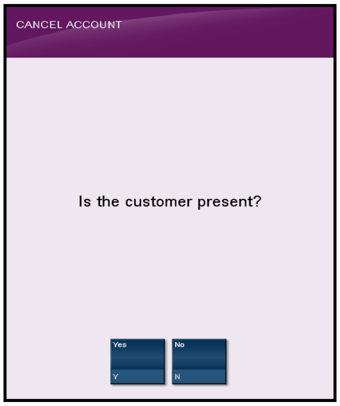
> *Because each Xstore menu is configurable, the button functions on your system may appear in a different order or have different text than examples shown in this manual.*

1. At the Register Sale screen, select **Extended Transaction** and **Layaway**. When the system displays the Layaway Search form, enter your criteria and select Process.

> *If you associated a customer with the sales transaction, Xstore retrieves any layaway accounts for that customer. You do not need to conduct a search.*

2. If necessary, use the up and down arrow keys to scroll through the list of accounts. Select an open layaway account from the list, then choose the **Select & Continue** option.
3. With the layaway account information displayed, select the **Cancel Layaway** option from the menu.

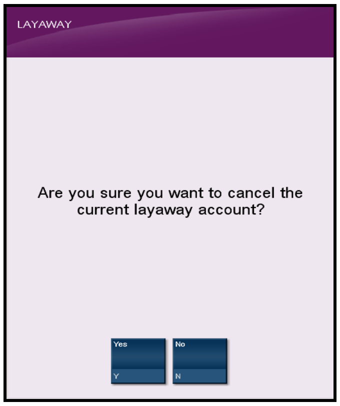
4. The system prompts you to confirm whether or not the customer is present at the time of cancellation. Select [Y] for Yes or [N] for No[1].



Is the customer present?

Figure 10-27: Customer Present Prompt

5. If the customer is present, the system displays a confirmation prompt. Select **Yes** to confirm the cancellation of the account.



Are you sure you want to cancel the current layaway account?

Figure 10-28: Prompt to Confirm Cancellation of Layaway Account

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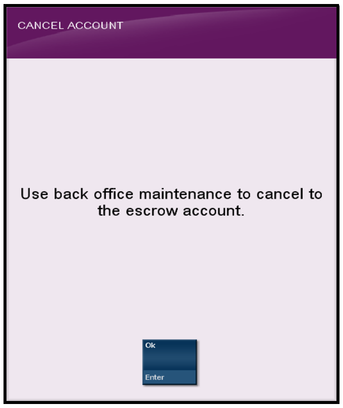
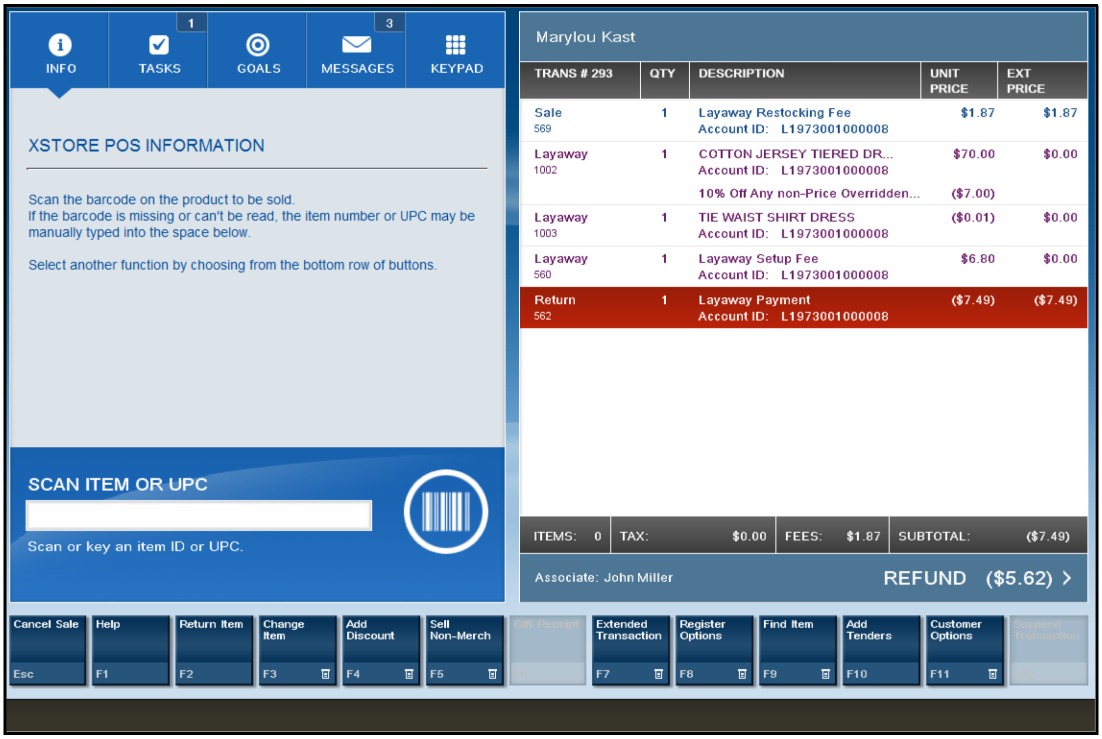
[1] If the customer is not present, the system requires that the account be closed by using the Layaway Accounts Maintenance function in the Back Office. Press [Enter] to close the message prompt.



Use back office maintenance to cancel to the escrow account.

When you exit from the layaway, the refund amount is displayed on the Register Sale screen.



Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

TRANS # 293	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 569	1	Layaway Restocking Fee Account ID: L1973001000008	$1.87	$1.87
Layaway 1002	1	COTTON JERSEY TIERED DR... Account ID: L1973001000008	$70.00	$0.00
		10% Off Any non-Price Overridden...	($7.00)	
Layaway 1003	1	TIE WAIST SHIRT DRESS Account ID: L1973001000008	($0.01)	$0.00
Layaway 560	1	Layaway Setup Fee Account ID: L1973001000008	$6.80	$0.00
Return 562	1	Layaway Payment Account ID: L1973001000008	($7.49)	($7.49)

ITEMS: 0 TAX: $0.00 FEES: $1.87 SUBTOTAL: ($7.49)

Associate: John Miller REFUND ($5.62)

Figure 10-29: Cancellation of Layaway

6. Complete the transaction by selecting a refund tender from the list.

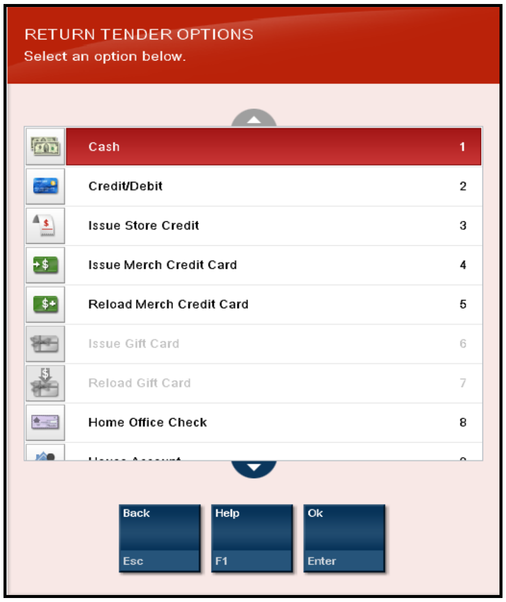


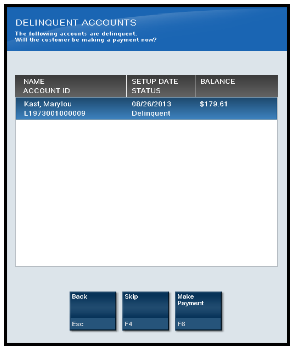
Figure 10-30: Refund Tender List

*Additional prompts may display depending on the tender type selected. For example, if the **Home Office Check** option is selected, the customer's address information is displayed and may be edited. The tender list is restricted to only those tender types permitted as refunds for cancellation of a layaway account.*

Receipts are created which contain the canceled layaway information.

Automatic Prompting: Accounts Requiring Attention

When you associate a customer with a sale transaction, the system may automatically determine that the customer has a layaway account that requires attention. In this case, the system may display a prompt similar to those shown and listed below, depending upon the reason that attention is needed.



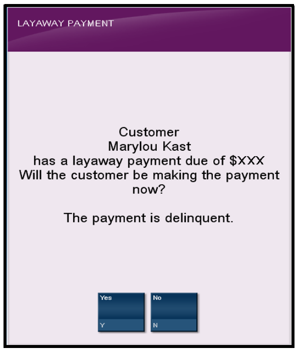
DELINQUENT ACCOUNTS

The following accounts are delinquent.
Will the customer be making a payment now?

NAME ACCOUNT ID	SETUP DATE STATUS	BALANCE
Kast, Marylou L1973001000009	08/26/2013 Delinquent	$179.61

Figure 10-31: Sale Prompt - Customer With Delinquent Account

Layaway mode prompts you may see:



LAYAWAY PAYMENT

Customer
Marylou Kast
has a layaway payment due of $XXX
Will the customer be making the payment now?

The payment is delinquent.

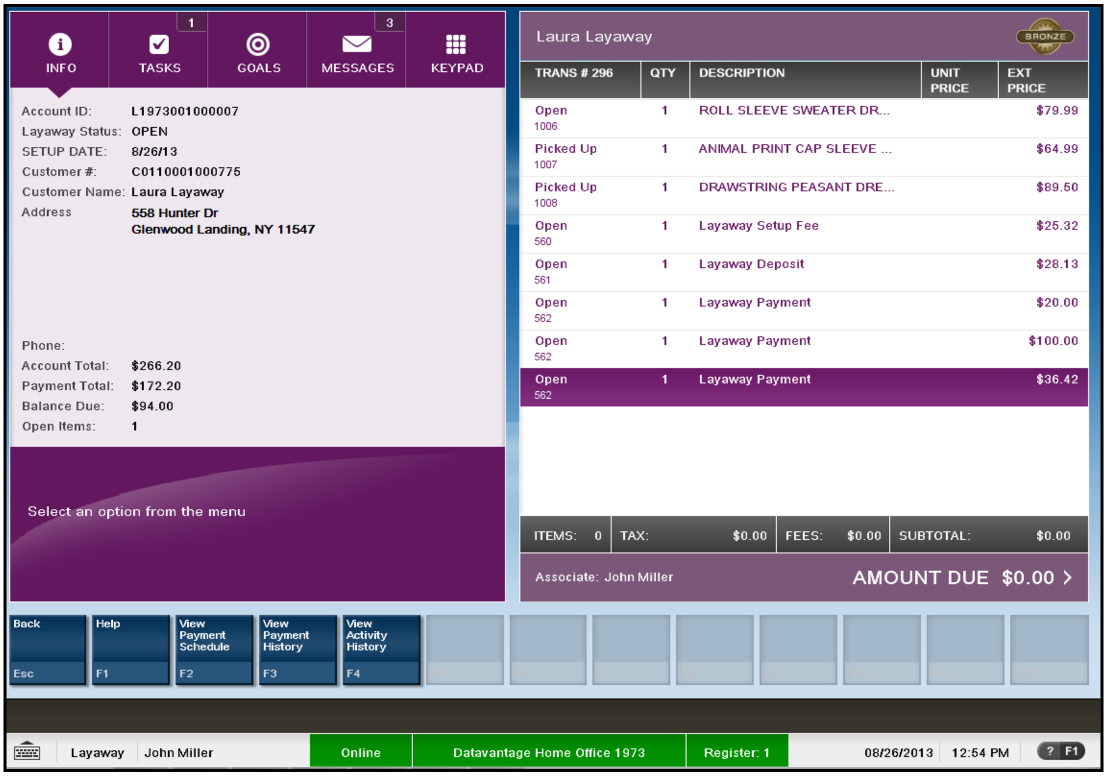
- **If a Layaway payment is due, the prompt indicates:** "As of date, this customer has a Layaway payment due of $x. Would the customer like to make the payment now?"
- **If a payment is overdue, the prompt indicates:** "This customer has an overdue Layaway balance of $x. An overdue penalty of $y has also been applied, making the total balance due $z. Would the customer like to pay the overdue balance now?"
- **If the Layaway contains items that can be picked up, the prompt indicates:** "This customer has Layaway items that are ready for pickup. Would the customer like to pick up these items now?"

Take any action on the account as determined by your store policy.

View Layaway Payment History

> *Because each Xstore 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.*

1. At the Sale screen, select **Extended Transaction** and **Layaway**. When the system displays the Layaway Search form, enter your criteria and select **Process**.
2. Select the account for which you want to view payment history.
3. With the account information displayed, select the **Layaway Details** option.
4. At the Layaway Details menu, select the **View Payment History** option.



Account ID: L1973001000007
Layaway Status: OPEN
SETUP DATE: 8/26/13
Customer #: C0110001000775
Customer Name: Laura Layaway
Address 558 Hunter Dr
Glenwood Landing, NY 11547
Phone:
Account Total: $266.20
Payment Total: $172.20
Balance Due: $94.00
Open Items: 1

Select an option from the menu

Laura Layaway

TRANS # 296	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Open 1006	1	ROLL SLEEVE SWEATER DR...		$79.99
Picked Up 1007	1	ANIMAL PRINT CAP SLEEVE ...		$64.99
Picked Up 1008	1	DRAWSTRING PEASANT DRE...		$89.50
Open 560	1	Layaway Setup Fee		$25.32
Open 561	1	Layaway Deposit		$28.13
Open 562	1	Layaway Payment		$20.00
Open 562	1	Layaway Payment		$100.00
Open 562	1	Layaway Payment		$36.42

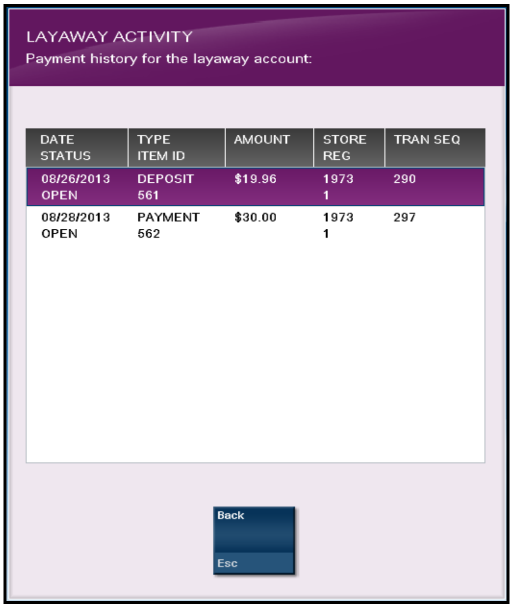
ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Miller AMOUNT DUE $0.00

Layaway John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 12:54 PM

Figure 10-32: Layaway Details Menu

5. The system displays the payment information for this account.



LAYAWAY ACTIVITY

Payment history for the layaway account:

DATE STATUS	TYPE ITEM ID	AMOUNT	STORE REG	TRAN SEQ
08/26/2013 OPEN	DEPOSIT 561	$19.96	1973 1	290
08/28/2013 OPEN	PAYMENT 562	$30.00	1973 1	297

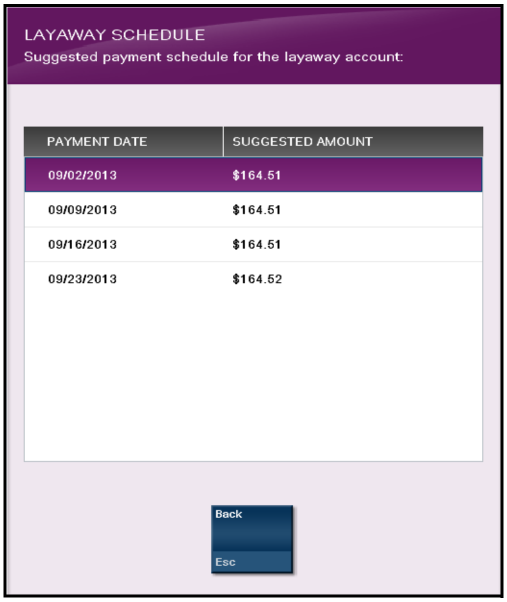
Figure 10-33: Layaway Payment History

The information shown here includes the payment date, status, payment type and payment type item Id (initial deposit and payments), payment amount, store ID, register ID, and transaction sequence ID.

View Layaway Payment Schedule

1. At the Sale screen, select **Extended Transaction** and **Layaway**. When the system displays the Layaway Search form, enter your criteria and select **Process**.
2. Select the account for which you want to view payment schedule information.
3. With the account information displayed, select the **Layaway Details** option.
4. At the Layaway Details menu, select the **View Payment Schedule** option (Figure 10-32, “Layaway Details Menu,” on page 282).

The system displays the payment schedule information for this account.



LAYAWAY SCHEDULE

Suggested payment schedule for the layaway account:

PAYMENT DATE	SUGGESTED AMOUNT
09/02/2013	$164.51
09/09/2013	$164.51
09/16/2013	$164.51
09/23/2013	$164.52

Figure 10-34: Layaway Payment Schedule

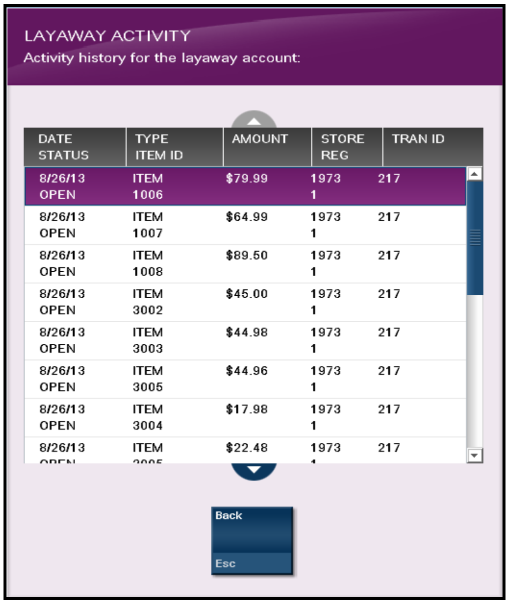
The information shown here includes the dates when payments are due and the suggested payment amount on each date.

Only one set of payment terms is retained by the system.

View Layaway Activity History

1. At the Sale screen, select **Extended Transaction** and **Layaway**. When the system displays the Layaway Search form, enter your criteria and select **Process**.
2. Select the account for which you want to view layaway activity information.
3. With the account information displayed, select the **Layaway Details** option.
4. At the Layaway Details menu, select the **View Activity History** option (Figure 10-32, “Layaway Details Menu,” on page 282).

The system displays the activity history information for this account.



LAYAWAY ACTIVITY

Activity history for the layaway account:

DATE STATUS	TYPE ITEM ID	AMOUNT	STORE REG	TRAN ID
8/26/13 OPEN	ITEM 1006	$79.99	1973 1	217
8/26/13 OPEN	ITEM 1007	$64.99	1973 1	217
8/26/13 OPEN	ITEM 1008	$89.50	1973 1	217
8/26/13 OPEN	ITEM 3002	$45.00	1973 1	217
8/26/13 OPEN	ITEM 3003	$44.98	1973 1	217
8/26/13 OPEN	ITEM 3005	$44.96	1973 1	217
8/26/13 OPEN	ITEM 3004	$17.98	1973 1	217
8/26/13	ITEM	$22.48	1973	217

Figure 10-35: Layaway Activity History

The information shown here includes the activity date, status, activity type, item ID, activity amount, store ID, register ID, and transaction sequence ID. Depending on how active the account has been, you may need to use the scroll bar in the window to see additional information.

Searching for Detailed Layaway Account Information

For more information about Layaway Maintenance and other Back Office maintenance functions, refer to the *Xstore Manager's Guide*.

CHAPTER 11

Special Order Transactions

Overview

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.

Setting Up a New Special Order

> *Because each Xstore 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.*

1. At the Sale screen, select **Extended Transaction**.
2. Select the **Special Order** option from the Extended Transaction menu.

3. Set up the order:

- If no customer is associated with the transaction, select the **Set Up New** option at the Special Order Search form. Go to step 4 on page 289.

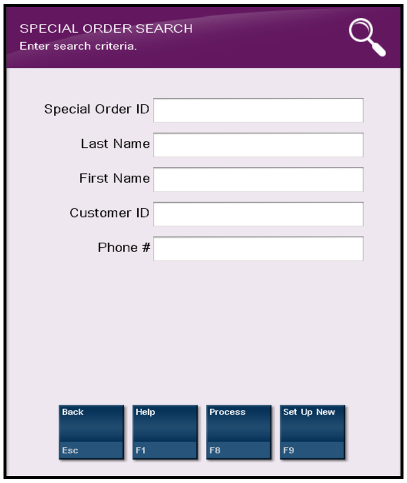
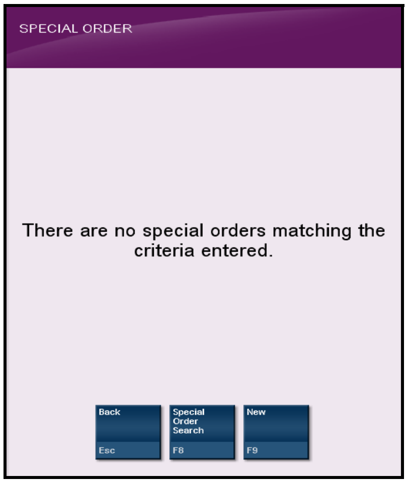


Figure 11-1: Special Order Search Form

- If a customer is associated with the transaction, select **New** at the No Special Order found prompt. Skip to step 5 on page 289.



There are no special orders matching the criteria entered.

Figure 11-2: No Special Order Found prompt

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

4. If a customer has not been associated with this sale, Xstore prompts for customer information. Enter the information and press [Enter] to continue.

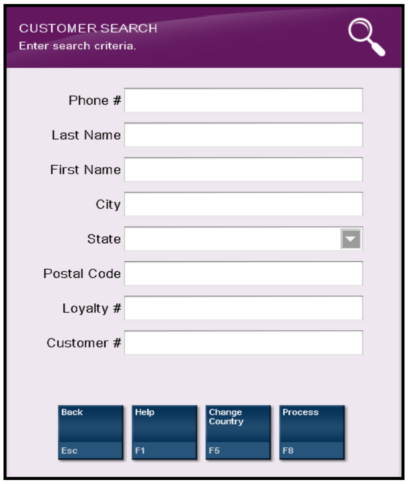
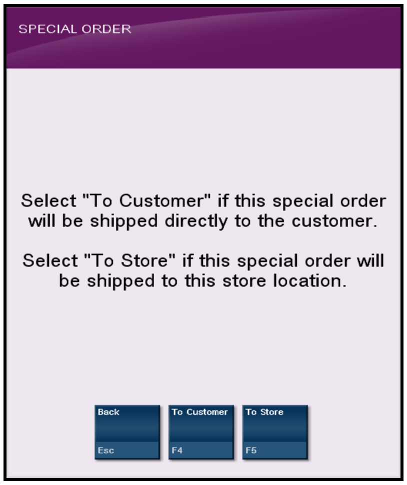


Figure 11-3: Customer Search Form

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

*For more information about the **Change Country** option, see “Search Form” on page 25.*

5. At the Special Order Ship Options form, select where the special order is to be shipped:



Select "To Customer" if this special order will be shipped directly to the customer.

Select "To Store" if this special order will be shipped to this store location.

Figure 11-4: Shipping/Pick Up Options

- ❑ If the customer is going to return to the store to pick up the item, select the **To Store** option.
- ❑ If the customer would like to have the item shipped directly to another location, select the **To Customer** option.

Depending upon the option chosen above, proceed as follows:

Table 11-1: *Shipping Options*

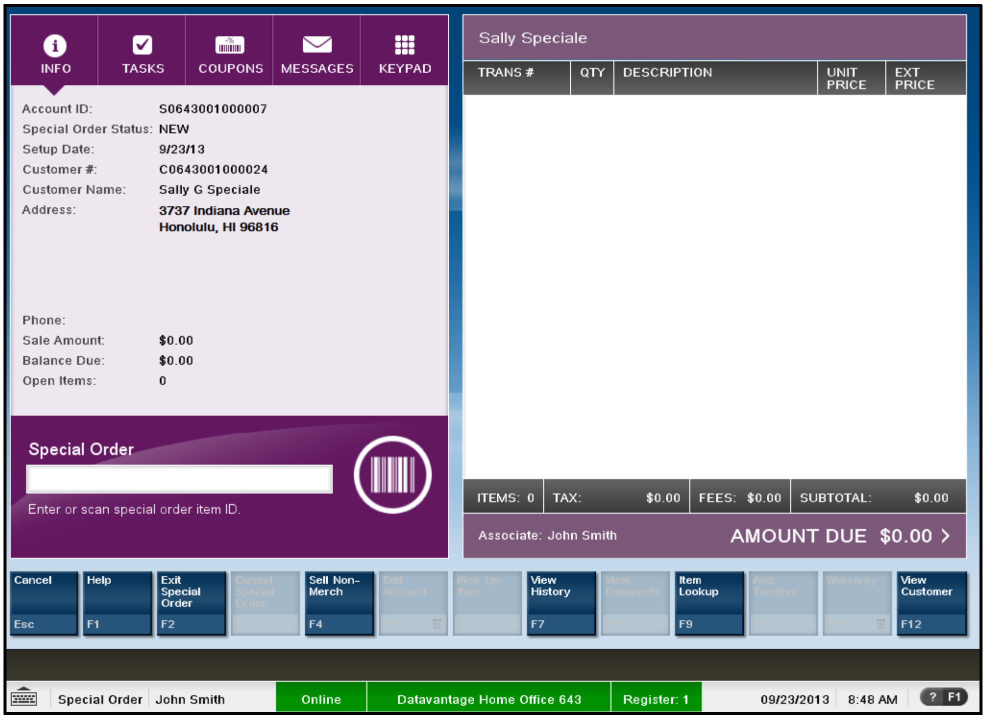
If you chose...	Then...
Ship to Store	Continue with "Shipping a Special Order Item to the Store" on page 290.
Ship to Customer	Continue with "Shipping Special Order Items to the Customer" on page 294.

Shipping a Special Order Item to the Store

...continued from step 5 on page 289

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

> *To add Wish List item(s) to the Special Order, select **View Customer** and then select the **Wish List** tab (see "Purchasing Wish List Item(s)" on page 43).*



Account ID: S0643001000007
Special Order Status: NEW
Setup Date: 9/23/13
Customer #: C0643001000024
Customer Name: Sally G Speciale
Address: 3737 Indiana Avenue
Honolulu, HI 96816
Phone:
Sale Amount: $0.00
Balance Due: $0.00
Open Items: 0

Sally Speciale

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Smith AMOUNT DUE $0.00

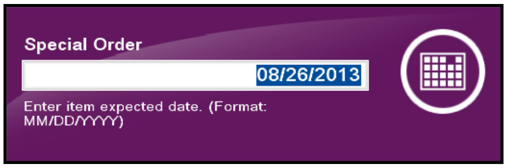
Enter or scan special order item ID.

Special Order | John Smith | Online | Datavantage Home Office 643 | Register: 1 | 09/23/2013 | 8:48 AM

Figure 11-5: Special Order Screen

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

2. Depending upon your store policy, you may be prompted to enter the date you expect to receive the item at the store. If prompted, enter the date you expect to receive the item and press [Enter].



Special Order

08/26/2013

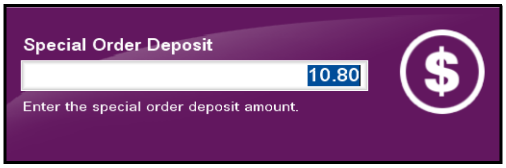
Enter item expected date. (Format: MM/DD/YYYY)

Figure 11-6: Expected Receipt Date Prompt

3. When finished entering special order items, select one of the following options from the Special Order screen to continue:

- Select the **Exit Special Order** option to return to the Register Sale screen to continue selling regular items.
- Select the **Complete Transaction** option to complete the transaction and begin the tendering process.

4. At the prompt for the special order deposit, enter the dollar amount (without a decimal point) that the customer wants to apply to the special order, and press [Enter].



Special Order Deposit

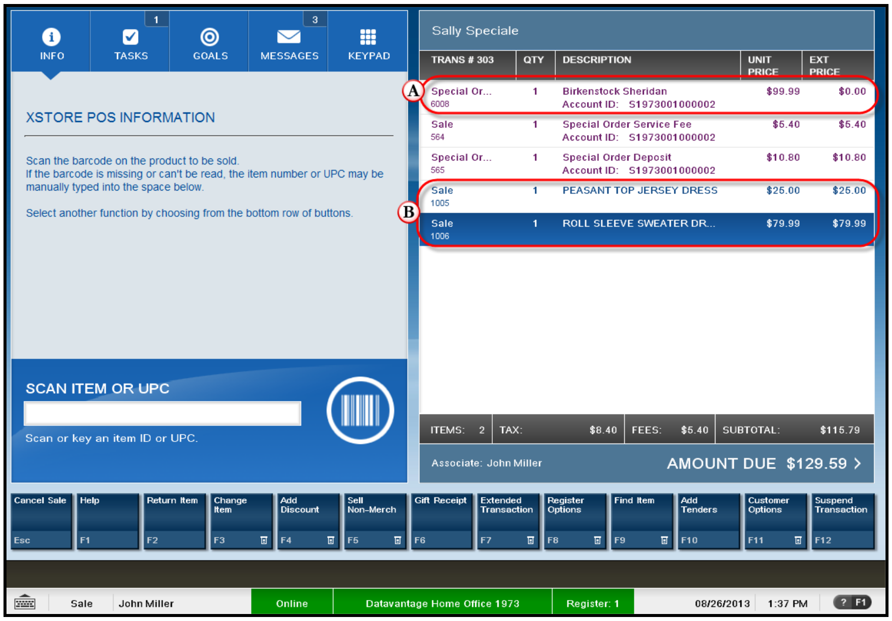
10.80

Enter the special order deposit amount.

Figure 11-7: Special Order Deposit Prompt

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

5. If you chose to continue selling regular items (**Exit Special Order** menu option), the Register Sale screen displays. The special order items are shown on the View Port along with the regular items in the sale as shown in Figure 11-8 below. Any fees for the special order are shown as sale items.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Scan or key an item ID or UPC.

Sally Speciale

TRANS # 303	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Special Or... 6008	1	Birkenstock Sheridan Account ID: S1973001000002	$99.99	$0.00
Sale 564	1	Special Order Service Fee Account ID: S1973001000002	$5.40	$5.40
Special Or... 565	1	Special Order Deposit Account ID: S1973001000002	$10.80	$10.80
Sale 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99

ITEMS: 2 TAX: $8.40 FEES: $5.40 SUBTOTAL: $115.79

Associate: John Miller AMOUNT DUE $129.59

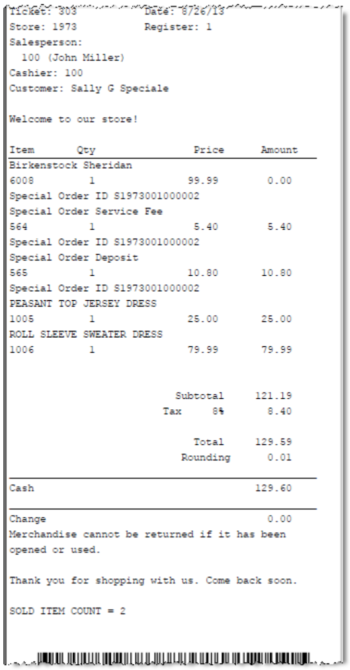
Figure 11-8: Register Sale with Special Order Item

A) - Special Order Item

B) - Regular Sale Items

Your store policy determines whether or not a Special Order may be mixed with other types of sales in the same transaction.

6. If you chose to tender the sale, the tender list is displayed. Tender the sale using the normal procedure. When the transaction is complete, the system creates receipts as required by your store policy.



```
Ticket: 303           Date: 8/26/13
Store: 1973           Register: 1
Salesperson:
  100 (John Miller)
Cashier: 100
Customer: Sally G Speciale

Welcome to our store!

Item       Qty                 Price      Amount
Birkenstock Sheridan
6008         1                 99.99        0.00
Special Order ID S1973001000002
Special Order Service Fee
564          1                  5.40        5.40
Special Order ID S1973001000002
Special Order Deposit
565          1                 10.80       10.80
Special Order ID S1973001000002
PEASANT TOP JERSEY DRESS
1005         1                 25.00       25.00
ROLL SLEEVE SWEATER DRESS
1006         1                 79.99       79.99


                             Subtotal     121.19
                          Tax      8%       8.40

                                Total     129.59
                              Rounding      0.01

Cash                                      129.60

Change                                      0.00
Merchandise cannot be returned if it has been
opened or used.

Thank you for shopping with us. Come back soon.

SOLD ITEM COUNT = 2
```

Figure 11-9: Sample Sale Transaction Receipt (with special order item)

```
          Datavantage Home Office
       30500 Bruce Industrial Pkwy
            Solon, OH 44139
             440-498-4414

Ticket: 303           Date: 8/26/13
Store: 1973           Register: 1
Cashier: 100
Customer ID: C1973001000033
Customer Name: Sally G Speciale

        S p e c i a l   O r d e r   I D
          S 1 9 7 3 0 0 1 0 0 0 0 0 2

Items placed on special order may be picked up or
sent directly to you.

Item       Qty                 Price      Amount
Birkenstock Sheridan
6008         1                 99.99       99.99

Payment Type                              Amount
Special Order Deposit                      10.80
8/26/13


                   Special Order Total:   107.99
                       Deposit/Payment:    10.80
                           Balance Due:    97.19

              S1973001000002

Item availability date is provided solely as an
estimate. The actual availability date may vary.

              Customer Copy
```

Figure 11-10: Sample Special Order Receipt

About the Sale Transaction Receipt

In this example, the sold item count is 2 indicating that the customer is taking two items from the store at this time. The special order item is not included in this count.

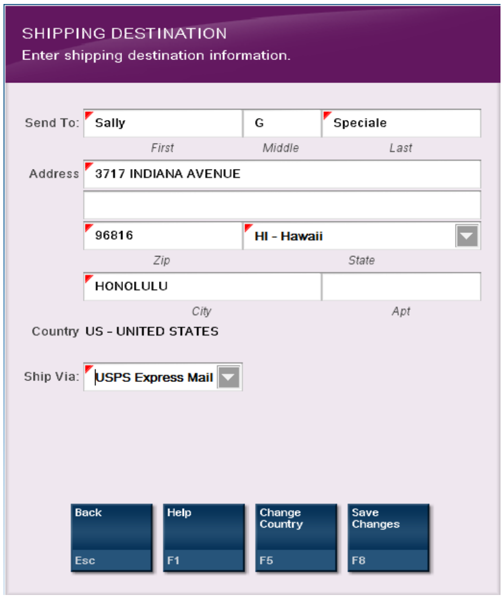
Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to "Email Receipt Options" on page 54 for more information about sending email receipts.

Shipping Special Order Items to the Customer

...continued from step 5 on page 289

1. At the prompt for shipping destination information, enter/verify the customer and address information for this special order and select the **Save Changes** option.



SHIPPING DESTINATION
Enter shipping destination information.

Send To: Sally (First) G (Middle) Speciale (Last)
Address: 3717 INDIANA AVENUE
96816 (Zip) HI - Hawaii (State)
HONOLULU (City) (Apt)
Country: US - UNITED STATES
Ship Via: USPS Express Mail

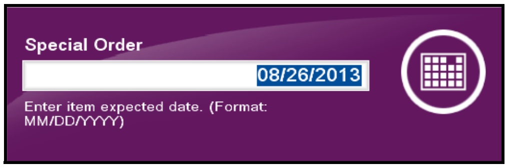
Figure 11-11: Shipping Destination Address Form

*For more information about the **Change Country** option, see "Search Form" on page 25.*

2. At the Special Order screen, scan or enter the item ID to be special ordered. All items are entered as special order items (Figure 11-5, "Special Order Screen," on page 290).

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

3. Depending upon your store policy, you may be prompted to enter the date you expect to receive the item at the store. Enter the date you expect to receive the item and press [Enter].



Special Order
08/26/2013
Enter item expected date. (Format: MM/DD/YYYY)

4. When finished entering special order items, select one of the following options to continue:

   - ☐ Select the **Exit Special Order** option to return to the Register Sale screen to continue selling regular items (if your store policy permits this).
   - ☐ Select the **Complete Transaction** option to complete the transaction and begin the tendering process.

5. Depending upon your system’s configuration, you may be prompted that a shipping fee has been automatically added to the special order. If prompted, press [Enter] to acknowledge this prompt.

6. If you chose to exit the special order to sell more regular items, the Register Sale screen displays. The special order items are shown on the View Port along with the regular items in the sale.

7. If you chose to tender the sale, the tender list is displayed. Tender the sale using the normal tendering process.

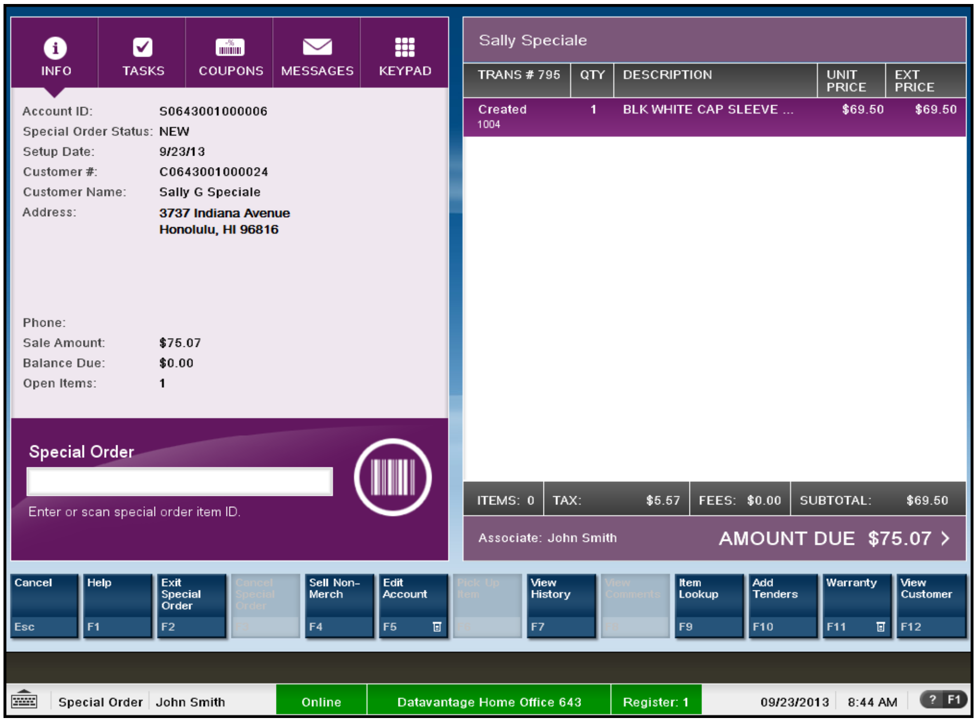
When the transaction is complete, the system creates receipts as required by your store policy.

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

Email Receipts

If your store issues email receipts, additional/different prompts display. Refer to “Email Receipt Options” on page 54 for more information about sending email receipts.

Special Order Setup/Maintenance Options



Account ID: S0643001000006
Special Order Status: NEW
Setup Date: 9/23/13
Customer #: C0643001000024
Customer Name: Sally G Speciale
Address: 3737 Indiana Avenue
Honolulu, HI 96816
Phone:
Sale Amount: $75.07
Balance Due: $0.00
Open Items: 1

Enter or scan special order item ID.

Sally Speciale

TRANS # 795	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Created 1004	1	BLK WHITE CAP SLEEVE ...	$69.50	$69.50

ITEMS: 0 TAX: $5.57 FEES: $0.00 SUBTOTAL: $69.50

Associate: John Smith AMOUNT DUE $75.07 >

Figure 11-12: Special Order Menu Options

The View comments option on the Special Order menu will only be active when a comment is associated with this special order account.

During a special order setup transaction you can also perform the following activities before tendering the sale:

- ❑ If you can sell non-merchandise items that are eligible for special order, refer to “Adding Non-Merchandise Items to the Sale” on page 214 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. When you look up an item while in a special order transaction, choose the **Add Item** menu option on the item lookup results screen to add the item to the special order. Refer to “Searching for Items Using Item Lookup” on page 187 for more information.
- ❑ To view the special order history, refer to “Viewing Special Order History” on page 298.
- ❑ To add a warranty to an item, see “Adding a Warranty to a Special Order Item” on page 298.
- ❑ To modify the special order account, select the **Edit Account** option from the Special Order screen menu.

Using these edit account options you can add a coupon, add a discount, add a comment about the account, and change a line item*. Refer to Chapter 8, "Modifying a Sale Transaction" on page 213 for more information about these options.

Figure 11-13: Special Order Edit Account Menu Options

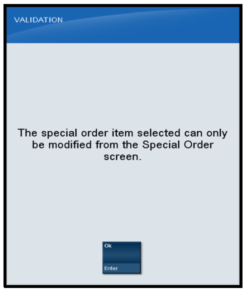
*About changing an item

Line item changes (**Change Item** menu option) include options such as changing the item quantity, changing the item price, changing the item tax, voiding a line, modifying and voiding a discount, changing the commissioned associate, changing the expected date for the item, and adding/editing line item comments.

If you modify a line item in the special order sale, the entire special order is recalculated. If an additional deposit must be made, you are prompted to enter the deposit amount. If the change makes the special order over-paid, a refund is issued.

Refer to "Modifying Line Items in a Sale" on page 216 for more information about these options.

All changes to special order items must be done at the Special Order screen. You cannot change special order items at the sale screen.



The special order item selected can only be modified from the Special Order screen.

☐ To change item quantities, refer to "Changing the Item Quantity" on page 217".

☐ To override a price, refer to "Changing the Item Price" on page 219".

☐ To change the tax rate/amount, refer to "Changing Item Taxes" on page 227".

☐ To void an item, refer to "Voiding an Item" on page 221".

☐ To add/change/delete discounts, refer to "Adding a Discount/Award to an Item or Transaction" on page 201".

☐ To special order gift registry items, refer to "Selling Gift Registry items" on page 403.

☐ To change the commissioned sale associate for the sale, refer to "Changing the Commissioned Associate" on page 223".

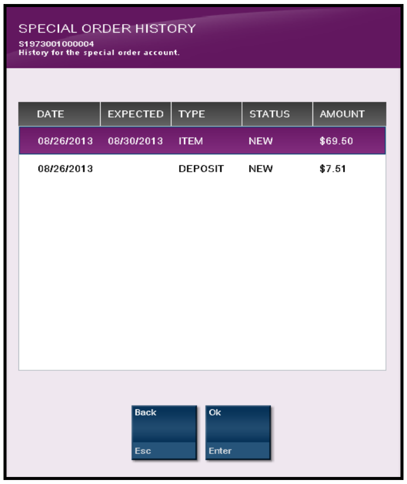
☐ To change the expected arrival date for an item, refer to "Changing the Item Expected Date" on page 299.

☐ To add/edit a line item comment, refer to "Adding/Editing a Line Item Comment" on page 226.

Viewing Special Order History

1. From the Special Order screen menu (Figure 11-12, “Special Order Menu Options,” on page 296), select the **View History** option.

   Xstore displays the Special Order account information, including the status of each item.



SPECIAL ORDER HISTORY
S1973001000004
History for the special order account.

DATE	EXPECTED	TYPE	STATUS	AMOUNT
08/26/2013	08/30/2013	ITEM	NEW	$69.50
08/26/2013		DEPOSIT	NEW	$7.51

Figure 11-14: Special Order History Screen

2. Press [Enter] to close the Special Order History screen.

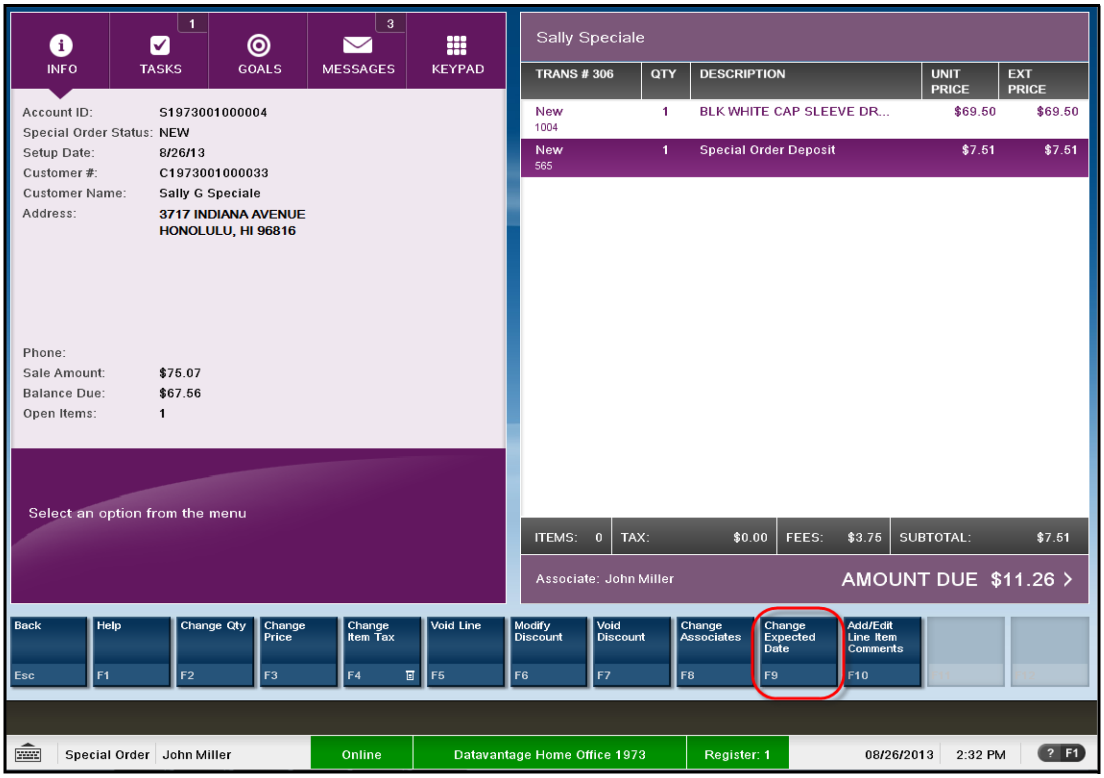
Adding a Warranty to a Special Order Item

If an item on the special order is eligible for a warranty, the **Warranty** option on the Special Order menu is active. If no items on the special order are eligible for a warranty, this option is not available.

1. From the Special Order screen menu, select the **Warranty** option.
2. Follow the prompts to add a warranty to an item or to change the warranty owner. Refer to “Warranty and Service Plan Transactions” on page 343 for more information about warranties.

Changing the Item Expected Date

1. Select **Edit Account** (Figure 11-12, "Special Order Menu Options," on page 296).
2. Select **Change Item** (Figure 11-13, "Special Order Edit Account Menu Options," on page 297).
3. Select the **Change Expected Date** option from the Special Order Change Item menu.



Account ID: S1973001000004
Special Order Status: NEW
Setup Date: 8/26/13
Customer #: C1973001000033
Customer Name: Sally G Speciale
Address: 3717 INDIANA AVENUE
HONOLULU, HI 96816
Phone:
Sale Amount: $75.07
Balance Due: $67.56
Open Items: 1

Select an option from the menu

Sally Speciale

TRANS # 306	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
New 1004	1	BLK WHITE CAP SLEEVE DR...	$69.50	$69.50
New 565	1	Special Order Deposit	$7.51	$7.51

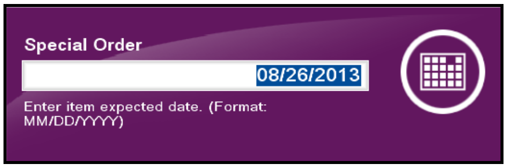
ITEMS: 0 TAX: $0.00 FEES: $3.75 SUBTOTAL: $7.51

Associate: John Miller AMOUNT DUE $11.26

Special Order John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 2:32 PM

Figure 11-15: Special Order Change Item Menu - Change Expected Date Option

4. Use the up and down arrow keys to select the item and press [Enter] to continue.
5. Enter the expected arrival date for the item in the Special Order Expected Date prompt and press [Enter] to continue.



Special Order

08/26/2013

Enter item expected date. (Format: MM/DD/YYYY)

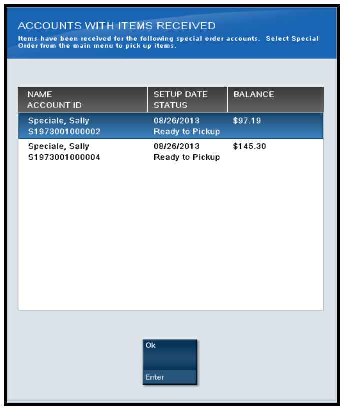
Figure 11-16: Special Order Expected Date Prompt

The new expected arrival date is assigned to the item.

Picking Up a Special Order

If the customer had the special order item(s) delivered to the store, use the following procedure for picking up the item(s).

If you enter the customer's information at the beginning of a sale and the customer's special order item has been received at the store, a message displays indicating the order has been received and is ready for pickup. Press [Enter] to acknowledge the message and continue with step 1 below.



ACCOUNTS WITH ITEMS RECEIVED

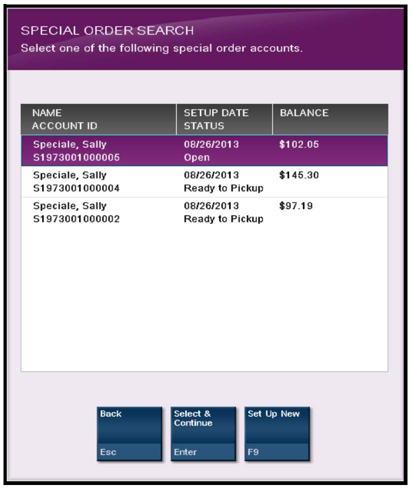
Items have been received for the following special order accounts. Select Special Order from the main menu to pick up items.

NAME ACCOUNT ID	SETUP DATE STATUS	BALANCE
Speciale, Sally S1973001000002	08/26/2013 Ready to Pickup	$97.19
Speciale, Sally S1973001000004	08/26/2013 Ready to Pickup	$145.30

1. At the Register Sale screen, select **Extended Transaction** --> **Special Order** from the Extended Transaction menu.

If the customer has already been associated with the special order, select the special order account from the list of accounts as shown in step 3 below.

2. At the Special Order Search form, enter/scan the required search criteria and select the **Process** option.
3. If multiple special orders match the entered criteria, select the appropriate special order from the list and press [Enter] to continue.



SPECIAL ORDER SEARCH

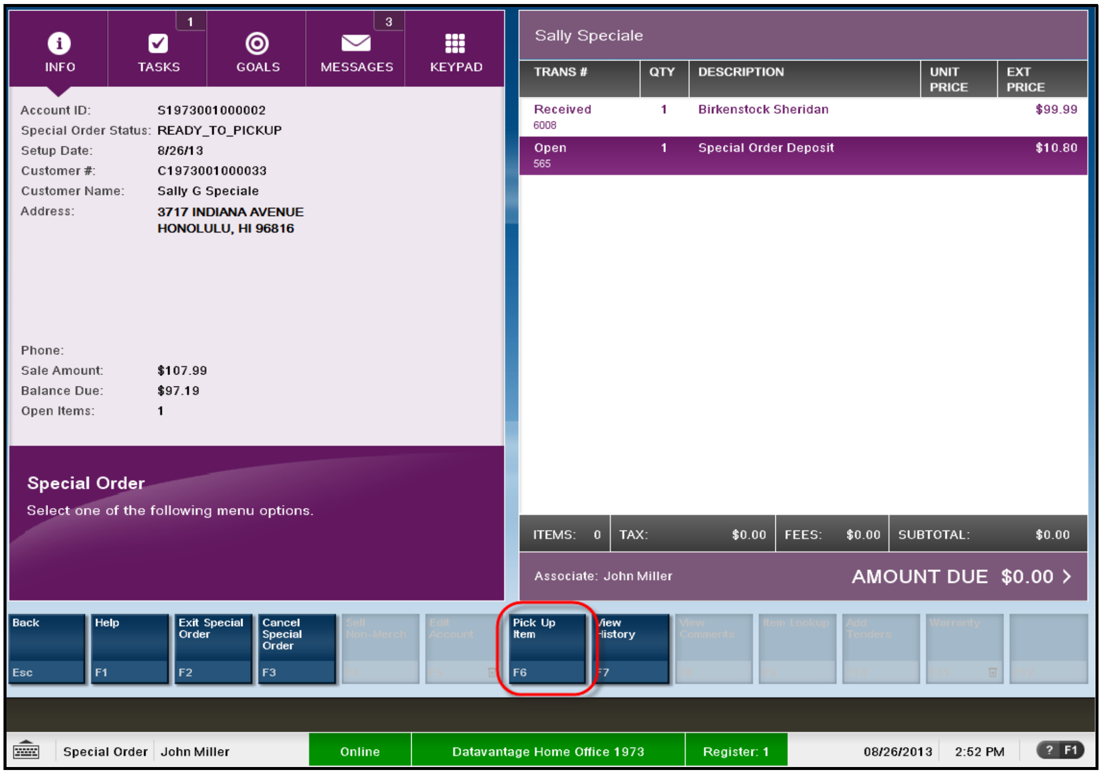
Select one of the following special order accounts.

NAME ACCOUNT ID	SETUP DATE STATUS	BALANCE
Speciale, Sally S1973001000005	08/26/2013 Open	$102.05
Speciale, Sally S1973001000004	08/26/2013 Ready to Pickup	$145.30
Speciale, Sally S1973001000002	08/26/2013 Ready to Pickup	$97.19

Figure 11-17: List of Special Orders

A special order with a CLOSED status cannot be accessed. If you select a closed account, the system notifies you that the account is closed.

4. At the Special Order Account screen, select the **Pick Up Item** option to continue.



Account ID: S1973001000002
Special Order Status: READY_TO_PICKUP
Setup Date: 8/26/13
Customer #: C1973001000033
Customer Name: Sally G Speciale
Address: 3717 INDIANA AVENUE
HONOLULU, HI 96816
Phone:
Sale Amount: $107.99
Balance Due: $97.19
Open Items: 1

Special Order

Select one of the following menu options.

Sally Speciale

TRANS #	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Received 6008	1	Birkenstock Sheridan		$99.99
Open 565	1	Special Order Deposit		$10.80

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

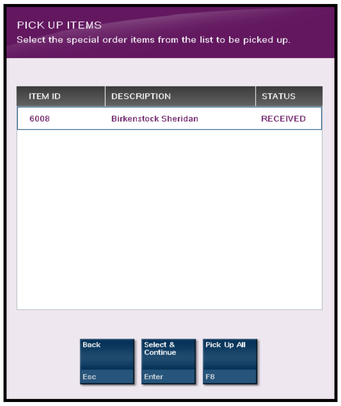
Associate: John Miller AMOUNT DUE $0.00

Special Order | John Miller | Online | Datavantage Home Office 1973 | Register: 1 | 08/26/2013 | 2:52 PM

Figure 11-18: Special Order Account Screen

*The **Pick Up Item** option is only active if at least one item on the account has been received.*

5. To select a single item from the list, use the up and down arrow keys to highlight it, press the [Spacebar] and press [Enter]. To pick up all of the items that are ready, select the **Pickup All** option.



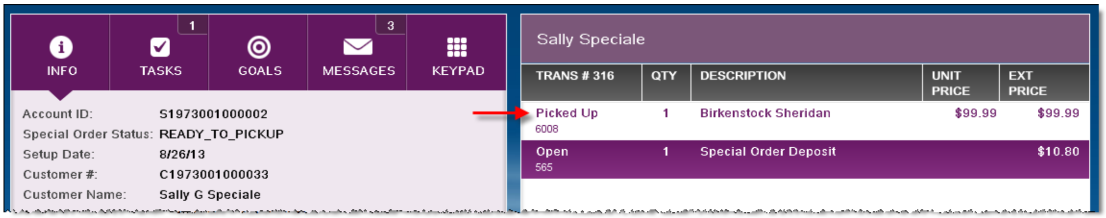
PICK UP ITEMS

Select the special order items from the list to be picked up.

ITEM ID	DESCRIPTION	STATUS
6008	Birkenstock Sheridan	RECEIVED

Figure 11-19: List of Special Order Items Ready for Pickup

The item status is changed from **Received** to **Picked Up** on the View Port as shown below.



Account ID: S1973001000002
Special Order Status: READY_TO_PICKUP
Setup Date: 8/26/13
Customer #: C1973001000033
Customer Name: Sally G Speciale

Sally Speciale

TRANS # 316	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Picked Up 6008	1	Birkenstock Sheridan	$99.99	$99.99
Open 565	1	Special Order Deposit		$10.80

Figure 11-20: View Port Status - After Pickup

6. When finished selecting the special order pickup items, choose one of the following options to continue:

- ❑ Select the **Exit Special Order** option to return to the Register Sale screen to continue selling regular items. The Register Sale screen displays and the special order items are shown on the View Port along with the regular items in the sale.

  <OR>

- ❑ Select the **Add Tenders** option or press [Enter] to complete the transaction. The tender list is displayed and you can tender the sale using the normal tendering process.

Special Order Pickup Options

During a special order pickup transaction, you can also perform the following activities ***before*** tendering the sale:

- To add or view comments about the transaction, refer to "Special Order Setup/ Maintenance Options" on page 296."
- To view the special order history, refer to "Viewing Special Order History" on page 298.
- To cancel the special order, refer to "Cancelling a Special Order" on page 303.

Editing Special Order Pickup Items

If allowed by your store policy, you can use the following options to modify a line item in the special order pickup transaction.

- To change the commissioned sale associate for the sale, refer to "Changing the Commissioned Associate" on page 223" for more information.
- To change the tax rate/amount, refer to "Changing Item Taxes" on page 227" for more information.
- To add/change/delete discounts, refer to "Item Level Discounts" on page 203" for more information.
- To remove an item from the special order, refer to "Voiding an Item" on page 221" for more information.

Cancelling a Special Order

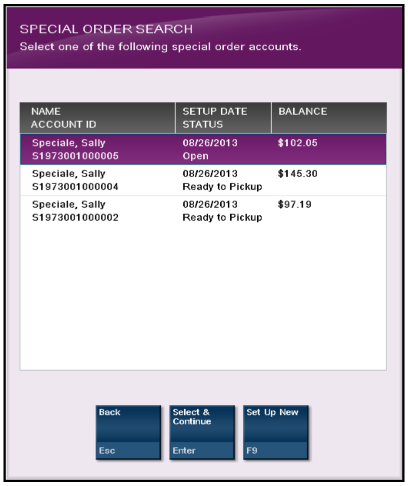
If the customer had the special order item(s) delivered to the store, use the following procedure for cancelling the item(s). To cancel a gift registry order, be sure to assign the gift registry prior to cancelling the order (see "Selling Gift Registry items" on page 403).

1. At the Sale screen, select **Extended Transaction**.
2. Select the **Special Order** option from the Extended Transaction menu.

> *If the customer has already been associated with the special order, select the special order account from the list of accounts as shown in step 4 below.*

3. At the Special Order Search form, enter/scan the required search criteria and select the **Process** option.

4. If multiple special orders match the entered criteria, select the appropriate special order from the list and press [Enter] to continue.



SPECIAL ORDER SEARCH

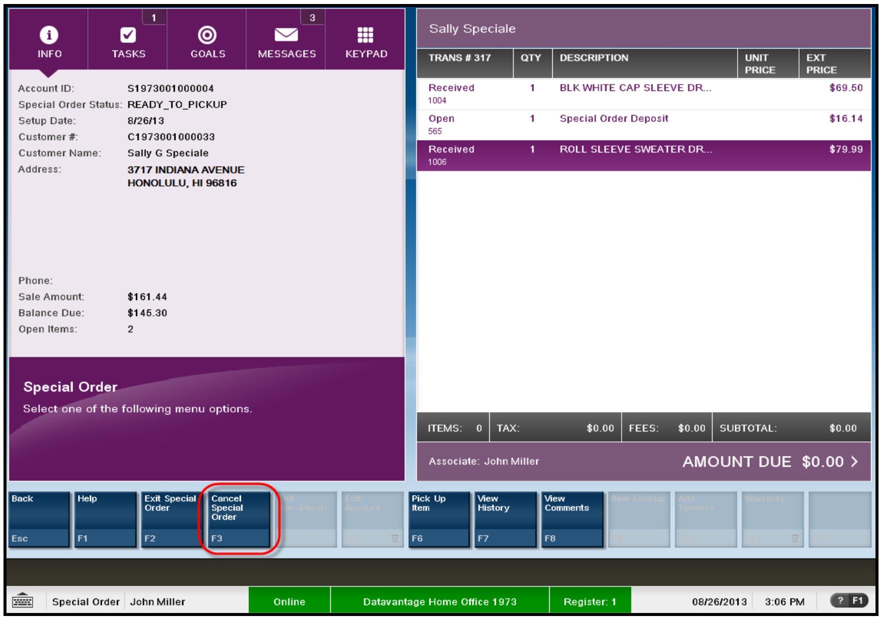
Select one of the following special order accounts.

NAME ACCOUNT ID	SETUP DATE STATUS	BALANCE
Speciale, Sally S1973001000005	08/26/2013 Open	$102.05
Speciale, Sally S1973001000004	08/26/2013 Ready to Pickup	$145.30
Speciale, Sally S1973001000002	08/26/2013 Ready to Pickup	$97.19

Figure 11-21: List of Special Orders

A special order with a CLOSED status cannot be accessed. If you select a closed account, the system notifies you that the account is closed.

5. At the Special Order Account screen, select the **Cancel Special Order** option to continue.



Account ID: S1973001000004
Special Order Status: READY_TO_PICKUP
Setup Date: 8/26/13
Customer #: C1973001000033
Customer Name: Sally G Speciale
Address: 3717 INDIANA AVENUE
HONOLULU, HI 96816

Phone:
Sale Amount: $161.44
Balance Due: $145.30
Open Items: 2

Special Order

Select one of the following menu options.

Sally Speciale

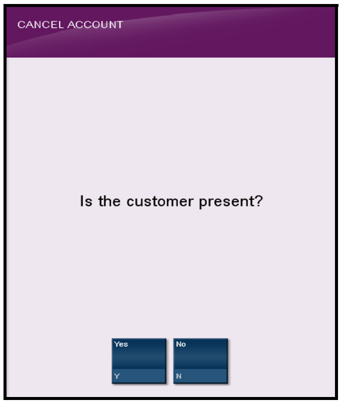
TRANS # 317	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Received 1004	1	BLK WHITE CAP SLEEVE DR...		$69.50
Open 565	1	Special Order Deposit		$16.14
Received 1006	1	ROLL SLEEVE SWEATER DR...		$79.99

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Miller AMOUNT DUE $0.00

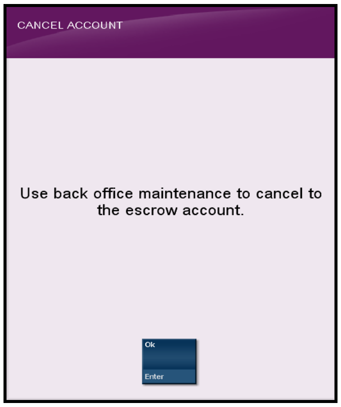
Figure 11-22: Special Order Account Screen

6. When prompted, answer whether or not the customer is present:



Is the customer present?

- Select **No** if the customer is not present. When the customer is not present, you must use the Back Office escrow process to cancel the special order.
    - **1)** Press [Enter] to close the message prompt. The system returns to the Special Order screen.

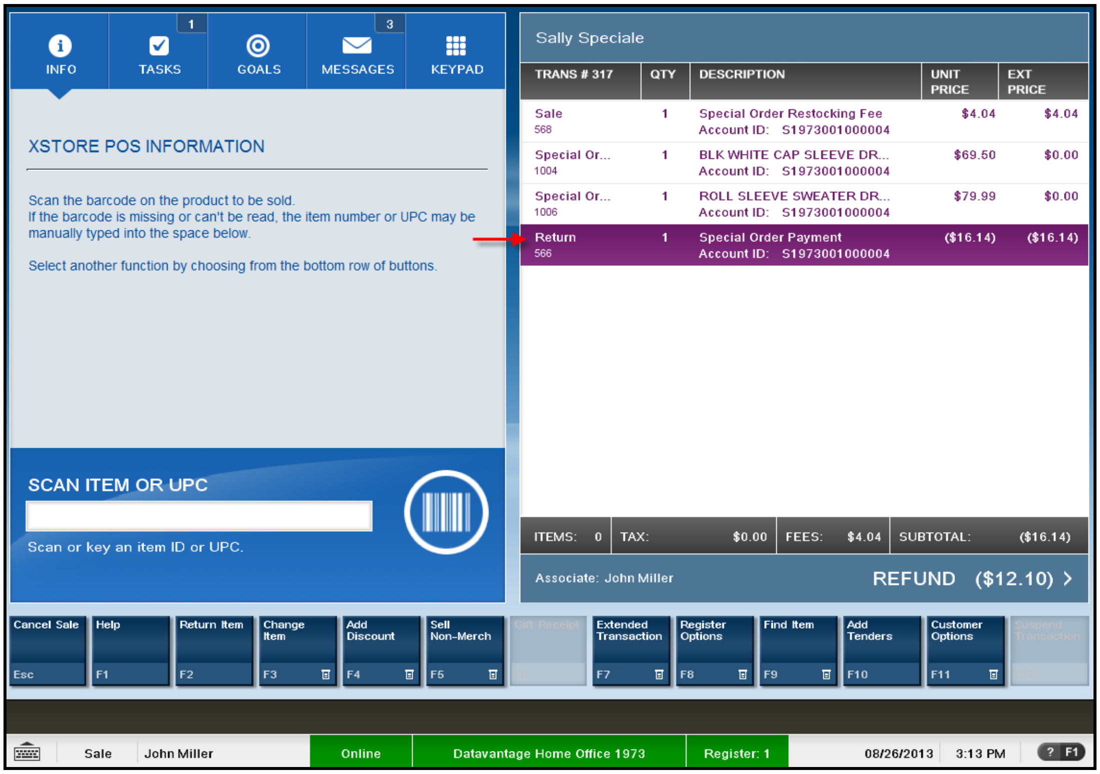


Use back office maintenance to cancel to the escrow account.

Figure 11-23: Use Back Office Prompt

- **2)** Select **Exit Special Order** to return to sale mode. For more information about handling escrow accounts, refer to the *Xstore Manager’s Guide*.

- Select **Yes** if the customer is present.
    1) When prompted, select **Yes** to confirm you want to cancel the special order. The system returns to the sale screen and the refund amount is show on the View Port.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Scan or key an item ID or UPC.

TRANS # 317	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 568	1	Special Order Restocking Fee Account ID: S1973001000004	$4.04	$4.04
Special Or... 1004	1	BLK WHITE CAP SLEEVE DR... Account ID: S1973001000004	$69.50	$0.00
Special Or... 1006	1	ROLL SLEEVE SWEATER DR... Account ID: S1973001000004	$79.99	$0.00
Return 566	1	Special Order Payment Account ID: S1973001000004	($16.14)	($16.14)

ITEMS: 0 TAX: $0.00 FEES: $4.04 SUBTOTAL: ($16.14)

Associate: John Miller REFUND ($12.10)

Figure 11-24: Sale Screen With Refund

2) Tender the refund and return any amount due back to the customer.
3) The system creates receipts as needed.

CHAPTER 12

Work Order Transactions

Overview

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.

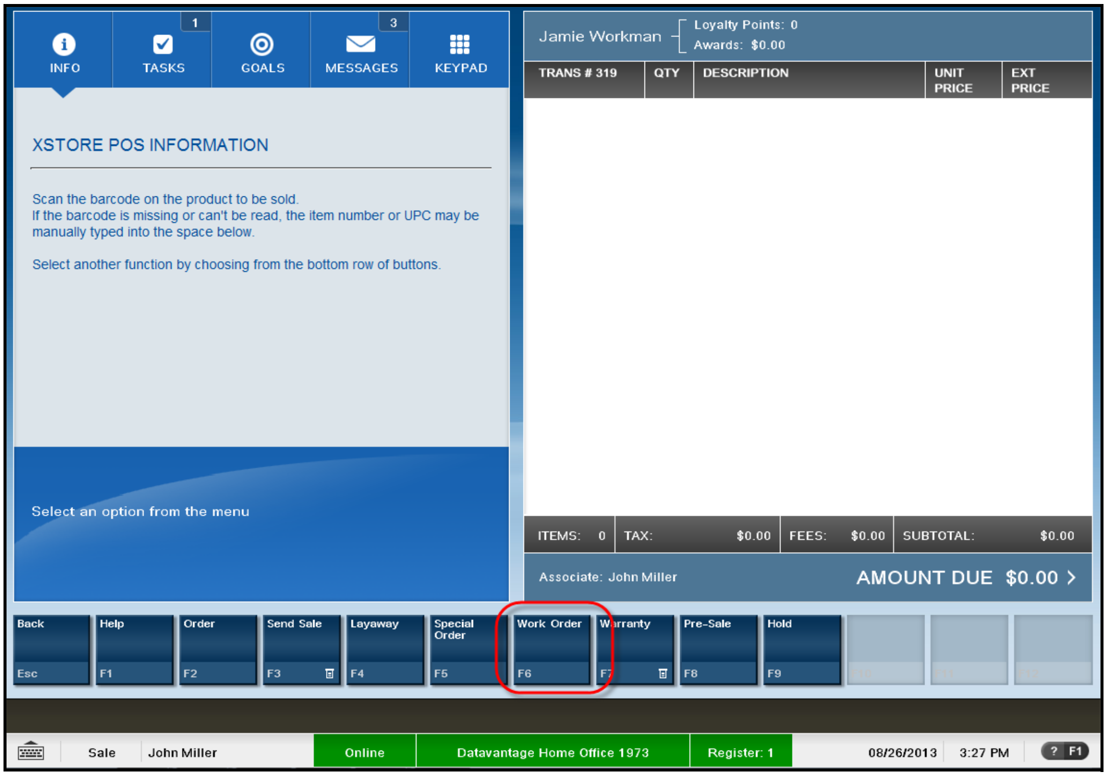
Creating a New Work Order

Because each Xstore 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.

1. At the Sale screen, select **Extended Transaction**.

2. At the Extended Transaction menu, select the **Work Order** option.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Select an option from the menu

Figure 12-1: Extended Transaction Menu

The system does not allow you to create a work order unless you have the required security privileges.

3. 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

1) If no customer is associated with the transaction, the system displays the Work Order Search form shown here.

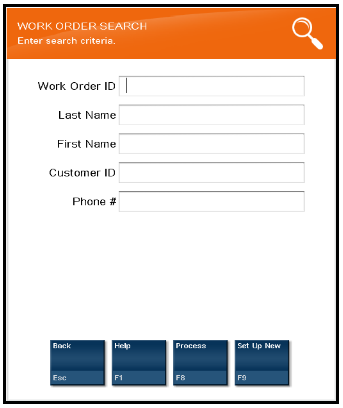


Figure 12-2: Work Order Search Form

2) Select **Set Up New**.

> *To search for an existing work order, enter your search criteria and select the* ***Process*** *option.*

3) The system displays the Customer Search form. Enter search criteria and select **Process**.

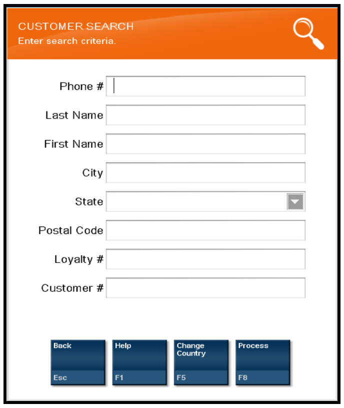


Figure 12-3: Customer Search Form

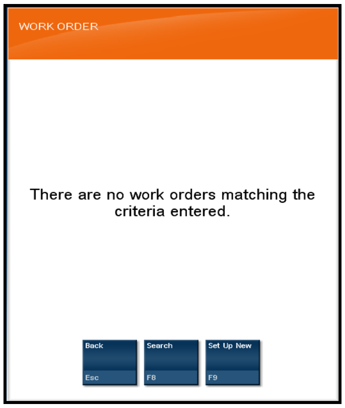
4) Select a customer to associate with the transaction.

5) When customer association is complete, go to step 4 on page 311.

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.



WORK ORDER

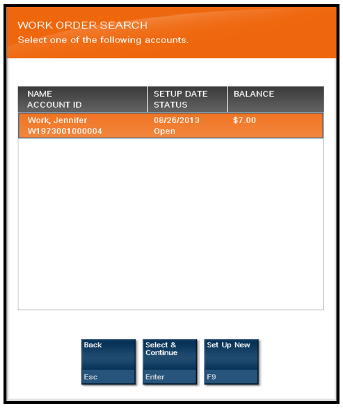
There are no work orders matching the criteria entered.

Figure 12-4: No Matching Work Orders Message

1) Select **Set Up New** to create a new work order.

2) Go to step 4 on page 311.

- ❑ If an established work order is found, the work order accounts are shown in a list.



WORK ORDER SEARCH

Select one of the following accounts.

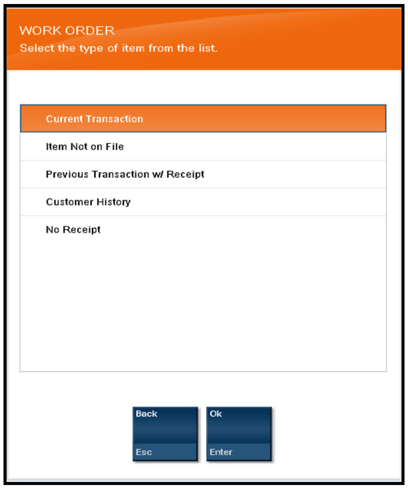
NAME ACCOUNT ID	SETUP DATE STATUS	BALANCE
Work, Jennifer W1973001000004	08/26/2013 Open	$7.00

Figure 12-5: Work Order Accounts List

1) Select **Set Up New** to create a new work order.

2) Go to step 4 below.

4. The system prompts for the source of information about the item that is referenced in the work order.



WORK ORDER
Select the type of item from the list.

Figure 12-6: Work Order Item Source Prompt

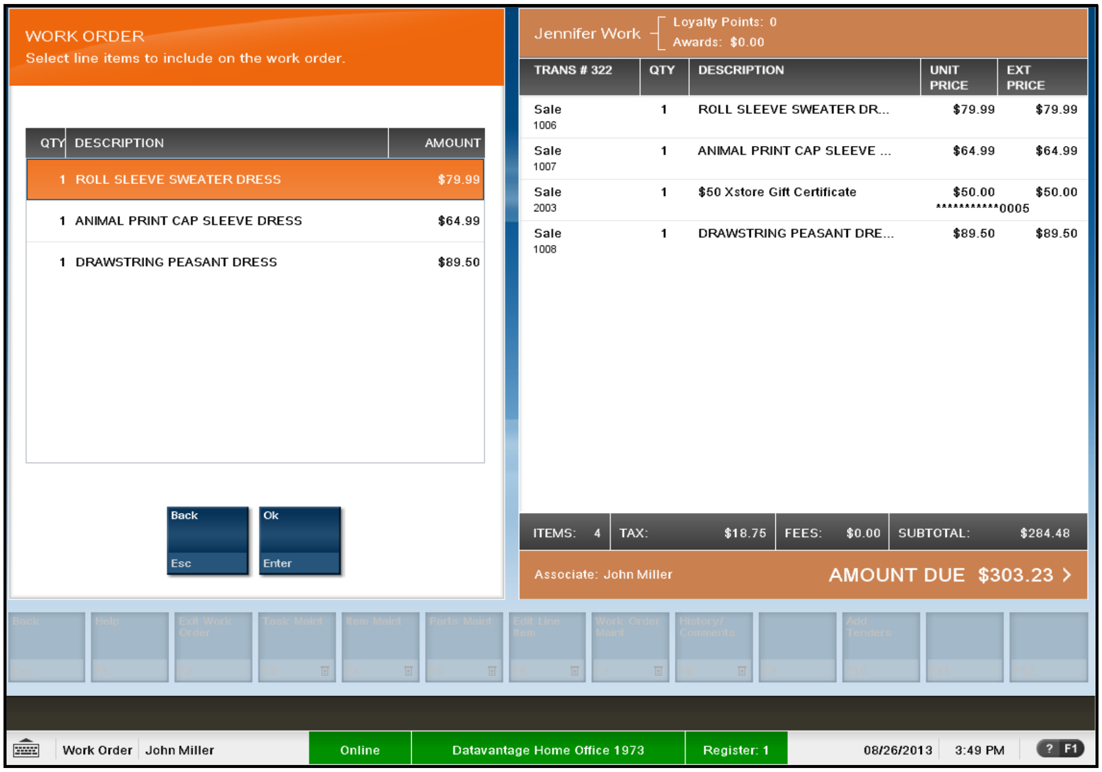
5. Select one of the following options and press [Enter]:

- ❑ **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" on page 312.
- ❑ **Item Not on File:** The item requiring work is not in the system. See "Work Order Item — Item Not on File" on page 318.
- ❑ **Previous Transaction with Receipt:** The item is identified on the receipt from a previous transaction. See "Work Order Item — Using Original Transaction Receipt" on page 313.
- ❑ **Customer History:** Find the item by searching the customer's previous purchase transaction history. See "Work Order Item — Customer History" on page 317.
- ❑ **No Receipt:** The item has no receipt available or is not referenced on a receipt. See "Work Order Item — No Receipt; Manual Item Entry" on page 315.
- ❑ **Customer History:** Find the item by searching the customer's previous purchase transaction history. See "Work Order Item — Customer History" on page 317.

Work Order Item — In the Current Sale Transaction

...continued from step 5 on page 311

1. The system displays a list of items that are eligible for a work order in the current transaction.



WORK ORDER
Select line items to include on the work order.

QTY	DESCRIPTION	AMOUNT
1	ROLL SLEEVE SWEATER DRESS	$79.99
1	ANIMAL PRINT CAP SLEEVE DRESS	$64.99
1	DRAWSTRING PEASANT DRESS	$89.50

Jennifer Work
Loyalty Points: 0
Awards: $0.00

TRANS # 322	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99
Sale 1007	1	ANIMAL PRINT CAP SLEEVE ...	$64.99	$64.99
Sale 2003	1	$50 Xstore Gift Certificate	$50.00 ***********0005	$50.00
Sale 1008	1	DRAWSTRING PEASANT DRE...	$89.50	$89.50

ITEMS: 4 TAX: $18.76 FEES: $0.00 SUBTOTAL: $284.48

Associate: John Miller AMOUNT DUE $303.23

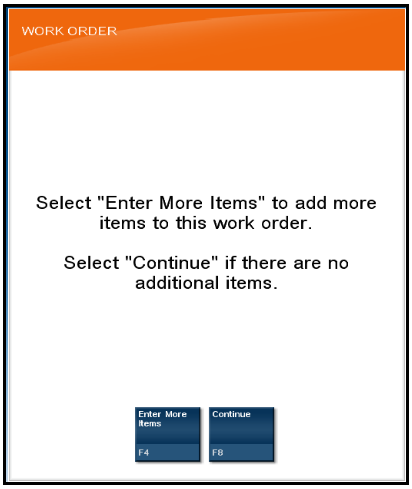
Work Order John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 3:49 PM

Figure 12-7: Items Eligible For Work Order

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:



Select "Enter More Items" to add more items to this work order.

Select "Continue" if there are no additional items.

Figure 12-8: 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 12-6 on page 311.

  <OR>

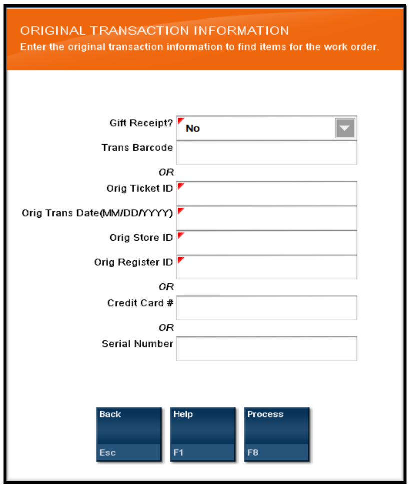
- ☐ If there are no more items for this work order, select the **Continue** option. The system displays the work order categories.

4. The next step in the process is to select a work order category. Continue with "Work Order Categories" on page 319.

Work Order Item — Using Original Transaction Receipt

...continued from step 5 on page 311

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.



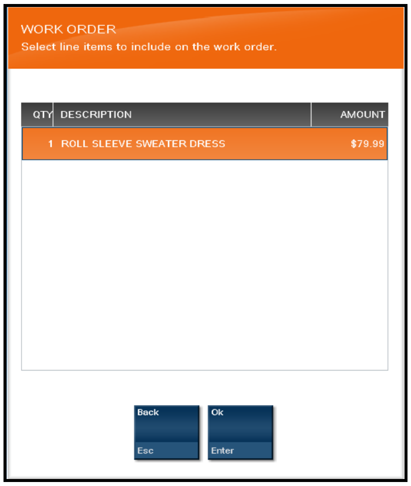
ORIGINAL TRANSACTION INFORMATION

Enter the original transaction information to find items for the work order.

Gift Receipt? No

Figure 12-9: 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.



WORK ORDER

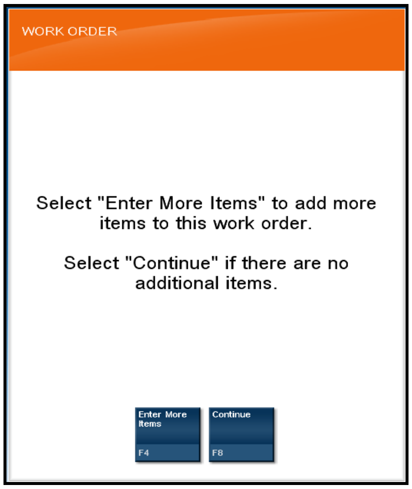
Select line items to include on the work order.

QTY	DESCRIPTION	AMOUNT
1	ROLL SLEEVE SWEATER DRESS	$79.99

Figure 12-10: Previous Transaction Item List

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:



Select "Enter More Items" to add more items to this work order.

Select "Continue" if there are no additional items.

Figure 12-11: 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 12-6 on page 311.

<OR>

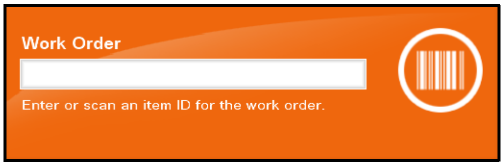
❑ If there are no more items for this work order, select the **Continue** option. The system displays the work order categories.

6. The next step in the process is to select a work order category. Continue with "Work Order Categories" on page 319.

Work Order Item — No Receipt; Manual Item Entry

...continued from step 5 on page 311

1. At the prompt for an item ID, enter the Item ID and press [Enter], or scan the item.

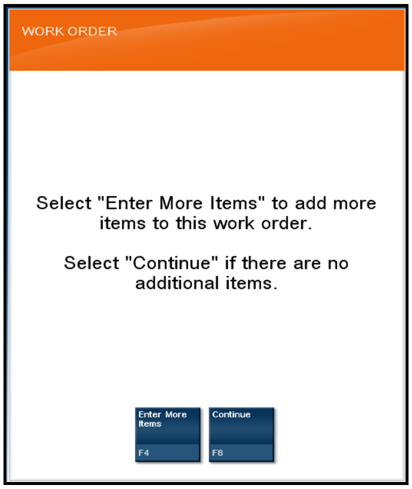


Enter or scan an item ID for the work order.

Figure 12-12: Item ID Prompt

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 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:



Select "Enter More Items" to add more items to this work order.

Select "Continue" if there are no additional items.

Figure 12-13: 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 12-6 on page 311.

  <OR>

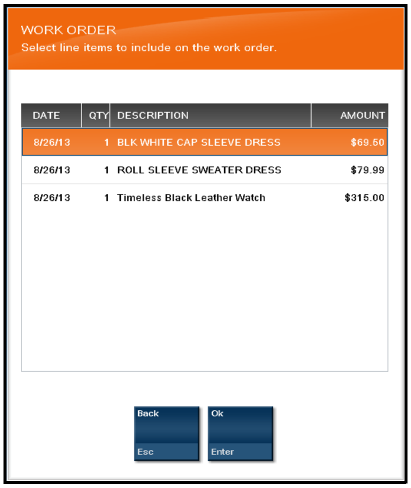
- ☐ If there are no more items for this work order, select the **Continue** option. The system displays the work order categories.

5. The next step in the process is to select a work order category. Continue with "Work Order Categories" on page 319.

Work Order Item — Customer History

...continued from step 5 on page 311

1. The system displays a list of items the customer has purchased previously.



WORK ORDER

Select line items to include on the work order.

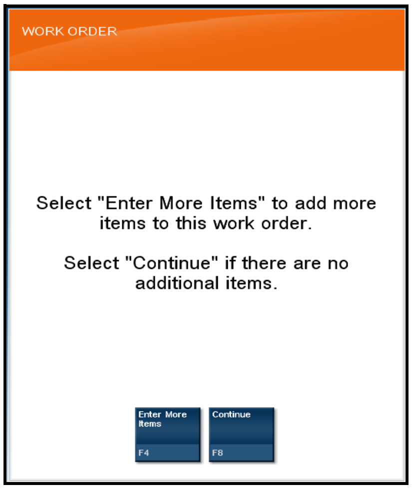
DATE	QTY	DESCRIPTION	AMOUNT
8/26/13	1	BLK WHITE CAP SLEEVE DRESS	$69.50
8/26/13	1	ROLL SLEEVE SWEATER DRESS	$79.99
8/26/13	1	Timeless Black Leather Watch	$315.00

Figure 12-14: 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.

You can select multiple items from the item list by pressing 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:



WORK ORDER

Select "Enter More Items" to add more items to this work order.

Select "Continue" if there are no additional items.

Figure 12-15: 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 12-6 on page 311.

<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" on page 319.

Work Order Item — Item Not on File

...continued from step 5 on page 311

1. At the prompt for an item description, enter a text description for the item and press [Enter].

Work Order

Enter the item description.

Figure 12-16: Item Description Prompt

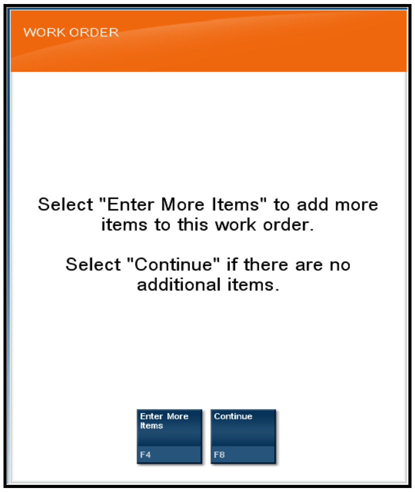
2. At the prompt for item value, enter the item's value and press [Enter].

Work Order

Enter the item value.

Figure 12-17: Item Value Prompt

3. The system prompts you to specify if there is another item to be added to the work order:



WORK ORDER

Select "Enter More Items" to add more items to this work order.

Select "Continue" if there are no additional items.

Figure 12-18: 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 12-6 on page 311.

<OR>

☐ If there are no more items for this work order, select the **Continue** option. The system displays the work order categories.

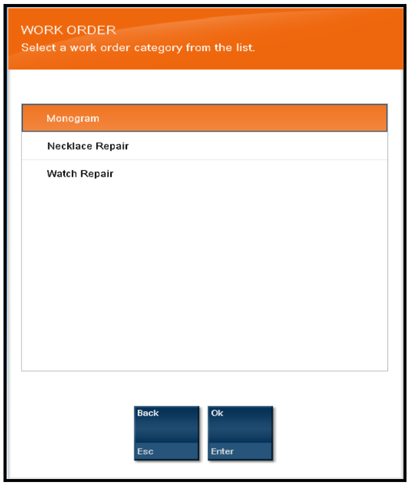
4. The next step in the process is to select a work order category. Continue with "Work Order Categories" on page 319.

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].



WORK ORDER
Select a work order category from the list.

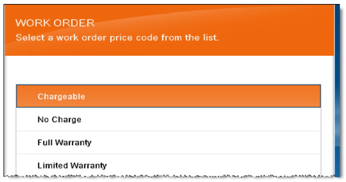
Monogram
Necklace Repair
Watch Repair

Figure 12-19: Work Order Categories

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:

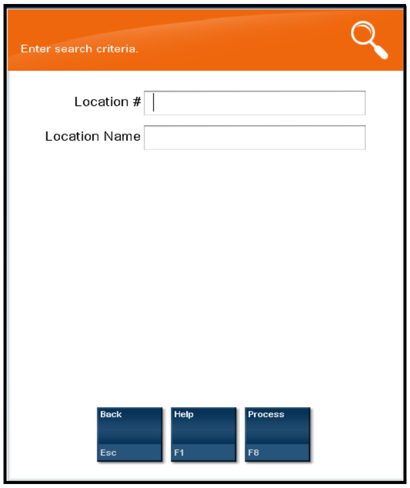
- **Pricing category** - Examples include No Charge, Warranty, and Chargeable.



WORK ORDER
Select a work order price code from the list.

- **Warranty Contract Number** - The system prompts for the Warranty Plan Number.

3. You may be prompted to search for a location where the work will be performed. If you don't know a location, leave the fields blank and select **Process** to show all available vendors.



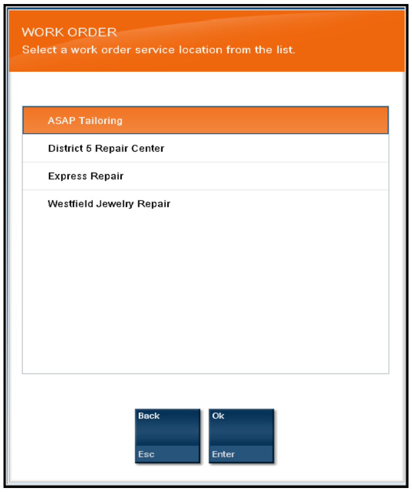
Enter search criteria.

Location #

Location Name

Figure 12-20: Work Order Location Search Form

4. The system displays a list of service locations. Select a location and press [Enter].



WORK ORDER

Select a work order service location from the list.

ASAP Tailoring

District 5 Repair Center

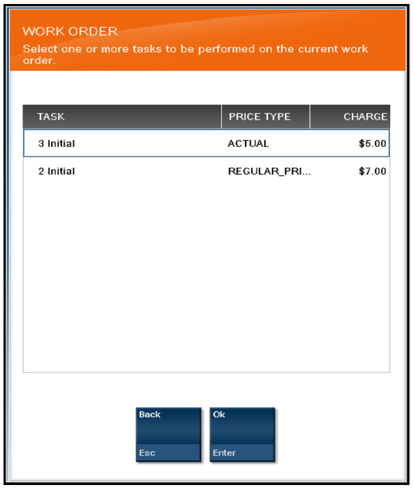
Express Repair

Westfield Jewelry Repair

Figure 12-21: Work Order Vendor List

To accommodate in-house work orders or a single location where work orders are performed, the system may 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.



WORK ORDER

Select one or more tasks to be performed on the current work order.

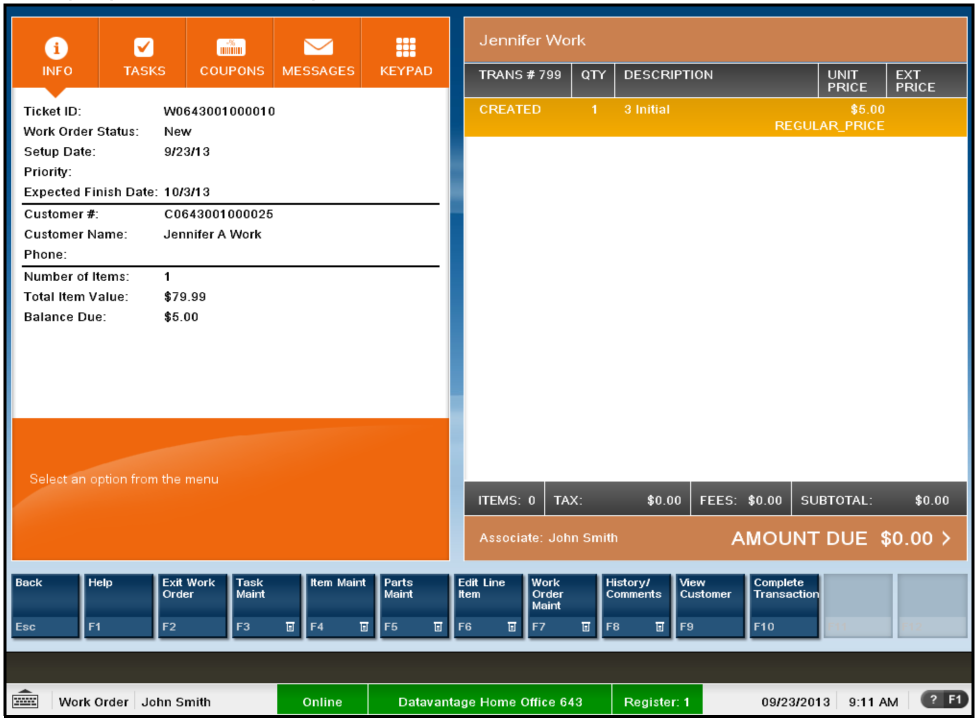
TASK	PRICE TYPE	CHARGE
3 Initial	ACTUAL	$5.00
2 Initial	REGULAR_PRI...	$7.00

Figure 12-22: Work Order Tasks List

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.



Ticket ID: W0643001000010
Work Order Status: New
Setup Date: 9/23/13
Priority:
Expected Finish Date: 10/3/13
Customer #: C0643001000025
Customer Name: Jennifer A Work
Phone:
Number of Items: 1
Total Item Value: $79.99
Balance Due: $5.00

Select an option from the menu

Jennifer Work

TRANS # 799	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
CREATED	1	3 Initial	$5.00 REGULAR_PRICE	

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Smith AMOUNT DUE $0.00

Work Order John Smith Online Datavantage Home Office 643 Register: 1 09/23/2013 9:11 AM ? F1

Figure 12-23: Work Order Summary Information

7. You can modify the work order or complete the transaction:

> *You cannot order off of a Wish List when creating a Work Order. You can, however, add and remove wish list items by selecting **View Customer** and then the **Wish List** tab (see "Purchasing Wish List Item(s)" on page 43).*

To **modify** the work order and add additional information, select from the following options as needed:

Refer to "Modifying a Work Order" on page 326 for detailed information about each of the options shown here.

☐ To **complete** this work order setup process, select one the following options:

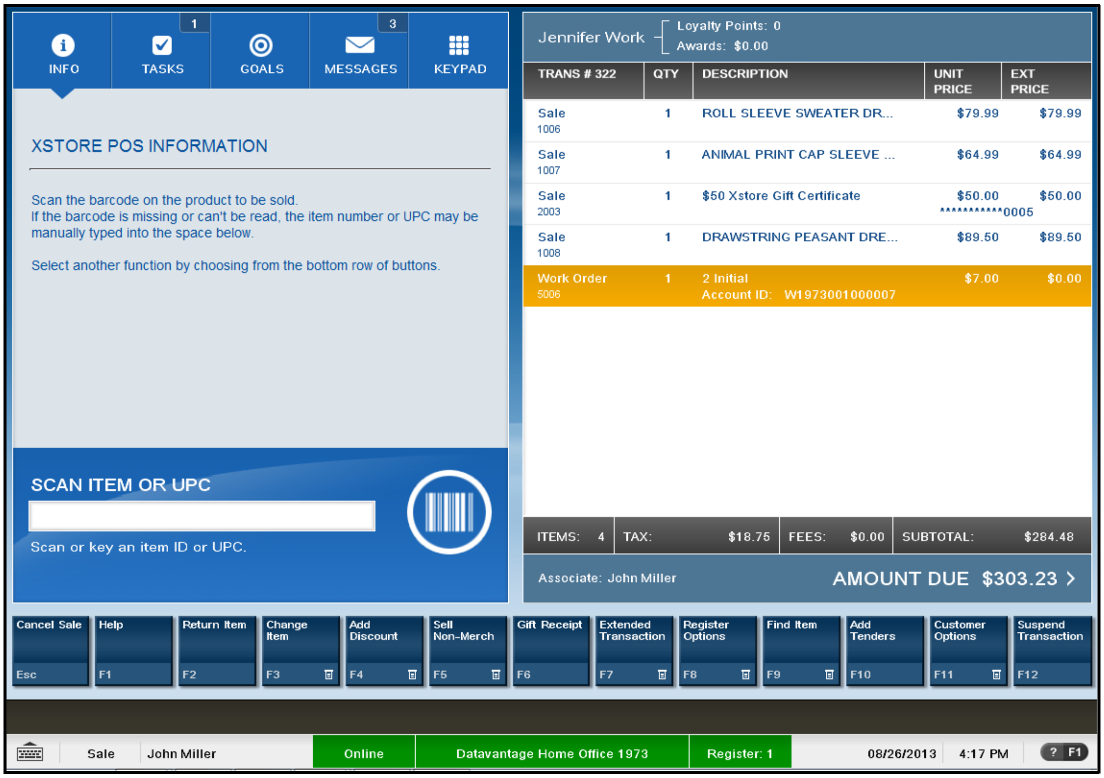
- ○ Select the **Add Tender** option or the **Complete Transaction** option to complete and tender the transaction. If prompted for a work order deposit, enter a deposit amount or accept the default amount and tender the transaction.

  <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.

> *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.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Scan or key an item ID or UPC.

Jennifer Work
Loyalty Points: 0
Awards: $0.00

TRANS # 322	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99
Sale 1007	1	ANIMAL PRINT CAP SLEEVE ...	$64.99	$64.99
Sale 2003	1	$50 Xstore Gift Certificate	$50.00 ***********0005	$50.00
Sale 1008	1	DRAWSTRING PEASANT DRE...	$89.50	$89.50
Work Order 5006	1	2 Initial Account ID: W1973001000007	$7.00	$0.00

ITEMS: 4 TAX: $18.75 FEES: $0.00 SUBTOTAL: $284.48

Associate: John Miller AMOUNT DUE $303.23

Sale John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 4:17 PM

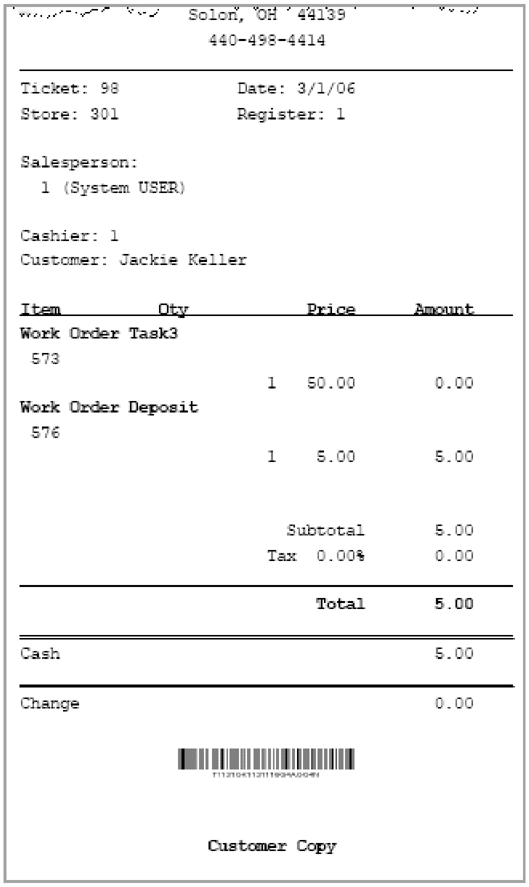
Figure 12-24: Sale Screen - Work Order Setup Account Information

When you tender the transaction, the system creates receipts as required by your store's policy.

> *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 XstoreManager's Guide for more information.*

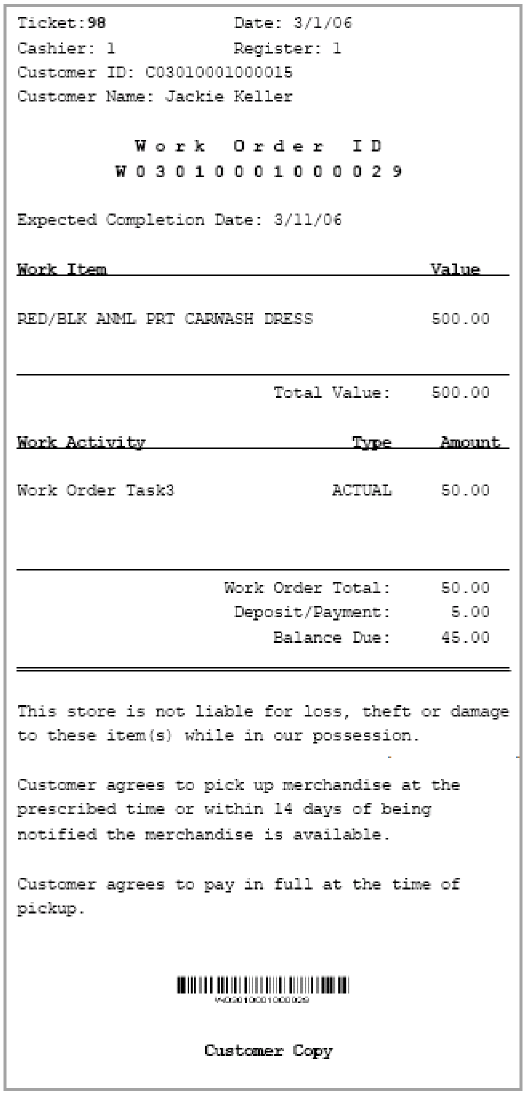
Receipt Samples:

Customer Sale Receipt Sample



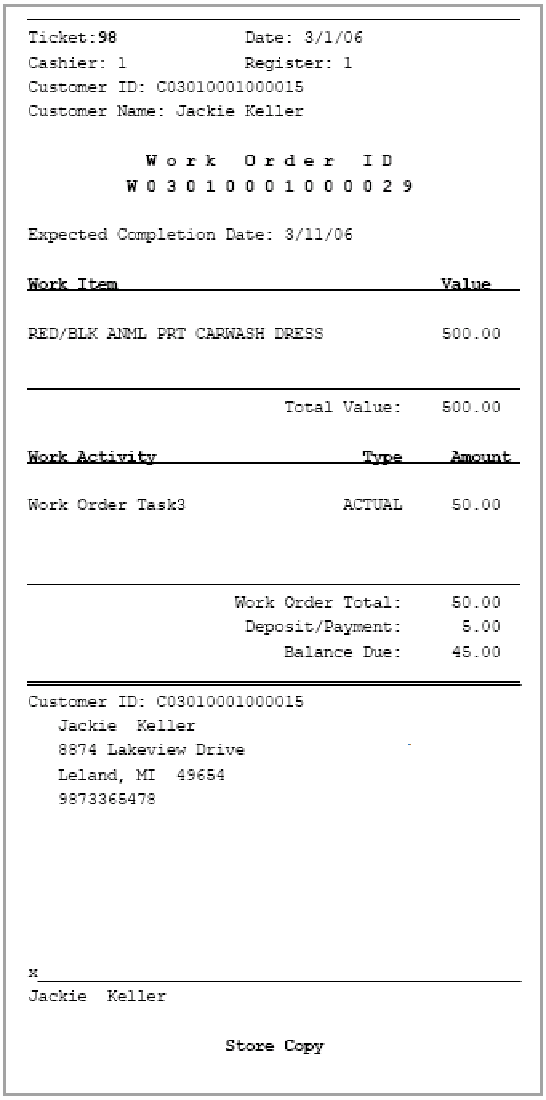
```
                  Solon, OH 44139
                   440-498-4414

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
```

Work Order Receipt, Customer Copy Sample



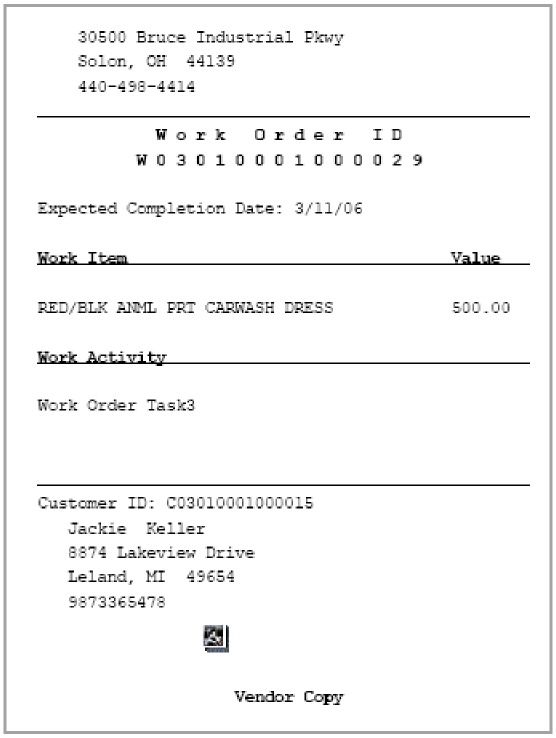
```
Ticket:98            Date: 3/1/06
Cashier: 1           Register: 1
Customer ID: C03010001000015
Customer Name: Jackie Keller

            Work Order ID
          W03010001000029

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
```

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
```

Work Order Receipt, Vendor Copy Sample



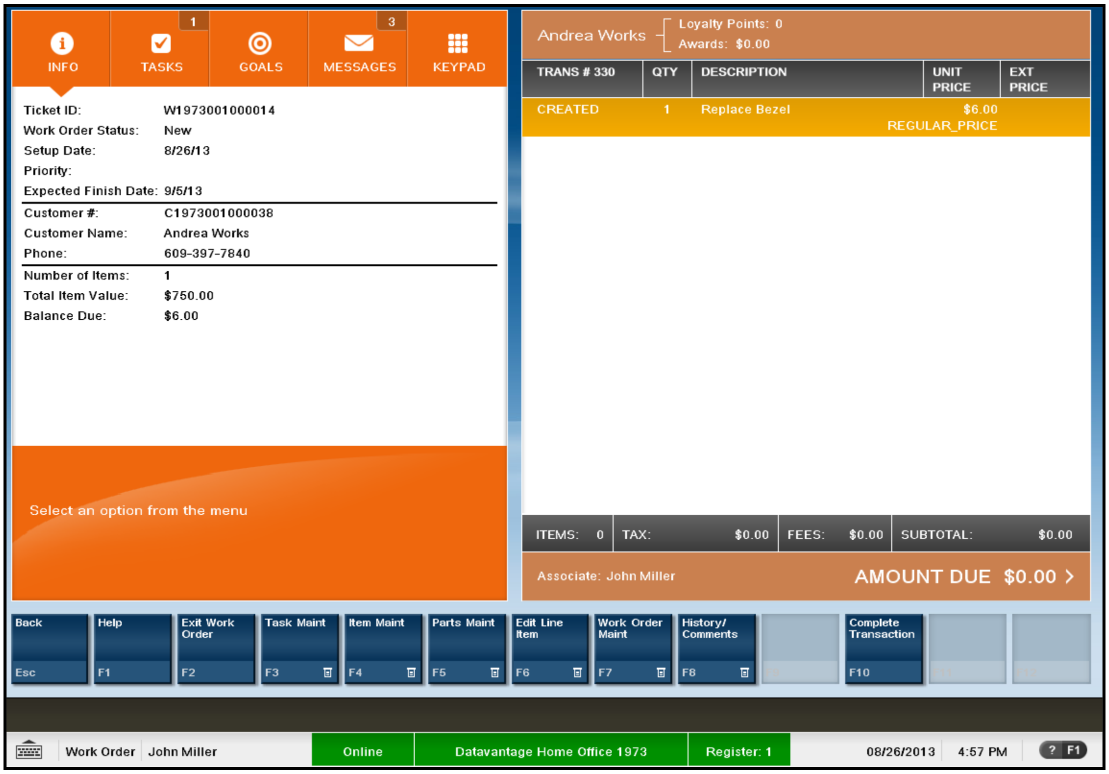
```
    30500 Bruce Industrial Pkwy
    Solon, OH  44139
    440-498-4414

            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

Work Activity

Work Order Task3

Customer ID: C03010001000015
   Jackie  Keller
   8874 Lakeview Drive
   Leland, MI  49654
   9873365478

                    Vendor Copy
```

Modifying a Work Order

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, select **Extended Transaction**.
3. At the Extended Transaction menu, select **Work Orders**. If a customer is associated with the transaction, Xstore 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 menu, select the **Task Maint** option.



Ticket ID: W1973001000014
Work Order Status: New
Setup Date: 8/26/13
Priority:
Expected Finish Date: 9/5/13

Customer #: C1973001000038
Customer Name: Andrea Works
Phone: 609-397-7840

Number of Items: 1
Total Item Value: $750.00
Balance Due: $6.00

Select an option from the menu

Andrea Works
Loyalty Points: 0
Awards: $0.00

TRANS # 330	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
CREATED	1	Replace Bezel	$6.00 REGULAR_PRICE	

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Miller AMOUNT DUE $0.00

Work Order John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 4:57 PM

Figure 12-25: 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.

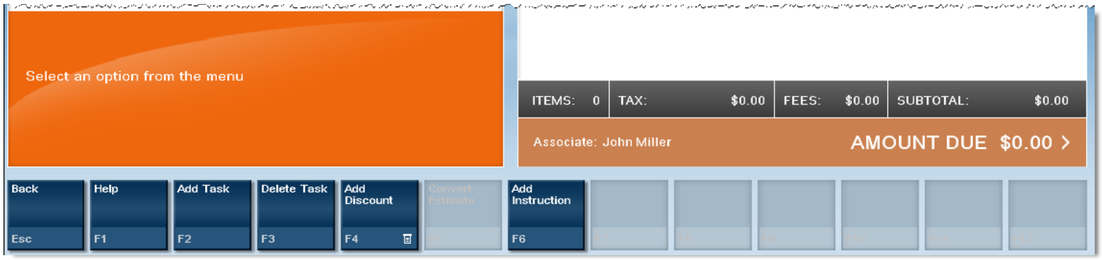


Figure 12-26: Task Maintenance Menu

> *The status of the work order (shipped, received, etc.) determines the options available here.*

The following **Task Maintenance** options are available:

- **Add Task** - Select this option to create an additional task on the work order.
  - **a.** The system displays the work order tasks that are available for the work order service location.
  - **b.** Select a task from the list and press [Enter].
  - **c.** The system adds the new task to the work order.
- **Delete Task** - Select this option to remove a task from the work order.
  - **a.** The system displays a list of the tasks on the current work order.
  - **b.** Select the task to be deleted from the work order and press [Enter].
  - **c.** The system removes the task by voiding the line item and any associated information from the work order.
- **Add Discount** - Select this option to add a discount to the work order task.
  - **a.** The system displays a list of discounts that may be applied to the work order task.
  - **b.** Select the type of discount to be applied to the work order task and press [Enter].
  - **c.** Select the task to be discounted and press [Enter].
  - **d.** Select the discount from the list of available discounts and press [Enter].
  - **e.** If prompted, select a reason for the discount, and enter any other information as needed when prompted.
  - **f.** The system applies the discount to the task (if permitted by store policy).
- **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.

The Convert Estimate option is only available when an estimated task is on the work order.

a. The system displays a list of the tasks that have estimated costs on the current work order.

b. Select the task to be converted to an actual cost amount and press [Enter].

c. The system displays a list of the tasks with actual costs that are applicable to the work order category (repairs, alterations, etc.).

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.

d. Select the most appropriate task and its actual cost for the work order and press [Enter].

e. 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.

a. The system displays a list of the tasks on the current work order.

b. Select the task to be associated with the instructions and press [Enter].

c. 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.

d. 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 5 on page 311.

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, select **Extended Transaction**.
3. At the Extended Transaction menu, select **Work Orders**. If a customer is associated with the transaction, Xstore 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 12-25, "Work Order Menu," on page 326).

   The following **Item Maintenance** options are available:

Select an option from the menu

ITEMS: 0 | TAX: $0.00 | FEES: $0.00 | SUBTOTAL: $0.00

Associate: John Miller

AMOUNT DUE $0.00

Figure 12-27: Item Maintenance Menu -Delete Not Available

- ☐ **Add Item** - Select this option to add additional items to the work order.
  1) 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 4 on page 311 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.

> *The Delete Item option is only available when there are two or more items on the work order.*

    1) 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) The system displays a list of the items on the current work order.
    2) Select the item you want to change and press [Enter].
    3) The system prompts you to enter a new value for the selected item.
    4) Enter the new value and press [Enter].
    5) The system updates the value of the item on the work order.
- ☐ **Edit Item Description** - Select this option to change the text description of an item on the work order.
    1) The system displays a list of the items on the current work order.
    2) Select the item you want to change and press [Enter].
    3) The system prompts you to enter a new text description for the selected item.
    4) Enter the new description and press [Enter].
    5) 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, select **Extended Transaction**.
3. At the Extended Transaction menu, select **Work Orders**. If a customer is associated with the transaction, Xstore 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 12-25, “Work Order Menu,” on page 326), choose the **Parts Maint** option.

The following **Parts Maintenance** options are available:

Select an option from the menu

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Miller AMOUNT DUE $0.00

Figure 12-28: 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.
  - **a.** The system prompts for the part identifier to be added to the work order.
  - **b.** Enter or scan the item ID or UPC and press [Enter].
  - **c.** 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.

> *The **Delete Parts** option is only available when a part has been added to this account.*

  - **a.** The system displays a list of the supplementary parts on the current work order.
  - **b.** Select the supplementary part to be deleted from the work order and press [Enter].
  - **c.** 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, select **Extended Transaction**.
3. At the Extended Transaction menu, select **Work Orders**. If a customer is associated with the transaction, Xstore 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. From the Work Order menu (Figure 12-25, "Work Order Menu," on page 326), choose the **Edit Line Item** option.

The following **Edit Line Item** options are available:

Select an option from the menu

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Miller AMOUNT DUE $0.00

Figure 12-29: Edit Line Item Menu

- **Change Quantity** - Select this option to change the quantity of an item.
  - **a.** The system displays a list of the line items on the current work order.
  - **b.** Select the line item to be changed and press [Enter].
  - **c.** The system prompts you to enter a new quantity for the selected item.
  - **d.** Enter the new quantity and press [Enter].
  - **e.** The system updates the line item quantity on the work order.

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.
  - **a.** The system displays a list of the line items on the current work order.
  - **b.** Select the line item to be changed and press [Enter].
  - **c.** The system prompts you to enter a new price for the selected item.
  - **d.** Enter the new price and press [Enter].
  - **e.** 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 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.
  - **a.** The system displays a list of the line items on the current work order.
  - **b.** Select the line item to be changed and press [Enter].
  - **c.** 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" on page 227 for procedural information.
  - **d.** Enter the information as required; the system updates the line item tax on the work order.

Work Order Maintenance

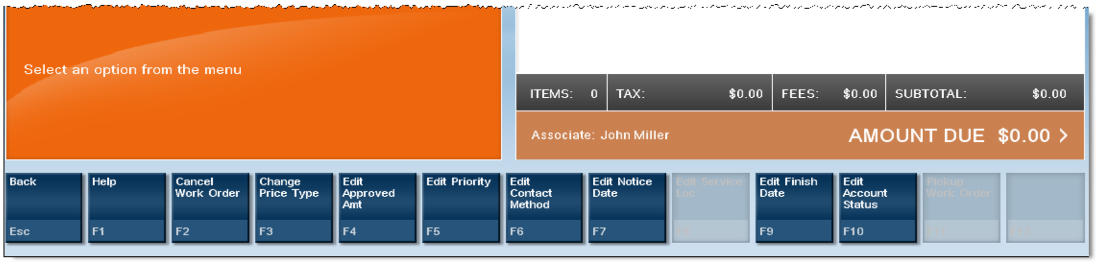
Work Order maintenance functions allow you to add, change, and maintain work orders.

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, select **Extended Transaction**.
3. At the Extended Transaction menu, select **Work Orders**. If a customer is associated with the transaction, Xstore 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 Figure 12-25, "Work Order Menu," on page 326, choose the **Work Order Maint** option.

   The following **Work Order Maintenance** options are available:



Select an option from the menu

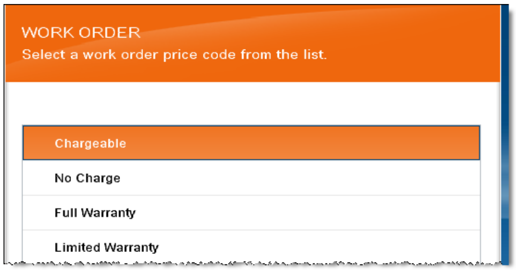
ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Miller AMOUNT DUE $0.00

Figure 12-30: Work Order Maintenance Menu

- **Cancel Work Order** - Select this option from the Work Order Maint menu to cancel an existing work order.
   a. With the work order displayed, select the **Cancel Work Order** option.
   b. At the prompt to confirm the work order cancellation, select **Yes**.
   c. 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**.

a. The system displays the work order price code list.



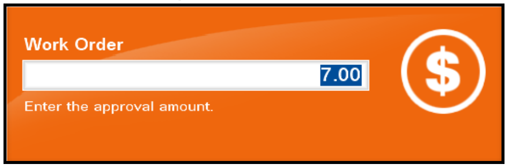
WORK ORDER
Select a work order price code from the list.

Figure 12-31: Work Order Price Code List

b. Select a price code from the list and press [Enter].

c. The system updates the current work order charge to the new price.

- **Edit Approved Amount** - Select this option to change the amount that has been pre-approved by the customer for the repair or alteration.



Work Order
7.00
Enter the approval amount.

Figure 12-32: Prompt for Customer-Approved Amount

a. The system prompts for the amount approved by the customer for this work order. The amount currently approved by the customer displays by default. The new amount entered here must be greater than the amount for any tasks on the work order, if applicable.

b. Enter the amount above which the customer must be notified before actual work can be done to the item and press [Enter].

c. The system updates the current work order with the new amount.

- **Edit Priority** - Select this option to choose a different priority. The default priority is "Normal" when the work order is set up.

a. The system displays a list of priority levels for a work order. For example, Normal, Priority, and Urgent.

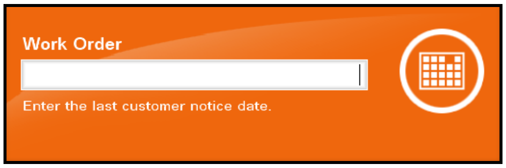
WORK ORDER
Select a work order priority code.

Figure 12-33: Priority Levels

b. Select a new priority from the list and press [Enter].

c. The system updates the current work order with the new priority.

- **Edit Notice Date** - Select this option to change the date that a notice was sent to the customer.
  - **a.** The system prompts for the date the customer was last notified about this work order.



Work Order

Enter the last customer notice date.

Figure 12-34: Customer Notice Date Entry Prompt

  - **b.** Enter the date the customer was most recently notified about this work order and press [Enter].
  - **c.** The system updates the current work order with the new customer notification date.

- **Edit Finish Date** - Select this option to change the date the finished item has been promised to the customer. The date can be changed from the default date assigned when the work order was set up originally.
  - **a.** The system prompts for the new date the work order repair/alteration will be completed).

Work Order

08/29/2013

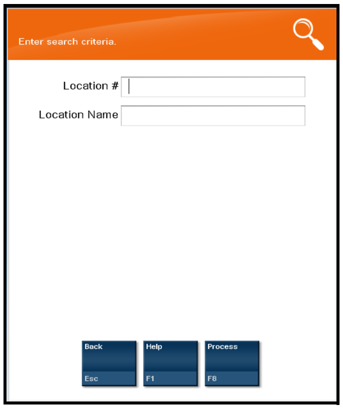
Enter the expected finish date.

Figure 12-35: Prompt for a New Expected Finish Date

  - **b.** Enter the date this work order will be finished and press [Enter]. This must be a future date.
  - **c.** The system updates the current work order with the new date the item repair/ alteration will be completed.

- **Edit Service Location** - Select this option to choose a different location where work will be performed.

a. 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.



Enter search criteria.

Location #

Location Name

Figure 12-36: Service Location Search Form

b. When the list of service locations displays, select a location and press [Enter].

c. The system updates the current work order with the new service location.

- **Edit Contact Method** - Select this option to modify the method of communication used to contact a customer.

a. The system displays a list of customer contact methods. For example, Cell Phone, Home Phone, Email, etc.

WORK ORDER
Select a work order contact method code.

Home	440-488-3153
Work	440-336-5547
Mobile	440-397-3345

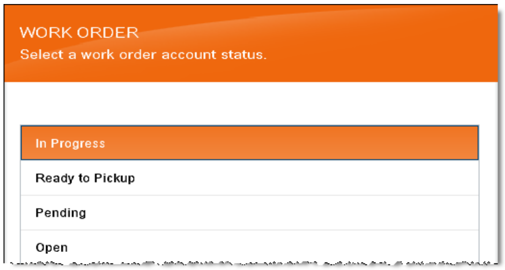
Figure 12-37: Contact Method List

b. Select a contact method from the list and press [Enter].

c. The system updates the current work order with the new customer contact method information.

- **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" on page 340 for more information.
- **Edit Account Status** - Select this option to choose a different status for the work order.

a. The system displays a list of work order status options. For example, Ready For Pickup, In Progress, Pending, etc.



WORK ORDER

Select a work order account status.

Figure 12-38: Account Status List

b. Select a new work order status from the list and press [Enter].

c. The system updates the status of the current work order.

> *If you try to change the status of the work order to Ready For Pickup, the system notifies you if there are any tasks with estimated prices on the work order. You must convert estimated prices to actual prices before you can continue. Acknowledge this prompt and convert all estimated prices to actual prices. Refer to "Task Maintenance" on page 327 for the procedure to make the conversion.*

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 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, select **Extended Transaction**.
3. At the Extended Transaction menu, select **Work Orders**. If a customer is associated with the transaction, Xstore 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 Figure 12-25, "Work Order Menu," on page 326, choose the **History/Comments** option.

The following **History/Comments** functions are available:

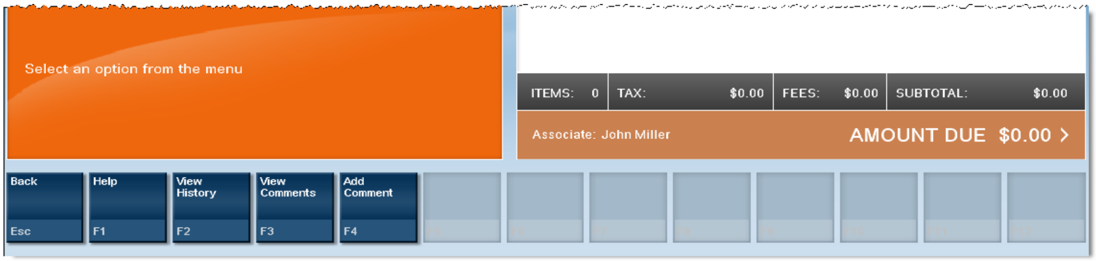
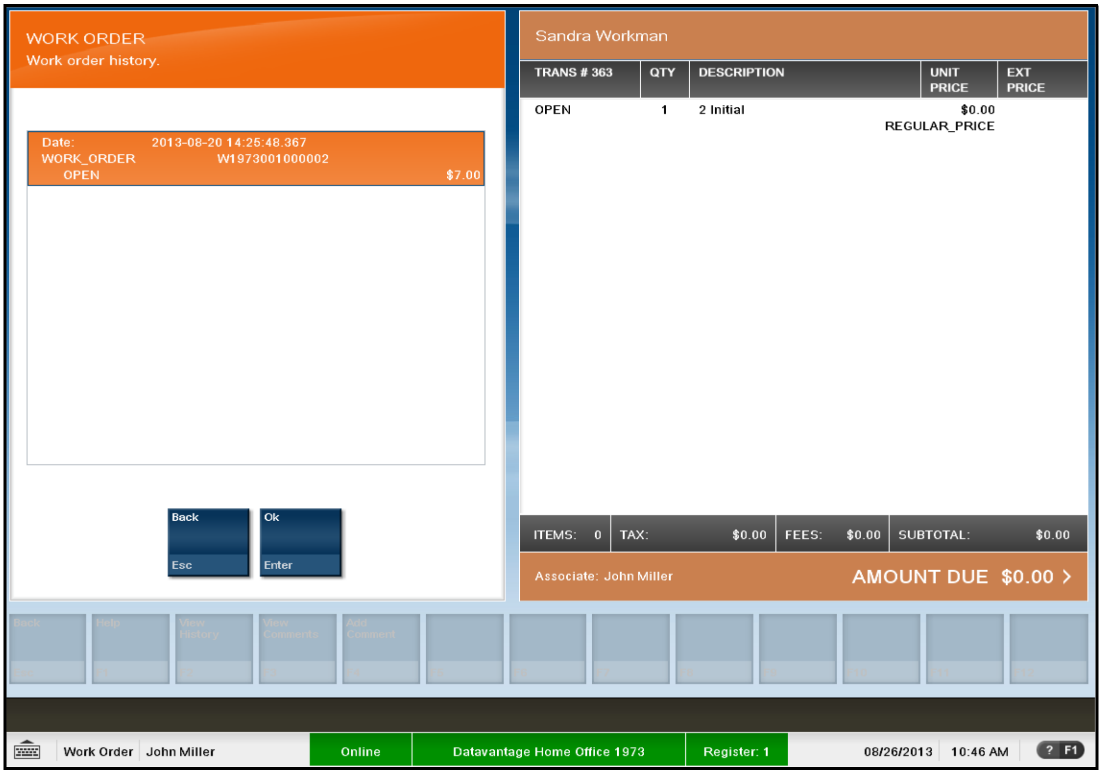


Figure 12-39: History/Comments Menu

- **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.

  a. 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.



Date: 2013-08-20 14:25:48.367
WORK_ORDER W1973001000002
OPEN $7.00

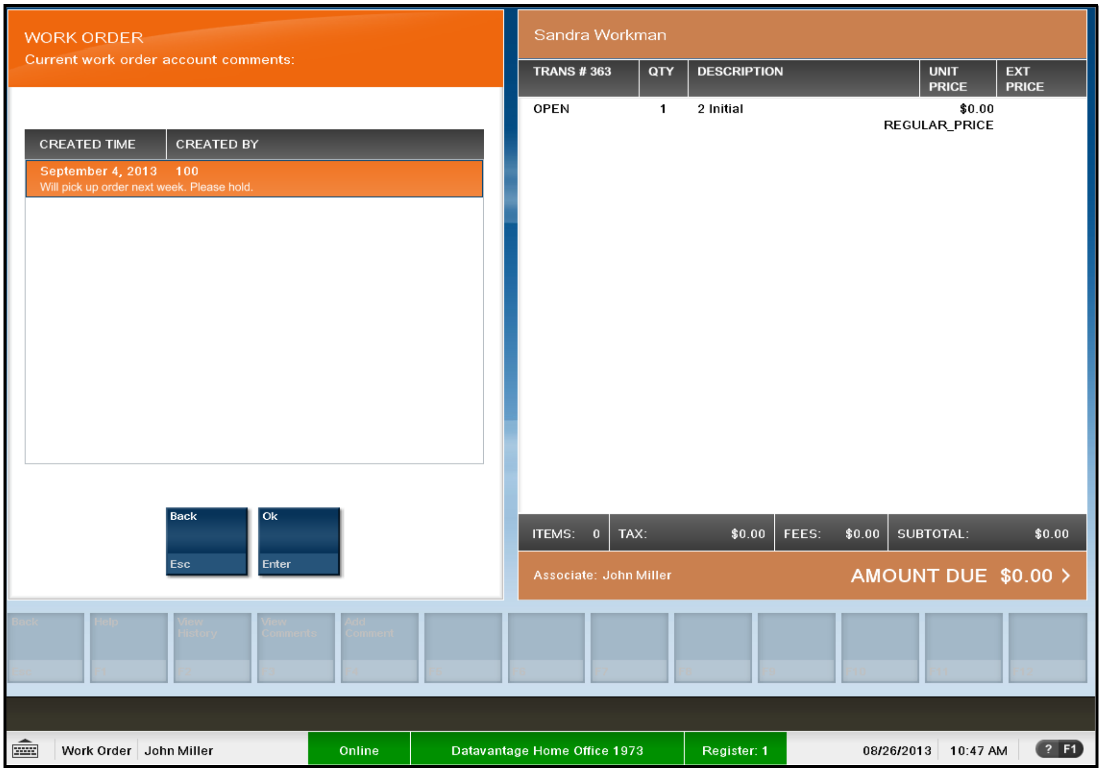
TRANS # 363	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
OPEN	1	2 Initial	$0.00 REGULAR_PRICE	

Figure 12-40: Work Order History Screen

  b. 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.

  a. 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.



Current work order account comments:

CREATED TIME	CREATED BY
September 4, 2013 Will pick up order next week. Please hold.	100

Sandra Workman

TRANS # 363	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
OPEN	1	2 Initial	$0.00 REGULAR_PRICE	

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Miller AMOUNT DUE $0.00

Work Order John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 10:47 AM

Figure 12-41: Work Order Comments Display

  b. 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.

  a. The system displays a free-text comment form.

Enter work order comment.

Ask if metalic thread is available for this item.

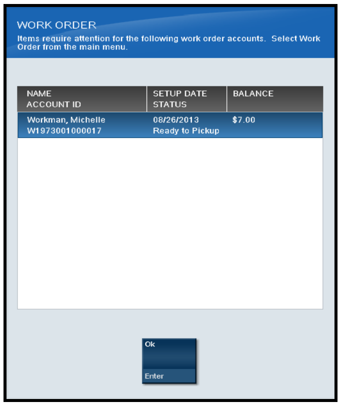
Figure 12-42: Entry Form for Work Order Comments

  b. Type a comment to be associated with this work order account.

  c. 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.

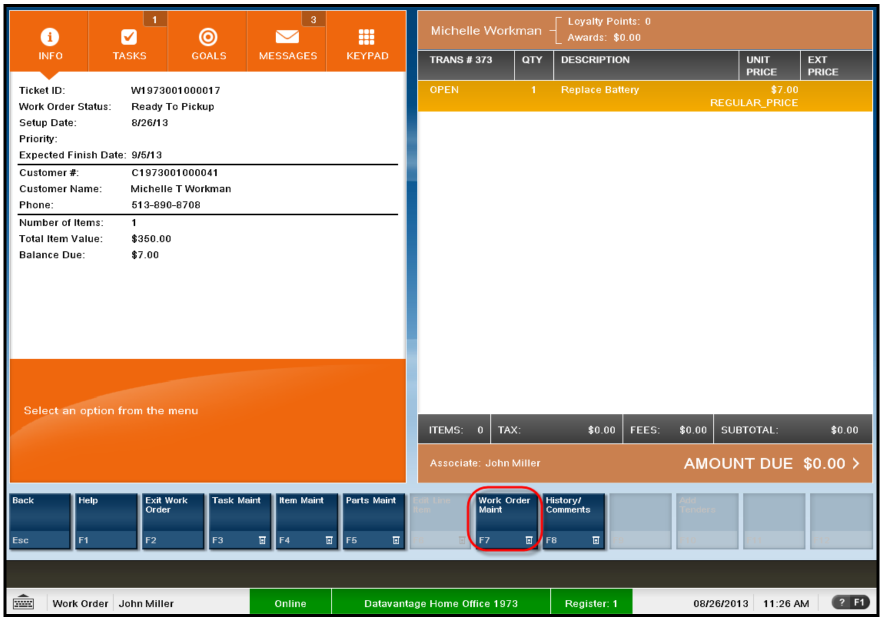


Items require attention for the following work order accounts. Select Work Order from the main menu.

NAME ACCOUNT ID	SETUP DATE STATUS	BALANCE
Workman, Michelle W1973001000017	08/26/2013 Ready to Pickup	$7.00

Figure 12-43: 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 Maintenance** option.



Ticket ID: W1973001000017
Work Order Status: Ready To Pickup
Setup Date: 8/26/13
Priority:
Expected Finish Date: 9/5/13
Customer #: C1973001000041
Customer Name: Michelle T Workman
Phone: 513-890-8708
Number of Items: 1
Total Item Value: $350.00
Balance Due: $7.00

Select an option from the menu

Michelle Workman
Loyalty Points: 0
Awards: $0.00

TRANS # 373	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
OPEN	1	Replace Battery	$7.00 REGULAR_PRICE	

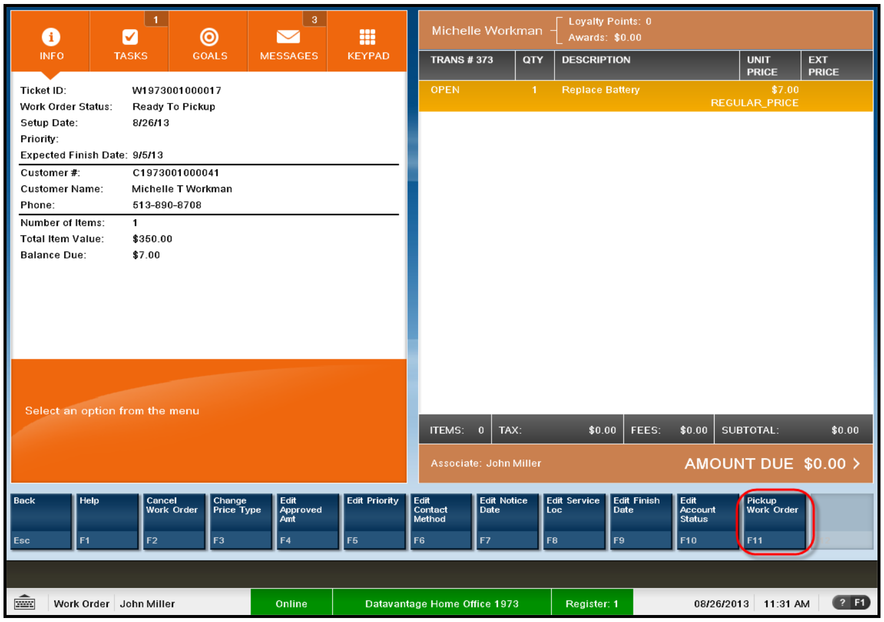
ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Miller AMOUNT DUE $0.00

Work Order John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 11:26 AM

Figure 12-44: Work Order - Ready For Pickup Status

4. From the Work Order Maintenance menu, select the **Pickup Work Order** menu button option.



Ticket ID: W1973001000017
Work Order Status: Ready To Pickup
Setup Date: 8/26/13
Priority:
Expected Finish Date: 9/5/13
Customer #: C1973001000041
Customer Name: Michelle T Workman
Phone: 513-890-8708
Number of Items: 1
Total Item Value: $350.00
Balance Due: $7.00

Select an option from the menu

Michelle Workman
Loyalty Points: 0
Awards: $0.00

TRANS # 373	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
OPEN	1	Replace Battery	$7.00 REGULAR_PRICE	

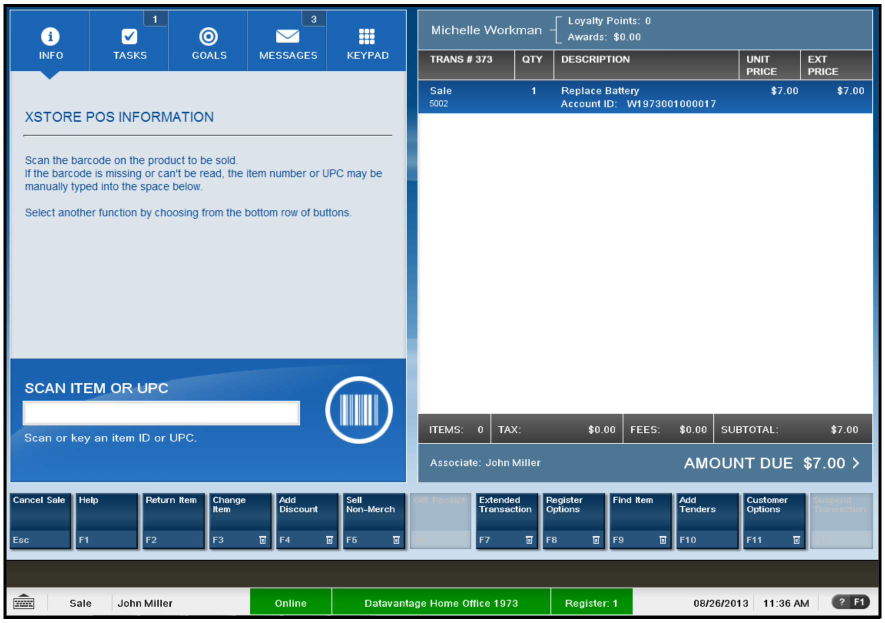
ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Miller AMOUNT DUE $0.00

Work Order | John Miller | Online | Datavantage Home Office 1973 | Register: 1 | 08/26/2013 11:31 AM

Figure 12-45: 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.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Scan or key an item ID or UPC.

Michelle Workman
Loyalty Points: 0
Awards: $0.00

TRANS # 373	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 5002	1	Replace Battery Account ID: W1973001000017	$7.00	$7.00

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $7.00

Associate: John Miller AMOUNT DUE $7.00

Sale | John Miller | Online | Datavantage Home Office 1973 | Register: 1 | 08/26/2013 11:36 AM

Figure 12-46: Work Order on the Sale Screen

CHAPTER 13

Warranty and Service Plan Transactions

Overview

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.

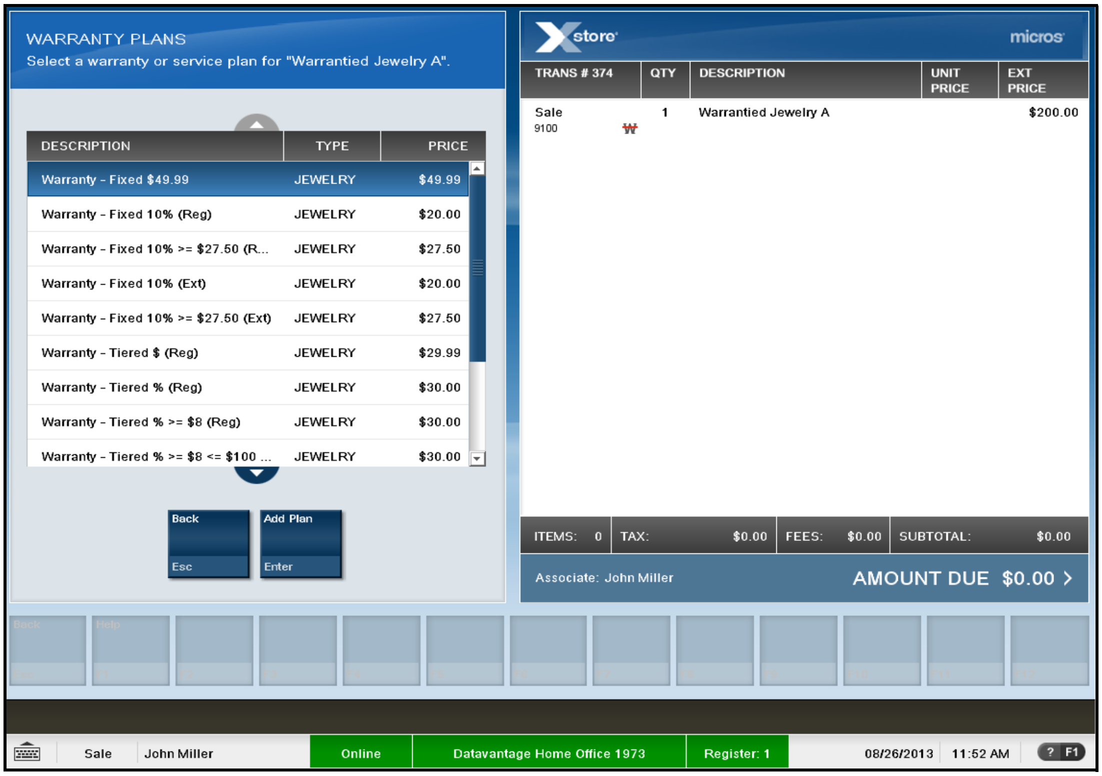
Additional benefits may be offered during the manufacturer's warranty and throughout the entire coverage period. A warranty/service plan may be offered to a customer during a sales transaction. It may also be used to bring the customer back to the store when the plan includes an option for periodic merchandise inspections.

Warranty/service plan specifications are defined and downloaded from the home office.

> *The terms warranty/service plan, warranty plan, warranty, and plan are used interchangeably in this guide.*

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.



WARRANTY PLANS
Select a warranty or service plan for "Warrantied Jewelry A".

DESCRIPTION	TYPE	PRICE
Warranty - Fixed $49.99	JEWELRY	$49.99
Warranty - Fixed 10% (Reg)	JEWELRY	$20.00
Warranty - Fixed 10% >= $27.50 (R...	JEWELRY	$27.50
Warranty - Fixed 10% (Ext)	JEWELRY	$20.00
Warranty - Fixed 10% >= $27.50 (Ext)	JEWELRY	$27.50
Warranty - Tiered $ (Reg)	JEWELRY	$29.99
Warranty - Tiered % (Reg)	JEWELRY	$30.00
Warranty - Tiered % >= $8 (Reg)	JEWELRY	$30.00
Warranty - Tiered % >= $8 <= $100 ...	JEWELRY	$30.00

TRANS # 374	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 9100 ₩	1	Warrantied Jewelry A		$200.00

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Miller AMOUNT DUE $0.00

Sale John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 11:52 AM

Figure 13-1: Warranty Plans

Items that are eligible for warranty plans but have not been associated with any plan show the No Warranty Purchased ₩ symbol on the View Port.

Only warranty plans that apply to the item are shown in this list.

Table 13-1: *Warranty Plans*

If the customer...	then...
wants to purchase a warranty/service plan,	**a.** select a warranty plan from the list. See Figure 13-1 on page 344. **b.** select the **Add Plan** option to add the warranty item (as a non-merchandise item) to the sale. **c.** go to step 2 below.
does not want to purchase a warranty/service plan,	**a.** press [Esc] to return to the sale and continue selling items. **Note:** The “No Warranty Purchased” symbol ~~W~~ indicates that the warranty for this item was declined. **b.** tender the transaction when the sale is complete.

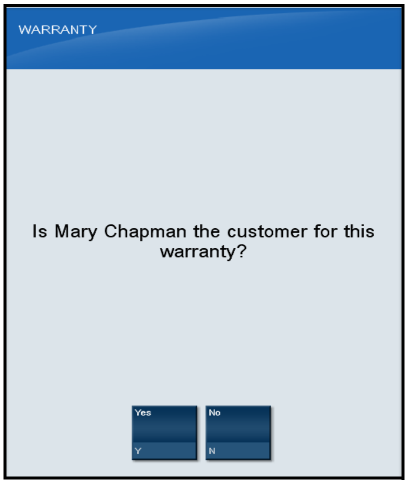
> If the customer decides to purchase the warranty after you escape from the warranty plan screen—but before tendering—you can add the warranty to the item from the *Extended Transaction* menu. Refer to “To Add a Warranty/Service Plan to an Item— In the Current Transaction” on page 350 for the procedure.

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.

> *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.

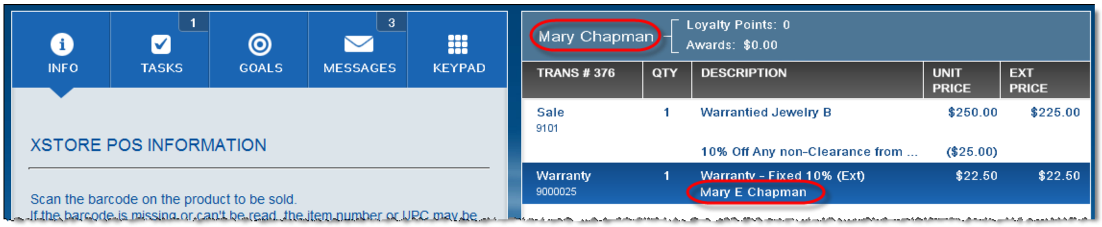


WARRANTY

Is Mary Chapman the customer for this warranty?

Figure 13-2: 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.



XSTORE POS INFORMATION

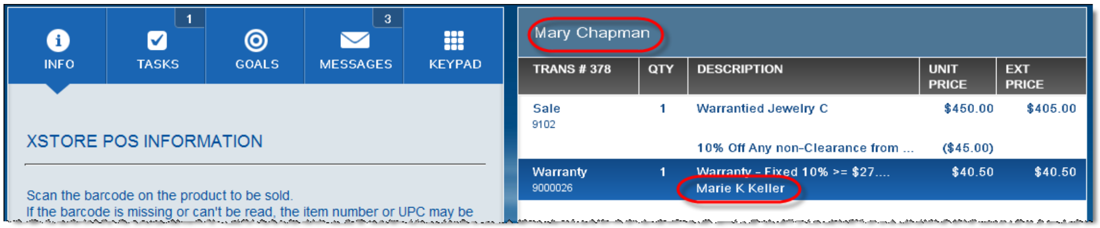
Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be

Mary Chapman
Loyalty Points: 0
Awards: $0.00

TRANS # 376	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 9101	1	Warrantied Jewelry B	$250.00	$225.00
		10% Off Any non-Clearance from ...	($25.00)	
Warranty 9000025	1	Warranty - Fixed 10% (Ext) Mary E Chapman	$22.50	$22.50

Figure 13-3: 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.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be

Mary Chapman

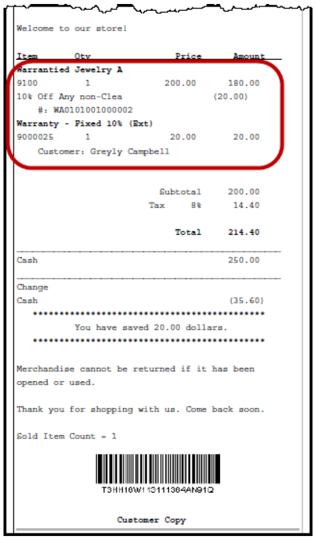
TRANS # 378	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 9102	1	Warrantied Jewelry C	$450.00	$405.00
		10% Off Any non-Clearance from ...	($45.00)	
Warranty 9000026	1	Warranty - Fixed 10% >= $27.... Marie K Keller	$40.50	$40.50

Figure 13-4: Sale Customer Different than the Warranty Plan Owner

<u>If no customer is currently associated with this sale</u>

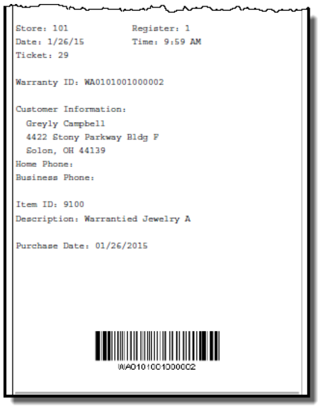
- When no customer is associated with this sale, the system prompts for warranty customer information.
    1) Enter the customer's information as required.
    2) The system prompts to confirm that this is the customer who will own the warranty plan.
        - Select **Yes** if this is the customer to 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.



```
Welcome to our store!

Item      Qty                Price     Amount
Warrantied Jewelry A
9100        1               200.00     180.00
10% Off Any non-Clea                  (20.00)
   #: WA0101001000002
Warranty - Pixed 10% (Ext)
9000025     1                20.00      20.00
   Customer: Greyly Campbell

                          Subtotal     200.00
                       Tax      8%      14.40

                             Total     214.40
---------------------------------------------
Cash                                   250.00
---------------------------------------------
Change
Cash                                  (35.60)
   ****************************************
        You have saved 20.00 dollars.
   ****************************************

Merchandise cannot be returned if it has been
opened or used.

Thank you for shopping with us. Come back soon.

Sold Item Count = 1

              T3HH16W113111364AN91Q

                  Customer Copy
```

Figure 13-5: Customer Sale Receipt With Warranty Item Example



```
Store: 101            Register: 1
Date: 1/26/15         Time: 9:59 AM
Ticket: 29

Warranty ID: WA0101001000002

Customer Information:
  Greyly Campbell
  4422 Stony Parkway Bldg F
  Solon, OH 44139
Home Phone:
Business Phone:

Item ID: 9100
Description: Warrantied Jewelry A

Purchase Date: 01/26/2015




             WA0101001000002
```

Figure 13-6: Warranty Receipt Example

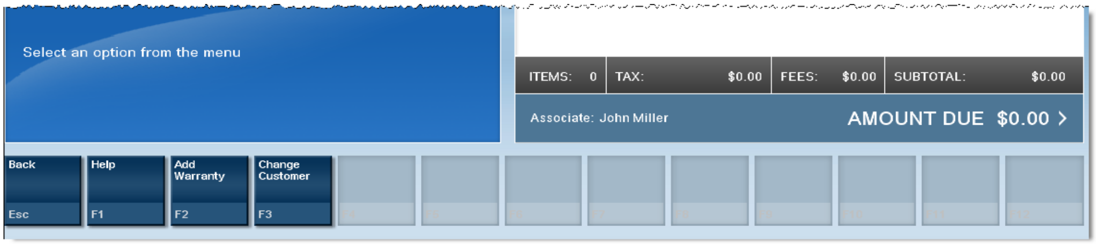
Adding a Warranty/Service Plan After a Purchase

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.

> *Warranty/Service Plans are only available for designated items as determined by the home office.*

1. In a sale transaction, select **Extended Transaction**.
2. Select the **Warranty** option to view the Warranty menu.

   You have the following options on the Warranty menu:



Select an option from the menu

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

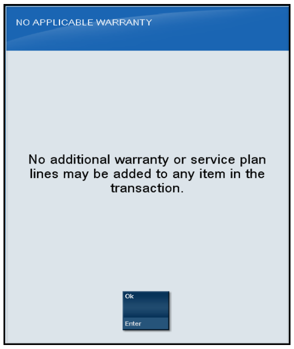
Associate: John Miller AMOUNT DUE $0.00

Figure 13-7: 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" on page 349.
- ☐ **Change Customer** - Select this option to change the owner of the warranty when the warranty information is displayed on the View Port. See "Changing the Warranty/Service Plan Customer" on page 358.

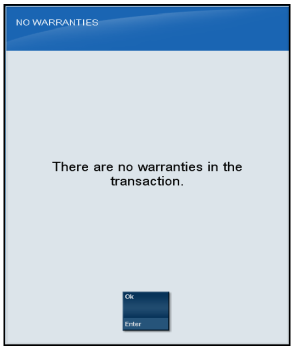
Validation prompts you may see

If you try to add a warranty/service plan to ineligible items, Xstore 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.*



No additional warranty or service plan lines may be added to any item in the transaction.

If you try to change warranty customer information in a transaction that does not include any warranties, Xstore displays a message indicating that there are no warranties in the transaction. Acknowledge this message by pressing [Enter] or selecting **Ok** *to continue.*



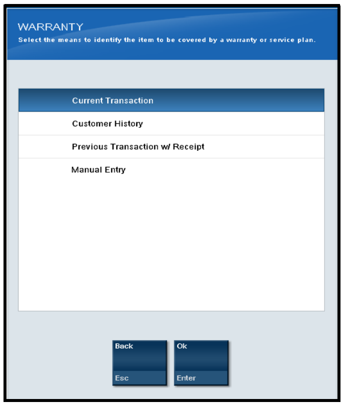
There are no warranties in the transaction.

Adding a Warranty/Service Plan to an Item

...continued from step 2 on page 348

1. Select the **Add Warranty** option from the Warranty menu. See Figure 13-7, “Warranty Menu,” on page 348.

   The system prompts you to select a source for locating a previously-purchased item that will be covered by a warranty/service plan:



Select the means to identify the item to be covered by a warranty or service plan.

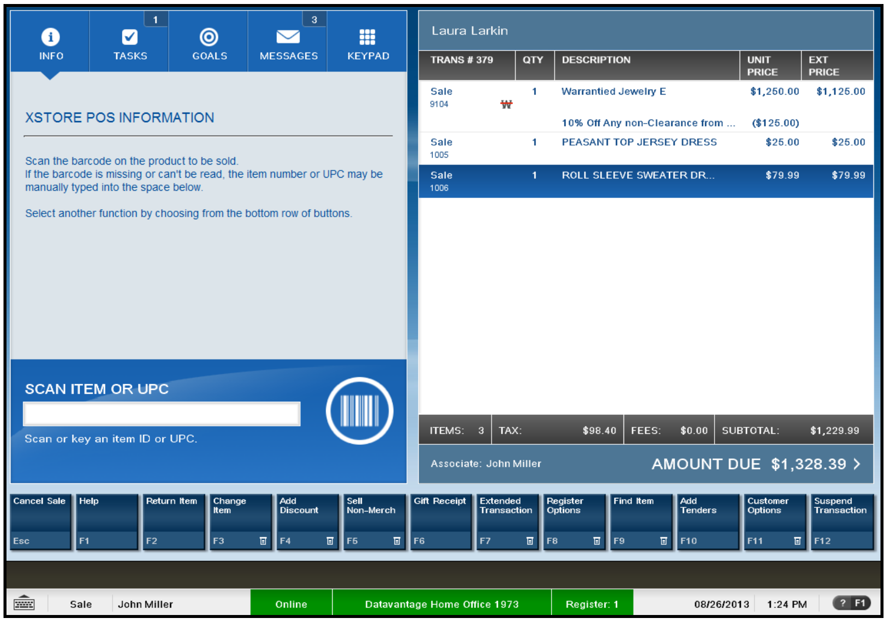
Figure 13-8: Add Item Warranty Options

- 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" on page 350.
- 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" on page 353.
- 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" on page 355.
- 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" on page 356.

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.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Scan or key an item ID or UPC.

Laura Larkin

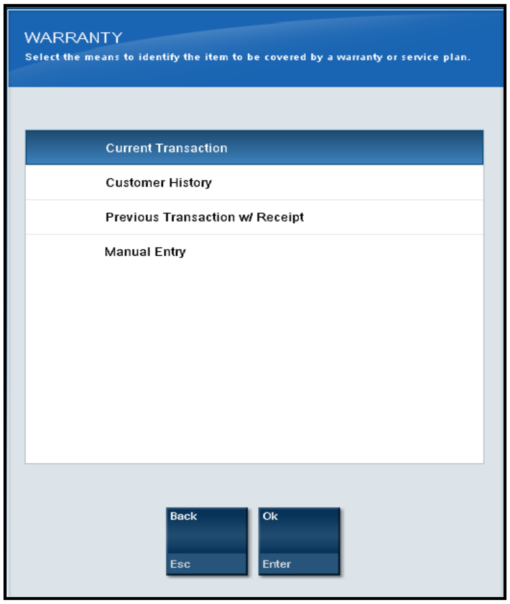
TRANS # 379		QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 9104	₩	1	Warrantied Jewelry E	$1,250.00	$1,125.00
			10% Off Any non-Clearance from ...	($125.00)	
Sale 1005		1	PEASANT TOP JERSEY DRESS	$25.00	$25.00
Sale 1006		1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99

ITEMS: 3 TAX: $98.40 FEES: $0.00 SUBTOTAL: $1,229.99

Associate: John Miller AMOUNT DUE $1,328.39

Figure 13-9: Sale With Declined Warranty Item

1. To purchase a warranty/service plan for this item, select **Extended Transaction** --> **Warranty** --> **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.



WARRANTY

Select the means to identify the item to be covered by a warranty or service plan.

Figure 13-10: 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].

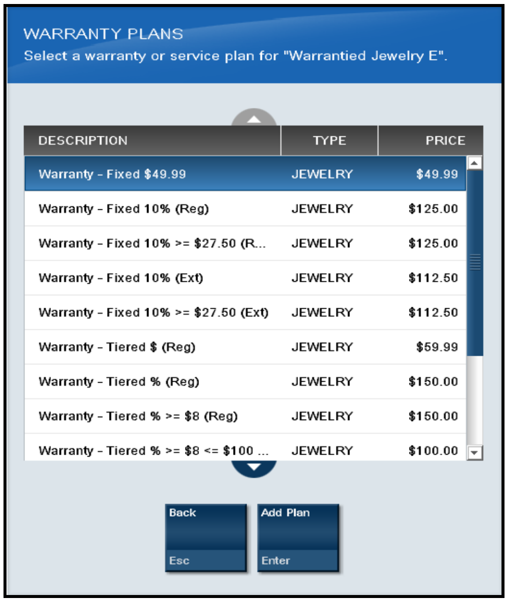
WARRANTY

Select the item to be covered by a warranty or service plan.

QTY	DESCRIPTION	PRICE
1	Warrantied Jewelry E	$1,125.00

Figure 13-11: 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 and select the **Add Plan** option to add the warranty plan (as a non-merchandise item) to the sale.



WARRANTY PLANS

Select a warranty or service plan for "Warrantied Jewelry E".

DESCRIPTION	TYPE	PRICE
Warranty - Fixed $49.99	JEWELRY	$49.99
Warranty - Fixed 10% (Reg)	JEWELRY	$125.00
Warranty - Fixed 10% >= $27.50 (R...	JEWELRY	$125.00
Warranty - Fixed 10% (Ext)	JEWELRY	$112.50
Warranty - Fixed 10% >= $27.50 (Ext)	JEWELRY	$112.50
Warranty - Tiered $ (Reg)	JEWELRY	$59.99
Warranty - Tiered % (Reg)	JEWELRY	$150.00
Warranty - Tiered % >= $8 (Reg)	JEWELRY	$150.00
Warranty - Tiered % >= $8 <= $100 ...	JEWELRY	$100.00

Figure 13-12: Warranty Plan Options for the Selected Item

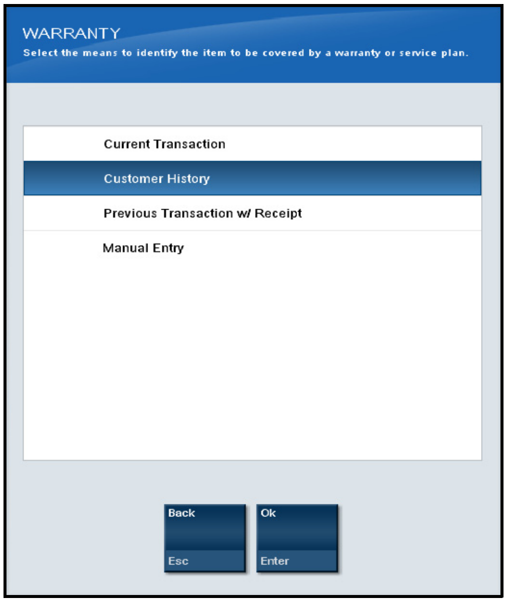
5. The system prompts for the customer to be associated with this warranty. Refer to step 2 on page 345 for more information about associating a customer with a warranty/service plan.

   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].



WARRANTY

Select the means to identify the item to be covered by a warranty or service plan.

Figure 13-13: 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].

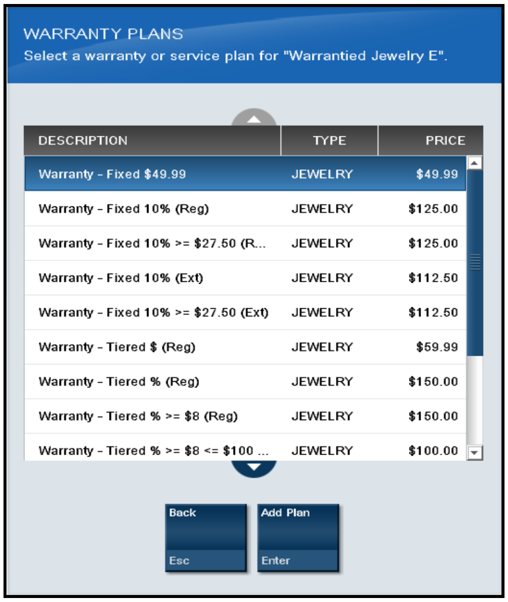
WARRANTY

Select the item to be covered by a warranty or service plan.

QTY	DESCRIPTION	PRICE
1	Warrantied Jewelry E	$1,125.00

Figure 13-14: 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, and select the **Add Plan** option to add the warranty plan (as a non-merchandise item) to the sale.



WARRANTY PLANS

Select a warranty or service plan for "Warrantied Jewelry E".

DESCRIPTION	TYPE	PRICE
Warranty - Fixed $49.99	JEWELRY	$49.99
Warranty - Fixed 10% (Reg)	JEWELRY	$125.00
Warranty - Fixed 10% >= $27.50 (R...	JEWELRY	$125.00
Warranty - Fixed 10% (Ext)	JEWELRY	$112.50
Warranty - Fixed 10% >= $27.50 (Ext)	JEWELRY	$112.50
Warranty - Tiered $ (Reg)	JEWELRY	$59.99
Warranty - Tiered % (Reg)	JEWELRY	$150.00
Warranty - Tiered % >= $8 (Reg)	JEWELRY	$150.00
Warranty - Tiered % >= $8 <= $100 ...	JEWELRY	$100.00

Figure 13-15: Warranty Plan Options for the Selected Item

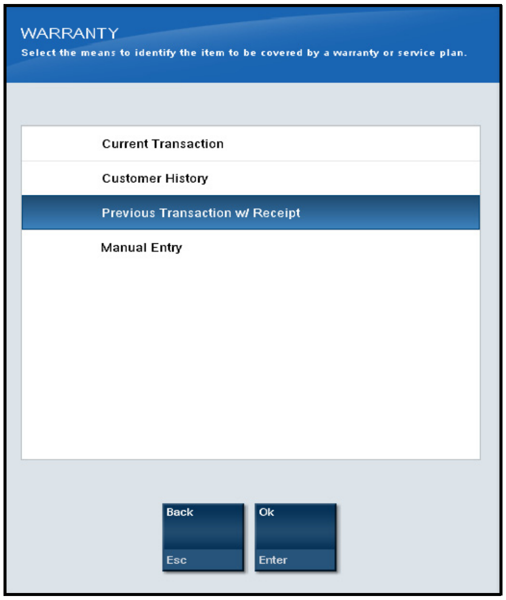
5. The system prompts for the customer to be associated with this warranty. Refer to step 2 on page 345 for more information about associating a customer with a warranty/service plan.

   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].



WARRANTY

Select the means to identify the item to be covered by a warranty or service plan.

Figure 13-16: 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.

WARRANTY

Select the item to be covered by a warranty or service plan.

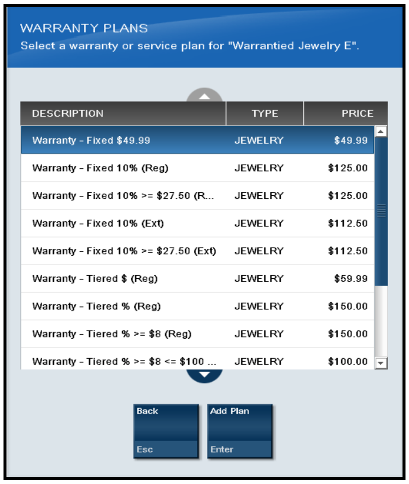
QTY	DESCRIPTION	PRICE
1	Warrantied Jewelry E	$1,125.00

Figure 13-17: Original Transaction Item(s) Eligible for a Warranty Plan

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.



WARRANTY PLANS

Select a warranty or service plan for "Warrantied Jewelry E".

DESCRIPTION	TYPE	PRICE
Warranty - Fixed $49.99	JEWELRY	$49.99
Warranty - Fixed 10% (Reg)	JEWELRY	$125.00
Warranty - Fixed 10% >= $27.50 (R...	JEWELRY	$125.00
Warranty - Fixed 10% (Ext)	JEWELRY	$112.50
Warranty - Fixed 10% >= $27.50 (Ext)	JEWELRY	$112.50
Warranty - Tiered $ (Reg)	JEWELRY	$59.99
Warranty - Tiered % (Reg)	JEWELRY	$150.00
Warranty - Tiered % >= $8 (Reg)	JEWELRY	$150.00
Warranty - Tiered % >= $8 <= $100 ...	JEWELRY	$100.00

Figure 13-18: 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 on page 345 for more information about associating a customer with a warranty/service plan.

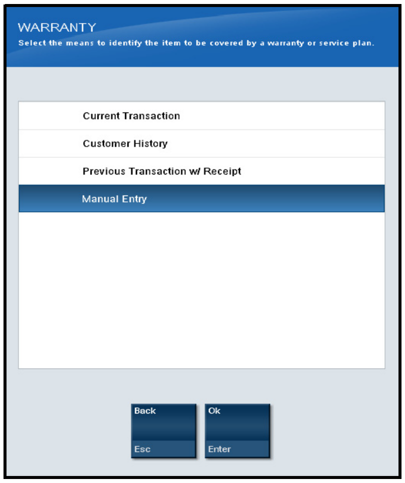
   When you tender the sale transaction, the system creates a receipt with the warranty details.

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].

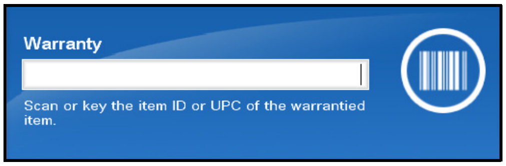


WARRANTY

Select the means to identify the item to be covered by a warranty or service plan.

Figure 13-19: 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.

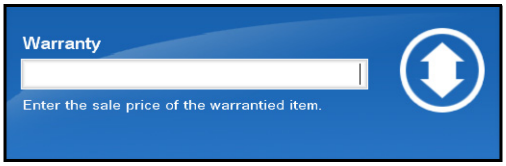


Warranty

Scan or key the item ID or UPC of the warrantied item.

Figure 13-20: Warrantied Item ID Prompt

4. If prompted, enter the price of the warrantied item, without a decimal point, and press [Enter] to continue.

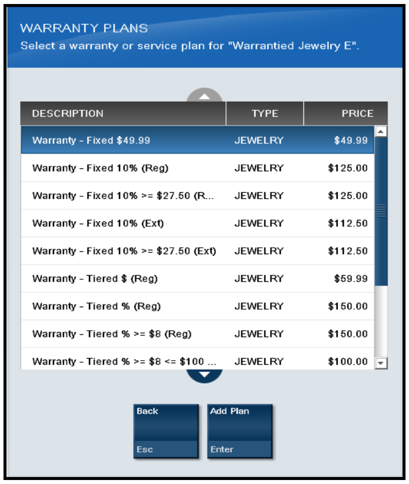


Warranty

Enter the sale price of the warrantied item.

Figure 13-21: Warrantied Item Price Prompt

The system displays a list of plan options associated with this item.



WARRANTY PLANS
Select a warranty or service plan for "Warrantied Jewelry E".

DESCRIPTION	TYPE	PRICE
Warranty - Fixed $49.99	JEWELRY	$49.99
Warranty - Fixed 10% (Reg)	JEWELRY	$125.00
Warranty - Fixed 10% >= $27.50 (R...	JEWELRY	$125.00
Warranty - Fixed 10% (Ext)	JEWELRY	$112.50
Warranty - Fixed 10% >= $27.50 (Ext)	JEWELRY	$112.50
Warranty - Tiered $ (Reg)	JEWELRY	$59.99
Warranty - Tiered % (Reg)	JEWELRY	$150.00
Warranty - Tiered % >= $8 (Reg)	JEWELRY	$150.00
Warranty - Tiered % >= $8 <= $100 ...	JEWELRY	$100.00

Figure 13-22: Warranty Plans Associated with the Item

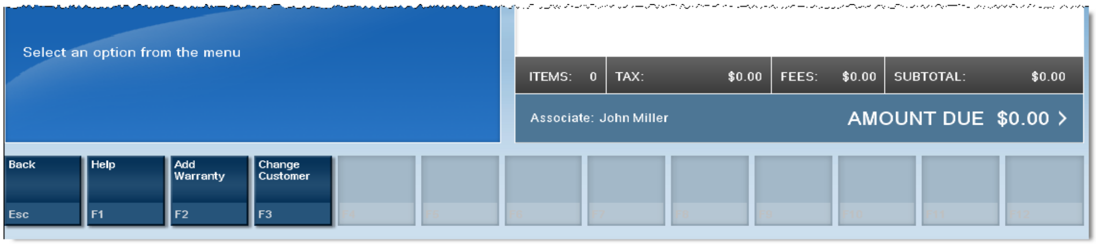
5. Select a warranty plan from the list. Choose the **Add Plan** option to include it (as a non-merchandise item) in the sale.
6. The system prompts for the customer to be associated with this warranty. Refer to step 2 on page 345 for more information about associating a customer with a warranty/service 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. At the Sale screen, with the warranty sale transaction displayed in the View Port, select **Extended Transaction**--> **Warranty** --> **Change Customer**.



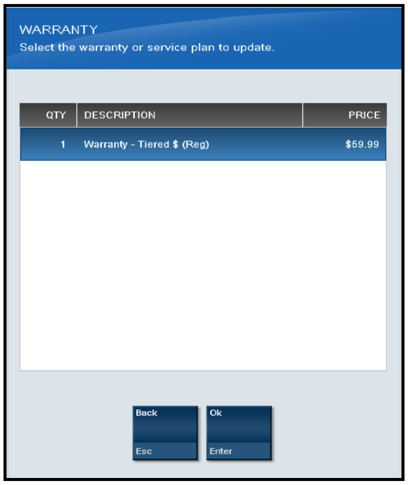
Select an option from the menu

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Miller AMOUNT DUE $0.00

Figure 13-23: 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].



WARRANTY

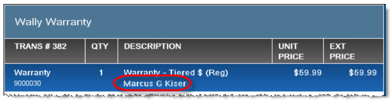
Select the warranty or service plan to update.

QTY	DESCRIPTION	PRICE
1	Warranty - Tiered $ (Reg)	$59.99

Figure 13-24: 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.



Wally Warranty

TRANS # 382	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Warranty 9000030	1	Warranty - Tiered $ (Reg) Marcus G Kiser	$59.99	$59.99

   When the sale transaction is completed, the system creates a receipt with the warranty details.

CHAPTER 14

Order Transactions via Locate

Overview

Locate Cross-channel Order Broker 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 Locate's Order Broker 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. See the *Xstore Manager's Guide* for more information about Back Office processing.

> *Locate orders cannot be set up with other transaction types. Once you add an item in a regular sale or return transaction, you cannot set up a new order.*

Message Bar Alerts

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

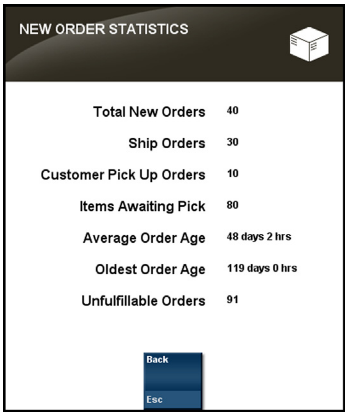
Click the message bar to view information about new orders that require your attention.

New Order Statistics:

- **Total New Orders** - The total number of new orders.
- **Ship Orders** - The number of orders waiting to be shipped from this store.

- **Customer Pick Up Orders** - The number of orders to be picked up in this store.
- **Items Awaiting Pick** - The number of items that must be set aside for the orders.
- **Average Order Age** - The average age of the orders awaiting fulfillment, in days and hours, or minutes.
- **Oldest Order Age** - The age of the oldest order awaiting fulfillment, in days and hours, or minutes.
- **Unfulfillable Orders** - The number of items that cannot be filled. When an order is rejected, the status becomes unfulfillable.

See the *XstoreManager's Guide* for more information about processing orders in the back office.



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

Available Options for Orders

Pickup Other Store

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. 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 specified address). Order creation is done by the Xstore system. In this scenario, order fulfillment may be done by the Xstore system, or by an external system. Inventory comes out of the fulfilling location. In Xstore, this order type is defined as **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**.

Web/Phone Order (Fulfillment only)

If the customer uses another channel (for example, web, call center, etc.) to create an order for pickup at a selected Xstore store location, your store may be identified as the fulfilling location. In Xstore, this order type is defined as **Web Pickup**.

> *Refer to the Xstore Manager's Guide for more information about fulfilling orders.*

Order Status

The following table describes order and item status values:

Table 14-1: *Order and Item Status Values*

Order Status Value	Item Status Value
Open[1] - If one of the items is in the following status: new order, polled, accepted, or in transit. **Ready for Pick Up** - All items are in reserved or received status (can also include cancelled item). **Ready to Ship -** This is applicable only for customer delivery or delayed pickup (aka pickup from this store). All items must be reserved or cancelled. **Complete** - The order has been completed. **Cancelled** - All items are cancelled. **Unfulfillable** – All items are unfulfillable or a mix of unfulfillable and cancelled. Unfulfillable items are those that have been rejected either manually by the receiving store or automatically by Locate™.	**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. **In Transit** - Indicates the item has been shipped. **Received** - Indicates the item has been received in the store. **Fulfilled** - Indicates the item has been picked up/delivered. **Cancelled** - Indicates the item has been cancelled. **Rejected** - Indicates the source location has rejected the order and the item is sourced from another location. The status of the order becomes unfulfillable. **Unfulfillable** -Indicates the item has been rejected and an alternative location could not be determined.

[1] It is possible for an open order to be under review and unable to be processed during this time. See the Xstore Manager's Guide.

Locate Order Processing

A customer is required for Locate Orders. You must assign a customer to the transaction when you select the **Order** menu option if you did not do so at the beginning of the transaction. To associate a customer with the order, select **Customer Options**, **Assign Customer** options at the Sale screen.

If the customer is not in the database, the system displays a message indicating the customer was not found. You must select the **New** option to set up the customer before the order setup can continue. Refer to "Associating a Customer with the Sale" on page 37 for more information about setting up a customer.

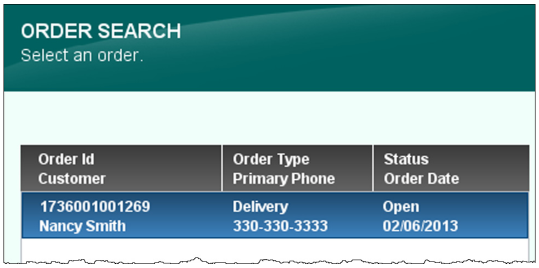
Searching for Locate Orders

1. From the Sale screen, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Order** option.

Based on whether or not a customer has been assigned determines Xstore behavior:

<table>
<tr><th>If</th><th>then</th></tr>
<tr><td>A customer has been associated with this transaction.</td><td>
The system automatically searches the database to locate any open order accounts for this customer.

If any orders are found, a notification prompt displays. Follow the instructions on the prompt to continue with the transaction.

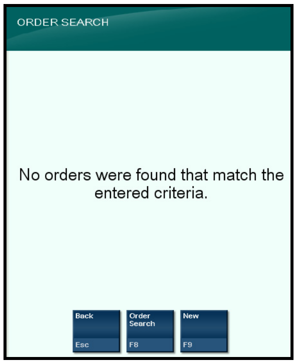


ORDER SEARCH
Select an order.

<table>
<tr><th>Order Id
Customer</th><th>Order Type
Primary Phone</th><th>Status
Order Date</th></tr>
<tr><td>1736001001269
Nancy Smith</td><td>Delivery
330-330-3333</td><td>Open
02/06/2013</td></tr>
</table>

If no Locate order account is found, Xstore provides options to set up a new order (New) or to perform another search (Order Search).

❑ Select New to set up a new Order. Continue with "Setting Up a New Order" on page 365.
<OR>
❑ Select Order Search to open the Order Search form to search for an existing order.



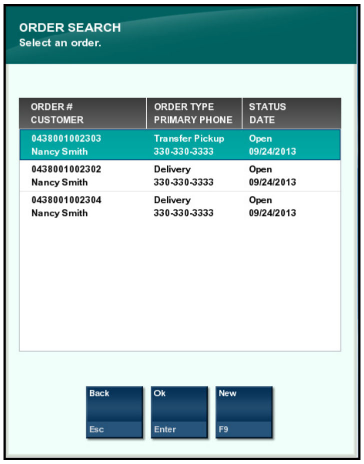
ORDER SEARCH

No orders were found that match the entered criteria.

</td></tr>
</table>

If	then
A customer has ***not*** been associated with this transaction.	The system displays the Order Search form. ■ Enter search criteria and select **Process** to search for an existing order. <OR> ■ Select **New** to enter customer information, then continue with "Setting Up a New Order" on page 365.

3. If multiple orders match the entered criteria, select the appropriate order from the list and press [Enter] to continue.



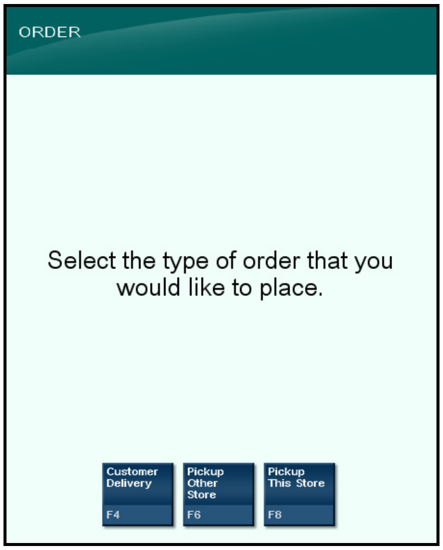
ORDER SEARCH
Select an order.

ORDER # CUSTOMER	ORDER TYPE PRIMARY PHONE	STATUS DATE
0438001002303 Nancy Smith	Transfer Pickup 330-330-3333	Open 09/24/2013
0438001002302 Nancy Smith	Delivery 330-330-3333	Open 09/24/2013
0438001002304 Nancy Smith	Delivery 330-330-3333	Open 09/24/2013

Setting Up a New Order

Once a customer has been assigned to the order, continue with order setup processing.

Select the type of order:



ORDER

Select the type of order that you would like to place.

Figure 14-1: Order Type Menu Options

- ❑ **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 "For Customer Delivery" on page 366.

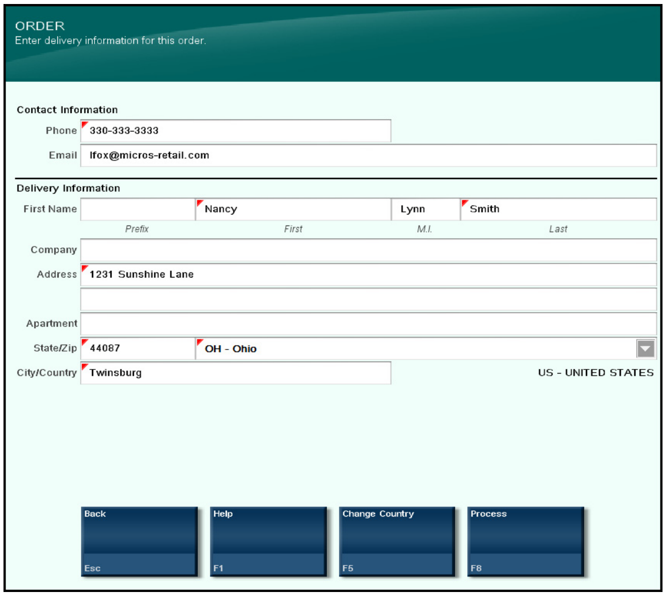
- ☐ **Pickup Other Store**: If an item is not available in your store, use this option to find another store location in which the item is currently available. The other store reserves the item, and holds it until the customer picks it up. This order type is defined as ***Pickup*** type in Xstore. Continue with "For Pickup Other Store" on page 370.
- ☐ **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 "For Pickup This Store" on page 373.

For Customer Delivery

...continued from **Customer Delivery** on page 365

1. Complete the Customer Order form for delivery information and select **Process**.

   By default, the form is populated with the customer's address information, but may be changed. To ensure the customer receives email notification about the order status, verify the email address is correct.



ORDER
Enter delivery information for this order.

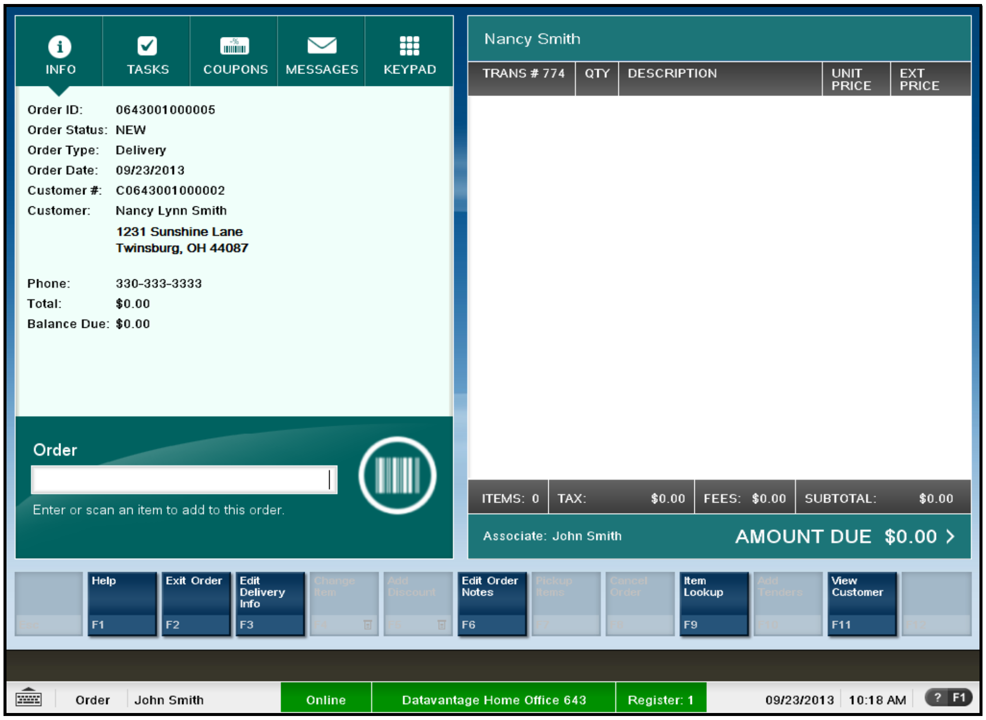
Contact Information
Phone 330-333-3333
Email lfox@micros-retail.com

Delivery Information
First Name: Prefix —; First Nancy; M.I. Lynn; Last Smith
Company
Address 1231 Sunshine Lane
Apartment
State/Zip 44087 OH - Ohio
City/Country Twinsburg US - UNITED STATES

Figure 14-2: Customer Order Form

2. At the Order screen, scan or enter the item Id.

> *To add Wish List item(s) to the Locate Order, select **View Customer** and then select the **Wish List** tab (see "Purchasing Wish List Item(s)" on page 43).*



Order ID: 0643001000005
Order Status: NEW
Order Type: Delivery
Order Date: 09/23/2013
Customer #: C0643001000002
Customer: Nancy Lynn Smith
1231 Sunshine Lane
Twinsburg, OH 44087
Phone: 330-333-3333
Total: $0.00
Balance Due: $0.00

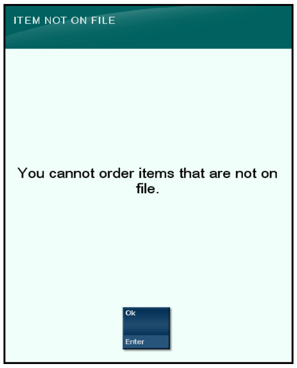
Enter or scan an item to add to this order.

Figure 14-3: Order Screen - For Customer Delivery

☐ If you do not know the item number and cannot scan the item, use the **Item Lookup** option to find the item number.

☐ If system records indicate the item is available in your store, you are prompted whether or not to order the item anyway. Select **Yes** at the prompt to continue with order processing, select **No** to return to sale mode and sell the item from your current inventory.

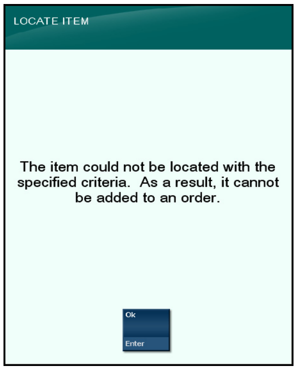
☐ If the item is not on file, you are prompted with this message. Press [Enter] to close the message and return to the Order screen.



You cannot order items that are not on file.

Figure 14-4: Not On File Prompt

- ❑ If the item cannot be located, you are prompted with this message. Press [Enter] to close the message and return to the Order screen.



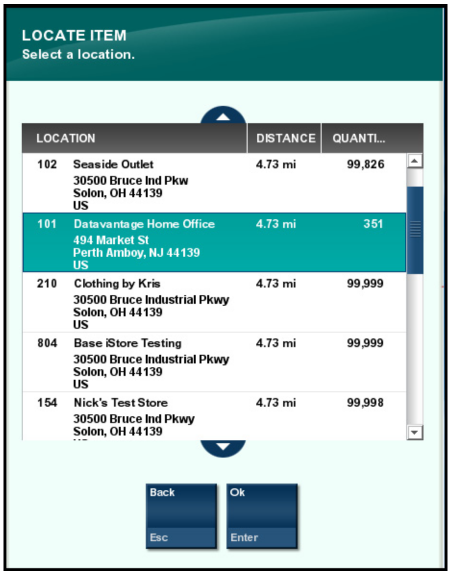
LOCATE ITEM

The item could not be located with the specified criteria. As a result, it cannot be added to an order.

Figure 14-5: Could Not Be Located Prompt

3. At the Locate Item results list, select the fulfilling location from the list of locations with the item available. For delivery orders, the system automatically searches for fulfilling locations based on the delivery address, and returns a list of valid locations. Information shown here includes the fulfilling location name and address, the distance between the fulfilling location and the delivery address, and the on hand quantity at the fulfilling location. If the quantity for a location is zero, the word "Drop Ship" displays in the Quantity column. If the quantity for a location is less than the requested quantity, the word “Backorder” displays in the Quantity column.

Press [Enter] to continue.

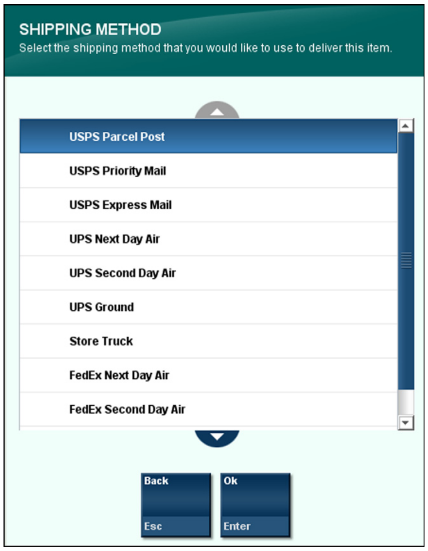


LOCATE ITEM
Select a location.

LOCATION		DISTANCE	QUANTI...
102	Seaside Outlet 30500 Bruce Ind Pkw Solon, OH 44139 US	4.73 mi	99,826
101	Datavantage Home Office 494 Market St Perth Amboy, NJ 44139 US	4.73 mi	351
210	Clothing by Kris 30500 Bruce Industrial Pkwy Solon, OH 44139 US	4.73 mi	99,999
804	Base iStore Testing 30500 Bruce Industrial Pkwy Solon, OH 44139 US	4.73 mi	99,999
154	Nick's Test Store 30500 Bruce Ind Pkwy Solon, OH 44139	4.73 mi	99,998

Figure 14-6: Locate Item Results List - For Delivery Order

4. Select the shipping delivery method from the Shipping Method options list and press [Enter].



SHIPPING METHOD

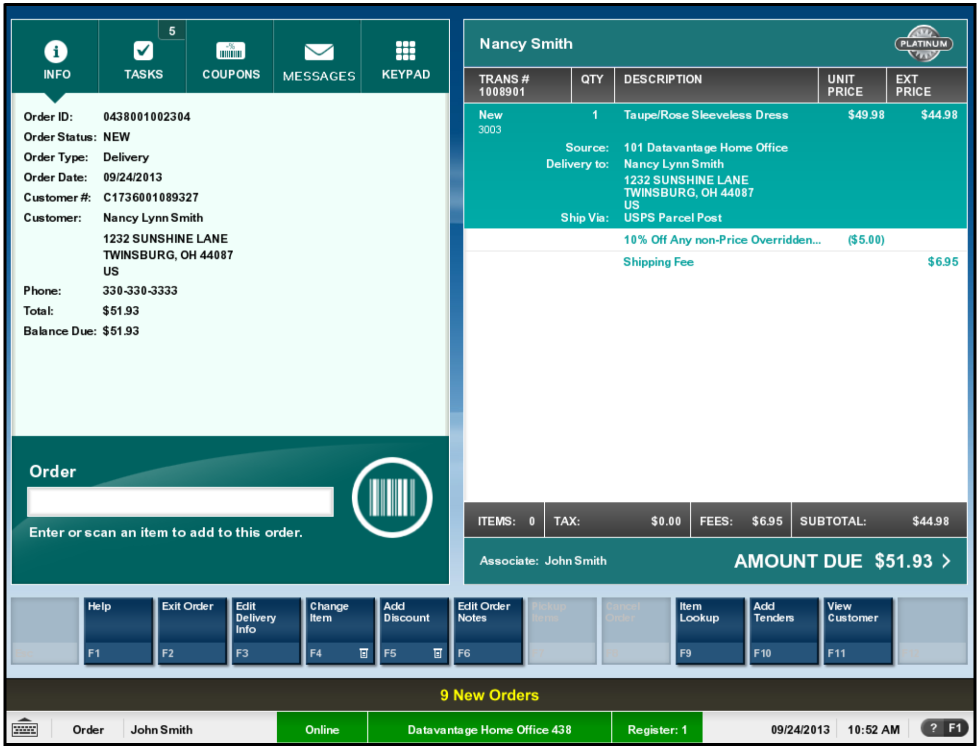
Select the shipping method that you would like to use to deliver this item.

- USPS Parcel Post
- USPS Priority Mail
- USPS Express Mail
- UPS Next Day Air
- UPS Second Day Air
- UPS Ground
- Store Truck
- FedEx Next Day Air
- FedEx Second Day Air

Figure 14-7: Shipping Method Options

The item is added to the order and shown on the View Port along with the fulfilling (source) location and delivery information.

5. When you are finished adding order items, select **Add Tenders** or **Exit Order** to tender and complete the sale. Customer delivery orders must be paid in full.



Order ID: 0438001002304
Order Status: NEW
Order Type: Delivery
Order Date: 09/24/2013
Customer #: C1736001089327
Customer: Nancy Lynn Smith
1232 SUNSHINE LANE
TWINSBURG, OH 44087
US
Phone: 330-330-3333
Total: $51.93
Balance Due: $51.93

Order

Enter or scan an item to add to this order.

Nancy Smith

TRANS # 1008901	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
New 3003	1	Taupe/Rose Sleeveless Dress	$49.98	$44.98
Source:		101 Datavantage Home Office		
Delivery to:		Nancy Lynn Smith 1232 SUNSHINE LANE TWINSBURG, OH 44087 US		
Ship Via:		USPS Parcel Post		
		10% Off Any non-Price Overridden...	($5.00)	
		Shipping Fee		$6.95

ITEMS: 0 TAX: $0.00 FEES: $6.95 SUBTOTAL: $44.98

Associate: John Smith AMOUNT DUE $51.93

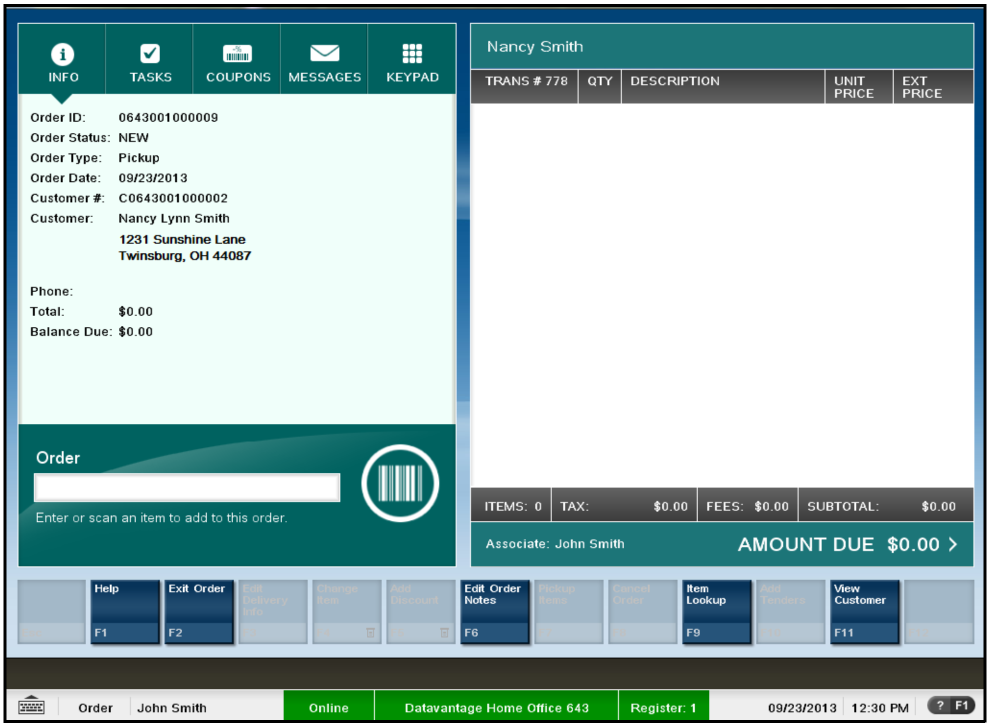
Figure 14-8: Customer Delivery Order Screen

For Pickup Other Store

...continued from **Pickup Other Store** on page 366

1. At the Order screen, scan or enter the item Id.

*To add Wish List item(s) to the Locate Order, select **View Customer** and then select the **Wish List** tab (see "Purchasing Wish List Item(s)" on page 43).*



Order ID: 0643001000009
Order Status: NEW
Order Type: Pickup
Order Date: 09/23/2013
Customer #: C0643001000002
Customer: Nancy Lynn Smith
1231 Sunshine Lane
Twinsburg, OH 44087
Phone:
Total: $0.00
Balance Due: $0.00

Enter or scan an item to add to this order.

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

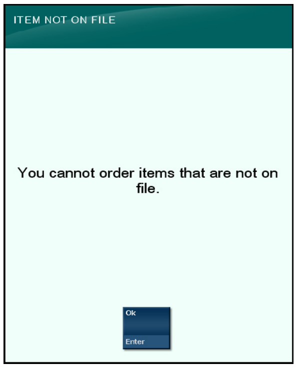
Associate: John Smith AMOUNT DUE $0.00

Order John Smith Online Datavantage Home Office 643 Register: 1 09/23/2013 12:30 PM

Figure 14-9: Order Screen - For Pickup Other Store

- ❑ If you do not know the item number and cannot scan the item, use the **Item Lookup** option to find the item number.
- ❑ If system records indicate the item is available in your store, you are prompted whether or not to order the item anyway. Select **Yes** at the prompt to continue with order processing, select **No** to return to sale mode and sell the item from your current inventory.

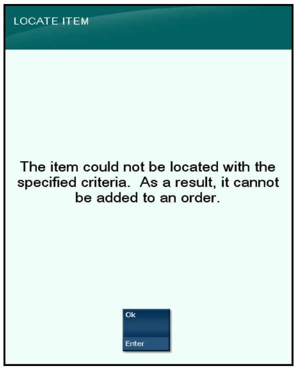
- ❑ If the item is not on file, you are prompted with this message. Press [Enter] to close the message and return to the Order screen.



ITEM NOT ON FILE

You cannot order items that are not on file.

- ❑ If the item cannot be located, you are prompted with this message. Press [Enter] to close the message and return to the Order screen.

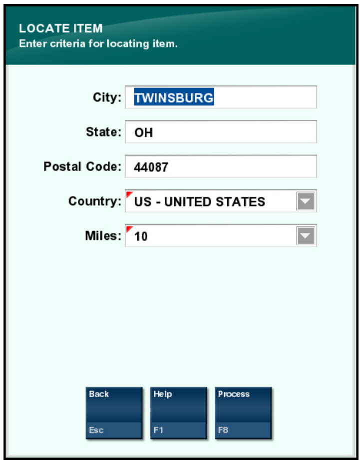


LOCATE ITEM

The item could not be located with the specified criteria. As a result, it cannot be added to an order.

Figure 14-10: Cannot Be Located Prompt

2. At the Locate Item form, enter the search criteria to find another store to fulfill the order and select **Process**. The default information shown here is based on the customer's address, but can be changed.



LOCATE ITEM
Enter criteria for locating item.

City: TWINSBURG
State: OH
Postal Code: 44087
Country: US - UNITED STATES
Miles: 10

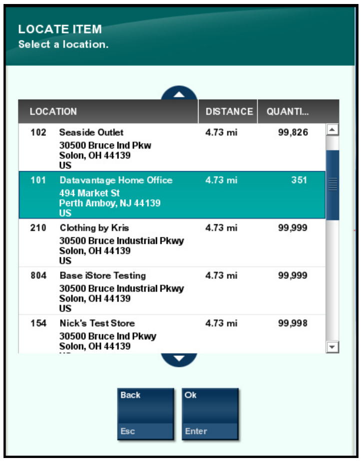
Figure 14-11: Locate Item Form - For Pickup Other Store

You are prompted if the search for a fulfilling store is not successful with the specified criteria. Press [Enter] to close the prompt and you can re-enter the search criteria to try again.

3. At the Locate Item results list, select the fulfilling location from the list of locations with the item available. Information shown here includes the fulfilling location name and address, the distance between the fulfilling location and the address specified in the search, and the on hand quantity at the fulfilling location.

If the quantity for a location is zero, the word "Drop Ship" displays in the Quantity column. If the quantity for a location is less than the requested quantity, the word "Backorder" displays in the Quantity column.

Press [Enter] to continue.



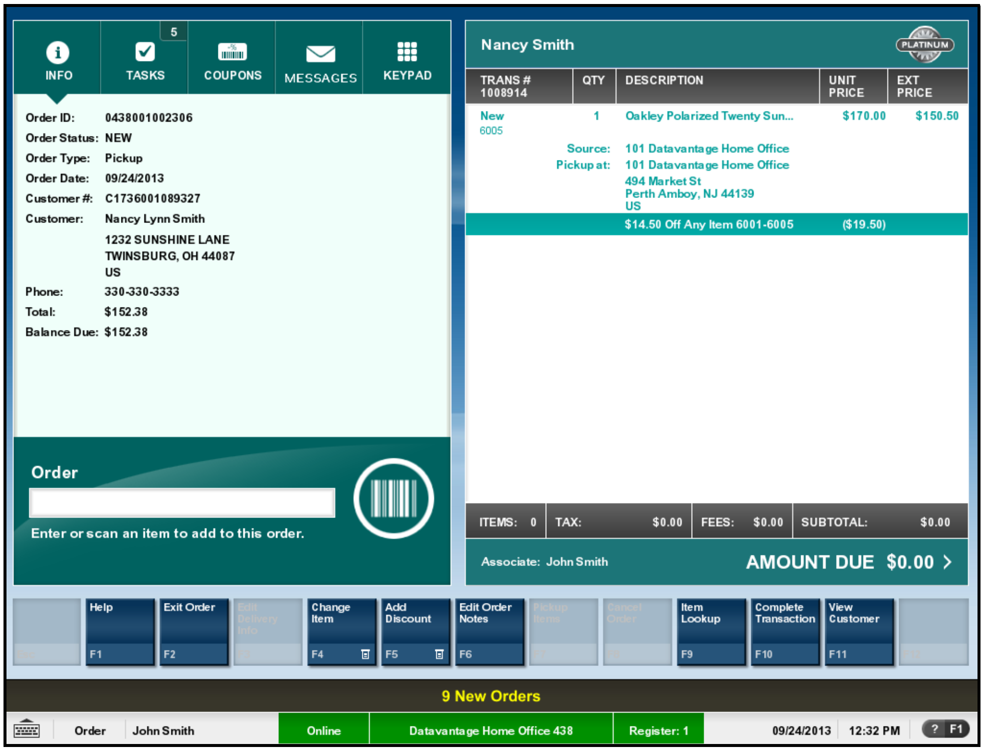
LOCATE ITEM
Select a location.

LOCATION		DISTANCE	QUANTI...
102	Seaside Outlet 30500 Bruce Ind Pkw Solon, OH 44139 US	4.73 mi	99,826
101	Datavantage Home Office 494 Market St Perth Amboy, NJ 44139 US	4.73 mi	351
210	Clothing by Kris 30500 Bruce Industrial Pkwy Solon, OH 44139 US	4.73 mi	99,999
804	Base iStore Testing 30500 Bruce Industrial Pkwy Solon, OH 44139 US	4.73 mi	99,999
154	Nick's Test Store 30500 Bruce Ind Pkwy Solon, OH 44139	4.73 mi	99,998

Figure 14-12: Locate Item Results List - Pickup Other Store Results

The Locate Item Results List may not display on your screen depending on your store's configurations. If your store is configured for Group Shipment or Split Shipment, Locate will automatically assign a store to the order.

4. The item is added to the order and shown on the View Port along with the location information:



Order ID: 0438001002306
Order Status: NEW
Order Type: Pickup
Order Date: 09/24/2013
Customer #: C1736001089327
Customer: Nancy Lynn Smith
1232 SUNSHINE LANE
TWINSBURG, OH 44087
US
Phone: 330-330-3333
Total: $152.38
Balance Due: $152.38

Order

Enter or scan an item to add to this order.

Nancy Smith

TRANS # 1008914	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
New 6005	1	Oakley Polarized Twenty Sun...	$170.00	$150.50
Source:		101 Datavantage Home Office		
Pickup at:		101 Datavantage Home Office 494 Market St Perth Amboy, NJ 44139 US		
		$14.50 Off Any Item 6001-6005	($19.50)	

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Smith AMOUNT DUE $0.00

9 New Orders

Order John Smith Online Datavantage Home Office 438 Register: 1 09/24/2013 12:32 PM

Figure 14-13: View Port - For Customer Pickup Other Store Order

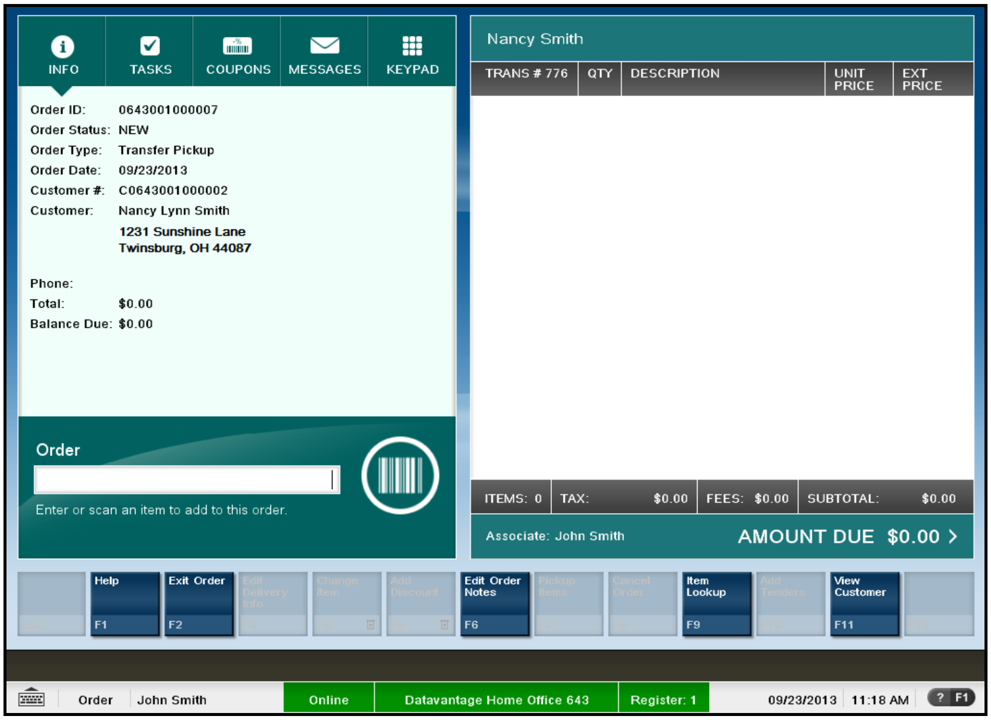
5. When you are finished adding items, select **Complete Transaction** or **Exit Order**.
6. At the prompt for the order deposit, enter the dollar amount (without a decimal point) that the customer wants to apply to the order, and press [Enter].
   - If you selected **Complete Transaction** the system displays the tender list.
   - If you selected **Exit Order** the system returns to Sale mode.
7. Tender the order using the normal tendering process.

For Pickup This Store

...continued from **Pickup This Store** on page 366.

1. At the Order screen, scan or enter the item Id.

> *To add Wish List item(s) to the Locate Order, select* ***View Customer*** *and then select the* ***Wish List*** *tab (see "Purchasing Wish List Item(s)" on page 43).*



Nancy Smith

Order ID: 0643001000007
Order Status: NEW
Order Type: Transfer Pickup
Order Date: 09/23/2013
Customer #: C0643001000002
Customer: Nancy Lynn Smith
1231 Sunshine Lane
Twinsburg, OH 44087

Phone:
Total: $0.00
Balance Due: $0.00

Order

Enter or scan an item to add to this order.

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Smith AMOUNT DUE $0.00

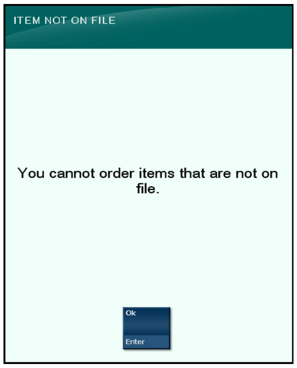
Order John Smith Online Datavantage Home Office 643 Register: 1 09/23/2013 11:18 AM

Figure 14-14: Order Screen - For Pickup This Store

☐ If you do not know the item number and cannot scan the item, use the **Item Lookup** option to find the item number.

☐ If system records indicate the item is available in your store, you are prompted whether or not to order the item anyway. Select **Yes** at the prompt to continue with order processing, select **No** to return to sale mode and sell the item from your current inventory.

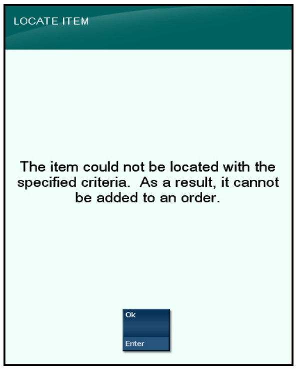
☐ If the item is not on file, you are prompted with this message. Press [Enter] to close the message and return to the Order screen.



ITEM NOT ON FILE

You cannot order items that are not on file.

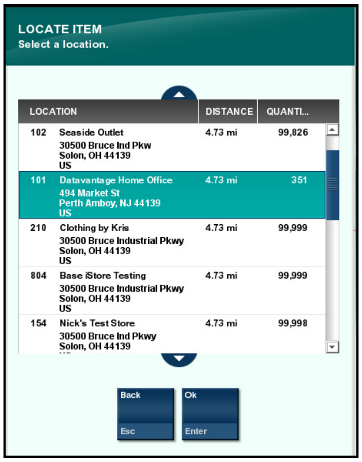
- ☐ If the item cannot be located, you are prompted with this message. Press [Enter] to close the message and return to the Order screen.



The item could not be located with the specified criteria. As a result, it cannot be added to an order.

Figure 14-15: Cannot Be Located Prompt

2. At the Locate Item results list, select the fulfilling location from the list of locations with the item available.



LOCATION		DISTANCE	QUANTI...
102	Seaside Outlet 30500 Bruce Ind Pkw Solon, OH 44139 US	4.73 mi	99,826
101	Datavantage Home Office 494 Market St Perth Amboy, NJ 44139 US	4.73 mi	351
210	Clothing by Kris 30500 Bruce Industrial Pkwy Solon, OH 44139 US	4.73 mi	99,999
804	Base iStore Testing 30500 Bruce Industrial Pkwy Solon, OH 44139 US	4.73 mi	99,999
154	Nick's Test Store 30500 Bruce Ind Pkwy Solon, OH 44139	4.73 mi	99,998

Figure 14-16: Locate Item Results List

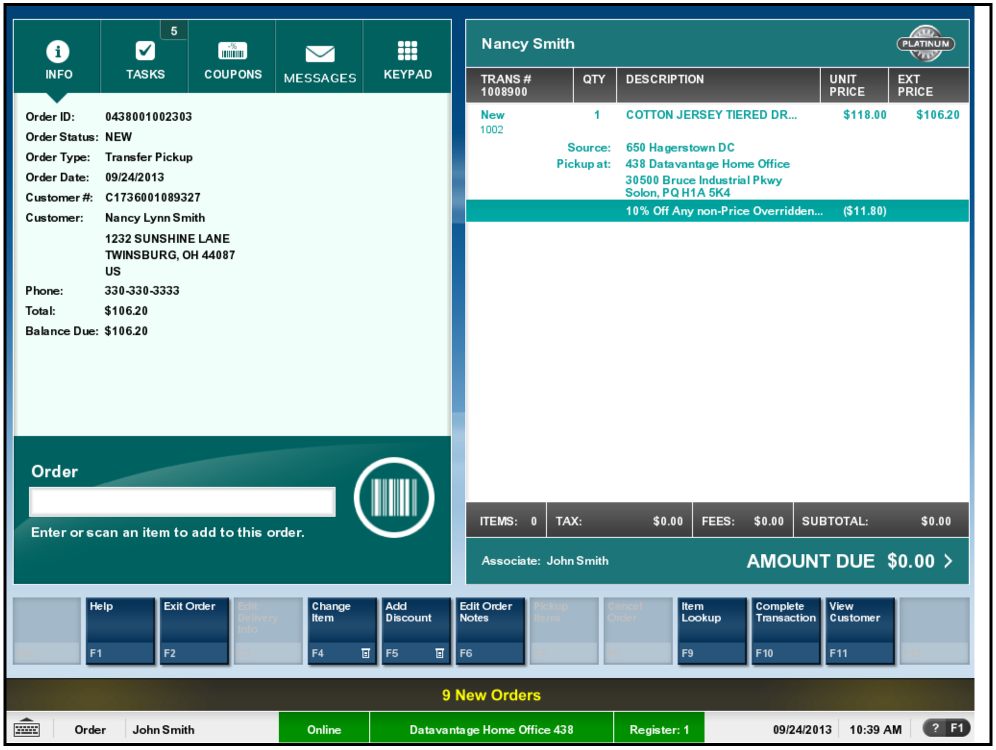
For *pickup this store* orders, the system automatically searches for fulfilling locations based on your store address, and returns a list of valid locations.

Information shown here includes the fulfilling location name and address, the distance between the fulfilling location and your store, and the on hand quantity at the fulfilling location.

If the quantity for a location is zero, the word "Drop Ship" displays in the Quantity column. If the quantity for a location is less than the requested quantity, the word “Backorder” displays in the Quantity column.

*The Locate Item Results List may not display on your screen depending on your store’s configurations. If your store is configured for **Group Shipment** or **Split Shipment** Locate™ will automatically assign a store to the order.*

3. Press [Enter] to continue.
4. If your system is set up to specify a shipping method, select the shipping method from the list when prompted and press [Enter]. The item is added to the order and shown on the View Port along with the location information.



Order ID: 0438001002303
Order Status: NEW
Order Type: Transfer Pickup
Order Date: 09/24/2013
Customer #: C1736001089327
Customer: Nancy Lynn Smith
1232 SUNSHINE LANE
TWINSBURG, OH 44087
US
Phone: 330-330-3333
Total: $106.20
Balance Due: $106.20

Nancy Smith

TRANS # 1008900	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
New 1002	1	COTTON JERSEY TIERED DR...	$118.00	$106.20
Source:		650 Hagerstown DC		
Pickup at:		438 Datavantage Home Office 30500 Bruce Industrial Pkwy Solon, PQ H1A 5K4		
		10% Off Any non-Price Overridden...	($11.80)	

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Smith AMOUNT DUE $0.00

Figure 14-17: View Port - For Customer Pickup At This Store Order

5. When you are finished adding items, select **Complete Transaction** or **Exit Order**.
6. At the prompt for the order deposit, enter the dollar amount (without a decimal point) that the customer wants to apply to the order, and press [Enter].
   - ❑ If you selected **Complete Transaction** the system displays the tender list.
   - ❑ If you selected **Exit Order** the system returns to Sale mode.
7. Tender the order using the normal tendering process.

Editing Order Items at Setup

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 change order information, select from the following options:

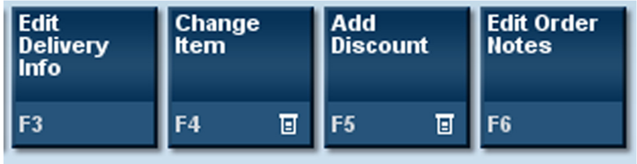


Figure 14-18: Change Order Menu Options

- To change the delivery information (when applicable) select the **Edit Delivery Info** option, and complete the delivery form.
- To add/change/delete discounts, select the **Add Discount** option. Refer to "Adding a Discount/Award to an Item or Transaction" on page 201".
- To add or edit comments associated with this order, select the **Edit Order Notes** option and type a comment about the order.
- To change a ***line item*** on the order, select the **Change Item** option. The following menu options display:

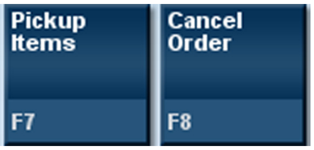
Figure 14-19: Change Line Item Menu Options

  - To change item quantities, refer to "Changing the Item Quantity" on page 217" for more information.
  - To override a price, refer to "Changing the Item Quantity" on page 217" for more information.
  - To change the tax rate/amount, refer to "Changing Item Taxes" on page 227".
  - To void an item, refer to "Voiding an Item" on page 221" for more information.
  - To change the commissioned sale associate for the sale, refer to "Changing the Commissioned Associate" on page 223" for more information.
  - To add or edit comments associated with a line item on the order, select the **Edit Line Notes** option and type a comment or edit an existing comment about the line item.

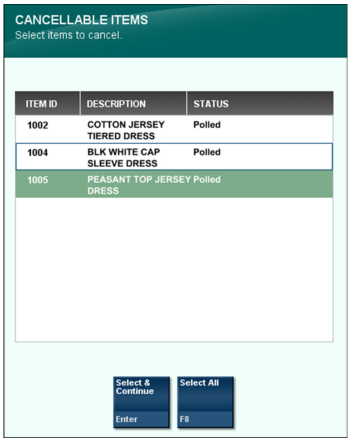
Cancelling an Order

If you are cancelling a Delivery or Pick Up This Store, the customer must return to where they placed the order to cancel. If the 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.

1. From the Sale screen, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Order** option.
3. Search and select the order to be cancelled. See "Searching for Locate Orders" on page 364.
4. From the Order screen, select the **Cancel Order** option.



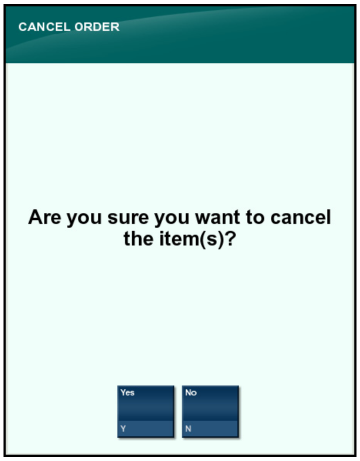
5. Select the items you wish to cancel. If cancelling the entire order, use the **Select All** button.



CANCELLABLE ITEMS
Select items to cancel.

ITEM ID	DESCRIPTION	STATUS
1002	COTTON JERSEY TIERED DRESS	Polled
1004	BLK WHITE CAP SLEEVE DRESS	Polled
1005	PEASANT TOP JERSEY DRESS	Polled

6. When prompted, select **Yes** to confirm you want to cancel the order.



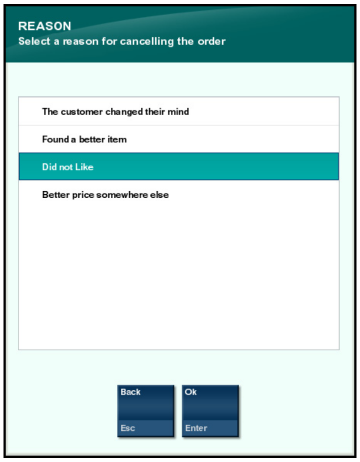
CANCEL ORDER

Are you sure you want to cancel the item(s)?

Figure 14-20: Cancel Order Confirmation Prompt

Canceled order detail is available from the Back Office Order Maintenance function. See the Xstore Manager's Guide for more information about maintaining Orders.

7. Select a reason for the cancellation and press [Enter].



REASON

Select a reason for cancelling the order

Figure 14-21: Select A Reason List

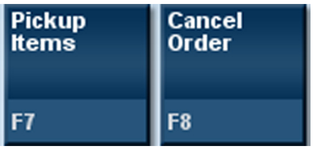
8. Process the transaction as required, returning any refund amounts to the customer. See Chapter 4, "Processing Tenders" on page 118 for more information about processing refund tenders.

Picking Up an Order

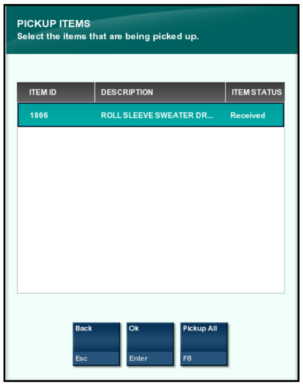
If the customer had the order item(s) delivered to this store, use the following procedure to pick up the item(s).

> *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. From the Sale screen, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Order** option.
3. Search and select the order you wish to pick up. See "Searching for Locate Orders" on page 364.
4. At the order screen, select **Pickup Items** to pick up the items on the order.



5. Select each item from the Pickup Items list and press [Enter], or select **Pickup All** to select all items at once.



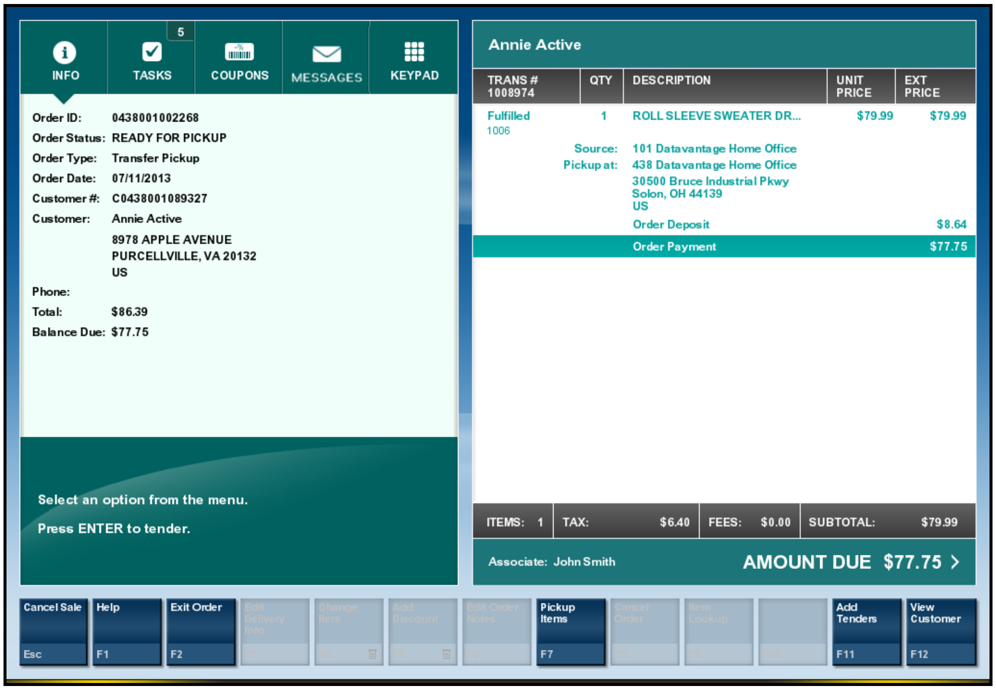
PICKUP ITEMS

Select the items that are being picked up.

ITEM ID	DESCRIPTION	ITEM STATUS
1006	ROLL SLEEVE SWEATER DR...	Received

Figure 14-22: Pickup Items List

The item status on the View Port changes from Received to Fulfilled indicating the item has been picked up. See Order and Item Status values on page 363 for more information about valid order and item statuses.



Order ID: 0438001002268
Order Status: READY FOR PICKUP
Order Type: Transfer Pickup
Order Date: 07/11/2013
Customer #: C0438001089327
Customer: Annie Active
8978 APPLE AVENUE
PURCELLVILLE, VA 20132
US
Phone:
Total: $86.39
Balance Due: $77.75

TRANS # 1008974	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Fulfilled 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99
	Source:	101 Datavantage Home Office		
	Pickup at:	438 Datavantage Home Office 30500 Bruce Industrial Pkwy Solon, OH 44139 US		
		Order Deposit		$8.64
		Order Payment		$77.75

Select an option from the menu.

Press ENTER to tender.

ITEMS: 1 TAX: $6.40 FEES: $0.00 SUBTOTAL: $79.99

Associate: John Smith AMOUNT DUE $77.75

Figure 14-23: Order Screen - Fulfilled Status

6. Select **Exit Order** or **Add Tenders** to complete the order:
   - ❑ Select **Exit Order** to return to the sale screen where you can add regular sale items to the transaction.
   - ❑ Select **Add Tenders** to display the Tender list. See Chapter 4, "Processing Tenders" on page 83 for more information about tendering the transaction.

CHAPTER 15

Pre-Sale Accounts

Overview

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:

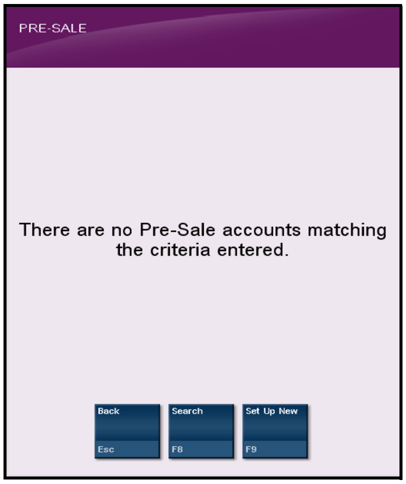
- The transaction must be associated with a customer.
- The transaction must be paid in full at setup.
- Only items on file can be added to the transaction.
- All Pre-Sale items must be picked up at the same time, partial pickups are not allowed.
- Pre-Sale accounts cannot be canceled if the customer is not present.

Pre-Sale Account Transactions

1. From the Sale screen, select **Extended Transaction**.
2. At the Extended Transaction menu, select the **Pre-Sale** 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” on page 382.
   - If you have not assigned a customer, see “If a customer has not been associated with the transaction” on page 383.

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:

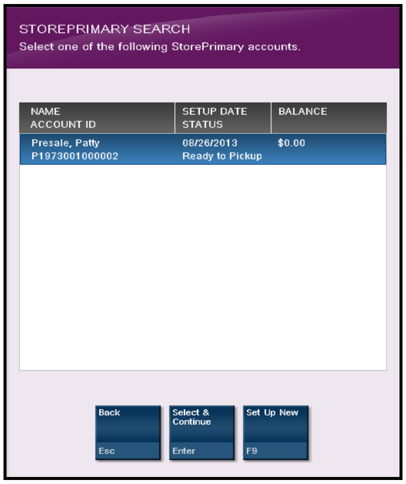


PRE-SALE

There are no Pre-Sale accounts matching the criteria entered.

Figure 15-1: No Pre-Sale Accounts Found

        - ○ Select **Set Up New** to create a Pre-Sale account for this customer. Continue with "Creating a New Pre-Sale Account" on page 383.
        - ○ Select **Search** to enter criteria to find a Pre-Sale account. See "Searching for a Pre-Sale Account" on page 385
    - ☐ If a Pre-Sale account is found, you have the following options:



STOREPRIMARY SEARCH

Select one of the following StorePrimary accounts.

NAME ACCOUNT ID	SETUP DATE STATUS	BALANCE
Presale, Patty P1973001000002	08/26/2013 Ready to Pickup	$0.00

Figure 15-2: Pre-Sale Account Found

        - ○ Select **Set Up New** to create a new Pre-Sale account. Continue with "Creating a New Pre-Sale Account" on page 383.
        - ○ Press [Enter] to view the selected 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:

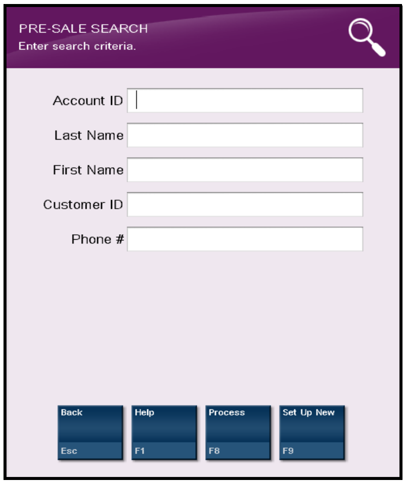


Figure 15-3: Pre-Sale Search Form

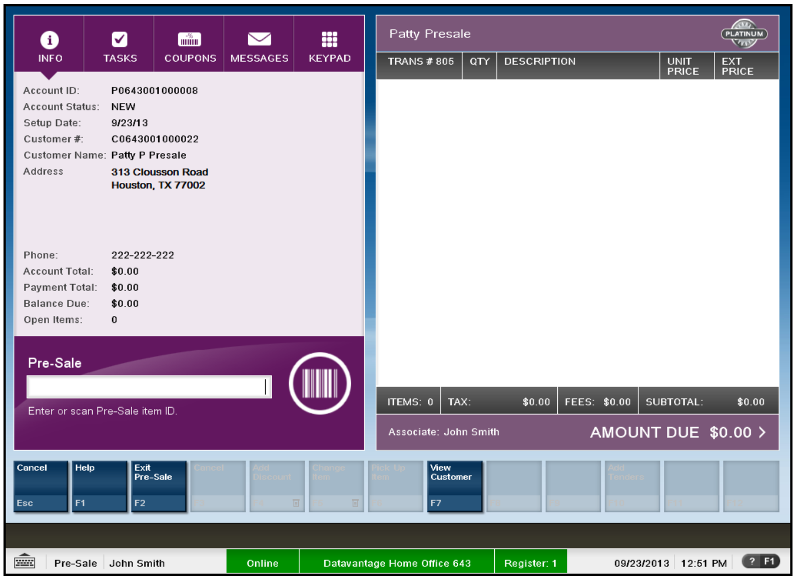
  - Select **Set Up New** to create a new Pre-Sale account. After associating a customer with the transaction, continue with "Creating a New Pre-Sale Account" on page 383.
  - To search for a Pre-Sale account, enter search criteria and select **Process**. See "Searching for a Pre-Sale Account" on page 385.
  - Select **Back** to return to the Sale screen.

Creating a New Pre-Sale Account

...continued from step 3 on page 381

1. After a customer is associated with the transaction, scan or enter the Pre-Sale item Id.

> *To add Wish List item(s) to the Pre-Sale, select **View Customer** and then select the **Wish List** tab (see "Purchasing Wish List Item(s)" on page 43).*



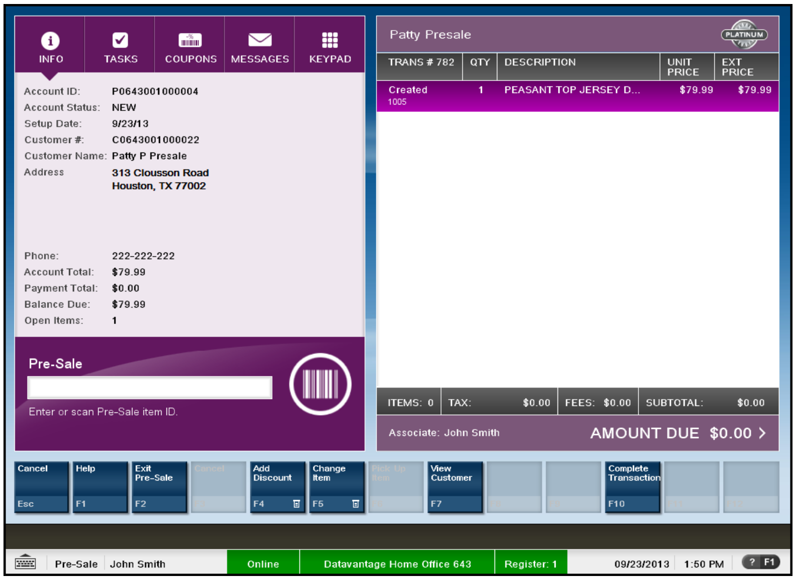
Account ID: P0643001000008
Account Status: NEW
Setup Date: 9/23/13
Customer #: C0643001000022
Customer Name: Patty P Presale
Address 313 Clousson Road
Houston, TX 77002
Phone: 222-222-222
Account Total: $0.00
Payment Total: $0.00
Balance Due: $0.00
Open Items: 0

Enter or scan Pre-Sale item ID.

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00
Associate: John Smith AMOUNT DUE $0.00

Figure 15-4: Pre-Sale Item Id Prompt

2. You have the following options at the Pre-Sale screen before tendering:



Account ID: P0643001000004
Account Status: NEW
Setup Date: 9/23/13
Customer #: C0643001000022
Customer Name: Patty P Presale
Address 313 Clousson Road
Houston, TX 77002
Phone: 222-222-222
Account Total: $79.99
Payment Total: $0.00
Balance Due: $79.99
Open Items: 1

Enter or scan Pre-Sale item ID.

Created 1005	1	PEASANT TOP JERSEY D...	$79.99	$79.99

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00
Associate: John Smith AMOUNT DUE $0.00

Figure 15-5: Pre-Sale Screen

- ❑ You can scan another Pre-Sale item.
- ❑ You can change an item by:
    - ❍ Adding a discount (See "Adding a Discount/Award to an Item or Transaction" on page 201).
    - ❍ Changing the item price ("Changing the Item Price" on page 219).
    - ❍ Voiding a line item ("Voiding an Item" on page 221).

  - ❍ Voiding a discount (this is only available for items with a discount applied, and uses the same process as voiding an item).

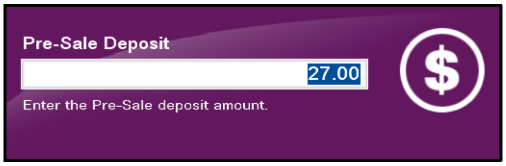
3. After adding items to the Pre-Sale, do one of the following to complete the Pre-Sale setup:

- ❑ Select **Exit Pre-Sale** to exit Pre-Sale mode and return to sale mode before tendering the sale.

  <OR>

- ❑ Select **Complete Transaction** to complete the Pre-Sale setup.

4. When prompted, press [Enter] to accept the deposit amount. Pre-Sale items must be paid in full at setup.



Pre-Sale Deposit

27.00

Enter the Pre-Sale deposit amount.

Figure 15-6: Pre-Sale Deposit Amount Prompt

Notes:

- 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.

5. If you selected **Complete Transaction**, tender the sale. If you selected **Exit Pre-Sale**, you are returned to the sale screen before tendering the sale.

Searching for a Pre-Sale Account

...continued from step 3 on page 381

1. To search for a Pre-Sale account, enter search criteria in the Pre-Sale Search form.

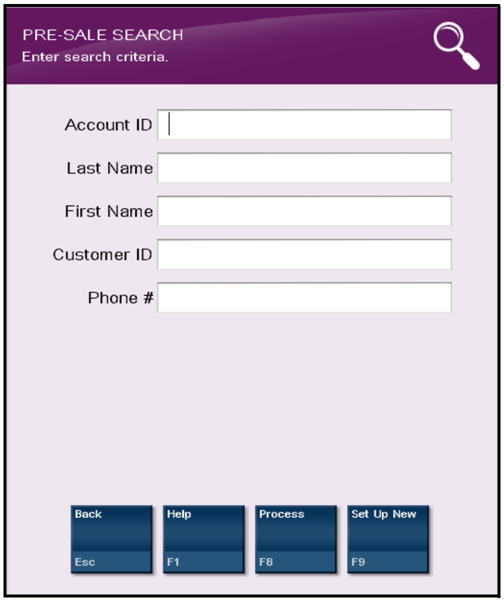


Figure 15-7: Pre-Sale Search Form

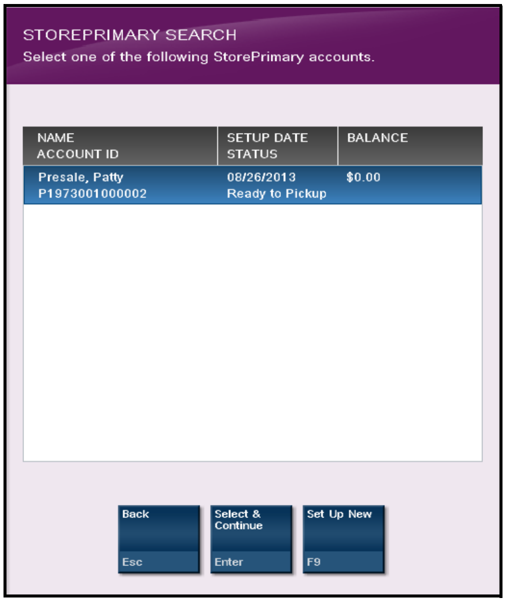
- **Account ID** - The Pre-Sale account identifier.
- **Last Name** - The Pre-Sale account owner’s last name.
- **First Name** - The Pre-Sale account owner’s first name.
- **Customer ID** - The Pre-Sale account owner’s customer Id.
- **Phone #** - The Pre-Sale account owner’s phone number.

2. 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 15-1 on page 382.
   - 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 15-2 on page 382.

Picking Up Pre-Sale Items

1. From the Sale screen, 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 returns a list of Pre-Sale accounts for the customer.

4. Select a Pre-Sale account from the list, then press [Enter].



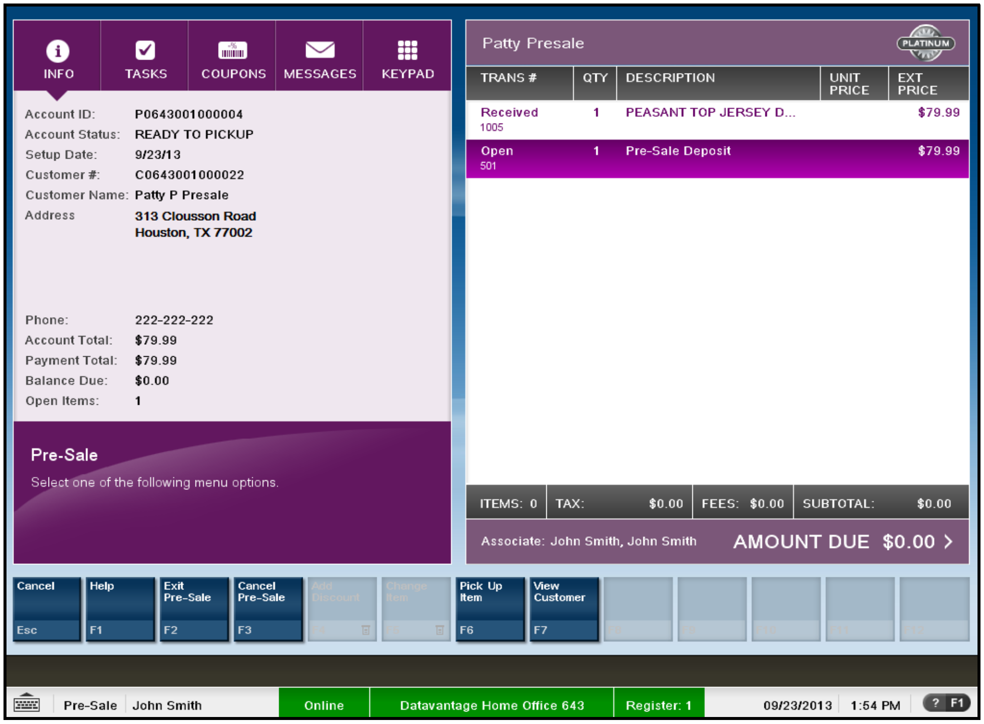
STOREPRIMARY SEARCH

Select one of the following StorePrimary accounts.

NAME ACCOUNT ID	SETUP DATE STATUS	BALANCE
Presale, Patty P1973001000002	08/26/2013 Ready to Pickup	$0.00

Figure 15-8: Pre-Sale Account List

5. At the Pre-Sale Account screen, select **Pick Up Item**.



Account ID: P0643001000004
Account Status: READY TO PICKUP
Setup Date: 9/23/13
Customer #: C0643001000022
Customer Name: Patty P Presale
Address 313 Clousson Road
Houston, TX 77002

Phone: 222-222-222
Account Total: $79.99
Payment Total: $79.99
Balance Due: $0.00
Open Items: 1

Pre-Sale

Select one of the following menu options.

Patty Presale

TRANS #	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Received 1005	1	PEASANT TOP JERSEY D...		$79.99
Open 501	1	Pre-Sale Deposit		$79.99

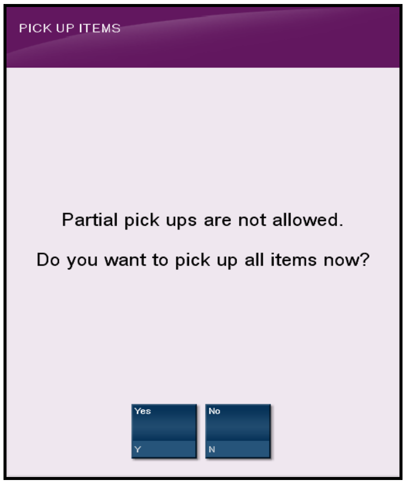
ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Smith, John Smith AMOUNT DUE $0.00

Figure 15-9: Pre-Sale Account Screen - Item Received

6. If prompted, select **Yes** to pick up all the Pre-Sale items. Selecting **No** returns to the Pre-Sale Account screen.

Note: This prompt only displays when there are multiple Pre-Sale items on the account.

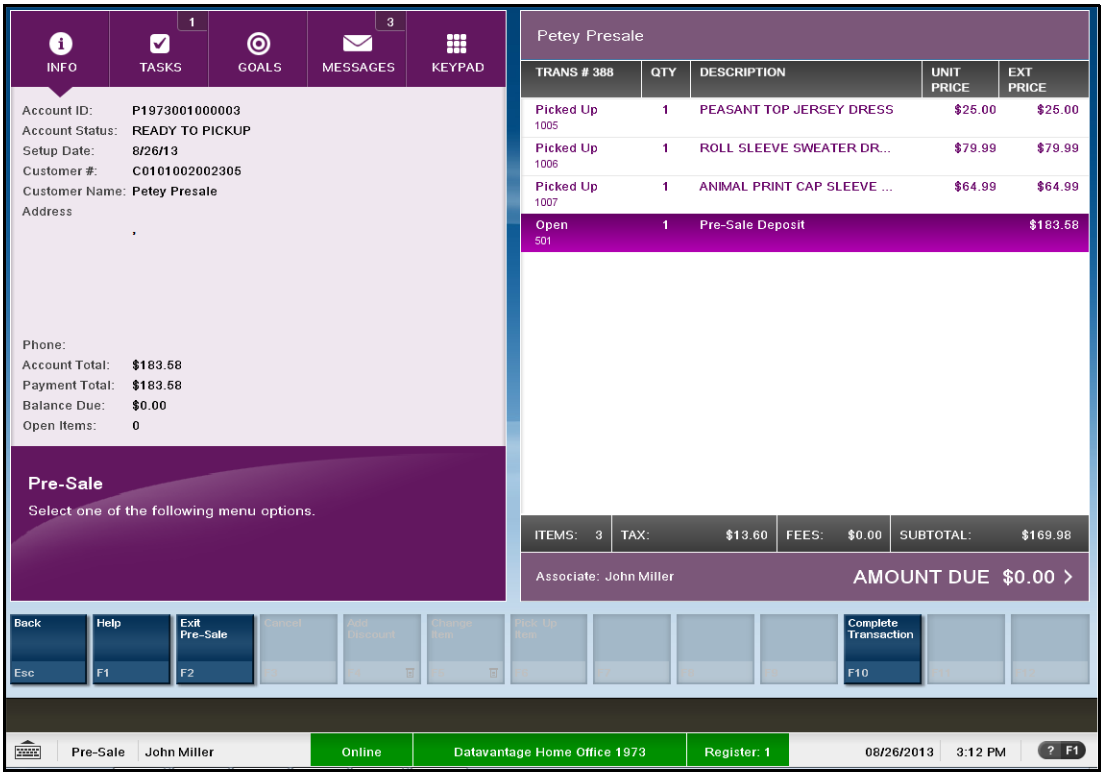


Partial pick ups are not allowed.

Do you want to pick up all items now?

Figure 15-10: Pick Up Items Confirmation Prompt

7. The system returns to the Pre-Sale Account screen and all items are marked as **Picked Up**.



Account ID: P1973001000003
Account Status: READY TO PICKUP
Setup Date: 8/26/13
Customer #: C0101002002305
Customer Name: Petey Presale
Address
,

Phone:
Account Total: $183.58
Payment Total: $183.58
Balance Due: $0.00
Open Items: 0

Pre-Sale

Select one of the following menu options.

Petey Presale

TRANS # 388	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Picked Up 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00
Picked Up 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99
Picked Up 1007	1	ANIMAL PRINT CAP SLEEVE ...	$64.99	$64.99
Open 501	1	Pre-Sale Deposit		$183.58

ITEMS: 3 TAX: $13.60 FEES: $0.00 SUBTOTAL: $169.98

Associate: John Miller AMOUNT DUE $0.00 >

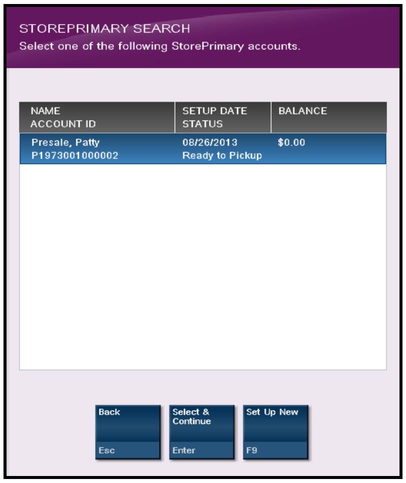
Figure 15-11: Pre-Sale Account Screen - Multiple Items Picked Up Example

8. Complete the transaction:
   - ❑ Select **Complete Transaction** to complete the transaction. See [“Email Receipt Options” on page 54]() for more information about receipts.

     <OR>
   - ❑ Select **Exit Pre-Sale** to return to the Sale screen before tendering the sale.

Cancelling a Pre-Sale Account

1. From the Sale screen, 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 returns a list of Pre-Sale accounts for the customer.
4. Select a Pre-Sale account from the list, then press [Enter].



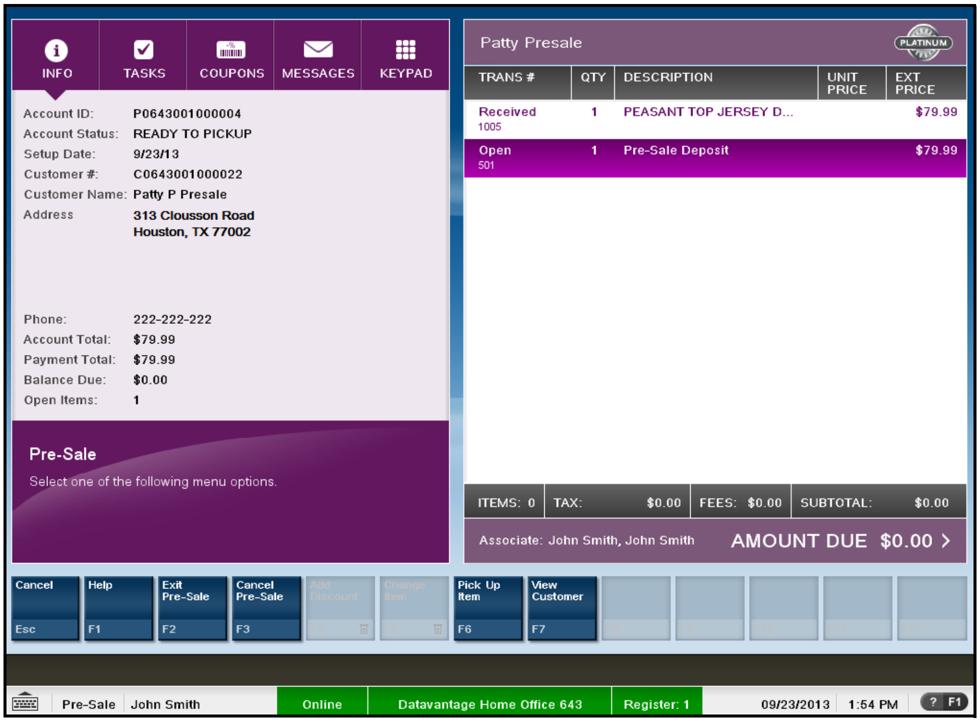
STOREPRIMARY SEARCH

Select one of the following StorePrimary accounts.

NAME ACCOUNT ID	SETUP DATE STATUS	BALANCE
Presale, Patty P1973001000002	08/26/2013 Ready to Pickup	$0.00

Figure 15-12: Pre-Sale Account List

5. At the Pre-Sale Account screen, select **Cancel Pre-Sale**.



Account ID: P0643001000004
Account Status: READY TO PICKUP
Setup Date: 9/23/13
Customer #: C0643001000022
Customer Name: Patty P Presale
Address 313 Clousson Road
Houston, TX 77002
Phone: 222-222-222
Account Total: $79.99
Payment Total: $79.99
Balance Due: $0.00
Open Items: 1

Pre-Sale

Select one of the following menu options.

Patty Presale

TRANS #	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Received 1005	1	PEASANT TOP JERSEY D...		$79.99
Open 501	1	Pre-Sale Deposit		$79.99

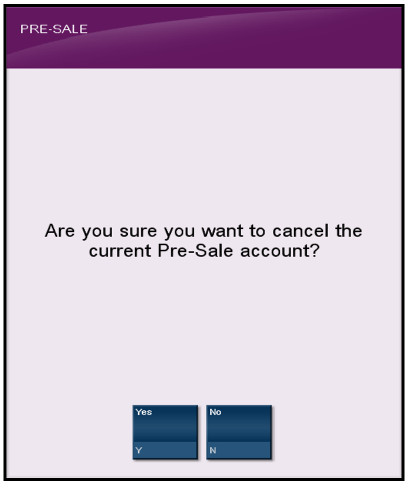
ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Smith, John Smith AMOUNT DUE $0.00

Pre-Sale John Smith Online Datavantage Home Office 643 Register: 1 09/23/2013 1:54 PM

Figure 15-13: Pre-Sale Account Screen

6. When prompted, select **Yes** to confirm you want to cancel this Pre-Sale account. Selecting **No** returns to the Pre-Sale Account screen.



PRE-SALE

Are you sure you want to cancel the current Pre-Sale account?

Figure 15-14: Cancel Pre-Sale Account Confirmation Prompt

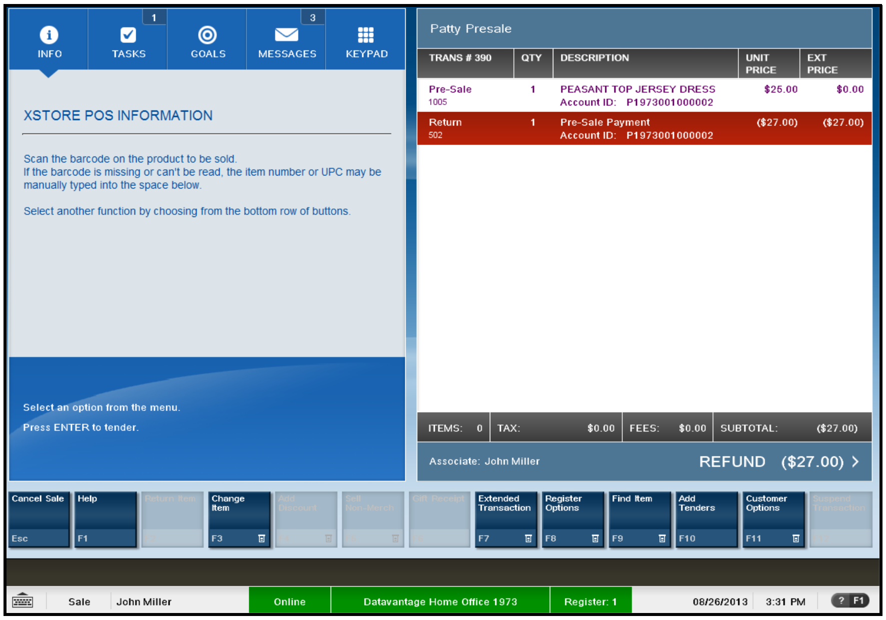
7. When prompted, select **Yes** to confirm the customer is present.

Is the customer present?

Figure 15-15: Customer Is Present Confirmation Prompt

> *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.*

8. The system returns to Sale mode where you can refund the customer's deposit.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Select an option from the menu.

Press ENTER to tender.

TRANS # 390	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Pre-Sale 1005	1	PEASANT TOP JERSEY DRESS Account ID: P1973001000002	$25.00	$0.00
Return 502	1	Pre-Sale Payment Account ID: P1973001000002	($27.00)	($27.00)

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: ($27.00)

Associate: John Miller REFUND ($27.00) >

Figure 15-16: Sale Screen - Refund Deposit

CHAPTER 16

Hold Account Transactions

Overview

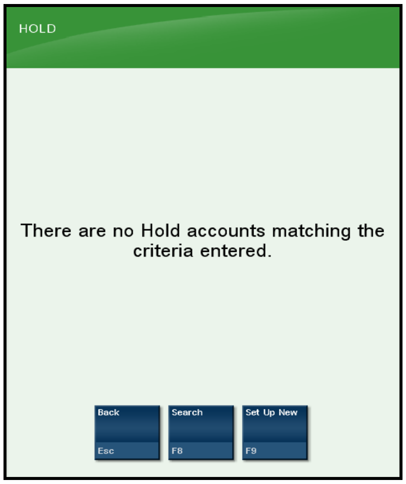
A Hold Account transaction is typically performed when customers plan to purchase merchandise, but would like the store to hold the item(s) for a short period of time so they can return to the store later to complete the purchase and pick up the reserved items. You must associate a customer with the transaction to ensure they receive the reserved items once they return.

Hold Account Transactions

1. From the Sale screen, 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" on page 394.
    - If you have not assigned a customer, see "If a customer has not been associated with the transaction" on page 395.

If a customer is associated with the transaction

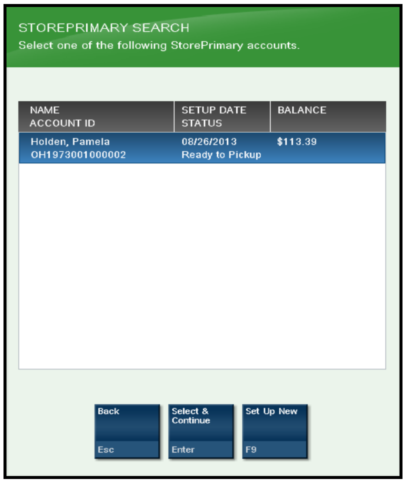
- When a customer has been associated with the current transaction, the system automatically searches the database to locate any open Hold accounts for this customer.
  - ❑ If no Hold accounts are found, you have the following options:



There are no Hold accounts matching the criteria entered.

Figure 16-1: No Hold Accounts Found

    - ❍ Select **Set Up New** to create a Hold account for this customer. Continue with "Creating a New Hold Account" on page 395.
    - ❍ Select **Search** to enter criteria to find a Hold account. See "Searching for a Hold Account" on page 397.
  - ❑ If a Hold account is found, you have the following options:



STOREPRIMARY SEARCH

Select one of the following StorePrimary accounts.

NAME ACCOUNT ID	SETUP DATE STATUS	BALANCE
Holden, Pamela OH1973001000002	08/26/2013 Ready to Pickup	$113.39

Figure 16-2: Hold Account Found

    - ❍ Select **Set Up New** to create a new Hold account. Continue with "Creating a New Hold Account" on page 395.
    - ❍ 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:

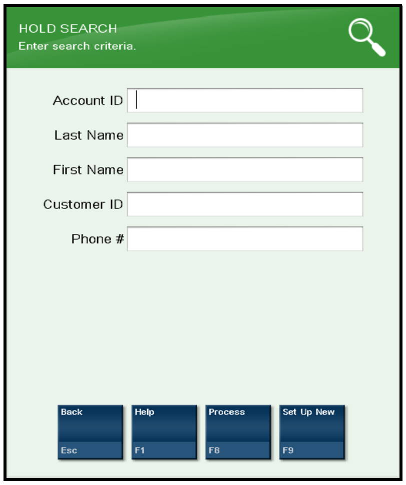


Figure 16-3: Hold Search Form

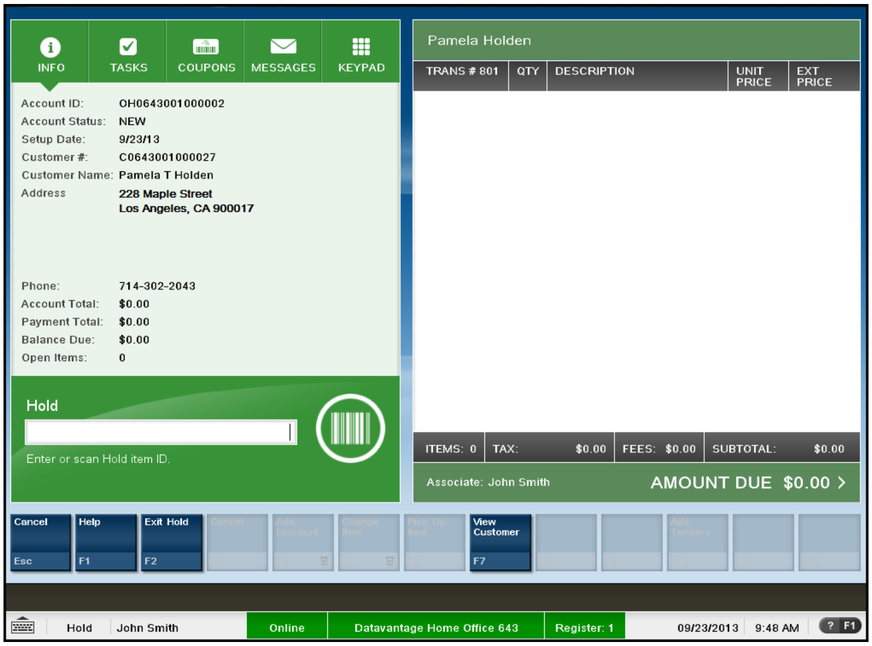
  - ☐ Select **Set Up New** to create a new Hold account. After associating a customer with the transaction, continue with "Creating a New Hold Account" on page 395.
  - ☐ To search for a Hold account, enter search criteria and select **Process**. See "Searching for a Hold Account" on page 397.
  - ☐ Select **Back** to return to the Sale screen.

Creating a New Hold Account

...continued from step 3 on page 393

1. After a customer is associated with the transaction, scan or enter the Hold item Id.

> *To add Wish List item(s) to the Hold, select **View Customer** and then select the **Wish List** tab (see "Purchasing Wish List Item(s)" on page 43).*



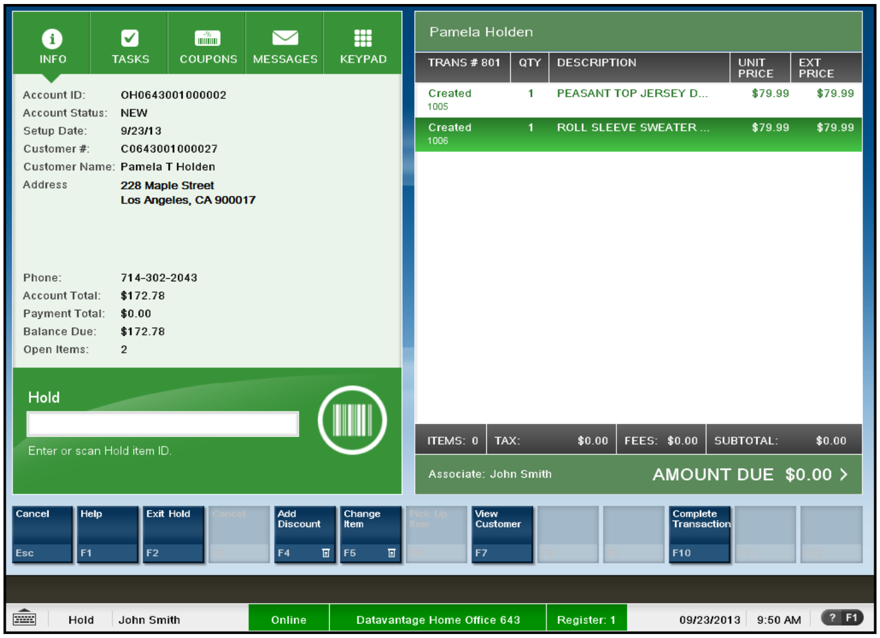
Account ID: OH0643001000002
Account Status: NEW
Setup Date: 9/23/13
Customer #: C0643001000027
Customer Name: Pamela T Holden
Address: 228 Maple Street
Los Angeles, CA 900017
Phone: 714-302-2043
Account Total: $0.00
Payment Total: $0.00
Balance Due: $0.00
Open Items: 0

TRANS # 801	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00
Associate: John Smith AMOUNT DUE $0.00

Figure 16-4: Hold Item Id Prompt

2. You have the following options at the Hold screen before tendering:



Account ID: OH0643001000002
Account Status: NEW
Setup Date: 9/23/13
Customer #: C0643001000027
Customer Name: Pamela T Holden
Address: 228 Maple Street
Los Angeles, CA 900017
Phone: 714-302-2043
Account Total: $172.78
Payment Total: $0.00
Balance Due: $172.78
Open Items: 2

TRANS # 801	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Created 1005	1	PEASANT TOP JERSEY D...	$79.99	$79.99
Created 1006	1	ROLL SLEEVE SWEATER ...	$79.99	$79.99

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00
Associate: John Smith AMOUNT DUE $0.00

Figure 16-5: Hold Screen - Item Added

- ❑ You can scan another Hold item.

- You can change an item by:
  - Adding a discount ("Adding a Discount/Award to an Item or Transaction" on page 201).
  - Changing the item price ("Changing the Item Price" on page 219).
  - Voiding a line item ("Voiding an Item" on page 221).
  - 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, do one of the following to complete the account setup:
   - Select **Exit Hold** to exit Hold mode and return to sale mode before completing the Hold account setup.

     <OR>
   - Select **Complete Transaction** to complete the Hold account setup.

Notes:

- 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 on page 393

1. To search for a Hold account, enter search criteria in the Hold Search form.

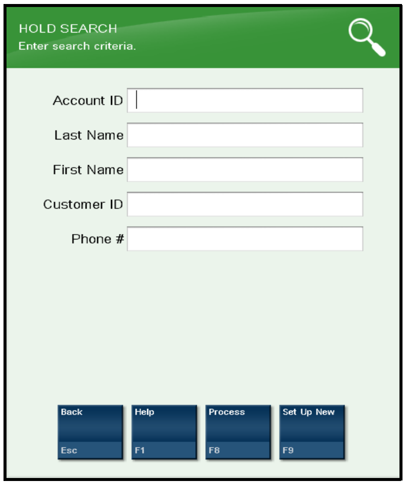


Figure 16-6: Hold Search Form

- **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 16-1, "No Hold Accounts Found," on page 394.
- 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 16-2, "Hold Account Found," on page 394.

Picking Up Hold Items

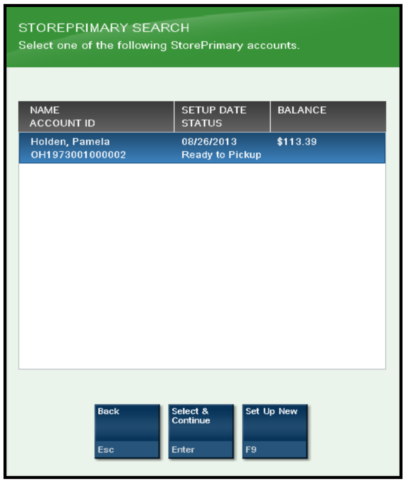
1. From the Sale screen, select **Extended Transaction**.

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 returns a list of Hold accounts for the customer.

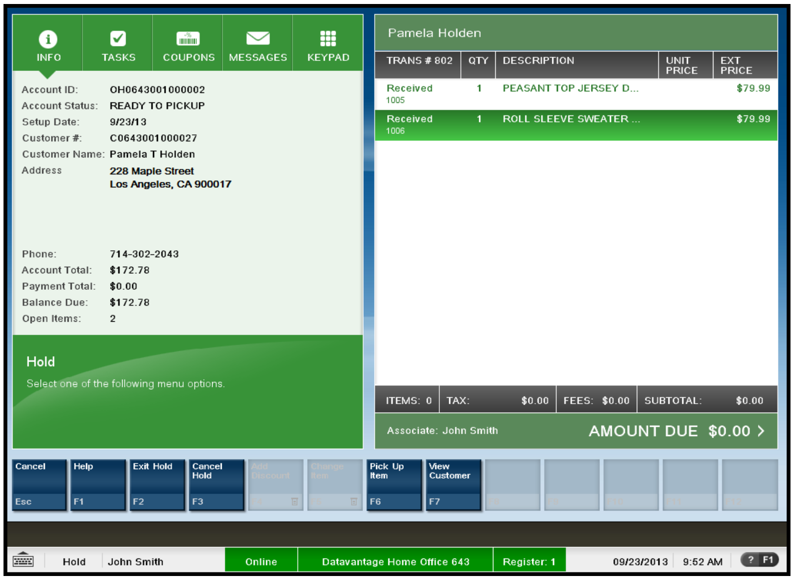
4. Select a Hold account from the list, then press [Enter].


STOREPRIMARY SEARCH
Select one of the following StorePrimary accounts.

NAME ACCOUNT ID	SETUP DATE STATUS	BALANCE
Holden, Pamela OH1973001000002	08/26/2013 Ready to Pickup	$113.39

Figure 16-7: Hold Account List

5. At the Hold Account screen, select **Pick Up Item**.



Account ID: OH0643001000002
Account Status: READY TO PICKUP
Setup Date: 9/23/13
Customer #: C0643001000027
Customer Name: Pamela T Holden
Address 228 Maple Street
Los Angeles, CA 900017
Phone: 714-302-2043
Account Total: $172.78
Payment Total: $0.00
Balance Due: $172.78
Open Items: 2

Hold

Select one of the following menu options.

Pamela Holden

TRANS # 802	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Received 1005	1	PEASANT TOP JERSEY D...		$79.99
Received 1006	1	ROLL SLEEVE SWEATER ...		$79.99

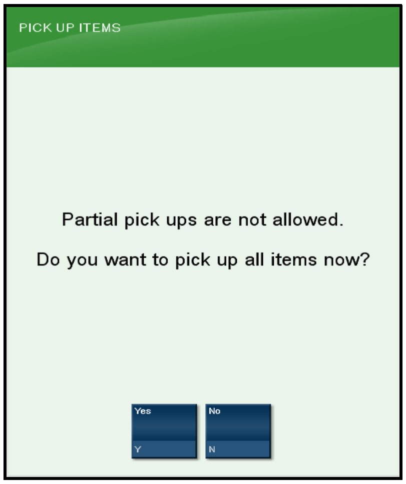
ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Smith AMOUNT DUE $0.00

Figure 16-8: Hold Account Screen Button 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



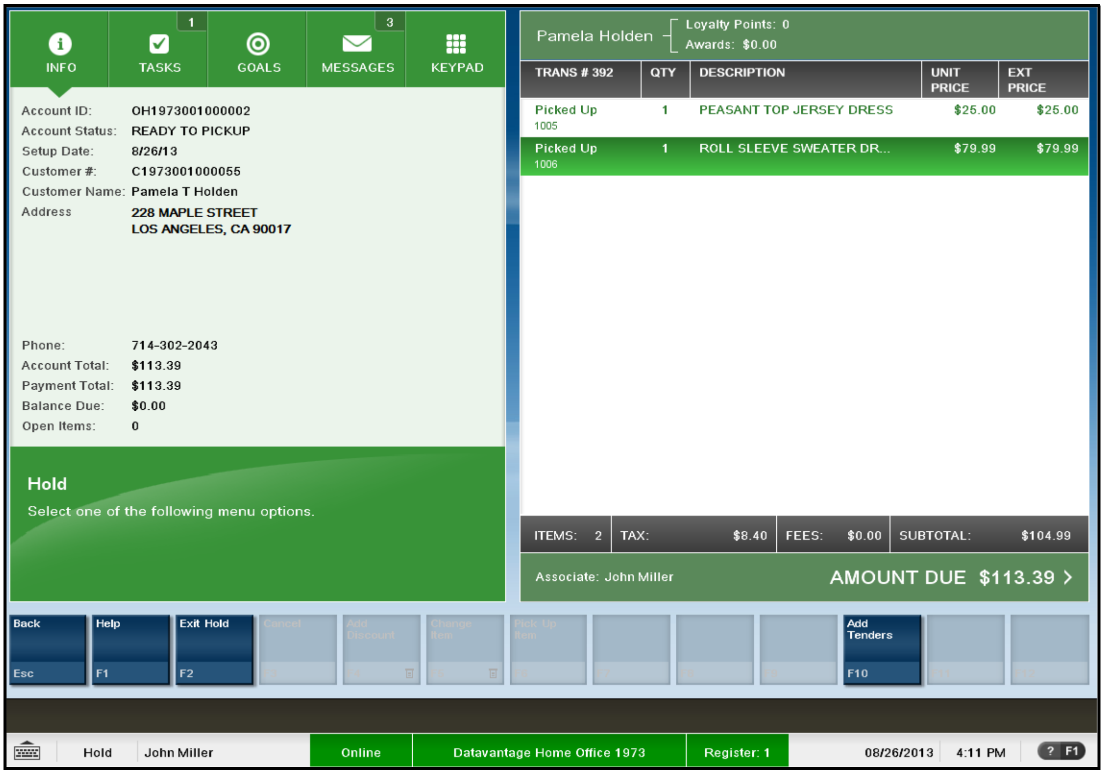
PICK UP ITEMS

Partial pick ups are not allowed.

Do you want to pick up all items now?

Figure 16-9: Pick Up Items Confirmation Prompt

7. The system returns to the Hold Account screen and all items are marked as **Picked Up**.



Account ID: OH1973001000002
Account Status: READY TO PICKUP
Setup Date: 8/26/13
Customer #: C1973001000055
Customer Name: Pamela T Holden
Address 228 MAPLE STREET
LOS ANGELES, CA 90017

Phone: 714-302-2043
Account Total: $113.39
Payment Total: $113.39
Balance Due: $0.00
Open Items: 0

Hold
Select one of the following menu options.

Pamela Holden
Loyalty Points: 0
Awards: $0.00

TRANS # 392	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Picked Up 1005	1	PEASANT TOP JERSEY DRESS	$25.00	$25.00
Picked Up 1006	1	ROLL SLEEVE SWEATER DR...	$79.99	$79.99

ITEMS: 2 TAX: $8.40 FEES: $0.00 SUBTOTAL: $104.99

Associate: John Miller AMOUNT DUE $113.39

Figure 16-10: Hold Account Screen - Items Picked Up

8. Complete the transaction:

❑ Select **Add Tenders** to complete the transaction. See “Email Receipt Options” on page 54 for more information about receipts.

<OR>

❑ Select **Exit Hold** to return to the Sale screen before completing the transaction.

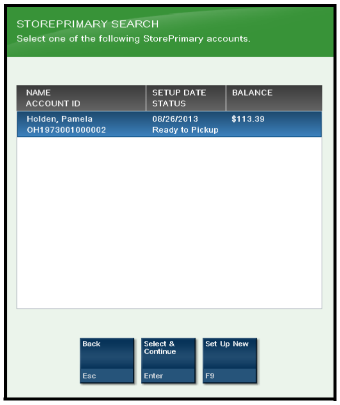
Cancelling a Hold Account

1. From the Sale screen, 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 returns a list of Hold accounts for the customer.

4. Select a Hold account from the list, then press [Enter].

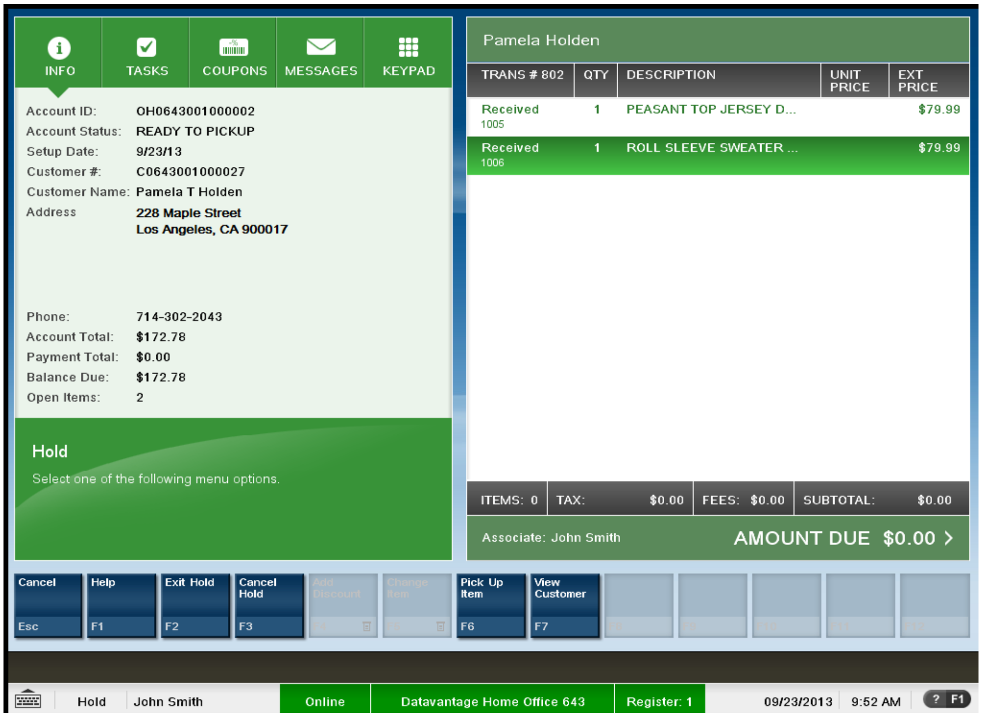


STOREPRIMARY SEARCH

Select one of the following StorePrimary accounts.

NAME ACCOUNT ID	SETUP DATE STATUS	BALANCE
Holden, Pamela OH1973001000002	08/26/2013 Ready to Pickup	$113.39

5. At the Hold Account screen, select **Cancel Hold**.



Account ID: OH0643001000002

Account Status: READY TO PICKUP

Setup Date: 9/23/13

Customer #: C0643001000027

Customer Name: Pamela T Holden

Address 228 Maple Street
Los Angeles, CA 900017

Phone: 714-302-2043

Account Total: $172.78

Payment Total: $0.00

Balance Due: $172.78

Open Items: 2

Hold

Select one of the following menu options.

Pamela Holden

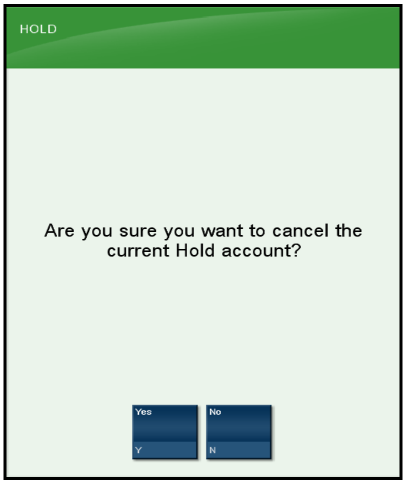
TRANS # 802	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Received 1005	1	PEASANT TOP JERSEY D...		$79.99
Received 1006	1	ROLL SLEEVE SWEATER ...		$79.99

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: $0.00

Associate: John Smith AMOUNT DUE $0.00

Figure 16-11: Hold Account Screen Button Options

6. When prompted, select **Yes** to confirm you want to cancel this Hold account. Selecting **No** returns to the Hold Account screen.



Are you sure you want to cancel the current Hold account?

Figure 16-12: Cancel Hold Account Confirmation Prompt

7. The system returns to Sale mode where you can complete the cancel process.

CHAPTER 17

Gift Registry

Overview

The Gift Registry feature is a tool to assist the customer in purchasing gifts for someone registered. Items in a sale transaction can be associated to a registry, additionally, gift registries can be set up and maintained in the system from the Back Office. Gift Registry is available if you are using Relate. The following can be done in the Register mode of Xstore:

- "Selling Gift Registry items" on page 403
- "Returning/Cancelling Gift Registry items" on page 406

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 Locate Orders.

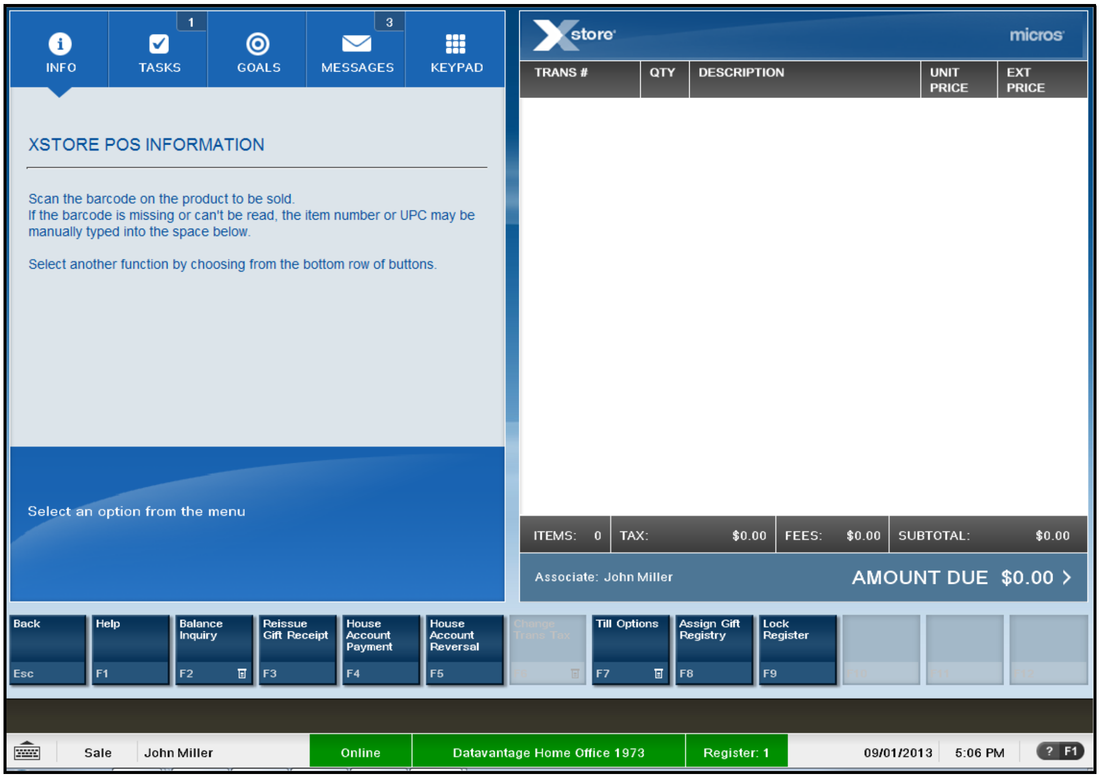
Assign the Gift Registry

If your system is offline, you cannot access the gift registry from Relate. However, if you've already accessed the gift registry and are making modifications, the registry updates once your system is back on line.

If the printed gift registry is available, scan the bar code to assign the gift registry to the sale.

1. From the Sale screen, select the **Register Options** menu button.

2. From the Register Options menu, select the **Assign Gift Registry** menu button.



XSTORE POS INFORMATION

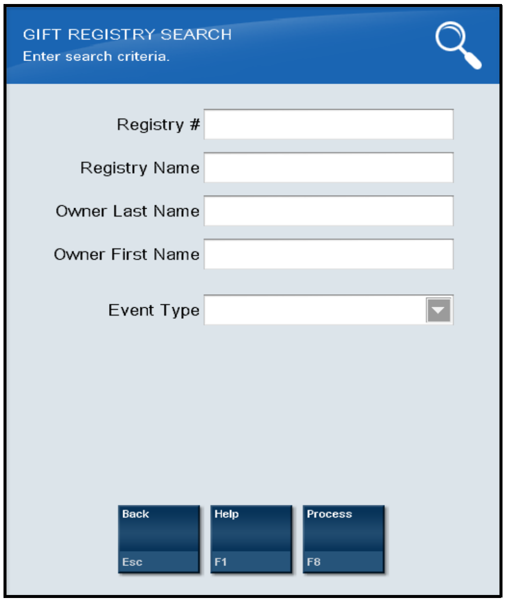
Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Select an option from the menu

Figure 17-1: Register Options Menu - Assign Gift Registry

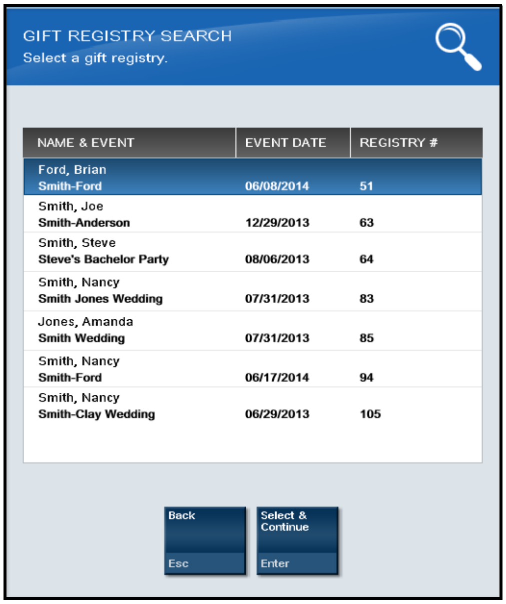
3. Enter the search criteria and select **Process**.



GIFT REGISTRY SEARCH
Enter search criteria.

Figure 17-2: Gift Registry Search

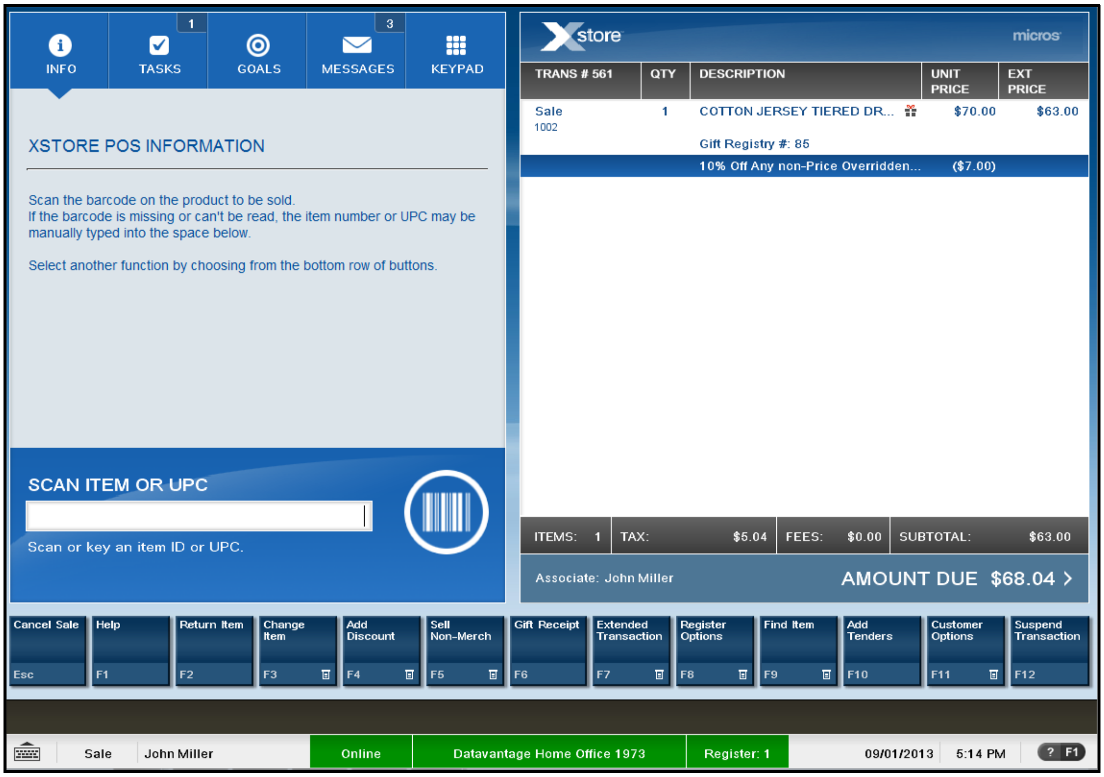
4. Select the desired registry from the returned list and press [Enter].



NAME & EVENT	EVENT DATE	REGISTRY #
Ford, Brian Smith-Ford	06/08/2014	51
Smith, Joe Smith-Anderson	12/29/2013	63
Smith, Steve Steve's Bachelor Party	08/06/2013	64
Smith, Nancy Smith Jones Wedding	07/31/2013	83
Jones, Amanda Smith Wedding	07/31/2013	85
Smith, Nancy Smith-Ford	06/17/2014	94
Smith, Nancy Smith-Clay Wedding	06/29/2013	105

Figure 17-3: Gift Registry Search Results

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.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

SCAN ITEM OR UPC

Scan or key an item ID or UPC.

TRANS # 561	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Sale 1002	1	COTTON JERSEY TIERED DR... 🎁 Gift Registry #: 85	$70.00	$63.00
		10% Off Any non-Price Overridden...	($7.00)	

ITEMS: 1 TAX: $5.04 FEES: $0.00 SUBTOTAL: $63.00

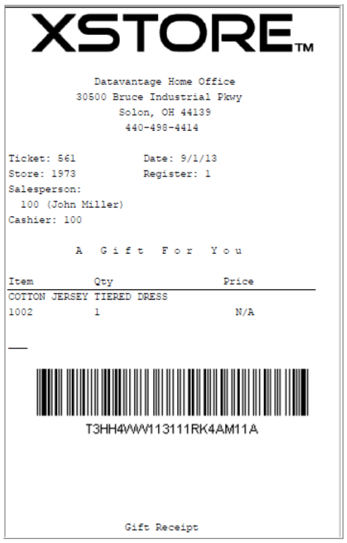
Associate: John Miller AMOUNT DUE $68.04

Sale John Miller Online Datavantage Home Office 1973 Register: 1 09/01/2013 5:14 PM

Figure 17-4: Sale with Gift Registry Item

6. Complete the Sale. See"Entering Items into the Sale Screen" on page 40 and "Sale Tenders" on page 84.

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  G i f t  F o r  Y o u

Item          Qty                Price
COTTON JERSEY TIERED DRESS
1002          1                    N/A

___

        T3HH4VWV113111RK4AM11A

             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 Locate™ orders you must assign the gift registry ***manually prior*** to entering the return or cancelling the order.

1. Assign the customer to a sale (see "Associating a Customer with the Sale" on page 37).

For Locate orders, assign the gift registry. Select **Register Options --> Assign Gift Registry** (see "Assign the Gift Registry" on page 403).

2. Return the item or cancel the order:
   - ❑ Return the item (see "Return Transactions" on page 65).
   - ❑ Cancel the order (see "Cancelling an Order" on page 377).

CHAPTER

18

Task Management

Overview

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 Relate users, this section also includes instructions on how to use the Black Book feature to focus on your primary customers.

The following instructions are found in this chapter:

- "Viewing and Maintaining Your Tasks" on page 408
- "Viewing Your Black Book [RELATE ONLY]" on page 416

Viewing and Maintaining Your Tasks

Use the My Tasks screen to view and maintain your tasks.

Accessing the My Tasks Screen

Access the My Tasks screen through the Register Login screen or the Back Office. The functionality is the same, however, the Register screen has a green background and the Back Office screen has a black background:

<table>
<tr><th>Register Login Screen</th><th>Back Office</th></tr>
<tr><td>

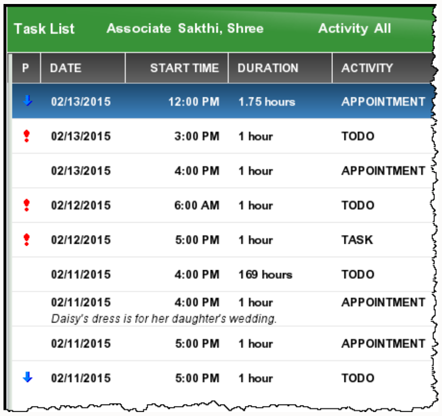
1. Select the **My Tasks** menu option.
2. Enter your Employee ID and password. Press [Enter]. The Task List displays.

   Note: *If you use a biometric device for employee authentication, you are not prompted for a password.*

</td><td>

From the Back Office main menu, select **Associate Tasks** --> **My Tasks**. The Task List displays.

</td></tr>
<tr><td>

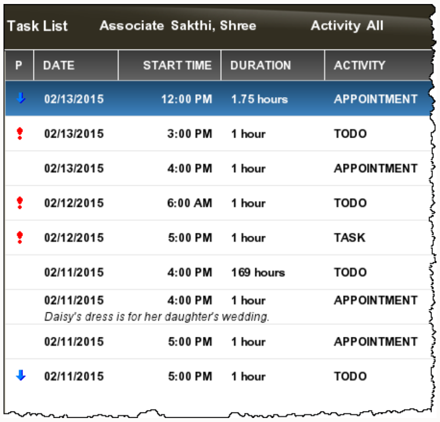


Task List Associate Sakthi, Shree Activity All

<table>
<tr><th>P</th><th>DATE</th><th>START TIME</th><th>DURATION</th><th>ACTIVITY</th></tr>
<tr><td>↓</td><td>02/13/2015</td><td>12:00 PM</td><td>1.75 hours</td><td>APPOINTMENT</td></tr>
<tr><td>!</td><td>02/13/2015</td><td>3:00 PM</td><td>1 hour</td><td>TODO</td></tr>
<tr><td></td><td>02/13/2015</td><td>4:00 PM</td><td>1 hour</td><td>APPOINTMENT</td></tr>
<tr><td>!</td><td>02/12/2015</td><td>6:00 AM</td><td>1 hour</td><td>TODO</td></tr>
<tr><td>!</td><td>02/12/2015</td><td>5:00 PM</td><td>1 hour</td><td>TASK</td></tr>
<tr><td></td><td>02/11/2015</td><td>4:00 PM</td><td>169 hours</td><td>TODO</td></tr>
<tr><td></td><td>02/11/2015
Daisy's dress is for her daughter's wedding.</td><td>4:00 PM</td><td>1 hour</td><td>APPOINTMENT</td></tr>
<tr><td></td><td>02/11/2015</td><td>5:00 PM</td><td>1 hour</td><td>APPOINTMENT</td></tr>
<tr><td>↓</td><td>02/11/2015</td><td>5:00 PM</td><td>1 hour</td><td>TODO</td></tr>
</table>

Figure 18-1: Task List - Register

</td><td>



Task List Associate Sakthi, Shree Activity All

<table>
<tr><th>P</th><th>DATE</th><th>START TIME</th><th>DURATION</th><th>ACTIVITY</th></tr>
<tr><td>↓</td><td>02/13/2015</td><td>12:00 PM</td><td>1.75 hours</td><td>APPOINTMENT</td></tr>
<tr><td>!</td><td>02/13/2015</td><td>3:00 PM</td><td>1 hour</td><td>TODO</td></tr>
<tr><td></td><td>02/13/2015</td><td>4:00 PM</td><td>1 hour</td><td>APPOINTMENT</td></tr>
<tr><td>!</td><td>02/12/2015</td><td>6:00 AM</td><td>1 hour</td><td>TODO</td></tr>
<tr><td>!</td><td>02/12/2015</td><td>5:00 PM</td><td>1 hour</td><td>TASK</td></tr>
<tr><td></td><td>02/11/2015</td><td>4:00 PM</td><td>169 hours</td><td>TODO</td></tr>
<tr><td></td><td>02/11/2015
Daisy's dress is for her daughter's wedding.</td><td>4:00 PM</td><td>1 hour</td><td>APPOINTMENT</td></tr>
<tr><td></td><td>02/11/2015</td><td>5:00 PM</td><td>1 hour</td><td>APPOINTMENT</td></tr>
<tr><td>↓</td><td>02/11/2015</td><td>5:00 PM</td><td>1 hour</td><td>TODO</td></tr>
</table>

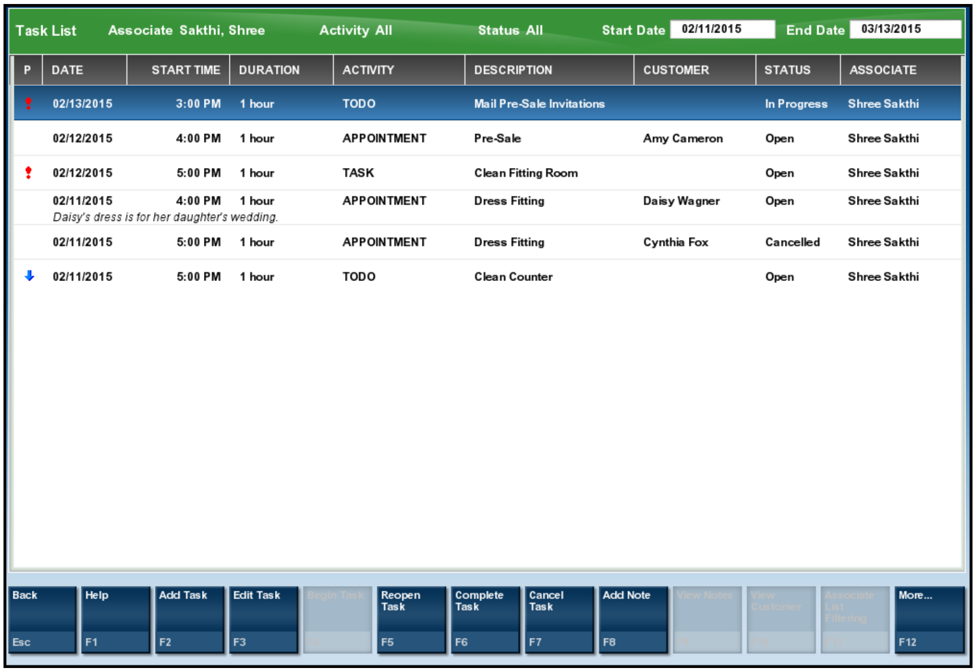
Figure 18-2: Task List - Back Office

</td></tr>
</table>

Viewing Task Information

Associates with a Manager security level or higher can view the list of tasks for all employees, as well as the store tasks. Associates with any security level below the Manager level can only view tasks assigned to them or assigned to their group(s).

The My Tasks screen displays all tasks visible to you. The menu options available are based on the task status and the associated workflow.



Task List Associate Sakthi, Shree Activity All Status All Start Date 02/11/2015 End Date 03/13/2015

P	DATE	START TIME	DURATION	ACTIVITY	DESCRIPTION	CUSTOMER	STATUS	ASSOCIATE
!	02/13/2015	3:00 PM	1 hour	TODO	Mail Pre-Sale Invitations		In Progress	Shree Sakthi
	02/12/2015	4:00 PM	1 hour	APPOINTMENT	Pre-Sale	Amy Cameron	Open	Shree Sakthi
!	02/12/2015	5:00 PM	1 hour	TASK	Clean Fitting Room		Open	Shree Sakthi
	02/11/2015 *Daisy's dress is for her daughter's wedding.*	4:00 PM	1 hour	APPOINTMENT	Dress Fitting	Daisy Wagner	Open	Shree Sakthi
	02/11/2015	5:00 PM	1 hour	APPOINTMENT	Dress Fitting	Cynthia Fox	Cancelled	Shree Sakthi
↓	02/11/2015	5:00 PM	1 hour	TODO	Clean Counter		Open	Shree Sakthi

Figure 18-3: My Tasks Screen

The My Task screen displays the following fields:

Table 18-1: *Task List Fields*

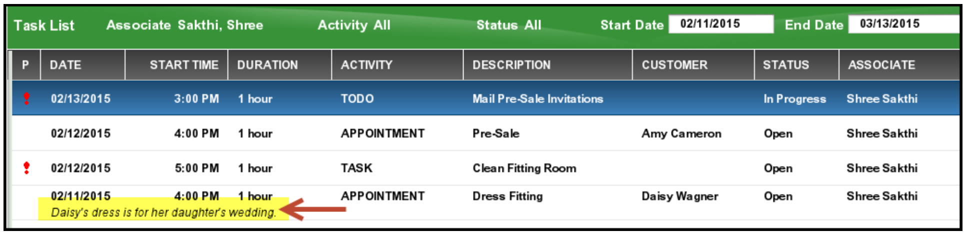
Field	Description
Priority (P)	The Importance of the task (**High** (!), **Medium** (none), or **Low** (↓).
Date	The date the task should be started.
Start Time	The time the task should begin.
Duration	The length of time for the task.
Activity	Type of task.
Description	Detailed description the task.

Table 18-1: *Task List Fields*

Field	Description
Customer	The customer associated with the task. If a customer is associated with the task, the task can be viewed from the Customer Maintenance Task tab as well, see “Tasks Tab” on page 159.
Status	Indicates the progress of the task: **Open** - The appointment is open, but not started. **In Progress** - The appointment has been started, but not completed. **Cancelled** - The appointment has been cancelled and cannot be reopened or edited. **Closed** - The appointment has been completed and cannot be reopened or edited.
Associate	The employee or employee group responsible for completing the task.

Viewing Notes

The most recent note associated with the task displays beneath the task row:



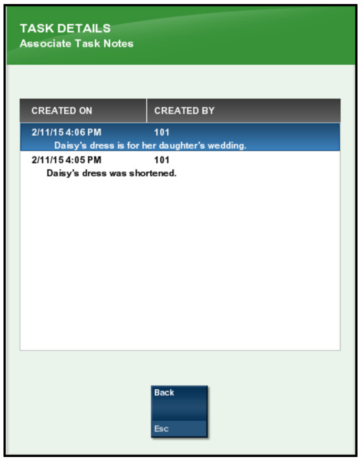
Task List Associate Sakthi, Shree Activity All Status All Start Date 02/11/2015 End Date 03/13/2015

P	DATE	START TIME	DURATION	ACTIVITY	DESCRIPTION	CUSTOMER	STATUS	ASSOCIATE
!	02/13/2015	3:00 PM	1 hour	TODO	Mail Pre-Sale Invitations		In Progress	Shree Sakthi
	02/12/2015	4:00 PM	1 hour	APPOINTMENT	Pre-Sale	Amy Cameron	Open	Shree Sakthi
!	02/12/2015	5:00 PM	1 hour	TASK	Clean Fitting Room		Open	Shree Sakthi
	02/11/2015	4:00 PM	1 hour	APPOINTMENT	Dress Fitting	Daisy Wagner	Open	Shree Sakthi

Daisy's dress is for her daughter's wedding.

Figure 18-4: View Recent Note

To view all notes associated with the task, select **View Notes** menu option.



TASK DETAILS
Associate Task Notes

CREATED ON	CREATED BY
2/11/15 4:06 PM Daisy's dress is for her daughter's wedding.	101
2/11/15 4:05 PM Daisy's dress was shortened.	101

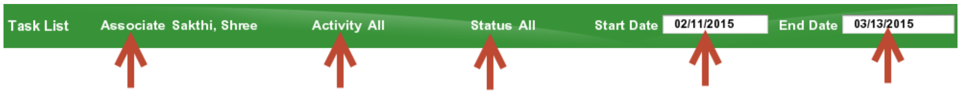
Figure 18-5: Associate Task Notes

Filtering Tasks

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. To filter:

3. Select one of the following Headings:

- ☐ **Associate** - your security privileges determine which Associates you can view. Select a value and then select **Ok**.
- ☐ **Activity** - Select a value and then select **Ok**.
- ☐ **Status**- Select a value and then select **Ok**.
- ☐ **Start Date** - override the default value.
- ☐ **End Date** - override the default value.



Task List
Associate Sakthi, Shree
Activity All
Status All
Start Date 02/11/2015
End Date 03/13/2015

Figure 18-6: Filter Bar

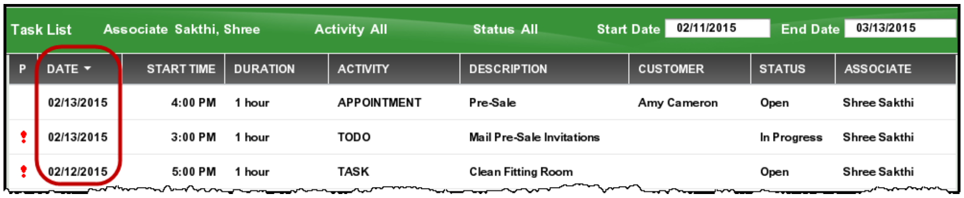
Xstore displays tasks that meet your filter values.

You can also use the following menu options to filter:

- Associate List Filter
- Activity List Filter
- Status List Filter

Sorting Columns

Select a heading to sort information by descending ▼ or ascending ▲ order.



Task List Associate Sakthi, Shree Activity All Status All Start Date 02/11/2015 End Date 03/13/2015

P	DATE ▼	START TIME	DURATION	ACTIVITY	DESCRIPTION	CUSTOMER	STATUS	ASSOCIATE
	02/13/2015	4:00 PM	1 hour	APPOINTMENT	Pre-Sale	Amy Cameron	Open	Shree Sakthi
!	02/13/2015	3:00 PM	1 hour	TODO	Mail Pre-Sale Invitations		In Progress	Shree Sakthi
!	02/12/2015	5:00 PM	1 hour	TASK	Clean Fitting Room		Open	Shree Sakthi

Figure 18-7: Task List Sort Columns - Date

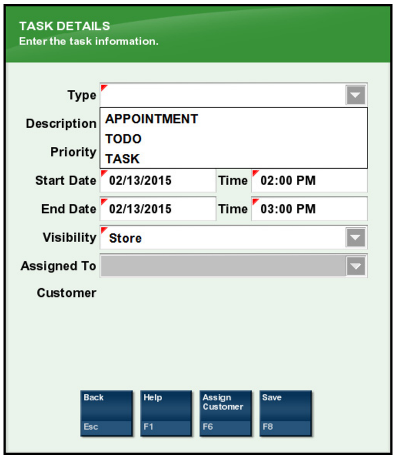
Viewing Customer Information

To view customer information:

1. Select the task associated with the customer and then select the **View Customer** menu option. The Customer Maintenance screen displays the Contact Information tab.
2. To view all tasks associated with the customer, select the **Tasks** tab. See "Tasks Tab" on page 159.
3. Select **Cancel** to return to the Task List.

Adding a Task

1. From the My Tasks screen or the Customer Maintenance Task tab, select **Add Task**. The Task Details prompt displays.
2. Enter the following task information:



TASK DETAILS
Enter the task information.

Type
Description
Priority
APPOINTMENT
TODO
TASK
Start Date 02/13/2015 Time 02:00 PM
End Date 02/13/2015 Time 03:00 PM
Visibility Store
Assigned To
Customer

Figure 18-8: Task Details - Add Task

Admin and Event type tasks cannot be added through Xstore. Admin and Event type tasks may still be viewed on the task list.

Table 18-2: *Task Details Options*

Field	Description
Type	Select a pre-defined task category. The categories are customized by your home office.
Description	Enter a detailed description of the task you are creating.
Priority	Select the priority of the task (**High**, **Medium**, or **Low**).
Start Date	Enter the date the task should be started.
End Date	Enter the date the task should be completed.
Start Time	Enter the time the task should begin. If you enter the time as military, Xstore will convert the time when you press [Enter].
End Time	Enter the time the task should end. If you enter the time as military, Xstore will convert the time when you press [Enter].
Visibility	Select the group that can view the task (**Store**, **Employee Group**, or **Employee**). **Note:** If using Relate tasks, Employee Group visibility is not an option.
Assigned To	This option is only editable if the **Visibility** field is set to **Employee Group** or **Employee**. Select from the list. **Note:** The employee must exist in Relate. If not, Xstore will indicate the user supplied is not a valid Relate user.

3. If needed, assign a customer to the task:
   - **a.** Select the **Assign Customer** button.
   - **b.** Enter your search criteria and then select **Process**.
   - **c.** If a list of matching customer records is found, select a customer from the list and choose one of these options:
     - **Select & Continue** – Assigns the selected name to the task.
     - **Select & View** – Opens the selected customer record for viewing, editing, or printing. See “Viewing a Customer Record” on page 148. Once you are done viewing or editing the record, select **Assign and Continue** option to associate the customer’s information to the task.

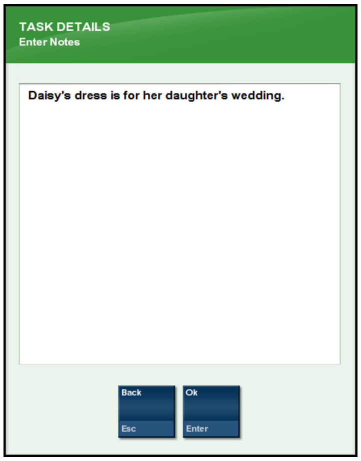
- **New** – Displays a form for adding a new customer record to the customer database. See "Adding a New Customer Record" on page 143.

> *If you are adding a task from the Customer Maintenance screen, you do not have the option to add the customer to the task. Xstore will automatically assign the task to the customer.*

4. Select **Save**. The task displays on the Task List, see Figure 18-3 on page 409.

Adding Notes

1. From the My Tasks screen or the Customer Maintenance Tasks tab, select the appointment.
2. Select **Add Note**.
3. Enter the text of your note and then select **Ok**.

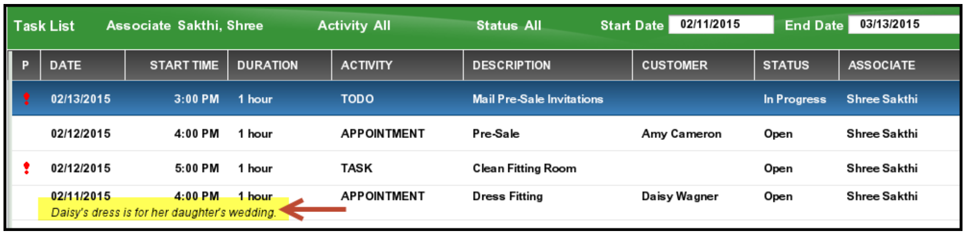


TASK DETAILS
Enter Notes

Daisy's dress is for her daughter's wedding.

Figure 18-9: Task Details - Enter Notes

4. The note displays beneath the task row. To view additional notes, select **View Notes**.



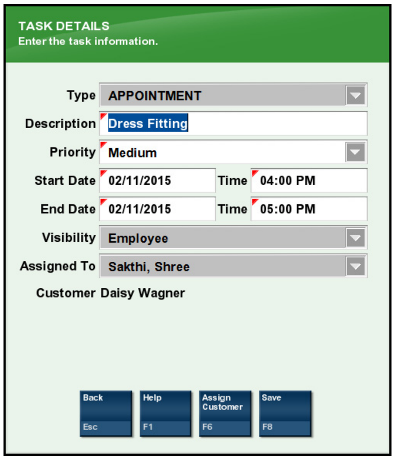
Task List Associate Sakthi, Shree Activity All Status All Start Date 02/11/2015 End Date 03/13/2015

P	DATE	START TIME	DURATION	ACTIVITY	DESCRIPTION	CUSTOMER	STATUS	ASSOCIATE
!	02/13/2015	3:00 PM	1 hour	TODO	Mail Pre-Sale Invitations		In Progress	Shree Sakthi
	02/12/2015	4:00 PM	1 hour	APPOINTMENT	Pre-Sale	Amy Cameron	Open	Shree Sakthi
!	02/12/2015	5:00 PM	1 hour	TASK	Clean Fitting Room		Open	Shree Sakthi
	02/11/2015 Daisy's dress is for her daughter's wedding.	4:00 PM	1 hour	APPOINTMENT	Dress Fitting	Daisy Wagner	Open	Shree Sakthi

Figure 18-10: My Tasks screen - Note

Editing a Task

1. From the My Tasks screen or the Customer Maintenance Tasks tab, select the task you wish to edit.
2. Select **Edit Task**. The Task Details prompt displays. Modify information as needed. Grayed out fields cannot be modified. Your security privilege may prevent you from being able to modify the visibility and assigned to fields.



TASK DETAILS
Enter the task information.

Type APPOINTMENT
Description Dress Fitting
Priority Medium
Start Date 02/11/2015 Time 04:00 PM
End Date 02/11/2015 Time 05:00 PM
Visibility Employee
Assigned To Sakthi, Shree
Customer Daisy Wagner

Figure 18-11: Task Details

3. To modify the assigned customer, select **Assign Customer** (see step 3 on page 413).
4. Select **Save**. The task is updated with the new information and displays on the Associate Task screen.

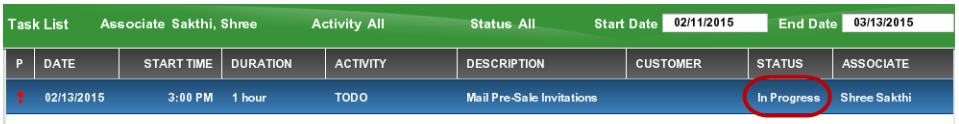
Updating Task Progress

The status of tasks can only be updated through the My Tasks menu option. You cannot update the status from the Customer Maintenance screen.

To update the status of a task:

1. From the My Tasks screen, select the task.
2. Select a status menu option. 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. Menu options include:
   - ☐ **Begin Task** - Sets the status to In progress.
   - ☐ **Reopen Task** - Sets the status to Open.
   - ☐ **Complete Task** - Sets the status to Closed and ***cannot be re-opened or edited***. A verification prompt displays, select **Yes** if applicable.
   - ☐ **Cancel Task** - Sets the status to Cancelled and ***cannot be re-opened or edited***. A verification prompt displays, select **Yes** if applicable.

The task status is updated.



Task List Associate Sakthi, Shree Activity All Status All Start Date 02/11/2015 End Date 03/13/2015

P	DATE	START TIME	DURATION	ACTIVITY	DESCRIPTION	CUSTOMER	STATUS	ASSOCIATE
!	02/13/2015	3:00 PM	1 hour	TODO	Mail Pre-Sale Invitations		In Progress	Shree Sakthi

Figure 18-12: Begin Task Option - In Progress Status

Viewing Your Black Book [RELATE ONLY]

Use the Black Book feature to view your primary customers contact information. The Black Book feature is only available to Relate users. Your security privileges determine the associates and customers you can access.

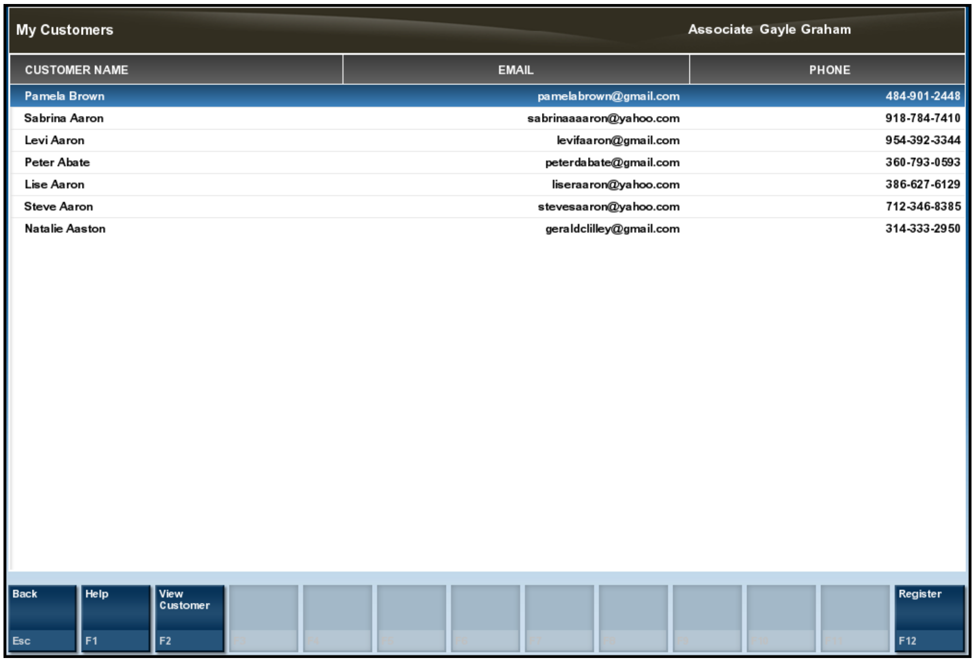
To view the Black Book screen:

1. Open the Back Office Main Menu and then select **Associate Tasks** -->**Black Book**.
2. Depending on your security privileges either:
   - ❑ The My Customer screen displays.

   <OR>

   - ❑ The Associate Filter prompt displays. Select an associate and press [Enter]. The My Customers screen displays.

*To view the customers for a different associate, select **Back**. Select an associate from the Associate Filter prompt and press [Enter].*



CUSTOMER NAME	EMAIL	PHONE
Pamela Brown	pamelabrown@gmail.com	484-901-2448
Sabrina Aaron	sabrinaaaaron@yahoo.com	918-784-7410
Levi Aaron	levifaaron@gmail.com	954-392-3344
Peter Abate	peterdabate@gmail.com	360-793-0593
Lise Aaron	liseraaron@yahoo.com	386-627-6129
Steve Aaron	stevesaaron@yahoo.com	712-346-8385
Natalie Aaston	geraldclilley@gmail.com	314-333-2950

Figure 18-13: My Customers Screen

The My Customers Screen displays the following:

Table 18-3: *My Customers Screen Fields*

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

Viewing a Customer Record

To view a customer record from the Black Book:

1. Select a customer from the list and then select **View Customer**. The Customer Maintenance Purchase History tab displays. See "Purchase History Tab" on page 152.
2. Select **Back** to return to the My Customers screen.

CHAPTER 19

Miscellaneous Transactions

Overview

Miscellaneous transactions are those activities that may not be directly related to a specific sale transaction, but offer important and useful functions. Like sale transactions, these activities are also logged by the system for accountability and reporting purposes.

This chapter describes the following miscellaneous transaction processes:

- Clocking in and clocking out process (see "Clocking In and Clocking Out" on page 420).
- Balance inquiry process (see "Balance Inquiry" on page 424).
- Change password process (see "Changing Your Password" on page 426).
- Viewing your timecard record (see "Viewing Your Timecard" on page 431).
- Viewing your work schedule (see "Viewing/Printing Your Work Schedule" on page 432).
- Viewing Other Employees' Schedules (see "Viewing Other Employees' Schedules" on page 434).
- House Account Payments (see "House Account Payment" on page 435).
- Post Voids (see "Post Void" on page 440).
- No Sales (see "No Sale" on page 442).
- Locking/Unlocking a Register (see "Lock/Unlock a Register" on page 444).

Clocking In and Clocking Out

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.

In order for your timecard to accurately reflect the number of hours worked, you must clock in and out by performing the following steps.

Clocking In

1. At the Login screen, select the **Clock In/Out** option. The system knows your clock-in status. If you are clocked in you are prompted to clock out; if you are not clocked in you are prompted to do so. This option is available at both the Register Login screen and the Back Office Login screen.

Touch-screen users swipe the clock area to clock in or clock out.

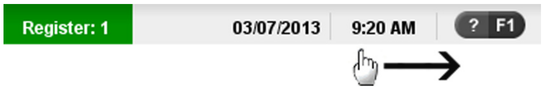
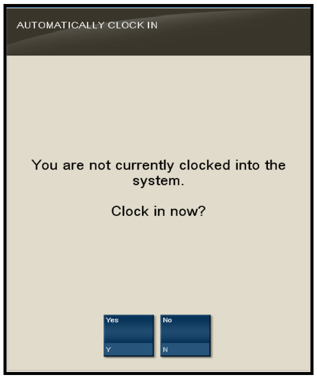


Figure 19-1: Register Login Screen

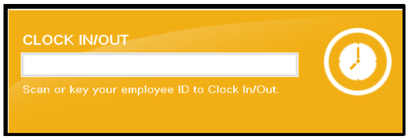
*After logging in, if you are required to clock in, Xstore prompts you to do that by displaying a message. Select **Yes** and go to [step 4 on page 421](#).*


AUTOMATICALLY CLOCK IN

You are not currently clocked into the system.

Clock in now?

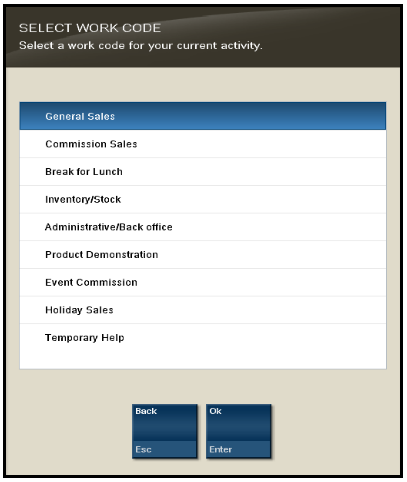
2. Scan or enter your employee ID at the Clock In/Out prompt.[1]



CLOCK IN/OUT

Scan or key your employee ID to Clock In/Out.

3. At the Clock In/Out Employee Password prompt, enter your password and press [Enter] to continue.
4. If prompted, use the up and down arrow keys to select a work code for your current activity and press [Enter] to continue.



SELECT WORK CODE

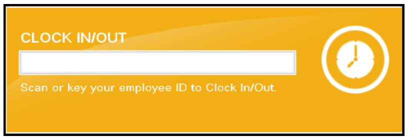
Select a work code for your current activity.

Figure 19-2: Work Code List

You are now clocked in and the system may print a clock in receipt for your records.

Clocking Out

1. At the Login screen, select the **Clock In/Out** option. The system knows your clock-in status. If you are clocked in you are prompted to clock out; if you are not clocked in you are prompted to do so. This option is available at both the Register Login screen and the Back Office Login screen.
2. Scan or enter your employee ID at the Clock In/Out Employee ID prompt and press [Enter].[1]



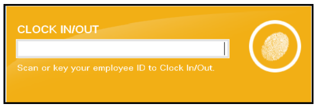
CLOCK IN/OUT

Scan or key your employee ID to Clock In/Out.

3. At the Clock In/Out Employee Password prompt, enter your password and press [Enter] to continue.

---

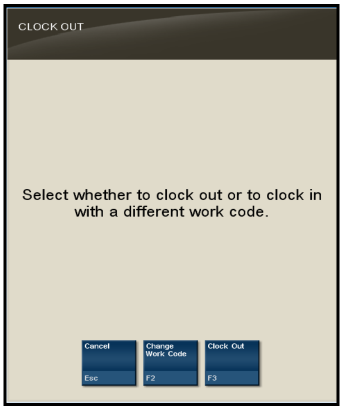
[1] If your system is set up to use a Biometric Fingerprint device, an Employee ID prompt displays. Use the device to scan your fingerprint rather than entering your user ID and password. You may also scan or type your user id and password at this prompt if needed.



CLOCK IN/OUT

Scan or key your employee ID to Clock In/Out.

4. You may be asked whether you want to clock out or if you would like to clock in for a new work activity:



Select whether to clock out or to clock in with a different work code.

Figure 19-3: Clock Out/New Work Code Prompt

❑ To clock out for the day, select the **Clock Out** option. You are now clocked out for the day and the system may print a clock out receipt for your records.

❑ To change your work code assignment, select the **Change Work Code** option. Selecting this option automatically clocks you out for your current work code assignment and prompts you to select a new work code. The system then automatically clocks you back in for the new assignment. The system may also print both a clock out receipt for your old work code activity and a clock in receipt for your new work code activity.

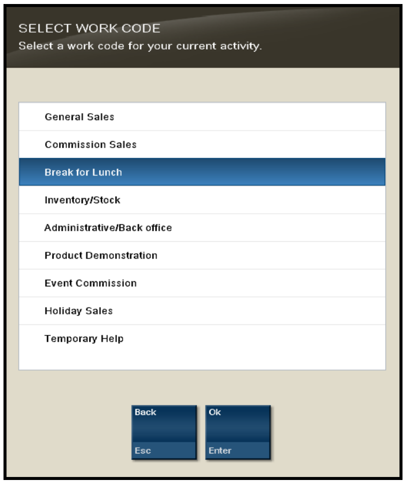
Clocking In and Out from Meal Breaks

If your store policy enforces meal break clock-out and clock-in, you cannot clock back in after a meal break until a specified period of time has elapsed.

If a minimum clocked-in time interval is used

If your store policy requires a minimum **clocked-in** time interval for a Meal Break work code (for example, 30 minutes), you cannot clock out early from your meal break. An override is allowed with a Manager's permission.

1. To take your meal break, select the Clock In/Out button from the main menu, enter your ID and password when prompted, and choose the meal break option from the Work Codes list.



SELECT WORK CODE

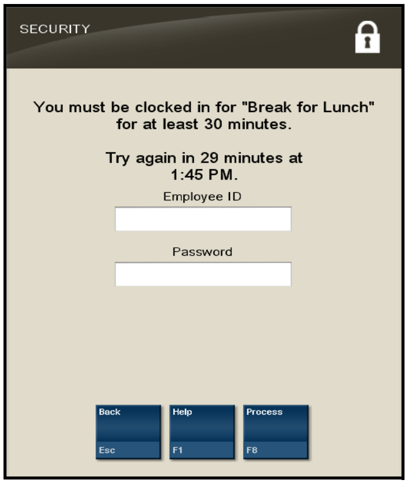
Select a work code for your current activity.

- General Sales
- Commission Sales
- Break for Lunch
- Inventory/Stock
- Administrative/Back office
- Product Demonstration
- Event Commission
- Holiday Sales
- Temporary Help

Figure 19-4: Work Codes List

The system automatically clocks you out from the current work code and clocks you in to the meal break work code.

2. If you try to clock out (or to clock in with a different work code) from the meal break before 30 minutes have elapsed, then the message shown here is displayed.



SECURITY

You must be clocked in for "Break for Lunch" for at least 30 minutes.

Try again in 29 minutes at 1:45 PM.

Employee ID

Password

Figure 19-5: Try To Clock Out Early Message

If a minimum clocked-out time interval is used

If your store policy is set up for a minimum **clocked-out** time interval for a break (for example, 30 minutes), you cannot clock back in early.

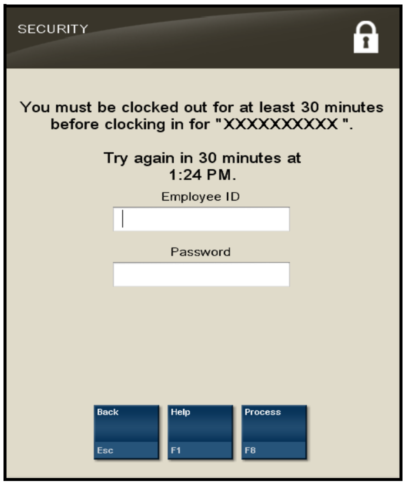
In effect, this means that once you have clocked out during your shift, you cannot clock back in again for at least 30 minutes.

An override is allowed with a Manager’s permission.

1. To take your break at some point after your initial clock-in for the day, select the Clock In/Out button from the main menu, enter your ID and password when prompted, and choose to clock out.

   You are clocked out from the current work code.

2. If you try to clock back in to the system before 30 minutes have elapsed, then the message shown here is displayed. (The work code in this example has been replaced by XXXXXXXX.)



You must be clocked out for at least 30 minutes before clocking in for "XXXXXXXXXX ".

Try again in 30 minutes at 1:24 PM.

Figure 19-6: Try To Clock In Early Message

Balance Inquiry

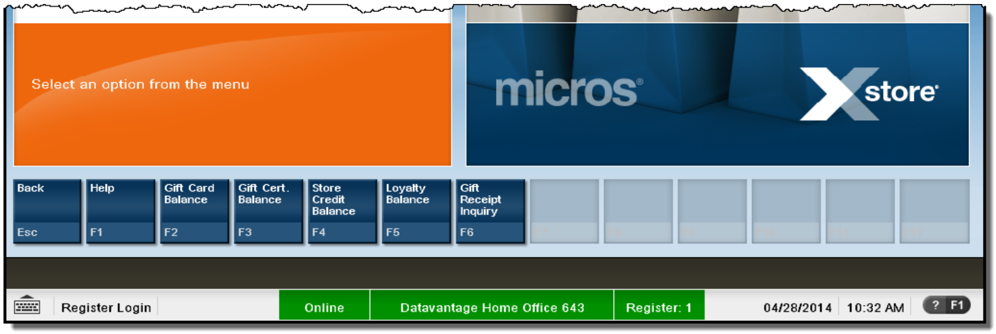
Gift cards and store credit vouchers may be used as a tender until the total value of the account has been used. Since the amount left on a card or voucher cannot be visibly seen, this function electronically checks the account record and tells you the remaining value on the account. You can also use 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.

> *Depending upon the configuration of your system, this option may be available from several different locations. Before logging in, Balance Inquiry is available from the Register Login screen and from the Till Options menu. After logging in, Balance Inquiry is available from both the Register Options menu and the Back Office Main Menu. The procedure that follows describes how to access Balance Inquiry from the Register Login screen.*

1. Select **Balance Inquiry** at the Register Login screen to view the inquiry functions available in your store.

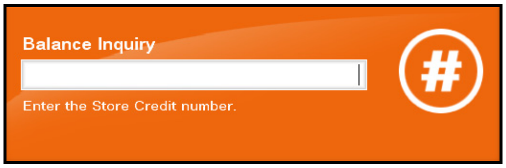
2. Select the type of inquiry you want to perform by selecting the appropriate option from the Balance Inquiry menu.



Select an option from the menu

Figure 19-7: Balance Inquiry Menu Options

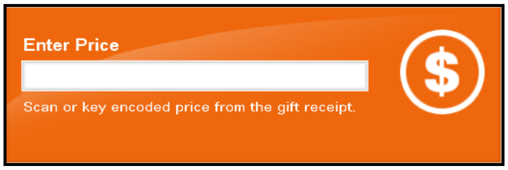
3. At the prompt, enter the information as prompted: a card number, account number, or gift receipt information.



Balance Inquiry

Enter the Store Credit number.

Figure 19-8: Store Credit Number Prompt



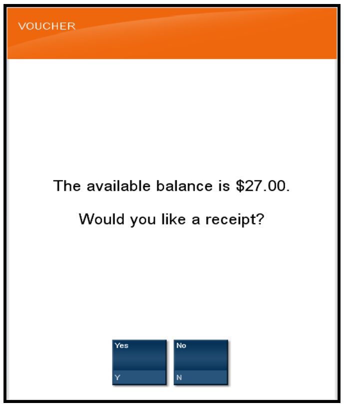
Enter Price

Scan or key encoded price from the gift receipt.

Figure 19-9: Gift Receipt Prompt

The information required here varies according to the type of balance inquiry you are performing. Enter the applicable information and press [Enter] to continue.

4. The system retrieves the account balance/gift receipt information and displays the information on the screen.

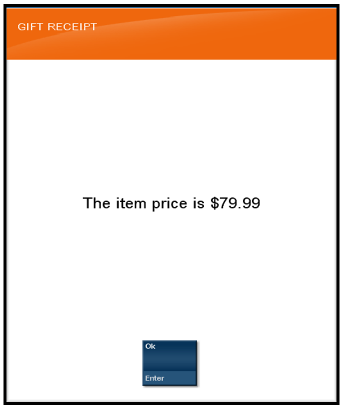


VOUCHER

The available balance is $27.00.

Would you like a receipt?

Figure 19-10: Available Account Balance



GIFT RECEIPT

The item price is $79.99

Figure 19-11: Item Price From Gift Receipt

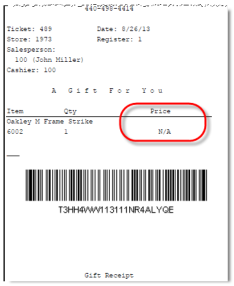
- ☐ If applicable, press [Y] to print a receipt for this balance information.

  <OR>

- ☐ If applicable, press [N] if you do not need a printed receipt for this balance information.
- ☐ If the option to print a receipt is not available, press [Enter] to close the prompt.

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.

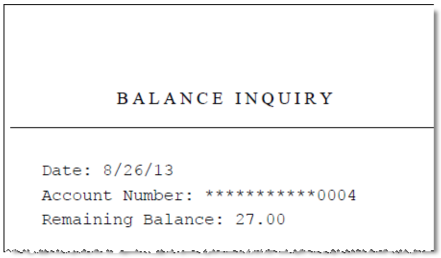


```
              440-498-4414

Ticket: 489          Date: 8/26/13
Store: 1973          Register: 1
Salesperson:
  100 (John Miller)
Cashier: 100

         A Gift For You

Item        Qty              Price
Oakley M Frame Strike
6002         1                N/A

          T3HH4VWV113111NR4ALYQE

              Gift Receipt
```

About Store Credit and Gift Certificate Balance Inquiry

When a balance inquiry for a store credit or gift certificate is performed, Xstore 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.

5. 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.



```
BALANCE INQUIRY

Date: 8/26/13
Account Number: ***********0004
Remaining Balance: 27.00
```

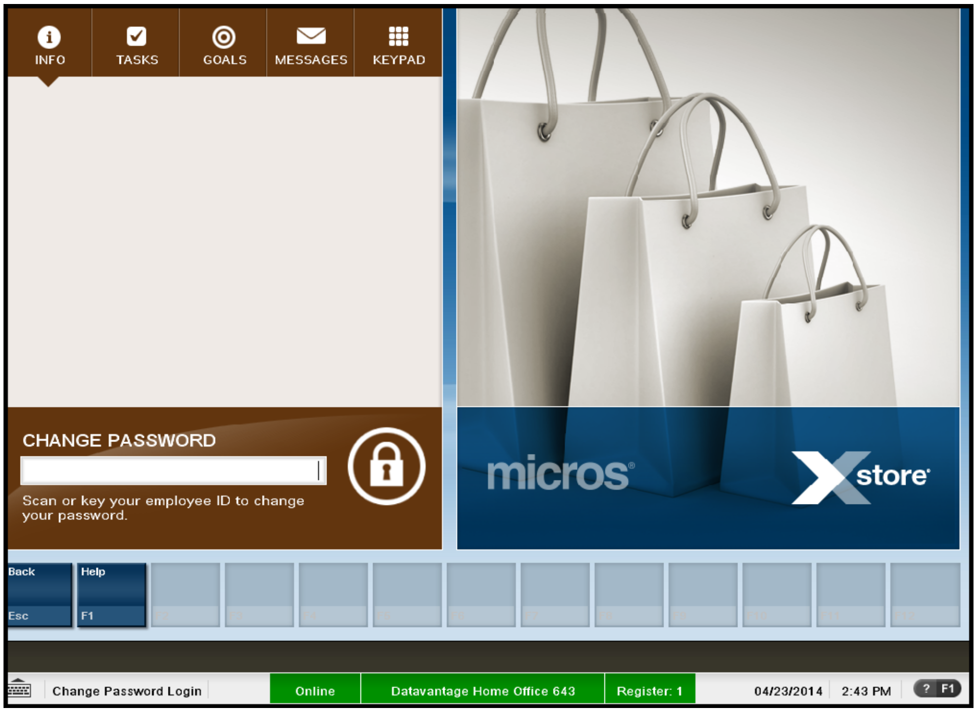
Figure 19-12: Sample Balance Inquiry Receipt

Changing Your Password

The **Change Password** option is available from the Register Login screen or the Back Office Login screen - *before* you log in.

1. Select the **Change Password** option from the Register Login screen or the Back Office Login screen. Xstore prompts for your employee ID.

2. Type or scan your employee ID at the Change Password prompt and press [Enter]. If fingerprint scans are supported, scan your finger at the prompt.



CHANGE PASSWORD

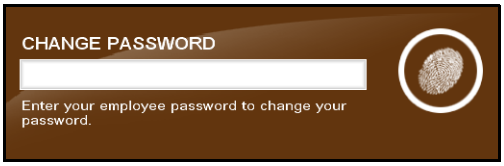
Scan or key your employee ID to change your password.

Change Password Login | Online | Datavantage Home Office 643 | Register: 1 | 04/23/2014 | 2:43 PM

Figure 19-13: Change Password Login Screen

3. At the prompt for your password, enter your **current** password and press [Enter].

Note: If you scanned your finger, this prompt is not displayed.

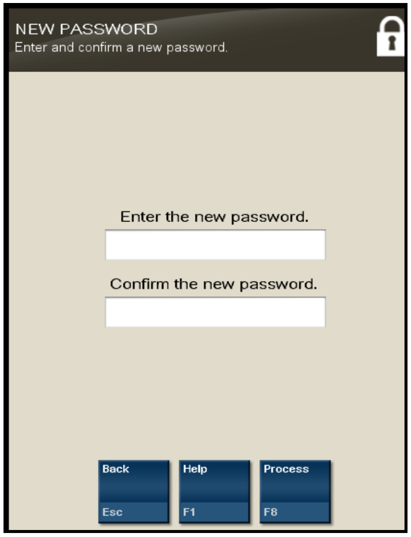


CHANGE PASSWORD

Enter your employee password to change your password.

Figure 19-14: Enter Current Password Prompt

4. You are now prompted to enter and confirm your **new** password. Type your new password in the first field and type the password again to confirm it in the field below.



NEW PASSWORD
Enter and confirm a new password.

Enter the new password.

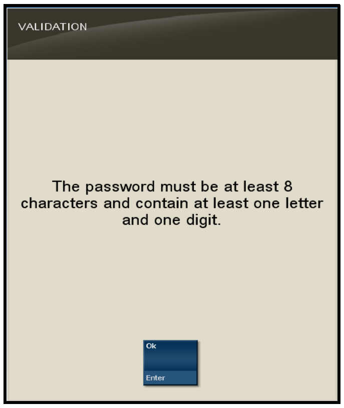
Confirm the new password.

Figure 19-15: New Password Prompt

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

5. Select **Process** to store your new password. If the system accepts the password, a confirmation message is shown indicating your password has been changed. Press [Enter] to acknowledge this prompt and return to the Register Login screen.

> *The system may enforce certain rules regarding passwords, such as the minimum number of characters required or whether you can reuse an old password.*
>
> *If your new password is not valid, press [Enter] to acknowledge the Validation prompt and try again.*



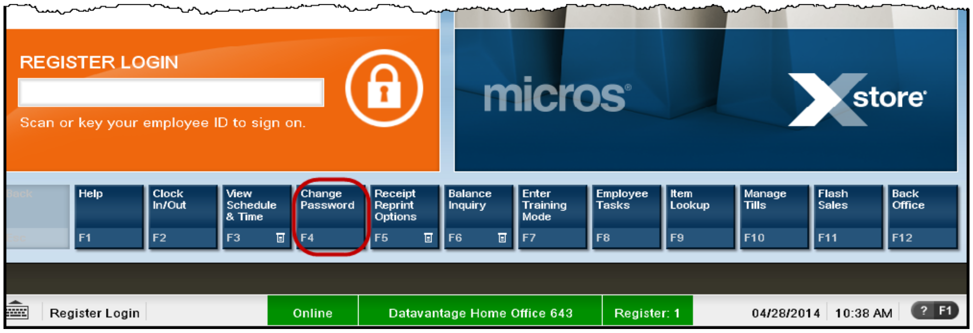
VALIDATION

The password must be at least 8 characters and contain at least one letter and one digit.

To Change Your Password with Challenge Questions

If your store is configured to use password challenge questions, you can re-set your password without knowing your current password by answering a set of questions. The answers to the questions are established using the Back Office see the *Xstore Manager's Guide.*

1. Select the **Change Password** option from the Register Login screen or the Back Office Login screen. Xstore prompts for your employee ID.

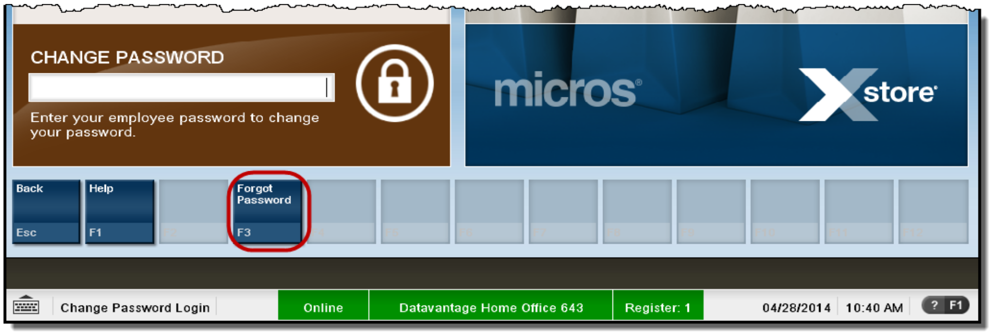


REGISTER LOGIN

Scan or key your employee ID to sign on.

Figure 19-16: Change Password Menu Option

2. Type or scan your employee ID at the Change Password prompt and press [Enter]. If fingerprint scans are supported, scan your finger at the prompt.
3. Select the **Forgot Password** menu button.

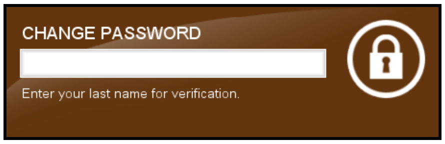


CHANGE PASSWORD

Enter your employee password to change your password.

Figure 19-17: Forgot Password Menu Option

4. Enter your last name for verification.

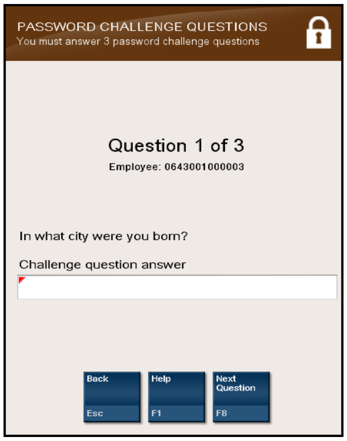


CHANGE PASSWORD

Enter your last name for verification.

Figure 19-18: Change Password Verification

5. For each challenge question, type the answer and then select **Next Question**. For the last question, select **Process**.



PASSWORD CHALLENGE QUESTIONS
You must answer 3 password challenge questions

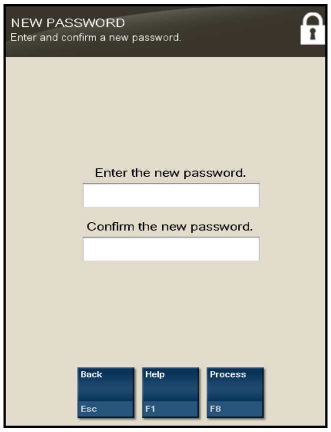
Question 1 of 3
Employee: 0643001000003

In what city were you born?

Challenge question answer

Figure 19-19: Example Challenge Question

6. Once you've answered all the questions correctly, the New Password prompt displays. Type your new password in the first field and type the password again to confirm it in the field below.



NEW PASSWORD
Enter and confirm a new password.

Enter the new password.

Confirm the new password.

Figure 19-20: New Password Prompt

7. Select **Process** to save your new password. If the system accepts the password, a confirmation message is shown indicating your password has been changed.
8. Press [Enter] to acknowledge this prompt and return to the Register Login screen.

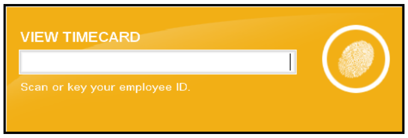
The system may enforce certain rules regarding passwords, such as the minimum number of characters required or whether you can reuse an old password.

If your new password is not valid, press [Enter] to acknowledge the validation prompt and try again.

Viewing Your Timecard

Use the following procedure to review your timecard. This option is available at both the Register Login screen and the Back Office Login screen.

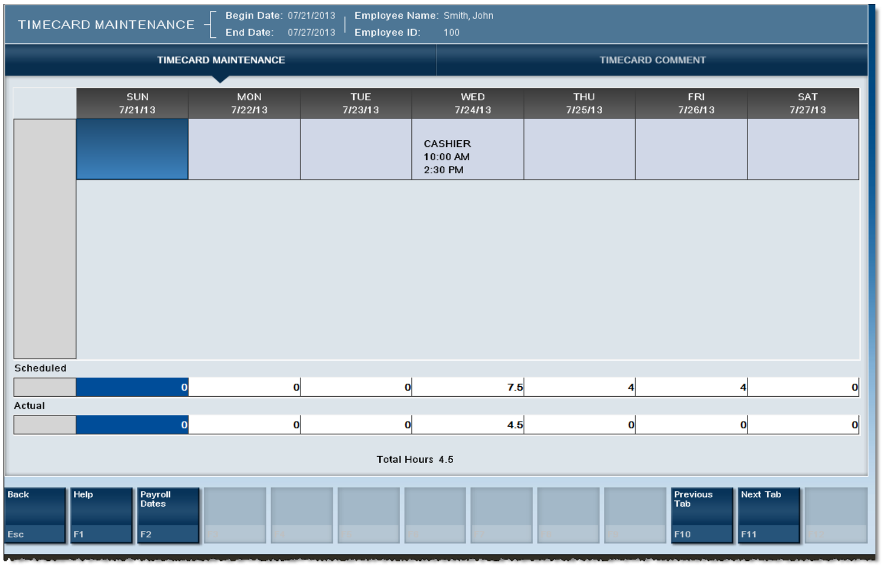
1. At either Login Screen, select the **View Schedule & Time** option.
2. Select the **View Timecard** option.
3. Scan or enter your employee ID at the View Timecard Employee ID prompt and press [Enter].



4. At the View Timecard Employee Password prompt, type your password and press [Enter] to continue.

If you use a biometric device for employee authentication, you are not prompted for a password.

5. Your timecard entries for the current payroll week are displayed. This screen is view-only, however you can add a comment that will be linked to your timecard for this payroll week.



Begin Date: 07/21/2013
End Date: 07/27/2013
Employee Name: Smith, John
Employee ID: 100

	SUN 7/21/13	MON 7/22/13	TUE 7/23/13	WED 7/24/13	THU 7/25/13	FRI 7/26/13	SAT 7/27/13
				CASHIER 10:00 AM 2:30 PM			
Scheduled	0	0	0	7.5	4	4	0
Actual	0	0	0	4.5	0	0	0

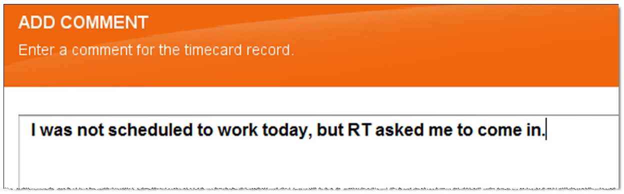
Total Hours 4.5

Figure 19-21: Timecard Maintenance Screen

*To view your timecard/schedule for a different week, select the **Payroll Dates** option and select a week from the list.*

Adding a Comment to Your Timecard Record

1. With your timecard record displayed, select **Next Tab**. The Timecard Comment screen displays.
2. At the Timecard Comment screen, select the **Add Comment** option.
3. Type a comment in the Add Comment form and press [Enter].

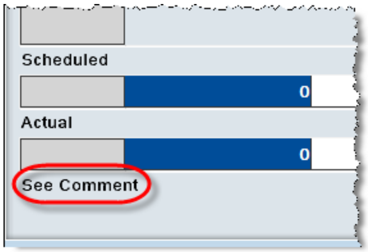

ADD COMMENT

Enter a comment for the timecard record.

I was not scheduled to work today, but RT asked me to come in.

Figure 19-22: Timecard Add Comment Form

The comment is now associated with this record as indicated by the **See Comment** text at the bottom of the Timecard Maintenance screen.



4. To view timecard comments, select the **Timecard Comment** tab.

Begin Date: 08/18/2013
End Date: 08/24/2013
Employee Name: Miller, John
Employee ID: 100

Business Date: 08/26/2013 Created On: 09/05/2013 02:54:10 PM Created By: 100

I was called in to work on this day.

Figure 19-23: Timecard Comment

All comments that are associated with this timecard record are displayed. In addition to the comment, the date and time the comment was entered and the ID of the person who entered the comment are also shown.

Viewing/Printing Your Work Schedule

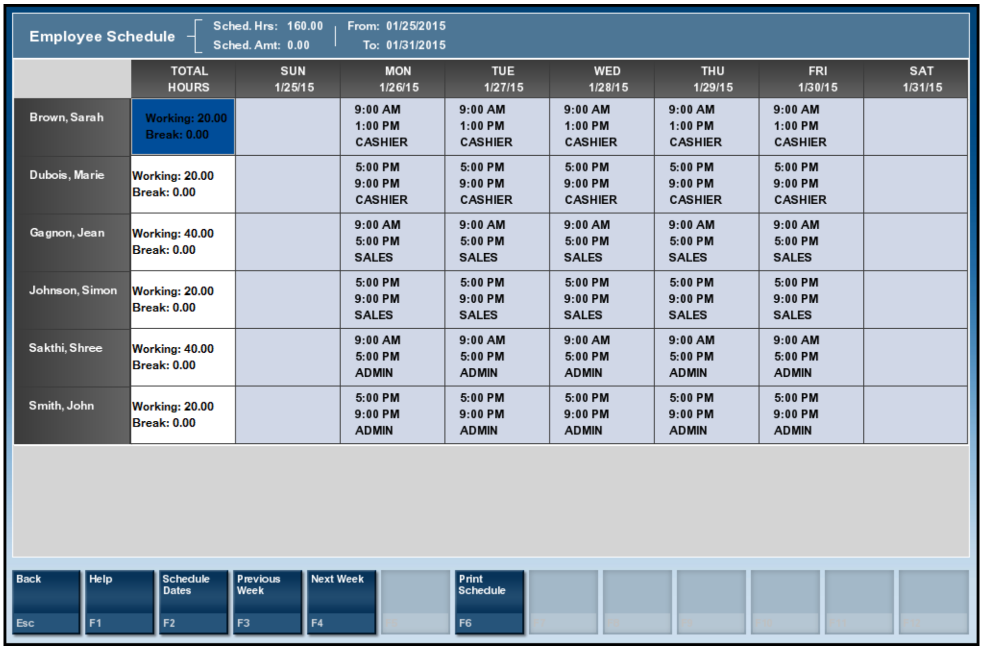
Use the following procedure to view your work schedule. This option is available at both the Register Login screen and the Back Office Login screen.

1. At either Login Screen, select the **View Schedule & Time** option.
2. Select the **View Schedule** option.
3. Scan or enter your employee ID at the View Schedule Employee ID prompt and press [Enter].

4. At the View Schedule Employee Password prompt, type your password and press [Enter] to continue.

> *If you use a biometric device for employee authentication, you are not prompted for a password.*

The system displays the work schedule for the current payroll week.



Employee Schedule

Sched. Hrs: 160.00
Sched. Amt: 0.00

From: 01/25/2015
To: 01/31/2015

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

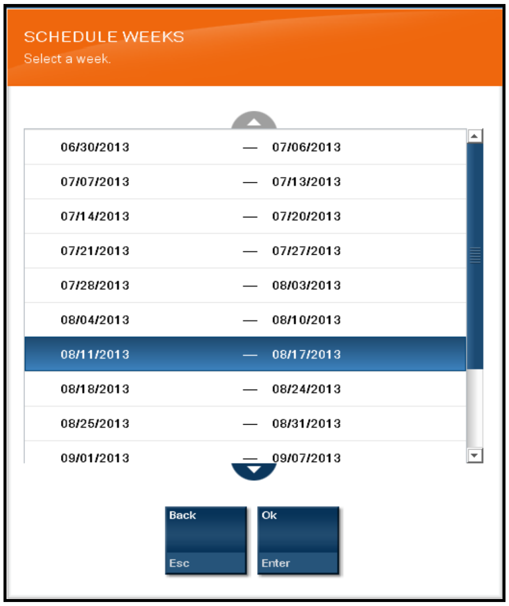
Figure 19-24: Employee Schedule Screen - Weekly Summary

The information shown here includes the hours and your work assignment for each day of the week and the total number of hours and break time scheduled for the week.

5. With your schedule displayed, you have the following options here:

- ❑ Select the **Previous Week** option to view last week's schedule.
- ❑ Select the **Next Week** option to view your work schedule for next week.
- ❑ Select the **Schedule Dates** option to view a specific week's work schedule:

The system displays a list of schedule week dates.



SCHEDULE WEEKS

Select a week.

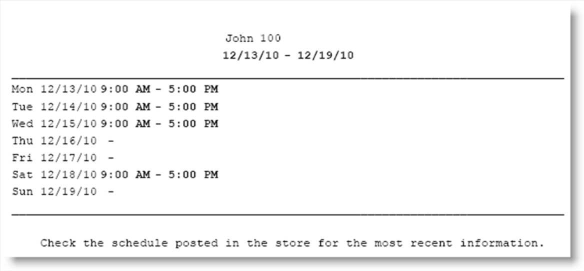
06/30/2013 — 07/06/2013
07/07/2013 — 07/13/2013
07/14/2013 — 07/20/2013
07/21/2013 — 07/27/2013
07/28/2013 — 08/03/2013
08/04/2013 — 08/10/2013
08/11/2013 — 08/17/2013
08/18/2013 — 08/24/2013
08/25/2013 — 08/31/2013
09/01/2013 — 09/07/2013

Figure 19-25: Schedule Week Dates

Use the up and down arrow keys to select a schedule week date from the list and press [Enter] to view your work schedule for the selected week.

Printing Your Schedule

To print a copy of your schedule for the displayed week, select the **Print Schedule** from the Employee Schedule Screen. The system prints the schedule on the receipt printer.



```
                    John 100
                12/13/10 - 12/19/10
________________________________________________________
Mon 12/13/10 9:00 AM - 5:00 PM
Tue 12/14/10 9:00 AM - 5:00 PM
Wed 12/15/10 9:00 AM - 5:00 PM
Thu 12/16/10  -
Fri 12/17/10  -
Sat 12/18/10 9:00 AM - 5:00 PM
Sun 12/19/10  -
________________________________________________________

  Check the schedule posted in the store for the most recent information.
```

Figure 19-26: Printed Schedule Example

Viewing Other Employees' Schedules

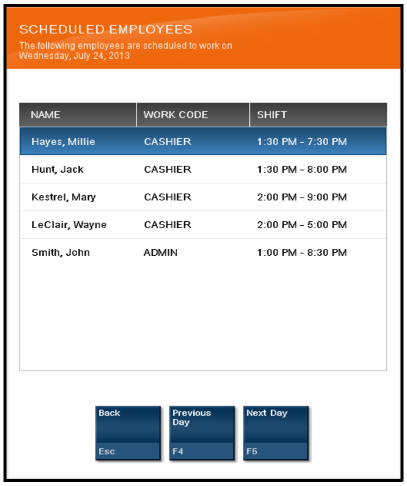
Use the following procedure to view a list of associates that are scheduled to work on a specific day.

1. At either Login Screen, select the **View Schedule & Time** option.
2. Select the **View Scheduled Employees** option.
3. Scan or enter your employee ID at the View Schedule Employee ID prompt and press [Enter].

4. At the View Schedule Employee Password prompt, type your password and press [Enter] to continue.

> *If you use a biometric device for employee authentication, you are not prompted for a password.*

The system displays a list of associates scheduled to work on this day.



SCHEDULED EMPLOYEES

The following employees are scheduled to work on Wednesday, July 24, 2013

NAME	WORK CODE	SHIFT
Hayes, Millie	CASHIER	1:30 PM - 7:30 PM
Hunt, Jack	CASHIER	1:30 PM - 8:00 PM
Kestrel, Mary	CASHIER	2:00 PM - 9:00 PM
LeClair, Wayne	CASHIER	2:00 PM - 5:00 PM
Smith, John	ADMIN	1:00 PM - 8:30 PM

Figure 19-27: List of Scheduled Employees

The information shown here includes each associate's name, work code, and the scheduled shift hours.

5. To view the employees scheduled to work tomorrow and on future dates, select the **Next Day** option. To View the employees that were scheduled to work yesterday and previous days, select the **Previous Day** option.

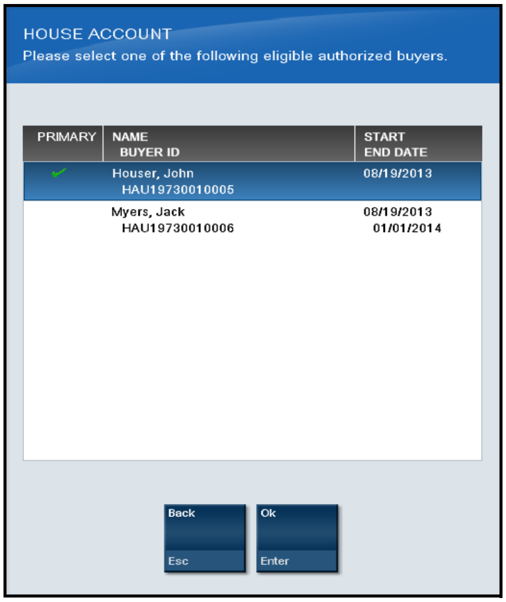
House Account Payment

This function allows you to accept a customer payment that is applied toward the balance owed by a customer. The tender types that are acceptable for payment are defined in your system's configuration. House Account payments may be included as part of a regular register sale or as the sole item (payment) in a sale.

Receiving a House Account Payment

1. Associate a customer with the transaction. Use the Customer Search screen to find the customer or company that is making the payment.
2. At the Sale screen, select **Register Options**.
3. At the Register Options menu, select **House Account Payment**.

4. Select the authorized buyer making the payment to the account and press [Enter].

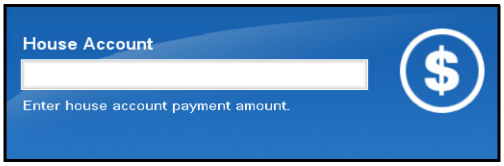


HOUSE ACCOUNT
Please select one of the following eligible authorized buyers.

PRIMARY	NAME BUYER ID	START END DATE
✓	Houser, John HAU19730010005	08/19/2013
	Myers, Jack HAU19730010006	08/19/2013 01/01/2014

Figure 19-28: House Account Authorized Buyer List

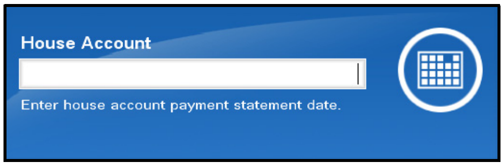
5. Enter the payment amount and press [Enter].



House Account
Enter house account payment amount.

Figure 19-29: House Account Payment Amount Prompt

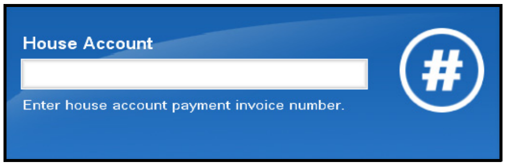
6. If prompted, enter the date of the payment statement on which the payment should appear and press [Enter].



House Account
Enter house account payment statement date.

Figure 19-30: House Account Payment Statement Date Prompt

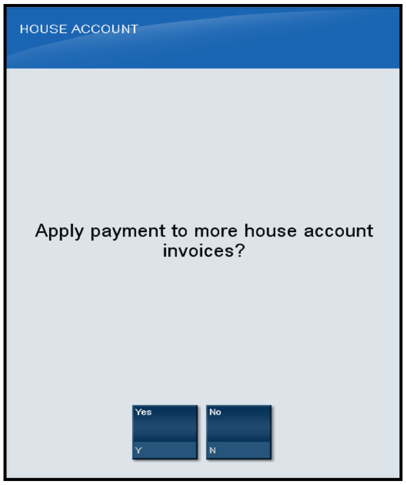
7. If prompted, enter the Invoice Number against which the payment is applied and press [Enter].



House Account
Enter house account payment invoice number.

Figure 19-31: House Account Payment Invoice Number Prompt

8. The system may ask if any more payment invoice numbers must be entered in this transaction:



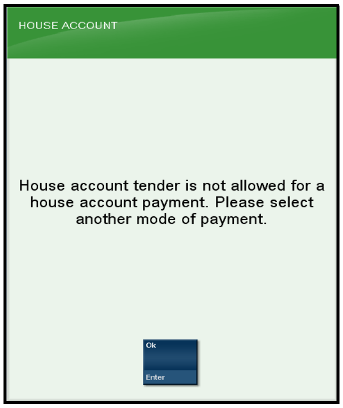
Apply payment to more house account invoices?

- Choose **Yes** if more invoice numbers must be entered in this transaction. Go to step 7 on page 436.
- Choose **No** to return to the Register Options screen.

9. Choose another option at the Register Options menu or select **Back** to return to the Sale screen.

10. Complete the transaction by selecting the **Add Tenders** option. Select a tender type and choose **Ok**.

Payments made to a House Account cannot be tendered using a House Account tender.



House account tender is not allowed for a house account payment. Please select another mode of payment.

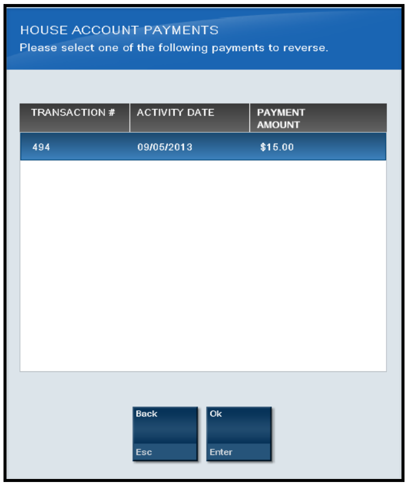
11. Enter the tender amount and press [Enter].

12. When the system asks if the sale is complete, select **Yes**.

Reversing a House Account Payment

Use this function to reverse a payment on a house account.

1. Associate a customer with the transaction. Use the Customer Search screen to find the customer or company that is reversing the payment.
2. At the Sale screen, select **Register Options**.
3. At the Register Options menu, select **House Account Reversal**.
4. If the customer has more than one house account, select the account from the list.
5. When prompted, select a payment to be reversed and press [Enter].



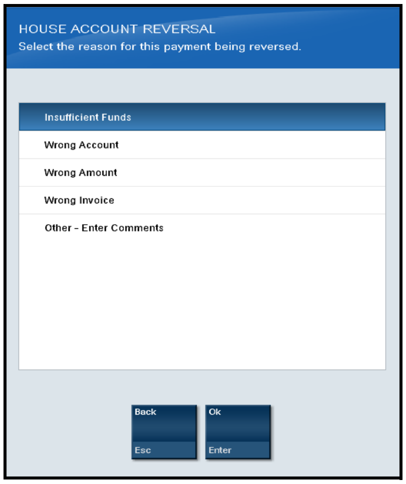
HOUSE ACCOUNT PAYMENTS

Please select one of the following payments to reverse.

TRANSACTION #	ACTIVITY DATE	PAYMENT AMOUNT
494	09/05/2013	$15.00

Figure 19-32: House Account Payments List

6. Select a reason for the house account reversal and press [Enter].



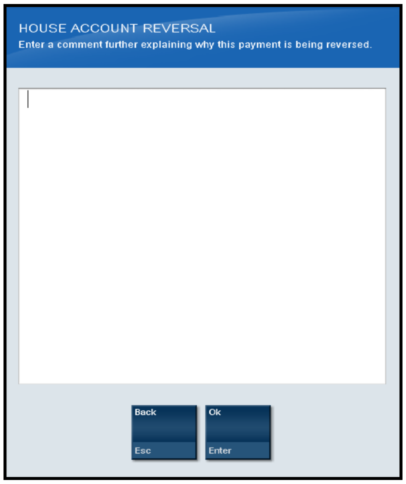
HOUSE ACCOUNT REVERSAL

Select the reason for this payment being reversed.

Insufficient Funds
Wrong Account
Wrong Amount
Wrong Invoice
Other - Enter Comments

Figure 19-33: House Account Reversal Reason Code List

7. When prompted, type additional information about this house account payment reversal and press [Enter].

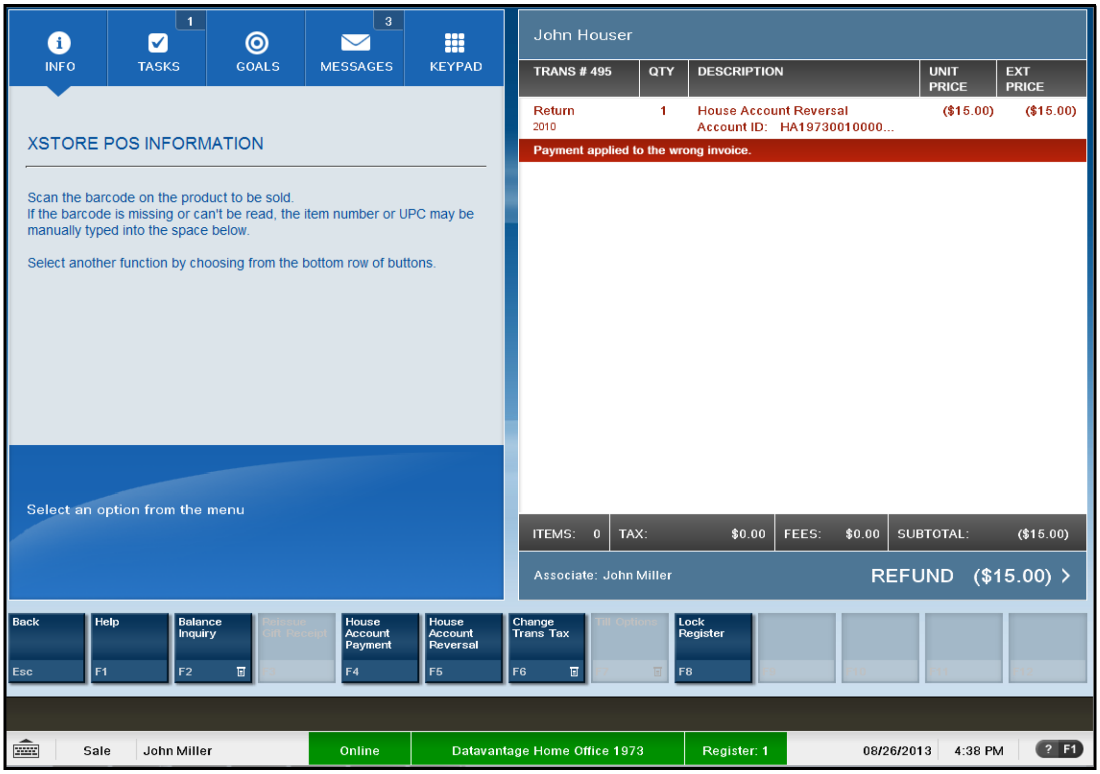


HOUSE ACCOUNT REVERSAL

Enter a comment further explaining why this payment is being reversed.

Figure 19-34: House Account Reversal Comment Prompt

8. The house account payment reversal amount is shown in the View Port. Press [Esc] to return to the Sale screen and tender the payment reversal refund.



XSTORE POS INFORMATION

Scan the barcode on the product to be sold.
If the barcode is missing or can't be read, the item number or UPC may be manually typed into the space below.

Select another function by choosing from the bottom row of buttons.

Select an option from the menu

John Houser

TRANS # 495	QTY	DESCRIPTION	UNIT PRICE	EXT PRICE
Return 2010	1	House Account Reversal Account ID: HA19730010000...	($15.00)	($15.00)

Payment applied to the wrong invoice.

ITEMS: 0 TAX: $0.00 FEES: $0.00 SUBTOTAL: ($15.00)

Associate: John Miller REFUND ($15.00)

Sale John Miller Online Datavantage Home Office 1973 Register: 1 08/26/2013 4:38 PM

Figure 19-35: House Account Payment Reversal

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.

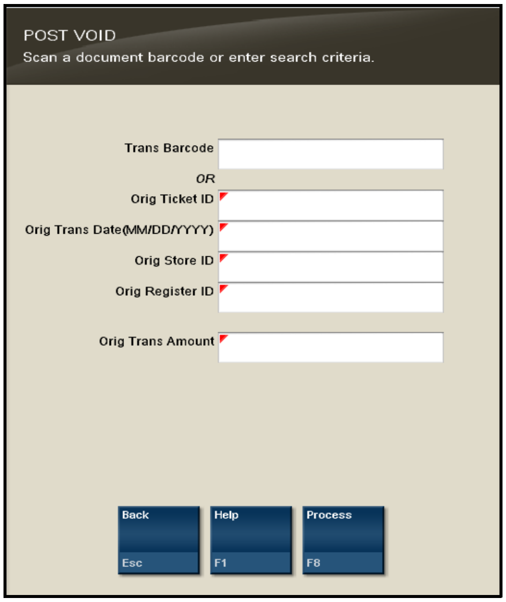
A Post Void transaction may be performed from the Register or from the Back Office, depending upon your system's configuration and store policy. In the Back Office it is available on the Main Menu and also from the Electronic Journal.

Performing a Post Void from the Register

1. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, then select **Till Options** --> **Post Void**.

   Or, at the Sale screen, select **Register Options** --> **Till Options** -->**Post Void**

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

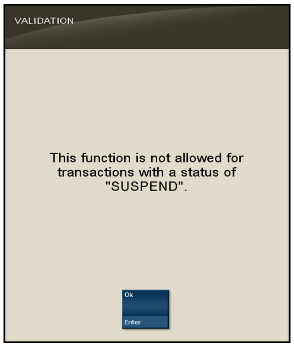


POST VOID

Scan a document barcode or enter search criteria.

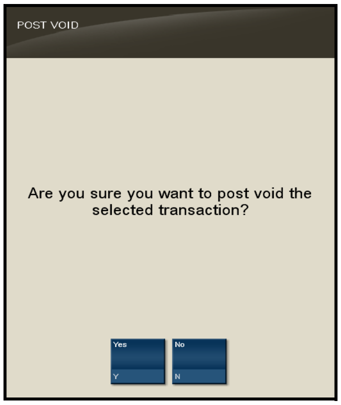
Figure 19-36: Prompt for Transaction Barcode

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.


VALIDATION

This function is not allowed for transactions with a status of "SUSPEND".

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.


POST VOID

Are you sure you want to post void the selected transaction?

Figure 19-37: 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.

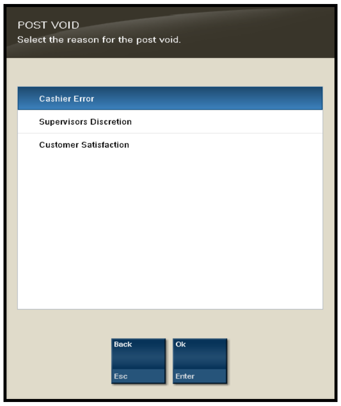
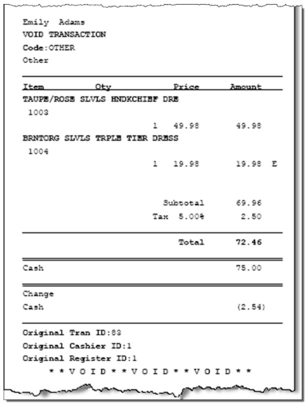

POST VOID
Select the reason for the post void.

Figure 19-38: List of Post Void Reasons

5. 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**.

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

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



```
Emily  Adams
VOID TRANSACTION
Code:OTHER
Other

Item          Qty           Price      Amount
TAUPE/ROSE SLVLS HNDKCHIEF DRE
 1003
                    1   49.98       49.98
BRNTORG SLVLS TRPLE TIER DRESS
 1004
                    1   19.98       19.98  E


                     Subtotal       69.96
                    Tax  5.00%       2.50

                        Total       72.46

Cash                                75.00

Change
Cash                               (2.54)

Original Tran ID:83
Original Cashier ID:1
Original Register ID:1
    * * V O I D * * V O I D * * V O I D * *
```

Figure 19-39: Void Receipt Example

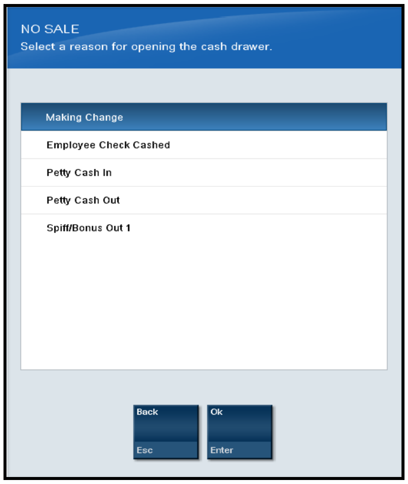
No Sale

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

1. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, then select **Till Options** --> **No Sale**.

Or, at the Sale screen, select **Register Options** --> **Till Options** -->**No Sale**.

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

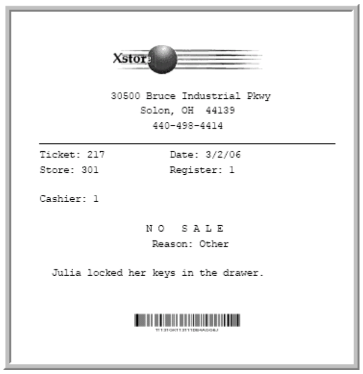


NO SALE
Select a reason for opening the cash drawer.

Figure 19-40: No Sale Reason List

3. The system may prompt you to enter a comment about the reason for opening the cash drawer. If it is required, enter the pertinent information in the comment entry form and press [Enter].

   The system prints a No Sale receipt for your records.



```
           30500 Bruce Industrial Pkwy
               Solon, OH  44139
                 440-498-4414
Ticket: 217           Date: 3/2/06
Store: 301            Register: 1

Cashier: 1

                  N O   S A L E
                  Reason: Other

  Julia locked her keys in the drawer.
```

Figure 19-41: No Sale Receipt Sample

Lock/Unlock a Register

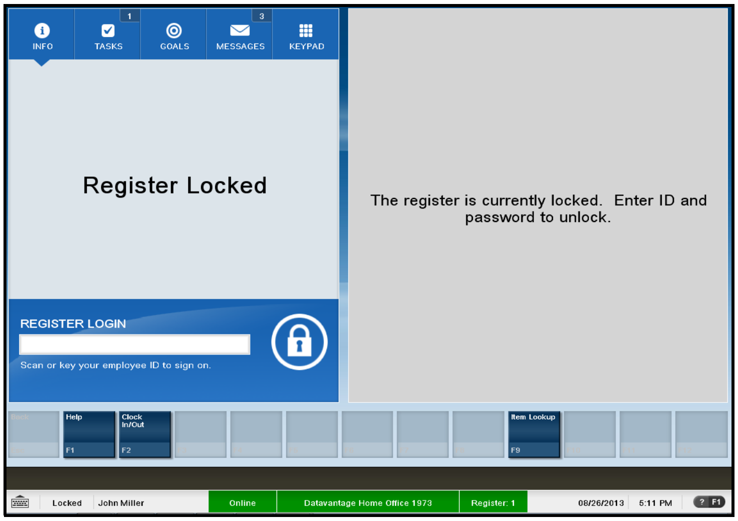
Your system may be configured to automatically log out an associate after a specified period of time if there is no system activity. However, you may need to temporarily leave a register before that occurs. In that case, you can lock the register to prevent another person from using the system while you are away.

Locking a Register

1. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, and then select **Till Options** --> **Lock Register**.

   Or, at the Sale screen, select **Register Options** --> **Lock Register**.

2. The system displays a message indicating that the system is now locked.



Register Locked

The register is currently locked. Enter ID and password to unlock.

Scan or key your employee ID to sign on.

Locked | John Miller | Online | Datavantage Home Office 1973 | Register: 1 | 08/26/2013 | 5:11 PM

Figure 19-42: Register Locked Screen

Any functions that may still be available are determined by your store policy.

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 (Figure 19-42, “Register Locked Screen,” on page 444) and press [Enter] to unlock the register.

   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.

CHAPTER 20

Flash Sales

Overview

From the register you can view the Flash Sales Summary Report which provides an instant snapshot of sales at the moment that you select it. The report displays data in a column format as well as in graphic format with bar charts and pie charts.

You can set the date parameters that are used to select the data included in the report, and to specify whether or not zero values are suppressed and whether or not the charts are shown. See "Running the Flash Sales Summary Report" on page 449.

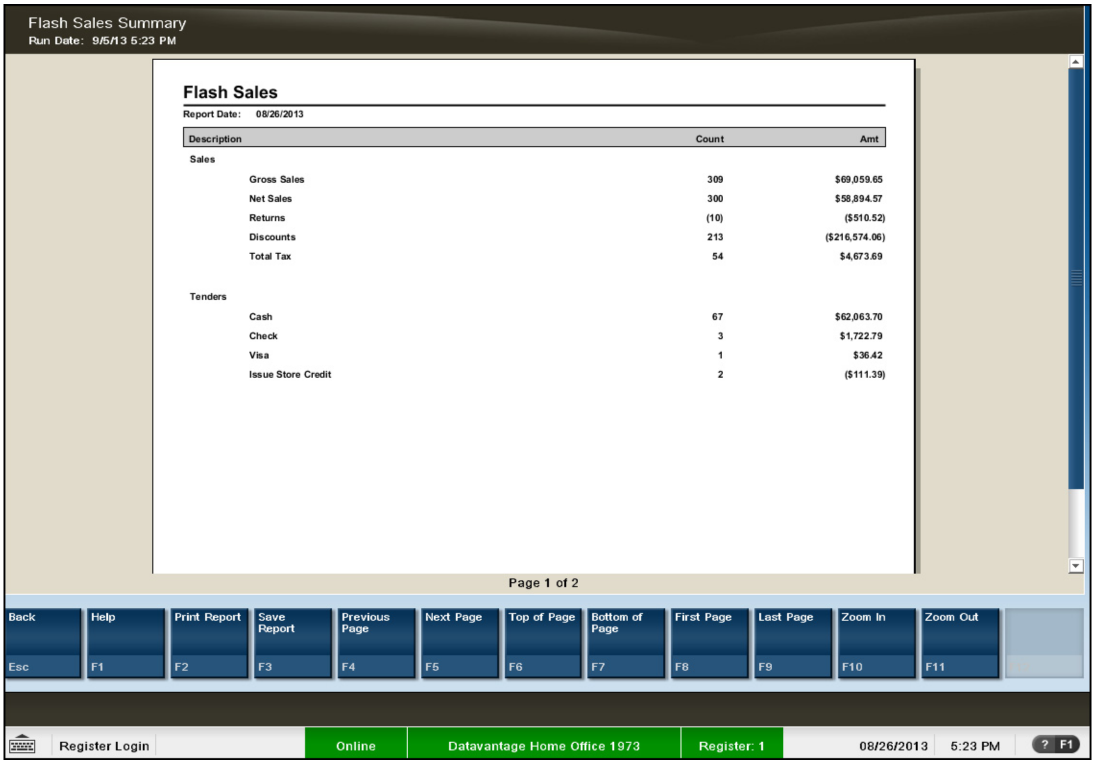
The report may be viewed online and printed immediately, or saved so that it may be viewed later. Saved reports may be preserved with the original selection parameters or with the original data.

Additional Flash Sales reports are accessible from the Back Office Reports Menu. Refer to the *Xstore Manager's Guide*, and the *Xstore Reports Guide* for information about the other Flash Sales Reports.

Onscreen Navigation for Flash Sales Report

All of the Flash Sales Reports have a consistent interface for navigating through multi-page reports, changing the display size, printing reports and saving reports so that they may be reused.

After you make your criteria selections and a report is displayed on the screen, options display at the bottom of the screen.



Flash Sales Summary
Run Date: 9/5/13 5:23 PM

Flash Sales

Report Date: 08/26/2013

Description	Count	Amt
Sales		
Gross Sales	309	$69,059.65
Net Sales	300	$58,894.57
Returns	(10)	($510.52)
Discounts	213	($216,574.06)
Total Tax	54	$4,673.69
Tenders		
Cash	67	$62,063.70
Check	3	$1,722.79
Visa	1	$36.42
Issue Store Credit	2	($111.39)

Page 1 of 2

Figure 20-1: Report Navigation Options

Back: Return to the criteria selection screen for the report.

Print Report: Send the report to a printer.

Save Report: Assign a name to the report so that it can be reused later with current criteria or current data.

Previous Page/Next Page: Go to the next lower page number or next higher page number.

Top of Page/Bottom of Page: Go to the beginning or end of the current page number.

First Page/Last Page: Jump to page 1 or the last page number in the report.

Zoom In/Zoom Out: Increase or decrease the onscreen magnification of the text.

Flash Sales Summary Report

The Flash Sales Summary Report (Figure 20-1 on page 448) provides current sales results for the entire store. It includes sales results from two perspectives:

Sales - The count of transactions and the dollar amount of the transactions in the following categories: gross sales, net sales, returns, discounts and total tax.

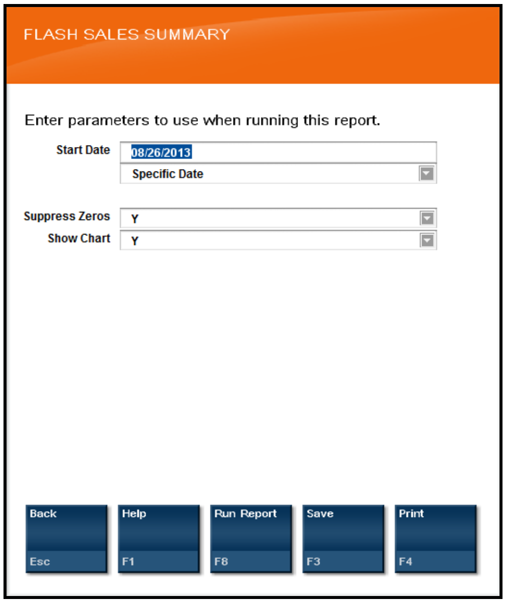
Tenders - The count of transactions and the dollar amount for each tender type that was used such as cash, various credit cards, store credit, gift certificates, etc.

The last page of the Flash Sales Summary report includes a pie chart of the tenders used and a bar chart of the sales results.

Running the Flash Sales Summary Report

1. Select the **Flash Sales** option from the Register Login menu.

The system displays a form where you can enter and select the report's criteria.



FLASH SALES SUMMARY

Enter parameters to use when running this report.

Start Date: 08/26/2013

Specific Date

Suppress Zeros: Y

Show Chart: Y

Figure 20-2: Criteria Entry Form for Flash Sales Summary Report

2. Enter your criteria in the form or make a selection from a drop-down list:

- **Start Date/Specific Date**: Enter a date on the top line or select a relative date from the drop-down list.
- **Suppress Zeros**: Select **Y** (Yes) or **N** (No) to determine whether values of zero display.
- **Show Chart**: Select **Y** (Yes) or **N** (No) to determine whether a graph(s) of the data displays on the last page of the report.

3. Select one of these options to finish your report:

- **Run Report**: Execute the report and display the results on the screen.
- **Print**: Execute the report and send the results to a printer.

☐ **Save**: Keep the report with the current data, or save only the report parameters to run this specific report with these parameters again.

a. If you chose to save the report, assign a name to your report so it can be viewed whenever needed.

SAVE FLASH SALES SUMMARY

Enter a report name and select how to save the report.

Save Report As: Flash Sales Summary_Aug 20 2013

Report Save Options: Save Report with Current Data

Figure 20-3: Save Report Options

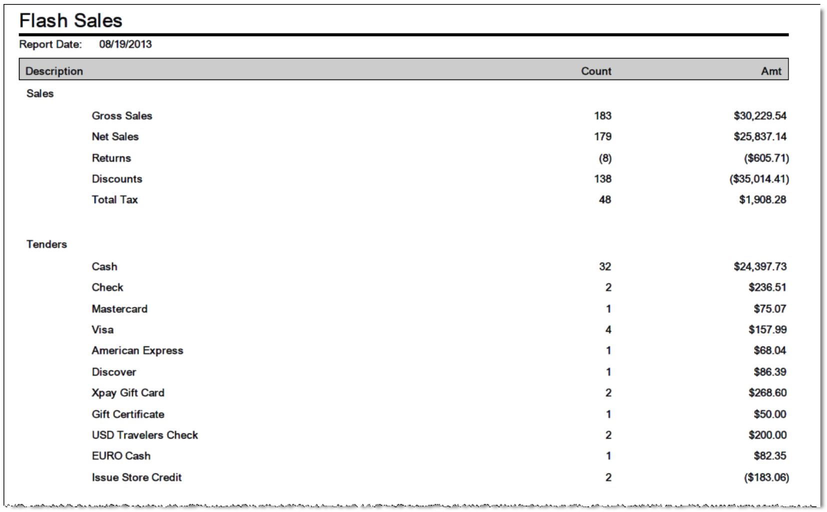
b. Choose one of the options in the Report Save Options drop-down list:

- ○ **Save Report with Current Data** - To save the report with the current values.
- ○ **Save Report Parameters** - To save only the parameters to use these parameters as a template to generate a new report at another time.

c. Select **Ok** to save the report. Reports are saved to your personal report area and can be retrieved from the Back Office Main Menu by selecting **Reports** and the **Saved Reports** option.

Refer to the Xstore Reports Guide for more information about setting up and running reports.

Flash Sales Summary (Data) Sample



Flash Sales

Report Date: 08/19/2013

Description		Count	Amt
Sales			
	Gross Sales	183	$30,229.54
	Net Sales	179	$25,837.14
	Returns	(8)	($605.71)
	Discounts	138	($35,014.41)
	Total Tax	48	$1,908.28
Tenders			
	Cash	32	$24,397.73
	Check	2	$236.51
	Mastercard	1	$75.07
	Visa	4	$157.99
	American Express	1	$68.04
	Discover	1	$86.39
	Xpay Gift Card	2	$268.60
	Gift Certificate	1	$50.00
	USD Travelers Check	2	$200.00
	EURO Cash	1	$82.35
	Issue Store Credit	2	($183.06)

Figure 20-4: Flash Sales Summary Report

Flash Sales Summary (Graph) Sample

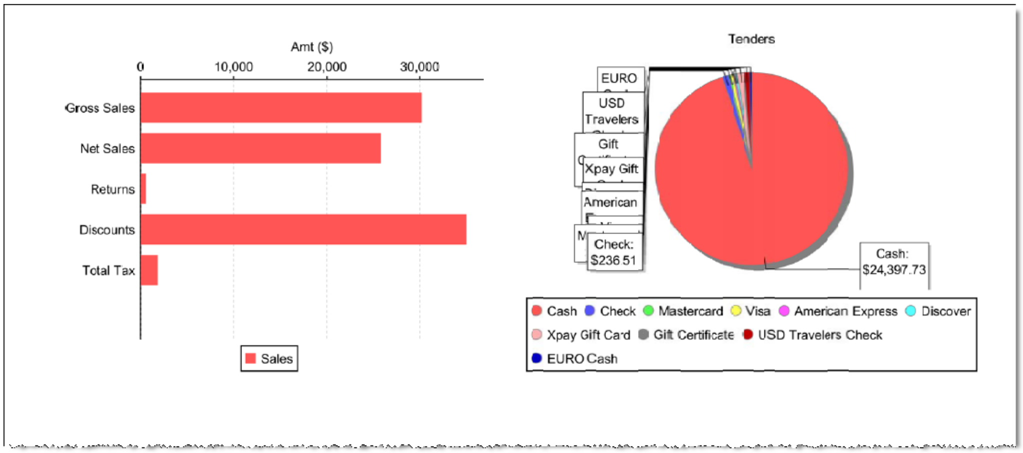


Figure 20-5: Flash Sales Summary Report - Graph View

CHAPTER 21

Register Open and Close

Overview

The Register Open and Close procedures explain the steps you must perform to open and close a register.

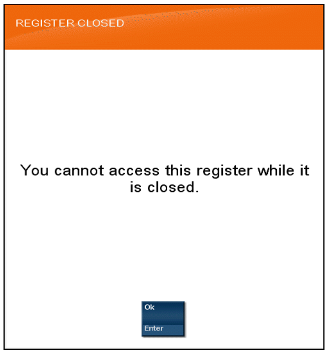
Due to the numerous system configuration options available, menu options are not identified by a function key number (F2, F3, etc.). Instead, the name on the button is used throughout this guide.

Register Open (Cashier Activities)

Opening the register is a process that can be quickly completed by managers or associates who have the proper security privileges. The process is highly configurable and your process may be different from the instructions below. Every effort has been made to include notes or examples of additional steps that may be configured for your store.

The open/close processes below include the counting of tills to show all steps to close the register. See Chapter 23, "Manage Till Options" on page 469 for more information on the functionality of tills.

1. When you attempt to log in to the system, Xstore determines the status of the register and store. If the register status is closed, a Register Closed message displays if configured to do so. Press [Esc] to close the message.

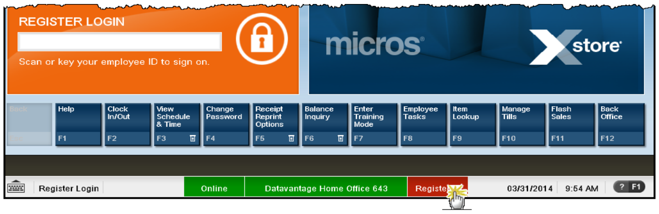


You cannot access this register while it is closed.

The red register indicator on the status bar also shows that the register is closed.

Figure 21-1: Status Bar - Register Closed

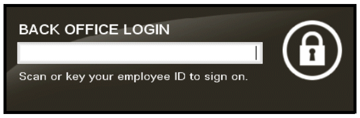
> *If you are using a touch-screen, tap the red register status bar to open the register. The focus bar prompts for your employee ID and password. Enter the information when prompted. Proceed to step 7 on page 456.*



2. Select the **Back Office** option on the Register menu to open the register from the Back Office Main Menu.

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

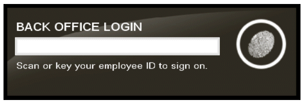
3. Xstore prompts for your employee ID to log in to the back office. Enter your employee ID and then press [Enter][1].



4. Xstore prompts for your employee password to complete the login process. Enter your employee password and then press [Enter].

---

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



5. At the Back Office Main Menu, select the **Open/Close Options** option and press [Enter], or press the number associated with the menu option on the keyboard to display the Open/Close Options menu.

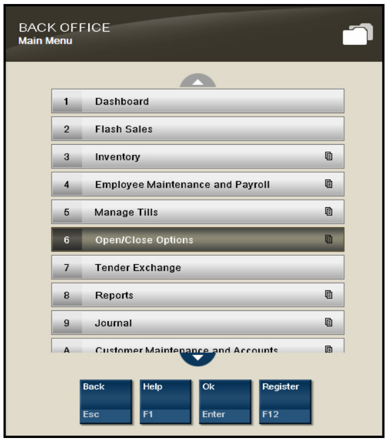


Figure 21-2: Back Office Main Menu

6. At the Open/Close Options menu, select the **Register Open** option and press [Enter], or press the number associated with the menu option on the keyboard.

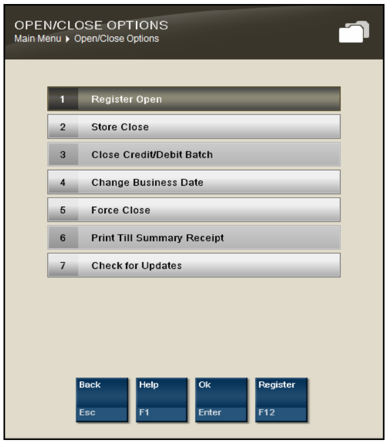


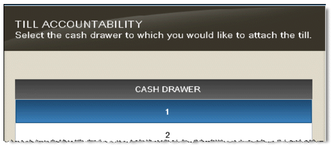
Figure 21-3: Open/Close Options Menu

The Register menu option toggles between open and close. If the available menu option is "Register Close", the register is currently open. If the available menu option is "Register Open", the register is currently closed.

7. Xstore prompts: Do you want to open this register? press [Y] to confirm that you want to open this register.

The following prompts are optional depending on your configuration:

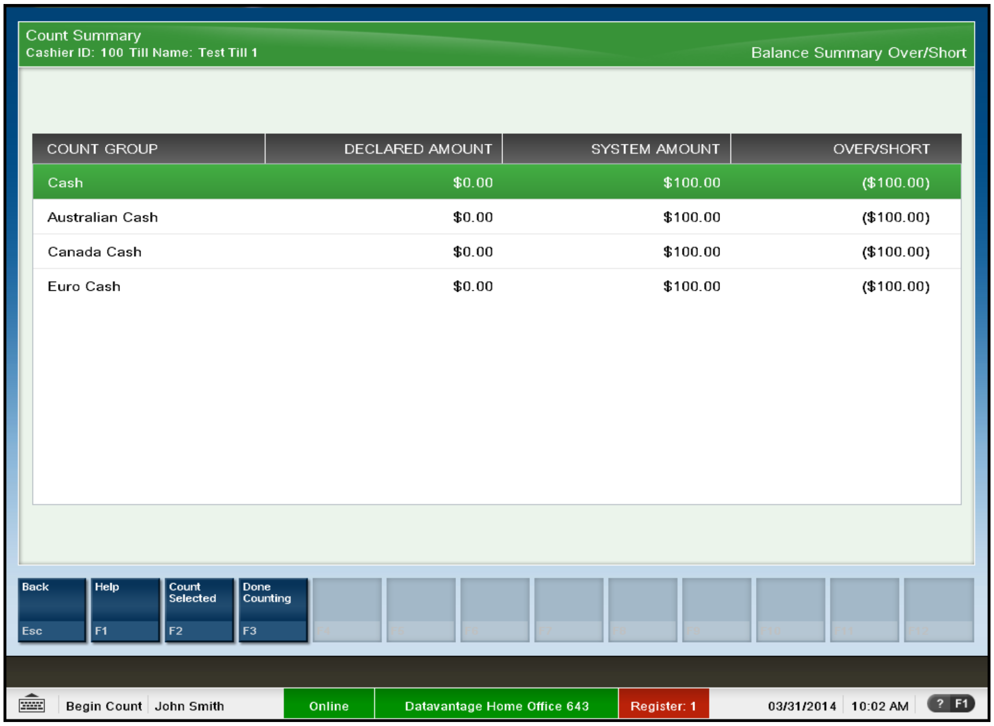
- If your register has more than one cash drawer, you are prompted to select the drawer from a list of available cash drawers.
- The system may be configured to print a Register Open receipt.



TILL ACCOUNTABILITY
Select the cash drawer to which you would like to attach the till.

CASH DRAWER
1
2

8. The Count Summary screen displays, select the tender type to be counted and then select the Count Selected button to display the tender group's count screen.



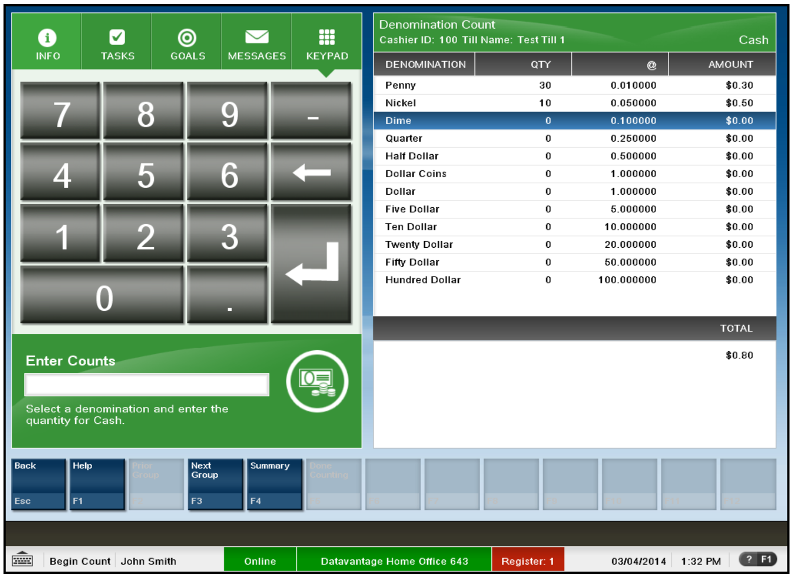
Count Summary
Cashier ID: 100 Till Name: Test Till 1
Balance Summary Over/Short

COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVER/SHORT
Cash	$0.00	$100.00	($100.00)
Australian Cash	$0.00	$100.00	($100.00)
Canada Cash	$0.00	$100.00	($100.00)
Euro Cash	$0.00	$100.00	($100.00)

Figure 21-4: Begin Count Summary Screen

9. Enter each value as required in the focus bar of the count screen and press [Enter]. Xstore will highlight the next denomination in the list.

Depending upon the configuration of your system, you may be prompted to enter the ***total*** *opening amount rather than prompted to count by denomination. See "Tender Count Screen Xstore Base Examples" on page 461.*



Denomination Count
Cashier ID: 100 Till Name: Test Till 1
Cash

DENOMINATION	QTY	@	AMOUNT
Penny	30	0.010000	$0.30
Nickel	10	0.050000	$0.50
Dime	0	0.100000	$0.00
Quarter	0	0.250000	$0.00
Half Dollar	0	0.500000	$0.00
Dollar Coins	0	1.000000	$0.00
Dollar	0	1.000000	$0.00
Five Dollar	0	5.000000	$0.00
Ten Dollar	0	10.000000	$0.00
Twenty Dollar	0	20.000000	$0.00
Fifty Dollar	0	50.000000	$0.00
Hundred Dollar	0	100.000000	$0.00

TOTAL
$0.80

Enter Counts

Select a denomination and enter the quantity for Cash.

Begin Count | John Smith | Online | Datavantage Home Office 643 | Register: 1 | 03/04/2014 | 1:32 PM

Figure 21-5: Denomination Count - Cash

10. Select Next Group to display the next count screen.

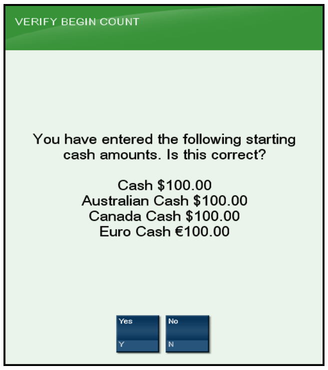
> *Select* ***Prior Group*** *to go back to the previous count screen.*

11. Repeat steps 9-10 until all tenders are counted and then select Summary to return to the Count Summary screen.

12. Review the amounts. If the totals are correct, select the **Done Counting** button.

> *Check the Over/Short column to see if your till is balanced with the system values for each tender type. To modify counts see "Editing Tender Group Counts" on page 464.*

13. If the starting cash amount matches, the system prompts to confirm the amount for all cash currencies you entered and opens the register after you acknowledge the system amount.



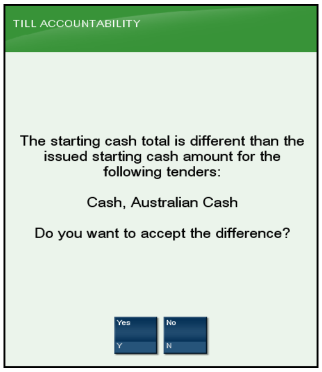
You have entered the following starting cash amounts. Is this correct?

Cash $100.00
Australian Cash $100.00
Canada Cash $100.00
Euro Cash €100.00

Figure 21-6: Verify Begin Count Prompt

If configured, the system prints a Begin Count receipt showing the amount of starting cash in the till and signature lines for the cashier and manager to sign confirming this open amount.

14. If the currency amounts do not match, the system displays a prompt to either recount the till or to accept the difference:



The starting cash total is different than the issued starting cash amount for the following tenders:

Cash, Australian Cash

Do you want to accept the difference?

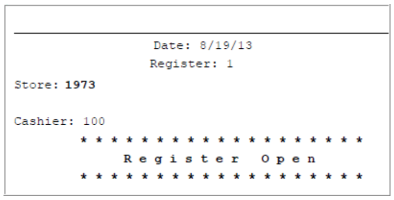
Figure 21-7: Starting Cash Difference Prompt

- Press [Y] to accept the amount you counted and continue opening the register. You are prompted to enter/select the reason for the discrepancy between the counted amount and the expected amount. You may be required to enter a comment and then press [Enter].

<OR>

- Press [N] to recount the till.

15. If you counted the till from the Back Office, select the **Register** option to display the register screen. The register is now open and a till has been counted and attached to the current register. The system may print a receipt indicating the register number that is open and the cashier ID who is at the register.



Date: 8/19/13
Register: 1
Store: 1973

Cashier: 100
****
Register Open
****

Figure 21-8: Register Open Receipt

Register Close

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

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

The procedures described in this section assume that till accountability is not being used (this is a configurable option). For more information on till accountability and its requirements, refer to the *Xstore Manager's Guide*.

> *The open/close instructions below include the counting of tills to show all steps to close the register. Refer to Chapter 23, "Manage Till Options" on page 469 for more information.*

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

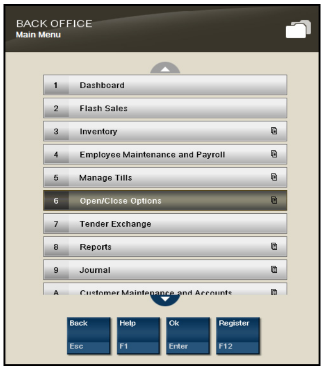
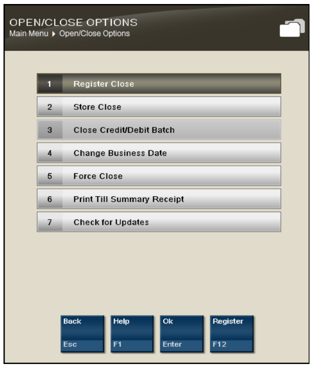


Figure 21-9: Back Office Main Menu

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

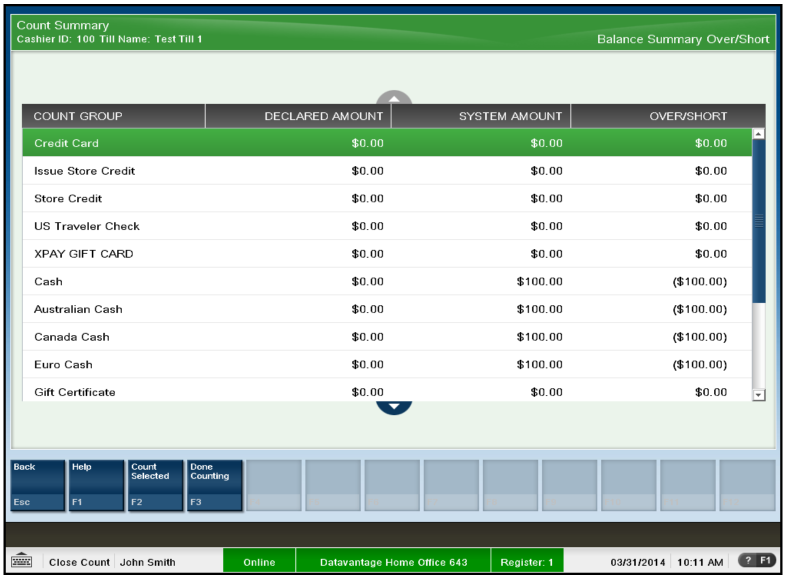


> *Note that the Register option toggles between open and close. If the option is "Register Close", the register is currently open. If the option is "Register Open", the register is currently closed.*

4. Xstore displays a confirmation prompt: Do you want to close this register? Press [Y] to close the register.

> *Pressing [N] at the Register Close confirmation prompt cancels the register close process and returns you to the Open/Close Options menu.*

5. The cash drawer opens and Xstore displays the Close Count Summary screen. Each count group (tender type) is counted individually. Specific groups require additional information as determined by the home office. Select the tender type to be counted and then select the Count Selected option to display the tender group's count screen.



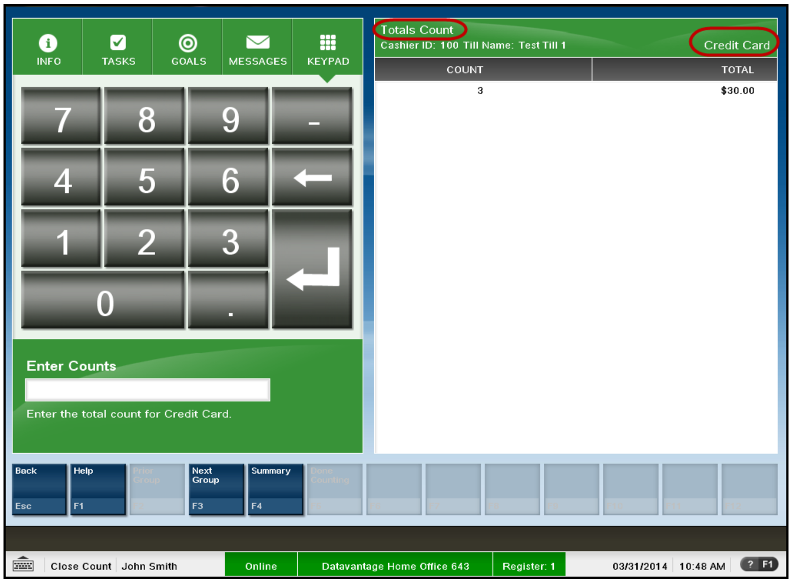
COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVER/SHORT
Credit Card	$0.00	$0.00	$0.00
Issue Store Credit	$0.00	$0.00	$0.00
Store Credit	$0.00	$0.00	$0.00
US Traveler Check	$0.00	$0.00	$0.00
XPAY GIFT CARD	$0.00	$0.00	$0.00
Cash	$0.00	$100.00	($100.00)
Australian Cash	$0.00	$100.00	($100.00)
Canada Cash	$0.00	$100.00	($100.00)
Euro Cash	$0.00	$100.00	($100.00)
Gift Certificate	$0.00	$0.00	$0.00

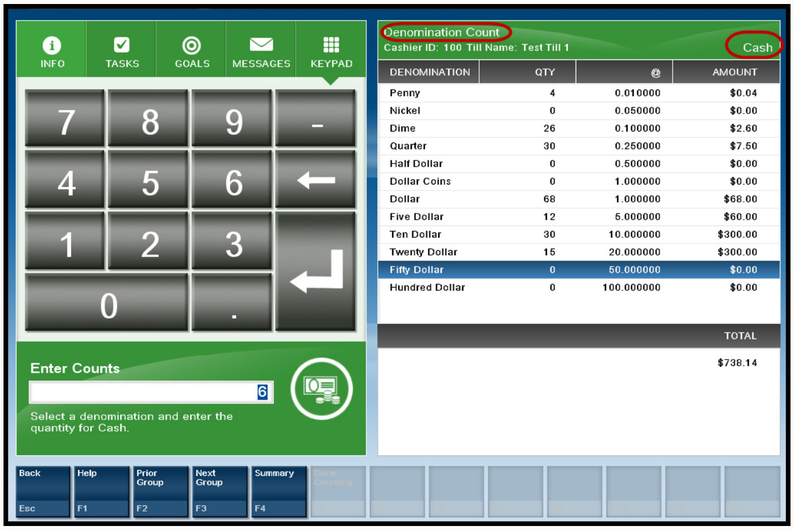
Figure 21-10: Close Count Summary Screen

> *Depending upon the configuration of your system and your store policy, the over/short amounts as shown above may not be displayed.*

6. Enter each value as required in the focus bar and press [Enter]. The tender type you select and your system's configuration determine the type of count you must perform. The following table shows Xstore base examples.

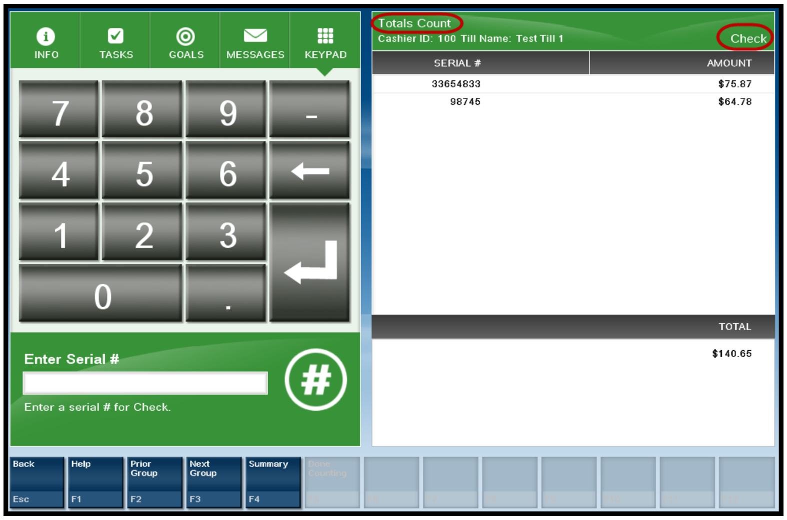
Table 21-1: *Tender Count Screen Xstore Base Examples*

<table>
<tr><th>Tender Count</th><th>Example</th></tr>
<tr><td>Credit Card
<i>(Totals[1] Count)</i></td><td>The focus bar prompts to enter the Count and then the Amount.


Totals Count
Cashier ID: 100 Till Name: Test Till 1
Credit Card
<table><tr><th>COUNT</th><th>TOTAL</th></tr><tr><td>3</td><td>$30.00</td></tr></table>
Enter Counts
Enter the total count for Credit Card.
Close Count John Smith Online Datavantage Home Office 643 Register: 1 03/31/2014 10:48 AM</td></tr>
<tr><td>Cash
<i>(Denomination[2] Count)</i></td><td>The focus bar prompts to enter the Count for each denomination. In the example below, the Fifty dollar denomination is being counted. Once [Enter] is pressed, the system highlights the next denomination in the count. The amount is calculated based on the quantity entered and displays a running total at the bottom of the screen.


Denomination Count
Cashier ID: 100 Till Name: Test Till 1
Cash
<table><tr><th>DENOMINATION</th><th>QTY</th><th>@</th><th>AMOUNT</th></tr>
<tr><td>Penny</td><td>4</td><td>0.010000</td><td>$0.04</td></tr>
<tr><td>Nickel</td><td>0</td><td>0.050000</td><td>$0.00</td></tr>
<tr><td>Dime</td><td>26</td><td>0.100000</td><td>$2.60</td></tr>
<tr><td>Quarter</td><td>30</td><td>0.250000</td><td>$7.50</td></tr>
<tr><td>Half Dollar</td><td>0</td><td>0.500000</td><td>$0.00</td></tr>
<tr><td>Dollar Coins</td><td>0</td><td>1.000000</td><td>$0.00</td></tr>
<tr><td>Dollar</td><td>68</td><td>1.000000</td><td>$68.00</td></tr>
<tr><td>Five Dollar</td><td>12</td><td>5.000000</td><td>$60.00</td></tr>
<tr><td>Ten Dollar</td><td>30</td><td>10.000000</td><td>$300.00</td></tr>
<tr><td>Twenty Dollar</td><td>15</td><td>20.000000</td><td>$300.00</td></tr>
<tr><td>Fifty Dollar</td><td>0</td><td>50.000000</td><td>$0.00</td></tr>
<tr><td>Hundred Dollar</td><td>0</td><td>100.000000</td><td>$0.00</td></tr>
<tr><td></td><td></td><td></td><td>TOTAL</td></tr>
<tr><td></td><td></td><td></td><td>$738.14</td></tr></table>
Enter Counts
6
Select a denomination and enter the quantity for Cash.</td></tr>
</table>

Table 21-1: *Tender Count Screen Xstore Base Examples*

Tender Count	Example
Check *(Totals[1] Count)*	The focus bar prompts to enter the **Serial #** and then the **Amount**. The system calculates the amount based on the quantity entered and displays a running total at the bottom of the screen.  Totals Count Cashier ID: 100 Till Name: Test Till 1 Check SERIAL # AMOUNT 33654833 $75.87 98745 $64.78 TOTAL $140.65 Enter Serial # Enter a serial # for Check.

1.A Totals Count prompts for a total number of the tender type and the total amount.
2.A Denomination Count requires that you specify the number of items (Count) and the value of each item in the tender group (Amount) that you selected.

The type of count is labeled on the upper left portion of the count screen view port. The tender type is identified in the upper right portion of the count screen view port.

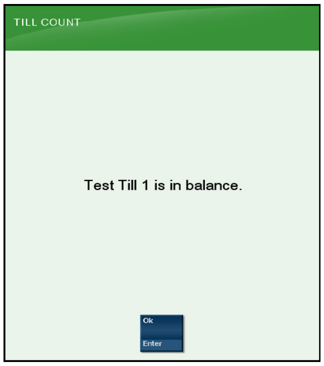
7. Select **Next Group** to display the next count screen.

*Select **Prior Group** to go back to the previous count screen.*

8. Repeat steps 6-7 until all tenders are counted. Select Summary to return to the Count Summary screen.
9. Review the amounts. If the totals are correct, select the **Done Counting** button.

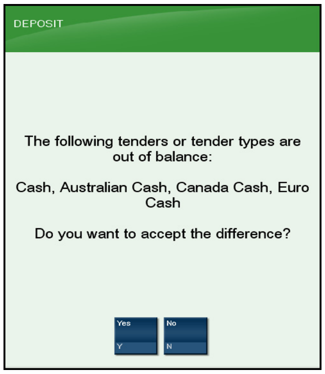
Check the Over/Short column to see if your till is balanced with the system values for each tender type. To modify counts see "Editing Tender Group Counts" on page 464.

10. If the till is in balance, a confirmation message displays. Press [Enter] to continue the register close.



Test Till 1 is in balance.

11. If any tenders are out of balance—your counts do not match the system expected amounts—Xstore displays a list of tenders that are out of balance.



The following tenders or tender types are out of balance:

Cash, Australian Cash, Canada Cash, Euro Cash

Do you want to accept the difference?

Figure 21-11: Tenders Out of Balance Prompt

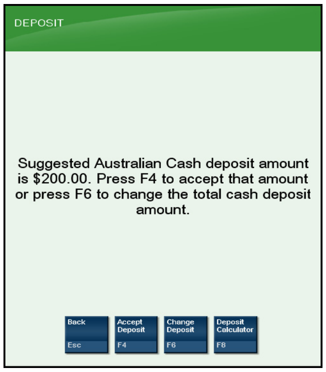
- ❍ Select **Yes** to accept your counted amounts. If prompted, select a reason for the count discrepancy and/or type a comment about the discrepancy.

  <OR>

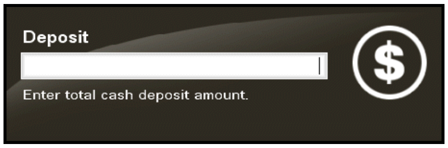
- ❍ Select **No** to recount any tenders as needed. Xstore re-displays the Close Count screen where you can make your changes as needed. See "Editing Tender Group Counts" on page 464.

12. Depending upon your system's configuration, you may be prompted with the suggested deposit amount.

- ❑ Select **Accept Deposit** to confirm the amount to be deposited and go to step 13 on page 464.
- ❑ Select **Change Deposit** to enter an amount to be deposited:
  - **1)** You are prompted to enter the amount to be deposited.



Suggested Australian Cash deposit amount is $200.00. Press F4 to accept that amount or press F6 to change the total cash deposit amount.



Enter total cash deposit amount.

2) Enter the amount and press [Enter] to continue the register close.

> *You can select the* **Deposit Calculator** *option to display a denomination count screen that can be used as a calculator—showing a running total at the bottom of the screen as you count the cash amount to be deposited.*

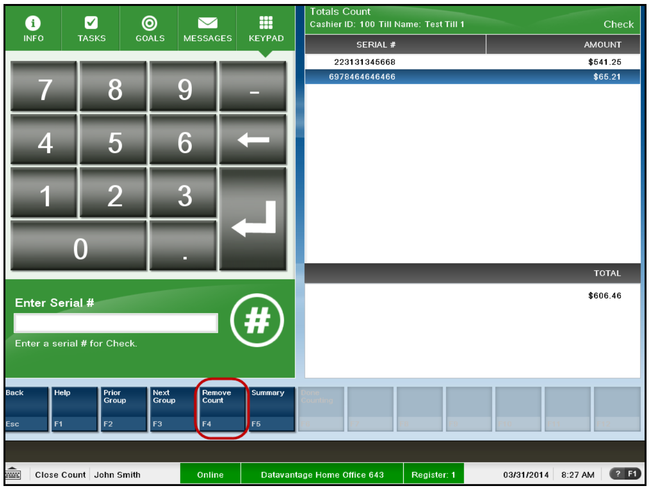
13. The system may be configured to print a **Closed Count** receipt and a **Register Closed** receipt.

    Close the cash drawer and the system closes the register.

Editing Tender Group Counts

If a tender group is out of balance, you can recount an individual tender group and edit the original count you entered into the system.

1. At the Count Summary screen (Figure 21-10 on page 460), select the tender group that must be recounted and select the **Count Selected** option to display the tender group count screen.



Totals Count
Cashier ID: 100 Till Name: Test Till 1
Check

SERIAL #	AMOUNT
223131345668	$541.25
6978464646466	$65.21

TOTAL
$606.46

Enter Serial #
Enter a serial # for Check.

Close Count | John Smith | Online | Datavantage Home Office 643 | Register: 1 | 03/31/2014 | 8:27 AM

2. Recount the tender and enter the new count values. Most tenders allow you to override the denomination count by selecting the row and then adding values into the focus bar prompts. When you press [Enter] the count value changes. For checks, however, you must select the **Remove Count** button to delete the row and then re-enter the **Serial #** and **Amount**.
3. Select the **Summary** option to view the changes and return to the Tender Group Summary screen.
4. Repeat steps 1-3 for each tender group that is not balanced. When you have completed editing the tender groups, select the **Done Counting** option. If there are tender groups that are still out of balance, a screen displays prompting whether you want to recount the tenders or accept the count and continue with the register close process.
5. Depending upon your system's configuration, you may be prompted with the suggested deposit amount. See step 11 on page 463 to complete the register close process.

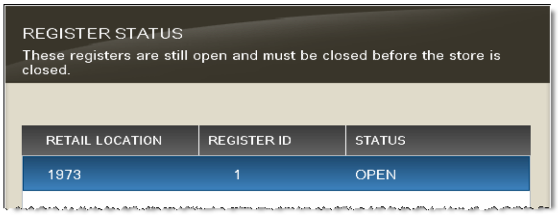
CHAPTER 22

Store Open/Close

Overview

When the store is physically closed at the end of business hours, the Xstore application may also run a store close to prevent the operation of certain business functions. From an application perspective, the store close process clears daily data, accepts downloads from corporate headquarters, purges old data, runs reports, and prepares your store to open for a new business day.

All cash registers must be closed before the store close process can be run. Refer to Chapter 21, "Register Open and Close" on page 453 for the register close process.



REGISTER STATUS

These registers are still open and must be closed before the store is closed.

RETAIL LOCATION	REGISTER ID	STATUS
1973	1	OPEN

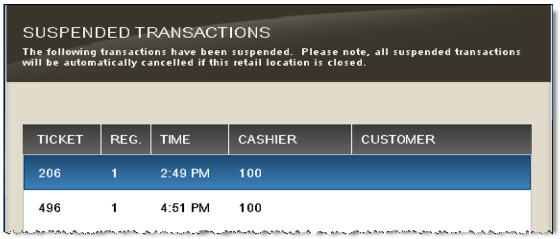
The store close is divided into a number of separate processes. If the system must be restarted, any completed process, any process that ended with errors, or any process that was skipped is not re-processed.

The store must be opened to allow business transactions in the system.

Store Close

Store open and store close activities are controlled by user security. You must have the proper security privileges to open and close the store. Refer to the XstoreManager's Guide for detailed information about opening and closing the store.

During the store close process, the system automatically finds and lists any suspended transactions that were not resumed during the business day. The associate performing the store close can either cancel the store close process at this point, or allow Xstore to automatically cancel all listed transactions and continue with the store close.



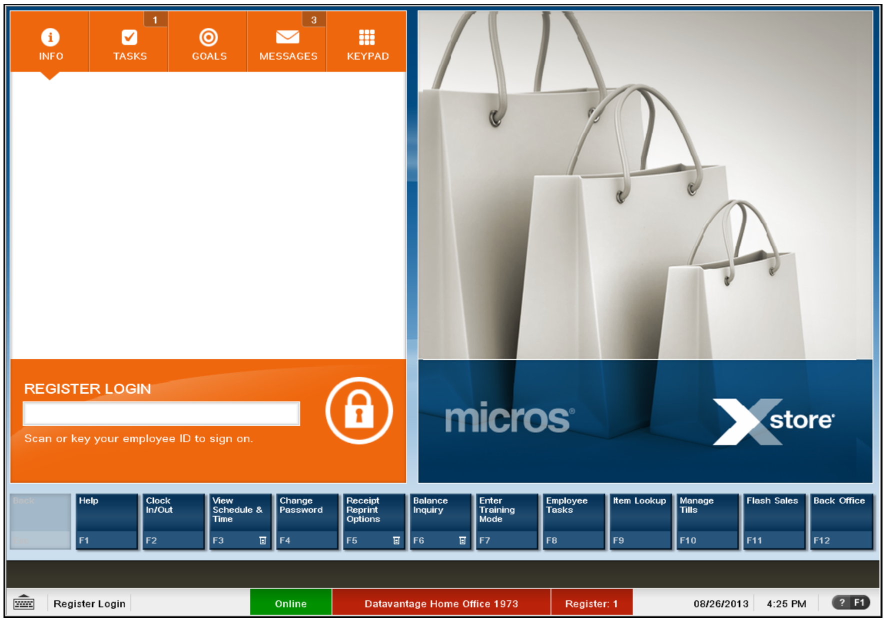
SUSPENDED TRANSACTIONS

The following transactions have been suspended. Please note, all suspended transactions will be automatically cancelled if this retail location is closed.

TICKET	REG.	TIME	CASHIER	CUSTOMER
206	1	2:49 PM	100	
496	1	4:51 PM	100	

In addition, the system may also list any pending orders that require attention. The associate performing the store close can either cancel the store close process, or allow Xstore to continue with the store close. The pending orders retain the same status and are not changed in any way by this notification prompt.

When the store is closed, the Store Indicator may be yellow or red, depending upon your system configuration, and the Register Indicator is red. An exception may occur if the register is being closed remotely. In that case, the Register Indicator is yellow while the processes are occurring, but it becomes red when it is completely closed.

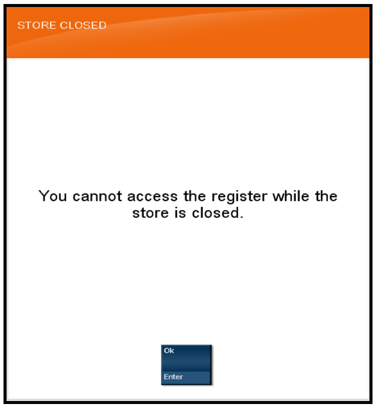


Scan or key your employee ID to sign on.

Figure 22-1: Register Login Screen - Store Closed

Depending upon your system configuration and store policy, you may have access to some register functions while the store is closed. For example, you may be able to clock in and out, and view your timecard and schedule information.

You cannot log in to the register until the store is opened. If you try to log in before opening the store, the system prompts you that you cannot continue until the store is opened.



You cannot access the register while the store is closed.

Figure 22-2: Store Closed Message

Press [Esc] to acknowledge the message and return to the Register Login screen.

The store must be opened before you can log in and perform transactions.

The store open procedure signals to all registers that the store is open. Once the store is open, sales cannot be rung until the register is opened and a till is counted for the register.

Refer to the Xstore Manager's Guide for procedural information.

Store Open

Store open and store close activities are controlled by user security. You must have the proper security privileges to open and close the store. Refer to the Xstore Manager's Guide for detailed information about opening and closing the store.

The store is opened to allow business transactions in the system. The store must be opened using the Back Office Store Open process. Once the store is open, you cannot ring sales until the register is opened and a till is counted for the register.

During the store open process, the system may also list any pending orders that require attention. Once the store is open, the associate can take any action as needed on the orders. See Chapter 14, "Order Transactions via Locate" on page 361 for more information about processing orders.

When the store is open, the Store indicator on the status bar is green indicating that the store is open.

Figure 22-3: Status Bar: Store Open - Register Closed

When both the store and the register are open, the Store and Register indicators on the status bar are green.

Figure 22-4: Status Bar: Store Open - Register Open

CHAPTER 23

Manage Till Options

Overview

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 Paid In and Paid Out, No Sale, Post Void, Foreign Currency Maint., Tender Exchange, and Change Float. Several other till maintenance options deal with the control and auditing of funds in the till. They include Cash Pickup, Cash Transfer, Till Audit, and Mid-Day Deposit. Finally, the Lock Register option provides physical security for the till.

Due to the flexibility of the system, menu options in this guide are not identified by a function key number (F2, F3, etc.). Instead, the name on the button is used throughout the procedures and processes. Many Till Options are controlled by user security and may not be available to all associates.

Manage Till Options Login

These Manage Till functions are available from either the Till Options menu or the Till Maintenance menu under the Manage Till menu option.

- Refer to "No Sale" on page 442 and "Lock/Unlock a Register" on page 444 for more information about "No Sale" transactions and locking/unlocking a register.
- Refer to "Post Void" on page 440 for more information about Post Voiding a transaction.
- Refer to **Store Bank Maintenance** options in the Xstore Manager's Guide for more information about managing the store bank and other Back Office functions.

Paid In-Paid Out

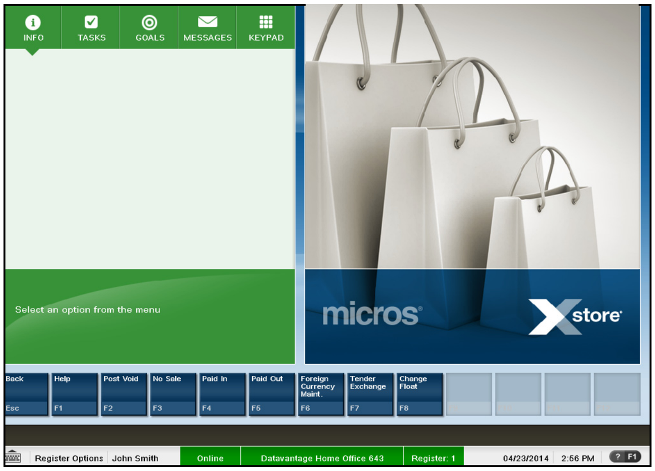
A paid in transaction allows you to move funds into a till from non-sale sources. A paid out transaction moves funds out of a till for non-refund purposes. The system's configuration controls which associates are allowed to move funds in or out of the till. It also specifies the list of valid reasons 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 Transaction

1. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, then select **Till Options** to display the Till Options menu.

   Or, at the Sale screen, select **Register Options** --> **Till Options** to display the Till Options menu.

2. Select the **Paid Out** option.

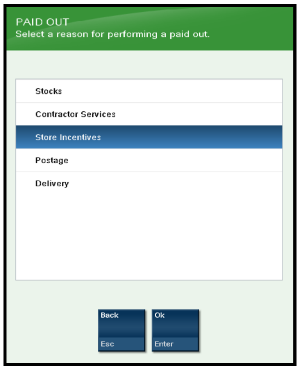


Select an option from the menu

Figure 23-1: Till Options Menu

3. The system displays a list of possible reasons for performing the paid out transaction. Choose a reason from the list and select **Ok**.

4. Depending upon the reason you selected, you may be prompted for additional information/comments. Enter the information as required and press [Enter].

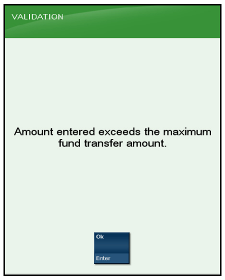


PAID OUT
Select a reason for performing a paid out.

5. Enter the amount that you are removing from the till and press [Enter].

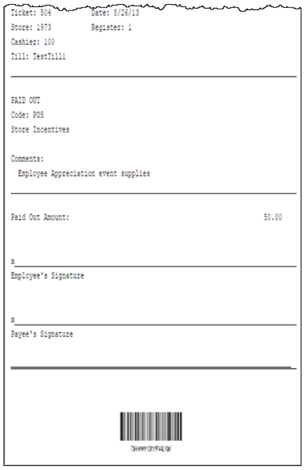
Figure 23-2: Paid Out Amount Prompt

If you exceed your store's maximum amount allowed for a paid out transactions you will see this message. Press [Enter] to close the prompt and reenter a new paid out amount.



Amount entered exceeds the maximum fund transfer amount.

6. Remove the cash and close the cash drawer. The system prints receipts as required by your store policy.



```
Ticket: 504        Date: 8/26/13
Store: 1973        Register: 1
Cashier: 100
Till: TestTill1
________________________________________

PAID OUT
Code: PO5
Store Incentives

Comments:
  Employee Appreciation event supplies
________________________________________

Paid Out Amount:                   50.00


x_______________________________________
Employee's Signature


x_______________________________________
Payee's Signature

________________________________________
```

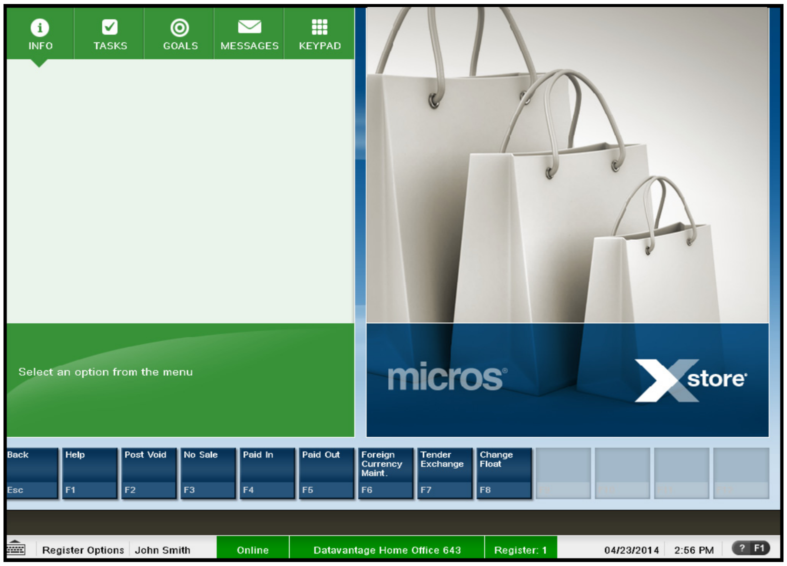
Figure 23-3: Sample Paid Out Receipt

Paid In Transaction

1. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, then select **Till Options** to display the Till Options menu.

   Or, at the Sale screen, select **Register Options**--> **Till Options** to display the Till Options menu.

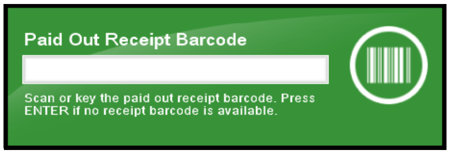
2. Select the **Paid In** option.



Select an option from the menu

Figure 23-4: Till Options Menu

3. If you are returning any funds from a previous paid out transaction, enter the tracking number or scan the paid out transaction receipt barcode and press [Enter]. Otherwise, just press [Enter] to bypass this prompt.



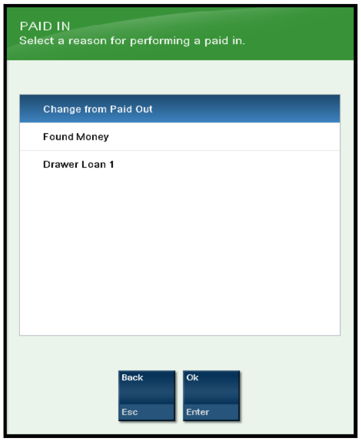
Paid Out Receipt Barcode

Scan or key the paid out receipt barcode. Press ENTER if no receipt barcode is available.

Figure 23-5: Prompt for Paid Out Receipt Barcode

4. The system displays a pre-defined list of possible reasons for performing the paid in transaction. Use the up and down arrow keys to choose a reason from the list and select **Ok**.

   Depending upon the reason you selected, you may be prompted for additional information/comments. Enter the information as required and press [Enter].



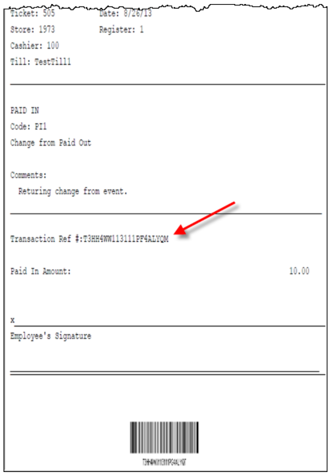
PAID IN

Select a reason for performing a paid in.

5. Enter the amount that you are placing in the till and press [Enter].

Figure 23-6: Paid In Amount Prompt

6. Close the cash drawer. The system prints receipts as required by your store's policy.



```
Ticket: 505          Date: 8/26/13
Store: 1973          Register: 1
Cashier: 100
Till: TestTill1

PAID IN
Code: PI1
Change from Paid Out

Comments:
  Returing change from event.

Transaction Ref #:T3HH4WW113111PF4ALYQM

Paid In Amount:                          10.00

x
Employee's Signature
```

Figure 23-7: Paid In Receipt

Note the reference to the original paid out transaction number shown in this example. This information associates the original paid out transaction with the current paid in transaction for accounting purposes.

Tender Exchange

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.

1. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, then select **Till Options** to display the Till Options menu.

   <OR>

   At the Sale screen, select **Register Options** --> **Till Options** to display the Till Options menu.

2. Select **Tender Exchange** from the Till Options menu.

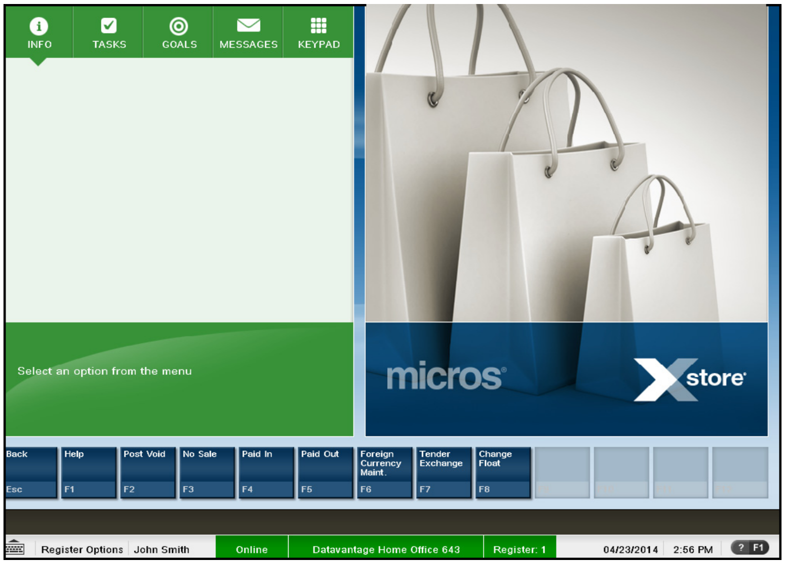
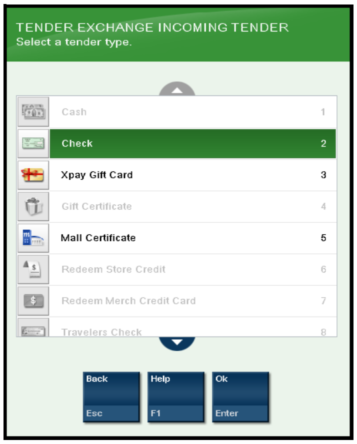


Figure 23-8: Till Options Menu

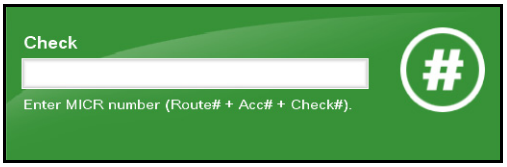
3. Choose the incoming tender type from the tender exchange list and select **Ok**. Use the up and down arrow keys to scroll through the list if necessary.



Only those types of tender that are configured to be available appear in the list. After selecting a tender type, the prompts that display depend upon the kind of tender selected. For example, exchanging a gift card for cash prompts for the gift card number.

In the example, a check is exchanged for cash—a common type of tender exchange—and the check information is entered manually rather than read by a MICR reader. If a reader is used, some of the following prompts may not appear because the information is picked up by the MICR reader.

4. When a check is exchanged, the system prompts for the MICR number that includes the check routing number, the bank account number, and the check number. Enter the information and press [Enter].



Enter MICR number (Route# + Acc# + Check#).

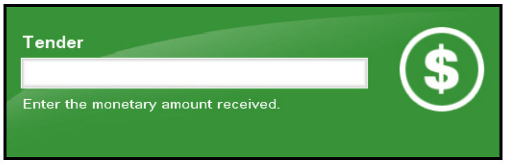
Figure 23-9: Check MICR Number Prompt

5. When prompted, enter the check number and press [Enter].

Enter check number.

Figure 23-10: Check Number Prompt

6. When prompted, enter the state/province that issued the ID being used to verify the person requesting the exchange and press [Enter]. Input for the state must be the standard two-letter postal abbreviation.
7. When prompted, enter the ID number being used for identification and press [Enter].
8. When prompted, enter the birth date of the person requesting the exchange (as shown on the ID) and press [Enter]. The date must be in the format mm/dd/yyyy.
9. When prompted, enter the amount of the incoming tender to be exchanged.



Enter the monetary amount received.

Figure 23-11: Amount Received From Customer Prompt

10. The system may prompt: Are there more incoming tenders to add to this exchange?

    ❑ Select Yes to return to the incoming tender list

    <OR>

    ❑ Select No to continue with the next step in the tender exchange process.

    This function allows you to combine several incoming tender types for this customer rather than creating separate transactions.

If more tenders must be added to the current exchange, repeat step 3 on page 474 through step 10 on page 475 until you have added all tenders.

11. Choose the outgoing tender type from the list and press [Enter].

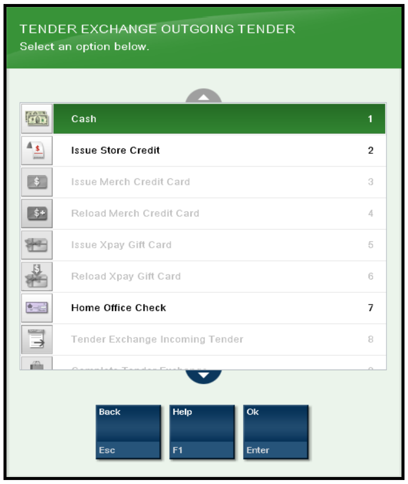

TENDER EXCHANGE OUTGOING TENDER
Select an option below.

Figure 23-12: Tender (Out) Exchange List

Only those types of tender that are configured to be given out appear in the list, similar to the tender types that appear on the tender (in) exchange list.

12. When prompted, enter the amount that is owed to the customer and press [Enter]. The system opens the cash drawer if applicable for the tender type.


Tender
100.00
Enter the amount to be given out for this tender.

Figure 23-13: Amount Given to Customer for Exchange Prompt

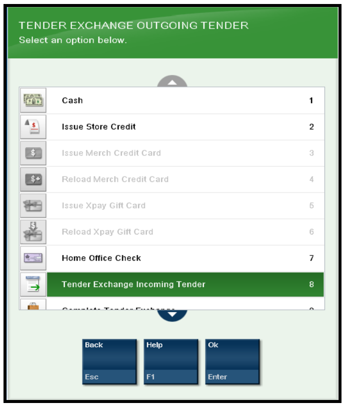
Your store may only allow one outgoing tender. If this is your store policy, the outgoing tender amount must equal the incoming tender amount.

13. The system prompts: Is this tender exchange complete?

- ❑ If you select **Yes**, the system may prompt you to close the cash drawer. The tender exchange is now complete.

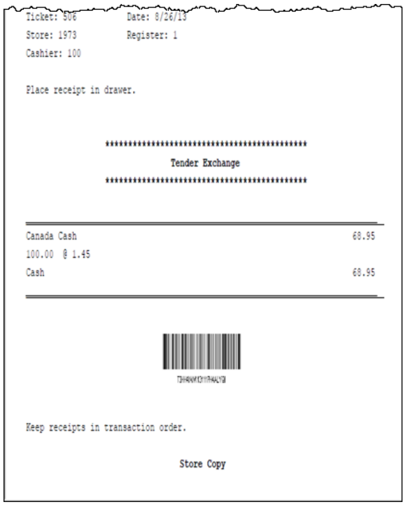
  <OR>

- ☐ If you select **No**, and your system is configured to allow multiple tenders in an exchange, the system returns you to the outgoing tender list where you may now have the option to add a new incoming tender to repeat the exchange process.


TENDER EXCHANGE OUTGOING TENDER
Select an option below.

  You may also be able to make changes to the current tender exchange. Repeat step 3 on page 474 through step 13 on page 476 if configured to allow multiple tenders in an exchange.

When the transaction is complete, the system prints a tender exchange receipt showing the incoming and outgoing tenders and amounts.



```
Ticket: 506          Date: 8/26/13
Store: 1973          Register: 1
Cashier: 100

Place receipt in drawer.

          *****************************************
                      Tender Exchange
          *****************************************

Canada Cash                                    68.95
100.00  @ 1.45
Cash                                           68.95

Keep receipts in transaction order.

                       Store Copy
```

Figure 23-14: Tender Exchange Receipt - Canada Cash For USD Exchange Example

Change Float

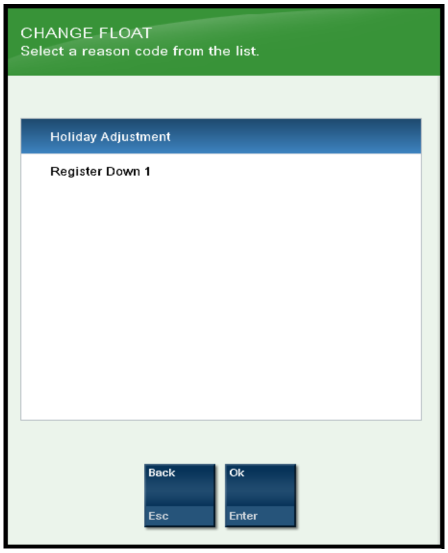
The Float is the total value of cash counted and removed from the till, but not included in the bank deposit. This cash remains in circulation to be used the next time the till is opened. This option can be used whenever you need to change the amount withheld from the bank deposit, and can be adjusted per till. For example, you may want to change the float amount during the holiday shopping season to plan for increased sale activity.

> *This option is controlled by security and may not be available.*

1. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, then select **Till Options** to display the Till Options menu.

   Or, at the Sale screen, select **Register Options** --> **Till Options** to display the Till Options menu.

2. At the Till Options menu, select the **Change Float** option.
3. The system prompts for the reason you are changing the float amount. Select a reason from the list and press [Enter] to continue.

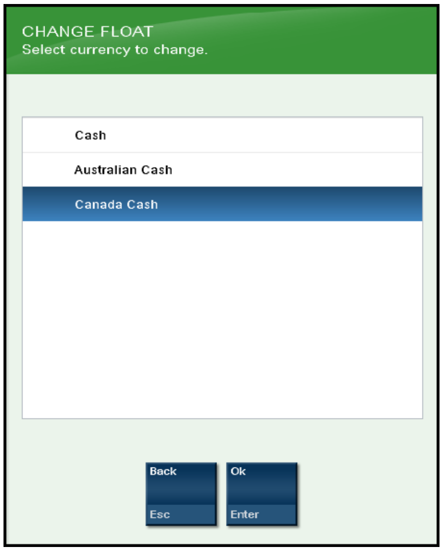


CHANGE FLOAT
Select a reason code from the list.

Holiday Adjustment
Register Down 1

Figure 23-15: Change Float Reasons

4. Depending upon the reason you selected, you may be prompted for additional information/comments. Enter the information as required and press [Enter].
5. If your store is configured for foreign cash currency tenders to be given as change, select the type of float tender from the list.

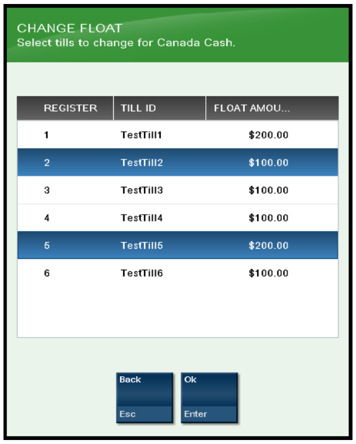


CHANGE FLOAT
Select currency to change.

Cash
Australian Cash
Canada Cash

Figure 23-16: Change Float Currency List

6. The system displays a list of tills. Use the up and down arrow keys to select the till(s) you want to change. Press the [Spacebar] to select multiple tills. After you select all of the tills you want to change, press [Enter].


CHANGE FLOAT
Select tills to change for Canada Cash.

REGISTER	TILL ID	FLOAT AMOU...
1	TestTill1	$200.00
2	TestTill2	$100.00
3	TestTill3	$100.00
4	TestTill4	$100.00
5	TestTill5	$200.00
6	TestTill6	$100.00

Figure 23-17: Till List - Two Tills Are Selected

7. The system prompts for the new float amount for the selected tills. Enter the new float amount and press [Enter].

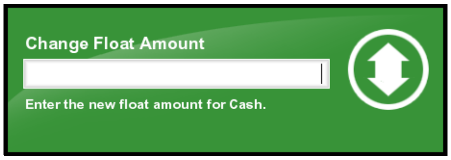
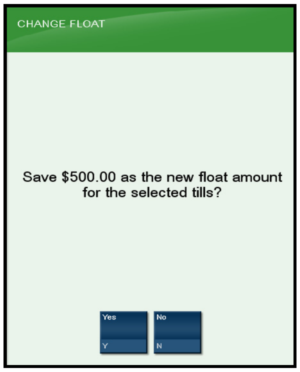

Change Float Amount
Enter the new float amount for Cash.

Figure 23-18: New Float Amount

8. The system prompts to confirm the new float amount for the selected tills. Press [Y] to accept the new float amount. The system updates the float amount to the new value for the selected tills and returns to the Till Options Menu.


CHANGE FLOAT
Save $500.00 as the new float amount for the selected tills?

Cash Pickup

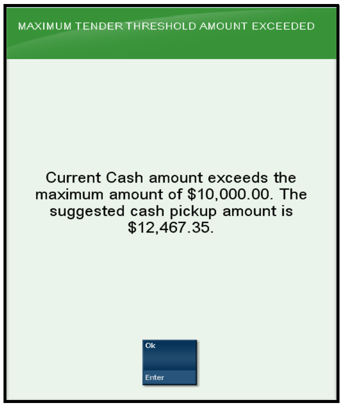
Cash Pickup is a till feature that allows an associate to take cash from a till so that the amount does not exceed a specified threshold amount. The system may be configured to prompt for an associate to make a cash pickup when the amount in the till is greater than the threshold amount.

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.



Current Cash amount exceeds the maximum amount of $10,000.00. The suggested cash pickup amount is $12,467.35.

1. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, then select **Till Maint** to display the Till Maintenance Options menu.

   Or, at the Sale screen, select **Register Options** --> **Till Options** to display the Till Options menu.
2. Select **Cash Pickup** from the menu.
3. If your store is configured for foreign cash currency tenders to be given as change, select the type of tender from the list.

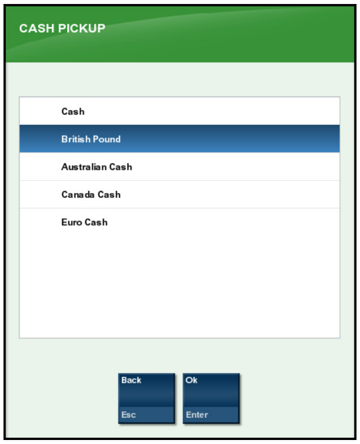


Figure 23-19: Cash Pickup Currency List

4. At the Cash Pickup prompt, enter the cash amount that you are picking up and press [Enter].

Cash Pickup

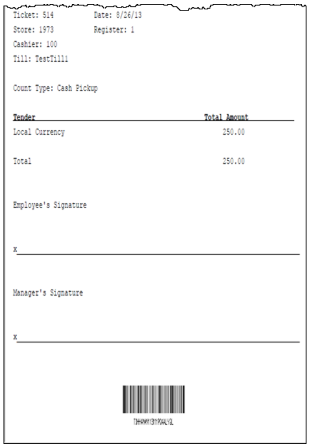
Enter amount of British Pound to pick up from the current till.

Figure 23-20: Cash Pickup Amount - British Pound

> *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.*
>
> *Your system may be configured to count the Cash Pickup currency. For examples of count screens, see "Tender Count Screen Xstore Base Examples" on page 461.*

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

   The system prints a receipt for this cash pickup transaction.



```
Ticket: 514        Date: 8/26/13
Store: 1973        Register: 1
Cashier: 100
Till: TestTill1

Count Type: Cash Pickup

Tender                                    Total Amount
Local Currency                               250.00

Total                                        250.00


Employee's Signature


x_____________________________________________________


Manager's Signature


x_____________________________________________________
```

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

Cash Transfer (From Store Bank To Till)

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

1. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, then select **Till Maint** to display the Till Maintenance Options menu.

   Or, at the Sale screen, select **Register Options** --> **Till Options** to display the Till Options menu.

2. In the Till Maintenance menu, select the **Cash Transfer** option.

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

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

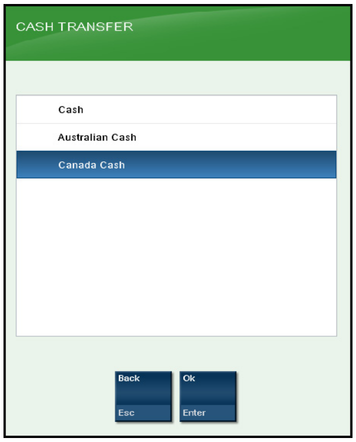
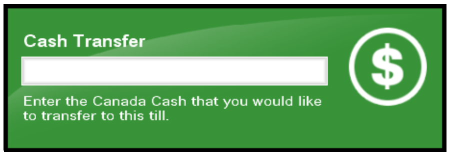


Figure 23-21: Cash Transfer Currency List

4. Enter the amount of cash you would like to transfer and then press [Enter].

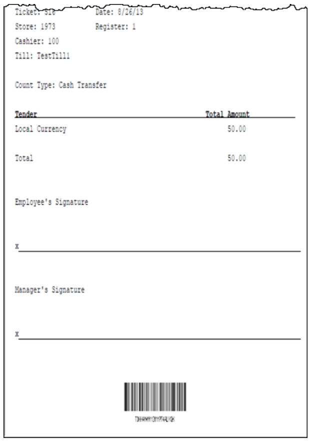


Enter the Canada Cash that you would like to transfer to this till.

Figure 23-22: Cash Transfer Amount Prompt- Canada Cash

Your system may be configured to count the Cash Transfer currency. For examples of count screens, see "Tender Count Screen Xstore Base Examples" on page 461.

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



```
Ticket: 516          Date: 8/26/13
Store: 1973          Register: 1
Cashier: 100
Till: TestTill1

Count Type: Cash Transfer

Tender                                   Total Amount
Local Currency                                  50.00

Total                                           50.00


Employee's Signature


x________________________________________________


Manager's Signature


x________________________________________________
```

Figure 23-23: Cash Transfer Receipt

Mid-Day Deposit

Mid-Day Deposit allows you to place funds into the store bank (safe) during the course of a working session. This activity is not necessarily restricted to a specific time, and may be performed as often as necessary.

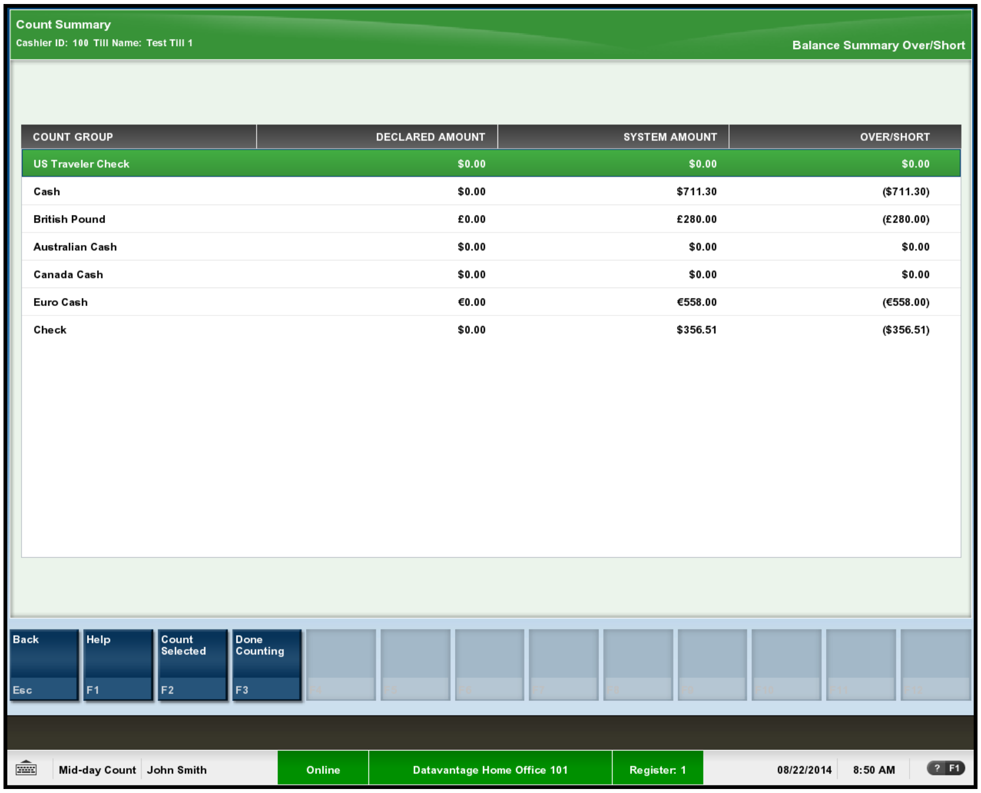
1. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, then select **Till Maint** to display the Till Maintenance Options menu.

Or, at the Sale screen, select **Register Options** --> **Till Options** to display the Till Options menu.

2. Select the **Mid-Day Deposit** option. The system opens the cash drawer when you select this option.

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

3. The Count Summary screen displays a list of tender groups that may be removed from the till and deposited in the store bank. Use the up and down arrow keys to scroll through the list and choose a count group. Select the **Count Selected** option.



Count Summary
Cashier ID: 100 Till Name: Test Till 1
Balance Summary Over/Short

COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVER/SHORT
US Traveler Check	$0.00	$0.00	$0.00
Cash	$0.00	$711.30	($711.30)
British Pound	£0.00	£280.00	(£280.00)
Australian Cash	$0.00	$0.00	$0.00
Canada Cash	$0.00	$0.00	$0.00
Euro Cash	€0.00	€558.00	(€558.00)
Check	$0.00	$356.51	($356.51)

Figure 23-24: Count Summary Screen - Mid Day Count

4. Enter each value as required in the focus bar and press [Enter]. The tender type you select and your system's configuration determine the type of count you must perform. For examples of count screens, see "Tender Count Screen Xstore Base Examples" on page 461.

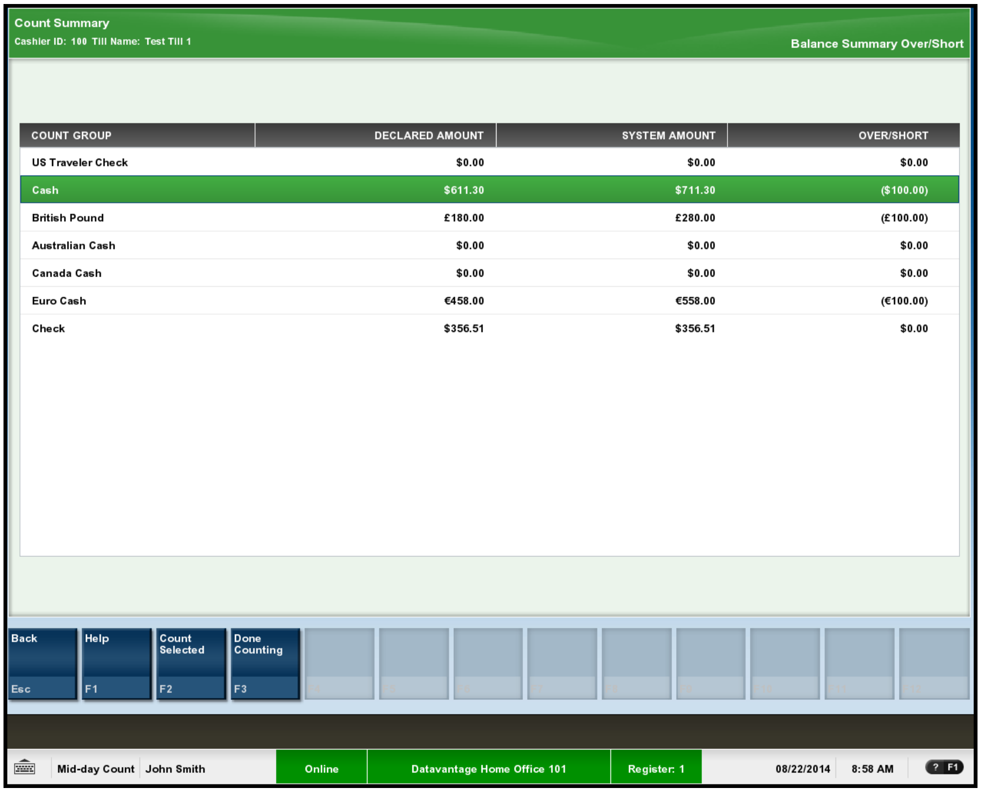
5. If additional funds are to be placed into the store bank, select the **Next Group** option to display the input screen for the next tender type.

a. Enter the count and amount values for the next tender group that you selected.

*You may select **Prior Group** to return to the previous tender group in the list.*

b. Select the **Summary** option to return to the list of all tender groups.

6. At the Count Summary screen, select the **Done Counting** option. The system prints a receipt for the Mid-Day deposit.



Count Summary

Cashier ID: 100 Till Name: Test Till 1

Balance Summary Over/Short

COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVER/SHORT
US Traveler Check	$0.00	$0.00	$0.00
Cash	$611.30	$711.30	($100.00)
British Pound	£180.00	£280.00	(£100.00)
Australian Cash	$0.00	$0.00	$0.00
Canada Cash	$0.00	$0.00	$0.00
Euro Cash	€458.00	€558.00	(€100.00)
Check	$356.51	$356.51	$0.00

Mid-day Count | John Smith | Online | Datavantage Home Office 101 | Register: 1 | 08/22/2014 | 8:58 AM

Figure 23-25: Mid-day Count Summary Screen - Done Counting

> *The difference between the Declared Amount (your count) and the System Amount is the amount remaining in the till.*

7. Close the cash drawer. The system returns to the Till Options menu.

Till Audit

Till Audit provides the capability to select a tender type, record its total current value, and see if that value balances with the amount that the system shows for the same tender. The system calculates and displays any difference (over/short) between the two amounts.

A till audit may be performed any time after the Beginning Count and before the Ending Count. The till does not need to be removed after the audit is completed.

1. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, then select **Till Maint** to display the Till Maintenance Options menu.

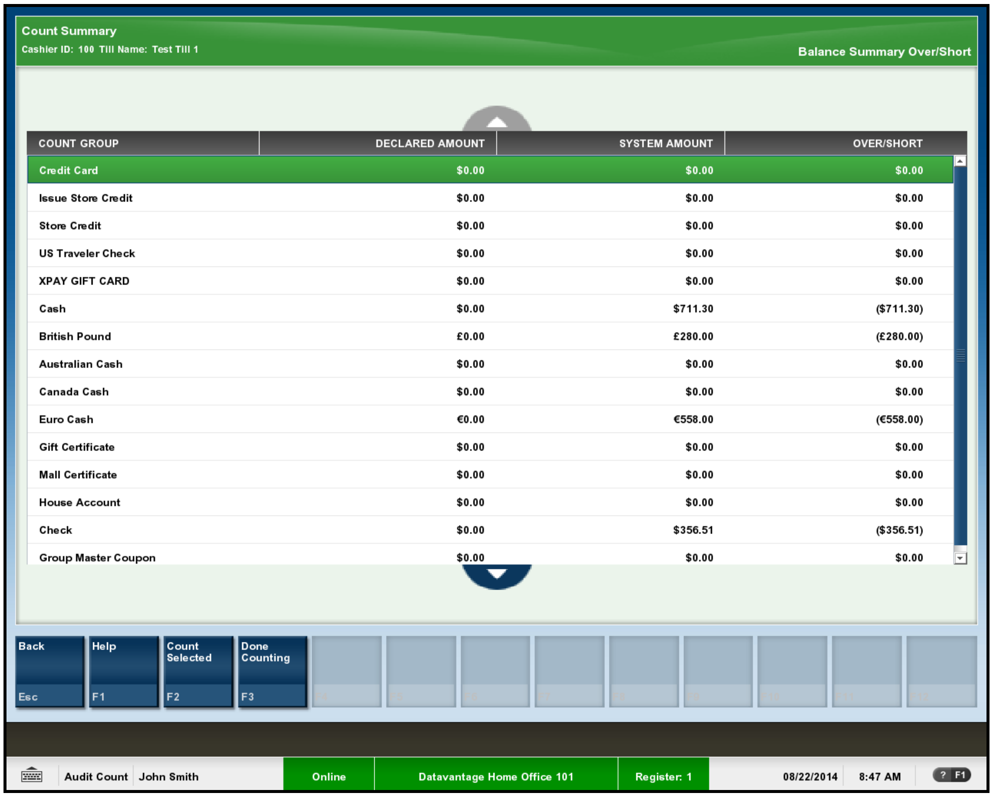
   <OR>

   At the Sale screen, select **Register Options** --> **Till Options** to display the Till Options menu.

2. Select the **Till Audit** option.

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

3. At the Count Summary screen, select the tender type you want to count and then select the **Count Selected** option. Use the up and down arrow keys to scroll through the list if necessary.



Count Summary

Cashier ID: 100 Till Name: Test Till 1

Balance Summary Over/Short

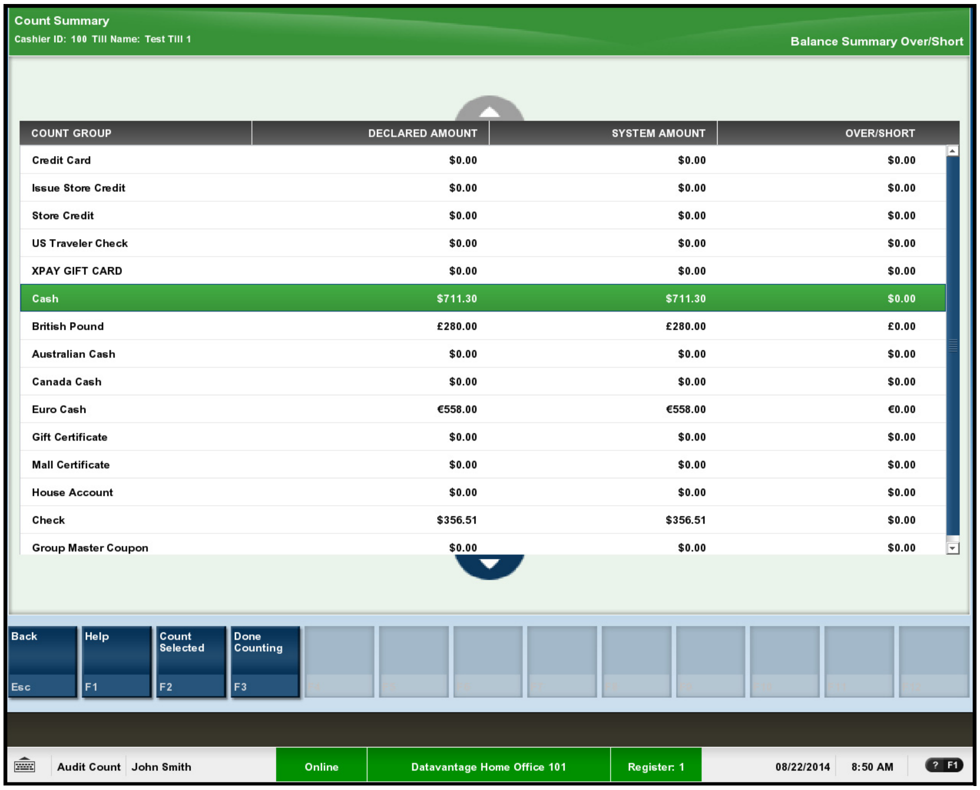
COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVER/SHORT
Credit Card	$0.00	$0.00	$0.00
Issue Store Credit	$0.00	$0.00	$0.00
Store Credit	$0.00	$0.00	$0.00
US Traveler Check	$0.00	$0.00	$0.00
XPAY GIFT CARD	$0.00	$0.00	$0.00
Cash	$0.00	$711.30	($711.30)
British Pound	£0.00	£280.00	(£280.00)
Australian Cash	$0.00	$0.00	$0.00
Canada Cash	$0.00	$0.00	$0.00
Euro Cash	€0.00	€558.00	(€558.00)
Gift Certificate	$0.00	$0.00	$0.00
Mall Certificate	$0.00	$0.00	$0.00
House Account	$0.00	$0.00	$0.00
Check	$0.00	$356.51	($356.51)
Group Master Coupon	$0.00	$0.00	$0.00

Figure 23-26: Audit Count - Count Summary Screen

4. Enter each value as required in the focus bar and press [Enter]. The tender type you select and your system’s configuration determine the type of count you must perform. For examples of count screens, see “Tender Count Screen Xstore Base Examples” on page 461.

5. After you complete the count for the selected group, select the **Next Group** option, and repeat this step for additional groups that you want to count.

6. After you count all groups that you want to audit, select the **Summary** option to return to the Count Summary screen. Check the Over/Short column to see if your till is now balanced with the system values for each tender type.



Count Summary

Cashier ID: 100 Till Name: Test Till 1

Balance Summary Over/Short

COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVER/SHORT
Credit Card	$0.00	$0.00	$0.00
Issue Store Credit	$0.00	$0.00	$0.00
Store Credit	$0.00	$0.00	$0.00
US Traveler Check	$0.00	$0.00	$0.00
XPAY GIFT CARD	$0.00	$0.00	$0.00
Cash	$711.30	$711.30	$0.00
British Pound	£280.00	£280.00	£0.00
Australian Cash	$0.00	$0.00	$0.00
Canada Cash	$0.00	$0.00	$0.00
Euro Cash	€558.00	€558.00	€0.00
Gift Certificate	$0.00	$0.00	$0.00
Mall Certificate	$0.00	$0.00	$0.00
House Account	$0.00	$0.00	$0.00
Check	$356.51	$356.51	$0.00
Group Master Coupon	$0.00	$0.00	$0.00

Figure 23-27: Count Summary Screen - Audit Complete

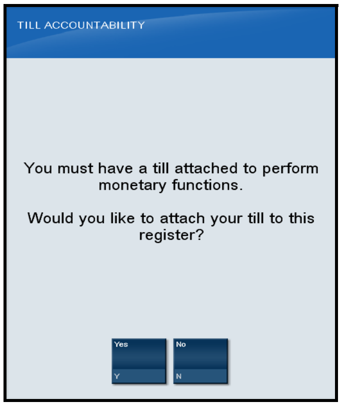
7. Select the **Done Counting** option when you complete your audit of the till.
8. The system prints a till audit receipt for your records.
9. Close the cash drawer. The system returns to the Till Options menu.

Till Accountability Mode Functions

Some till options are available only if your system uses till accountability, in which responsibility for a till is assigned to a specific cashier. This also allows Xstore to support more than one cash drawer on a single register. Till assignment is done through the Back Office Menu. Refer to the *Xstore Manager's Guide* for more information about all the functions available in Till Accountability mode.

Attaching a Till to a Register - Till Accountability Mode

This is an automatic function that occurs only in the till accountability mode of operation. When a cashier who has been assigned to a specific till logs in to the system, a prompt displays indicating that you must have a till attached. See "Basic Transaction Entry" on page 29".

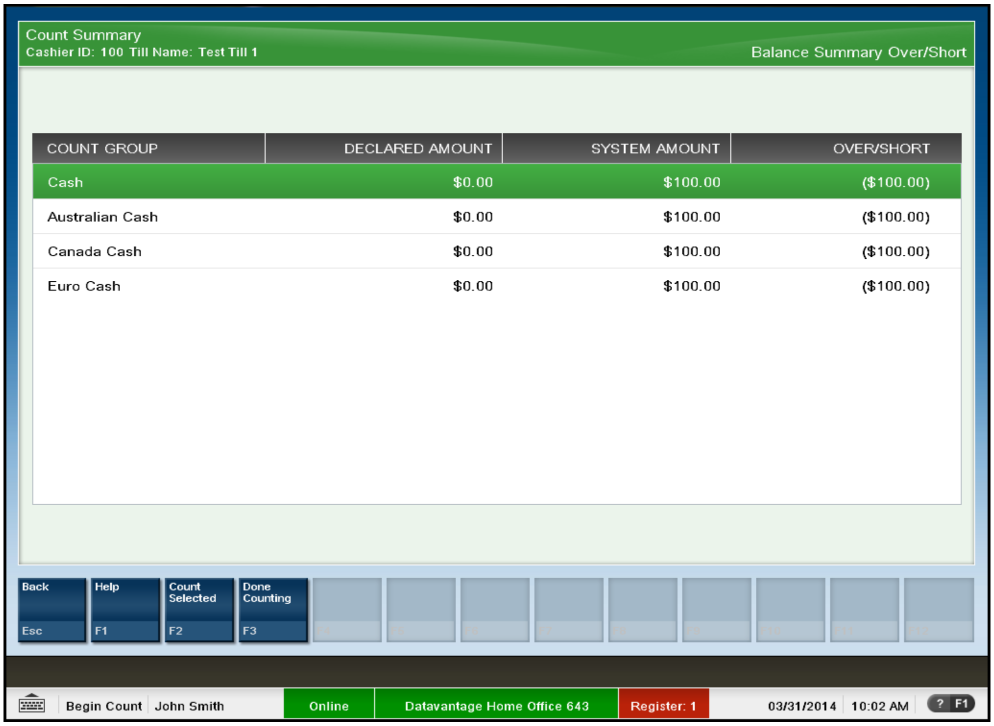


You must have a till attached to perform monetary functions.

Would you like to attach your till to this register?

A register must be open before a till can be attached to it.

1. If prompted, select **Yes** to attach the till to the register. The Begin Count Summary screen displays.



Cashier ID: 100 Till Name: Test Till 1

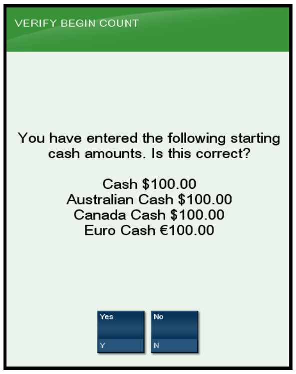
COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVER/SHORT
Cash	$0.00	$100.00	($100.00)
Australian Cash	$0.00	$100.00	($100.00)
Canada Cash	$0.00	$100.00	($100.00)
Euro Cash	$0.00	$100.00	($100.00)

Figure 23-28: Begin Count Summary Screen

2. Enter the count in the Enter Counts focus bar field and then press [Enter]. Xstore will highlight the next denomination in the list.

> *Depending upon the configuration of your system, you may be prompted to enter the **total** opening amount rather than prompted to count by denomination. See “Tender Count Screen Xstore Base Examples” on page 461.*

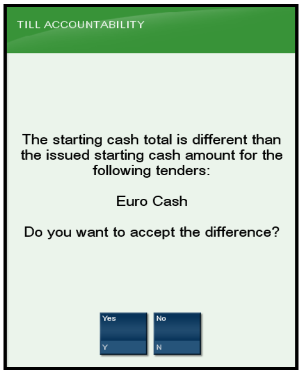
3. Select **Summary** to complete the count.
4. Select **Done Counting** after all denominations have been counted.
5. If the begin count matches the expected count, select **Yes**. Otherwise, select **No** to recount the till.



You have entered the following starting cash amounts. Is this correct?

Cash $100.00
Australian Cash $100.00
Canada Cash $100.00
Euro Cash €100.00

6. If the begin count does not match the expected amount, select **Yes** to accept the difference or select **No** to recount the till.



The starting cash total is different than the issued starting cash amount for the following tenders:

Euro Cash

Do you want to accept the difference?

Figure 23-29: Begin Count Does Not Match Expected Amount

7. After accepting the till amount, the sale screen displays.

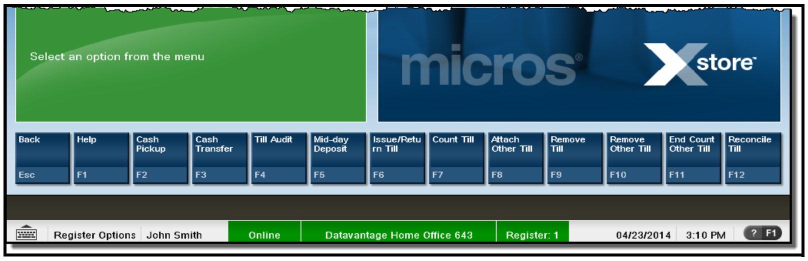
Removing a Till from a Register - Till Accountability Mode

Removing a till is performed only in the **till accountability** mode of operation in which a till is assigned to a specific cashier. When a cashier who has been assigned to a specific till logs out of the register, the system may prompt to remove the till.

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.

> *If you want to count/reconcile the till before removing it from the register, refer to "Performing a Close Count - Till Accountability Mode" on page 490.*

1. Select **Manage Tills** at the Register Login screen and log in to the system, then select **Till Maint** from the menu.
2. At the Till Maintenance menu, select the **Remove Till** option.



Select an option from the menu

Figure 23-30: Till Maintenance Menu Options

3. When prompted, Select **Yes** to confirm you want to remove the till.
4. Remove the till.
5. When prompted, press [Enter] to confirm you have removed the till from the register.
6. Close the register drawer. The till may now be stored or reconciled at a different register.

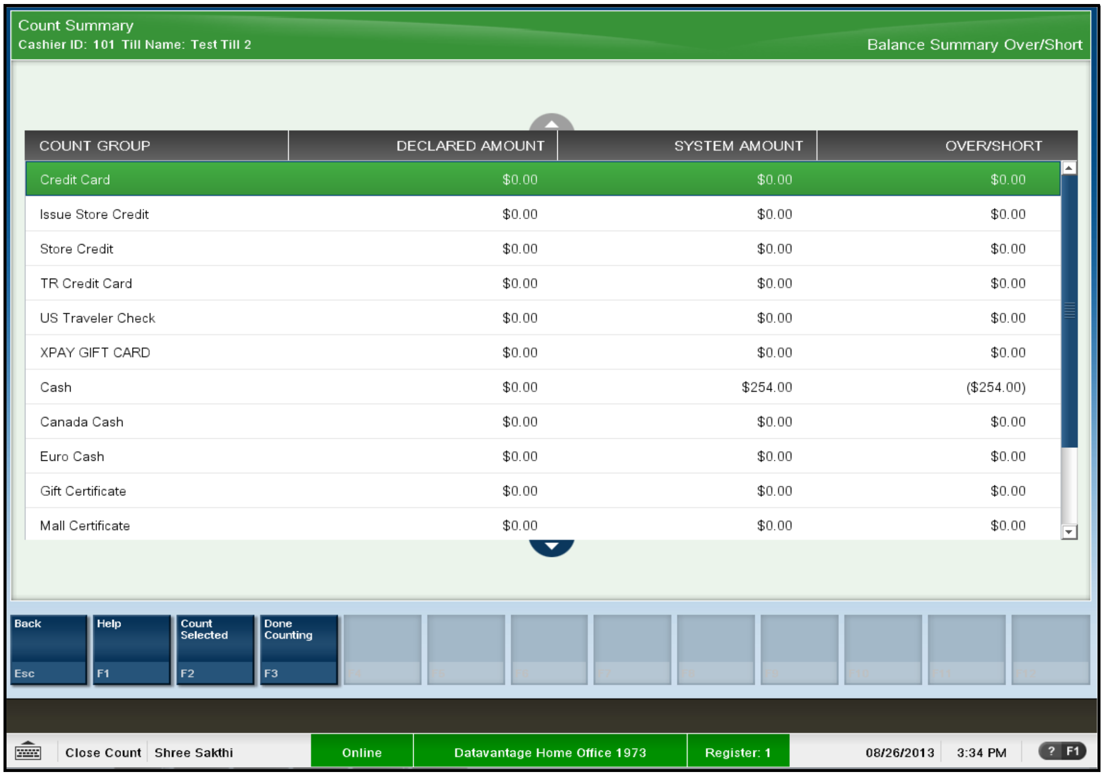
Performing a Close Count - Till Accountability Mode

The Close Count function provides the capability to declare final amounts for all the tender groups when a till is closed at any time. The system displays the values for each group in the System Amount column and any overages or shortages are indicated in the Over/Short column on the Close Count screen (if your system is configured to display them). If any of the tender groups are not in balance when an attempt is made to close a till, the system displays a warning message indicating which groups are out of balance. You may decide to accept the differences or to correct them before final closing.

1. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu.
2. Select **Till Maint** from the Manage Tills menu.

3. At the Till Maintenance menu, select the **Count Till** option (Figure 23-30, "Till Maintenance Menu Options," on page 490). The system opens the cash drawer.

   The Count Summary screen displays a list of tender groups and their current system amounts. If configured, your system may also show over/short amounts for each tender type.



Count Summary
Cashier ID: 101 Till Name: Test Till 2
Balance Summary Over/Short

COUNT GROUP	DECLARED AMOUNT	SYSTEM AMOUNT	OVER/SHORT
Credit Card	$0.00	$0.00	$0.00
Issue Store Credit	$0.00	$0.00	$0.00
Store Credit	$0.00	$0.00	$0.00
TR Credit Card	$0.00	$0.00	$0.00
US Traveler Check	$0.00	$0.00	$0.00
XPAY GIFT CARD	$0.00	$0.00	$0.00
Cash	$0.00	$254.00	($254.00)
Canada Cash	$0.00	$0.00	$0.00
Euro Cash	$0.00	$0.00	$0.00
Gift Certificate	$0.00	$0.00	$0.00
Mall Certificate	$0.00	$0.00	$0.00

Figure 23-31: Close Count Summary Screen

> *When a tender group is balanced, the value for the tender is zero in the Over/Short column.*

4. At the Count Summary screen, use the up and down arrow keys to select (highlight) a count group. Select the **Count Selected** option on the menu.

> *The Count Group you select determines the requirements for doing the count. For example, if you select **Cash**, you may need to count the total value of each denomination in the till. But if you select **Check**, you may need to indicate the number of checks in the till and their total value.*

5. Enter each value as required in the focus bar and press [Enter]. The value of the Total Amount in the lower right corner of the screen updates each time you make or change an entry, and it should equal the value for the same Count Group displayed on the Count Summary screen. See *"Tender Count Screen Xstore Base Examples" on page 461*.

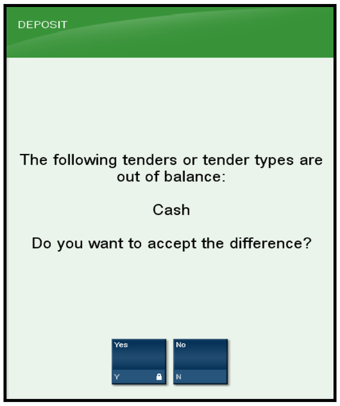
6. After completing the count for a group, select the **Next Group** option to display the count screen for the next sequential tender group in the list. It is always the group immediately below the current group on the Count Summary screen.

The Next Group that is displayed may not have any items in the till. For example, there may not be any European Cash in the till. You can select the ***Summary*** *option and use the up and down* arrow *keys to choose any group on the Count Summary screen.*

7. Count all tender groups and enter their values.

The type of count (by denomination, by item, total value, etc.) that must be performed is configurable for each tender type. Some count groups may require only a total value while other groups require a count by denomination.

8. After you think all groups are balanced, select the **Summary** option to view the Count Summary screen showing the values you entered.
9. At the Count Summary screen select the **Done Counting** option.
10. If any tender types are out of balance in the till, the system displays a warning message:



The following tenders or tender types are out of balance:

Cash

Do you want to accept the difference?

Figure 23-32: Tender Out of Balance Prompt

- Select **No** if you want to return to the Count Summary screen and correct an out-of-balance tender group.
- Select **Yes** if you want to continue and finalize the closing count for the till and accept the difference between your count and the expected count.

If you select ***Yes*** *at this prompt you are prompted for additional information about the discrepancy. This function may require a Manager security level.*

11. Select **Remove Till** to remove the till from the cash drawer. See “Removing a Till from a Register - Till Accountability Mode” on page 490.

When the till has been end-counted and removed, it can be returned to the Cash Manager where it is reconciled and prepared to be issued again.

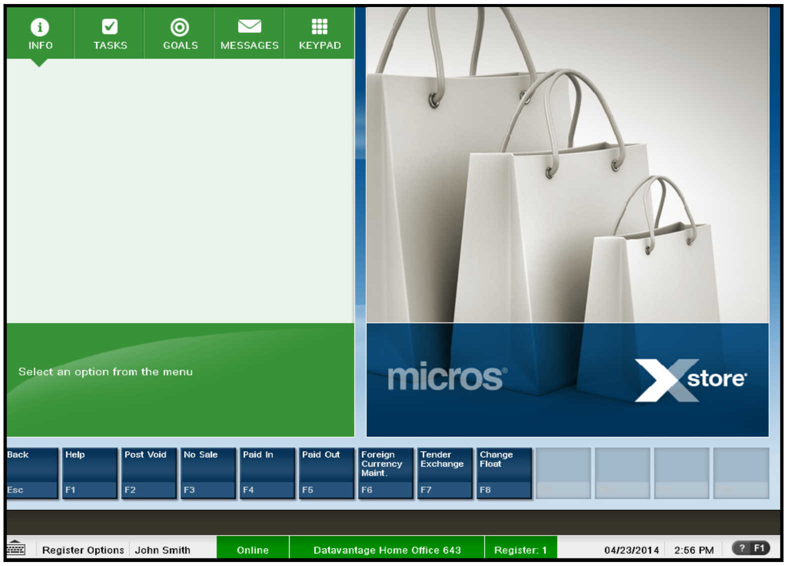
Refer to the Xstore Manager's Guide for more information about all the functions available in Till Accountability mode.

Foreign Currency Maintenance

If permitted by your store's policy, you can edit the currency exchange rate for the foreign currencies that are accepted as tenders for sale transactions. Since some currency rates fluctuate frequently, this feature allows you to edit the exchange rate as often as necessary.

Your system's configuration may make Foreign Currency Maintenance available from a different location than described below.

1. At the Register Login screen, select **Manage Tills** and log in to display the Manage Tills menu, then select **Till Options** to display the Till Options menu.
2. Select the **Foreign Currency Maint** option.



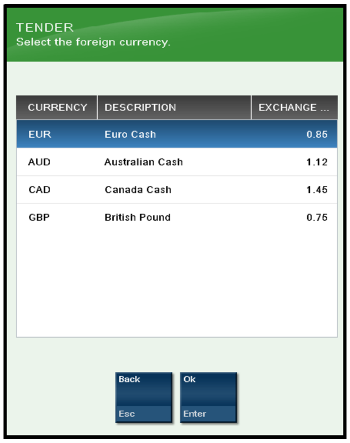
Select an option from the menu

Figure 23-33: Till Options - Foreign Currency Maintenance

If a key symbol is displayed on the Foreign Currency Maintenance option, your security level requires you to verify your identity by entering your ID and password.

3. If prompted, enter your employee ID and password and select **Process**.

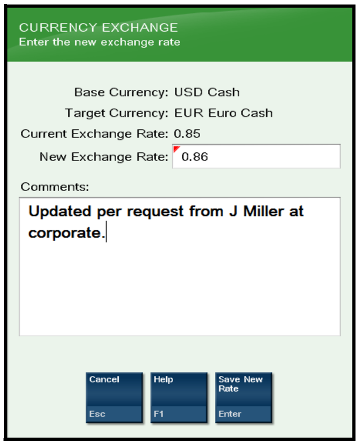
4. At the foreign currency list, choose the foreign tender you want to edit and select **Ok**.


TENDER
Select the foreign currency.

CURRENCY	DESCRIPTION	EXCHANGE ...
EUR	Euro Cash	0.85
AUD	Australian Cash	1.12
CAD	Canada Cash	1.45
GBP	British Pound	0.75

Figure 23-34: List of Foreign Currencies

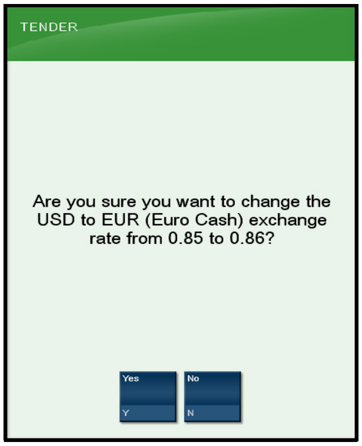
5. The system displays the current information for the currency you selected. Enter the new exchange rate and a comment (optional), then select **Save New Rate**.


CURRENCY EXCHANGE
Enter the new exchange rate

Base Currency: USD Cash
Target Currency: EUR Euro Cash
Current Exchange Rate: 0.85
New Exchange Rate: 0.86

Comments:
Updated per request from J Miller at corporate.

6. When prompted, select **Yes** to confirm that you want to complete the process.


TENDER

Are you sure you want to change the USD to EUR (Euro Cash) exchange rate from 0.85 to 0.86?

Figure 23-35: Change Exchange Rate Confirmation Prompt

*If you select **No** at this prompt, Xstore returns to the Till Options menu without making any changes to the exchange rate.*

The new currency exchange rate is now effective and the system prints a receipt with the new exchange rate. Xstore returns to the Till Options menu.

```
                 Datavantage Home Office
               30500 Bruce Industrial Pkwy
                     Solon, OH 44139
                      440-498-4414
_________________________________________________________
Ticket: 521        Date: 8/26/13
Store: 1973        Register: 1
Cashier: 101


               Exchange Rate Change

Currency                                  Old Rate  New Rate


CAD                                           1.45      1.47
Canadian Dollar

 Updated per request from J Miller at corporate.
```

Figure 23-36: Exchange Rate Receipt

INDEX

APPENDIX A

Glossary

ASN

Abbreviation for *Advance Shipping Notice.* An ID number received during receipt of a vendor shipment*.*

back office

An application that runs in Xstore and handles non-retail transaction functions such as inventory and register/store open/close.

bar code

A printed code consisting of a series of vertical bars that vary in width. Bar codes are capable of being read and decoded by bar code scanners.

blind return

A return transaction where the customer does not present the original sale receipt.

blind return threshold

An amount limit for blind returns. If the total return value exceeds the set threshold value, the transaction requires a manager's authorization to be completed.

business date

The date for which the store is open.

cash drawer

A cash register component where cash from transactions is kept. It often contains a removable till.

credit card authorization

The process in which a credit card is accepted, read and approved for a sales transaction. Pertinent credit information is transmitted via a modem and telephone line to a credit card clearinghouse. The clearing house (authorization source) communicates with the credit card’s bank for approval and the appropriate debit amount of the sale.

credit card reader

See also: MSR

CRM

See also: Customer Relationship Management

cross channel return

A register transaction in which a customer exchanges merchandise previously purchased on the website for other merchandise, a refund, or some form of credit. Cross channel returns are performed as verified returns using the customer’s shipping document information to locate the transaction information.

Customer Relationship Management

The management of customers with a retailer. This may refer to a module in Xstore, a separate software package such as Relate, or the overall concept of managing customer lists.

debit

Tender type where the user presents a card, swipes, and enters a PIN. Funds are withdrawn and settled instantly.

download

To import data into Xstore from the host system.

electronic journal

An electronically-captured record of all the transactions, it contains a duplication of the text printed on each receipt. This feature allows a user to view transactions and optionally perform post voids.

Euro

The currency used by the European Union (EU) countries.

forced SKU

An item ID that may be configured for use when an item is not found in the database of saleable items. Use of a Forced SKU in a sale transaction may trigger prompting for additional information such as an item description and item amount.

franking

Marking a document such as a check, gift certificate, or store credit to indicate that it has been processed. This is typically performed by inserting the document into a device at the register. After franking, the document may be returned to the customer, depending upon the type of document. Checks, for example, would be retained by the store.

fulfilling store

In a remote send transaction, this is the store that processes the requested item. The fulfilling store has the option of fulfilling or cancelling the order. If it fulfills the order, it may ship to the originating store or directly to the customer.

gross sales

Total sales for a given time period, before making deductions for customer discounts, allowances, or returns.

GST

Abbreviation for *Goods and Services Tax*, which is used in Canada.

hand held device

A computer that can be used as a stand-alone portable unit for point-of-sale, inventory, receiving and other applications.

home office

Physical building where a retailer is headquartered. While the organization may have stores worldwide, the home office contains management, IT staff, marketing, and other corporate offices.

IATA

Abbreviation for *International Air Transport Association*.

HST

Abbreviation for *Harmonized Sales Tax*, which is used in Canada.

layaway

A transaction for which the merchandise is held as the customer makes payments for it. When the item is paid in full, the customer may pick up the merchandise.

layaway account

The system records related to items, payments, and payment schedule for a customer who has made a layaway transaction. The system may be configured to allow single or multiple layaway accounts per customer.

lead register

A cash register that acts as the central register or file server in a multiple register environment. The master register normally controls slave registers that are networked to it.

loyalty

A concept of a customer gaining benefits from shopping. When the customer purchases items they are recorded against a loyalty account via CRM software, and the software at various times offers optional perks such as discounts, coupons, or other special offers that are only available to loyalty customers.

loyalty card

Credit card-sized card that identifies a customer as belonging to a specific loyalty account. The customer presents the loyalty card in order to record purchases against the loyalty account as well as to redeem awards.

mag stripe reader

See also: magnetic swipe reader

magnetic swipe reader

Hardware device that reads magnetic track data from a credit, debit, or gift card. A user swipes a card through the device, and the device translates the magnetic data on the stripe into serialized track data which it then sends to the host application.

MICR

Acronym for *Magnetic Ink Character Recognition*. A character recognition system that prints special ink and characters on checks that can be magnetized and read automatically. Within Xstore, MICR technology is used to read check data for check authorization.

MSR

See also: magnetic swipe reader

net sales

Total sales for a given time period, after the deduction of returns, allowances for damaged or missing goods, and any discounts allowed.

one-step processing

A send sale configuration in which all shipping-related functions are performed at the same time that items are added to the sales transaction. See “two-step processing” on page 510.

originating store

In a remote send transaction, this is the store in which the customer places the order.

persistent sale

A sale transaction that includes additional, related transactions that occur after the original register sale. Layaway sales, special orders, and work orders are examples of persistent sales. They include additional transactions and record keeping that are recorded in the system such as payments, shipping, and receiving.

pickup

Refers to the status of an item in a layaway account that is eligible to be carried out of the store. Also refers to the function performed in the system when it records related information about the layaway item such as the pickup date and other account data.

PIN

Acronym for *Personal Identification Number*. A password code, usually 4 digits, entered by the customer on a pinpad when using a debit card or a credit card for tendering.

PIN pad

Also PINpad, pinpad, pin pad, or PED (Pin Entry Device). An electronic device for reading debit or credit cards and for entering personal identification numbers (PIN) for authorization.

point-of-sale

Term used to describe cash register systems that record transactions or the area of checkout in a retail store.

POS

See also: point-of-sale

postal code

A code that identifies a postal delivery area. Known as a *zip code* in the United States.

post void

The action of cancelling the effects of a transaction within the system. Typically post voids are restricted to being performed on the same business date as the original transaction and only for certain tenders. Rules governing whether a transaction may be post voided or not are configured in the system.

PST

Abbreviation for *Provincial Sales Tax*, which is used in Canada.

register accountability

Refers to the money-handling processes that are required of a cashier upon opening and closing a register and that are available to the cashier during a session. Register accountability processes are available in a non-cashiering mode when the till is not assigned to a specific cashier.

remote send

A transaction for which items that are not currently in stock at the store are sold at the store but are fulfilled and shipped to the customer from another store/location. The store in which the customer places the order is the originating store: the store that processes the requested item is the fulfilling store.

return

A register transaction in which a customer exchanges previously purchased merchandise for other merchandise, a refund, or some form of credit. Returns may be blind (no receipt), verified (receipt used to reference original transaction), or unverified (receipt provided but cannot be validated by the database).

sale

A register transaction in which the user of the system is providing items to a customer in exchange for tenders. This is a basic transaction where the customer purchases items from a store.

send sale

A transaction in which items that are in stock are mailed to or for the customer. Delivery information and shipping charges are entered in Xstore.

ship sale

See also: send sale

signature capture device

A peripheral device that electronically captures an individual's signature for customer identification and transaction applications.

SKU

Acronym for *Stock Keeping Unit* which is an identification number assigned to a unique item by the retailer. The SKU may be an internal number or may be tied to an item's UPC or EAN.

special order

A transaction for which items that are not currently in stock at the store are ordered. The order is taken and the item is shipped either to the store or directly to the customer. Often used to purchase items that are not commonly stocked in the store, which may also be expensive to ship via traditional means.

store bank

The in-store safe that holds tenders until they can be deposited at a banking institution.

tender

A specified form of payment (cash, check, credit card, gift certificate, etc.) that a customer gives to the store in return for receiving items or services. Tender also refers to that part of the sale transaction in which the sale is completed by receiving the payment and the **Add Tenders** function is performed by the cashier.

tender franking

See also: franking

tender repository

Object that contains tenders. This may be synonymous with a till, or it may represent the store bank.

till

The paper money and currency tray that holds money in a cash drawer.

till accountability

Refers to the money-handling processes that are required or available when the till accountability configuration is in effect. A till is assigned to a specific cashier who has responsibility for the money in the till until the time when it is assigned to a different associate.

till count

Action performed where the user counts the tenders in a till. Till counts typically occur when issuing and returning tills to and from the store bank. Counts may also occur at arbitrary times (auditing a till) or when performing cash pickups or midday deposits.

timecard

The Clock In/Out entries for a pay period for an associate. The timecard calculates and shows the hours the associate worked.

timecard entry

A Clock In or Clock Out record that displays on the timecard. Each timecard entry consists of an activity (Clock In or Out), a time stamp, and a flag that indicates if the entry was maintained through Timecard Maintenance.

timecard record

See also: timecard entry

transaction

One unit of work performed by the user of the system. A transaction may be a retail sale, a return, post void, inventory movement, inventory count, etc. Each transaction has its own ID and is recorded by the system.

two-step processing

A send sale configuration in which shipping-related functions are performed as a separate step in the Back Office module after the sales transaction is completed at the register. See “one-step processing” on page 507.

unverified return

A return transaction where the original receipt is found in the database, but is missing data required to process the return, or the customer has a receipt but it cannot be found in the database.

UPC

An abbreviation for *Universal Product Code* which is an encoded set of lines and spaces that can be scanned and interpreted into numbers to identify a product.

upload

To export data from Xstore to the host system.

verified return

A return transaction using the customer’s original sale receipt to locate the transaction information stored in the database.

VAT

Abbreviation for Value-Added Tax, which is a form of sales tax used in Canada and Europe.

warranty

Nonphysical item that provides a service to another item where the customer may receive compensation such as a replacement or repair if the item is damaged or destroyed.