

Oracle® Retail Xstore Point of Service Classic Manager's Guide



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Oracle Retail Xstore Point of Service Classic Manager's Guide, Release 25.0.

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Preface

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

Audience

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

Documentation Accessibility

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

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Related Documents

For more information, see the following documents in the Oracle Retail Xstore Suite Release 25.0 documentation set:

- *Oracle Retail Xstore Suite Release Notes*
- *Oracle Retail Xstore Suite Implementation and Security Guide*
- *Oracle Retail Xstore Point of Service User Guide*
- *Oracle Retail Xstore Point of Service Classic User Guide*
- *Oracle Retail Xstore Point of Service Classic Shipping, Receiving, and Inventory Guide*
- *Oracle Retail Xstore Point of Service Reports Guide*
- *Oracle Retail Xstore Point of Service Self Checkout User Guide*
- *Oracle Retail Xstore Office User Guide*
- *Oracle Retail Xstore Point of Service Frameworks and Technologies Guide*
- *Oracle Retail Xstore Suite Deal Pricing Guide*
- *Oracle Retail Xenvironment User Guide*
- *Oracle Retail Xstore Point of Service Services Guide*
- *Oracle Retail Xstore Point of Service Technical Guide*
- *Oracle Retail Xstore Point of Service Host Interface Guide*

- *Oracle Retail Xstore Point of Service POS Log Files*
- *Oracle Retail Xstore Point of Service Database Dictionary Guide*
- *Oracle Retail Xstore Office Database Dictionary Guide*
- *Oracle Retail Xstore Suite Country Accelerator User Guide*
- *Oracle Retail Xstore Suite Country Accelerator Technical Guide*

Customer Support

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

<https://support.oracle.com>

When contacting Customer Support, please provide the following:

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

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 25.0) or a later patch release (for example, 25.0.1). If you are installing the base release or additional patches, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

Improved Process for Oracle Retail Documentation Corrections

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

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

<https://docs.oracle.com/en/industries/retail/index.html>

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number F123456-02 is an updated version of a document with part number F123456-01.

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

Oracle Retail Documentation at the Oracle Help Center

Oracle Retail product documentation is available on the following website:

<https://docs.oracle.com/en/industries/retail/index.html>

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

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Documentation and Screen Conventions

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

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

Documentation Conventions Overview

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

Table 1-1 Documentation Conventions in the User Guide

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

Information Conventions



Note:

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



Note:

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



Note:

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

Where to Look for Additional Help

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

- The *Oracle Retail Xstore Point of Service Classic User Guide* provides detailed information for entering sale, refund, and miscellaneous transactions, and is designed to provide training assistance for cashier-level employees. It also provides detailed basic navigation information such as touch-screen components.
- The *Oracle Retail Xstore Point of Service Reports Guide* contains a description of each report, step-by-step instructions on how to run each report, an explanation of the criteria selection options, and a report sample.
- The *Oracle Retail Xstore Point of Service Classic Shipping, Receiving, and Inventory Guide* provides step-by-step instructions for shipping and receiving functions, as well as the procedures required for counting and managing inventory through Oracle Retail Xstore Point of Service.
- The *Oracle Retail Xstore Point of Service User Guide* describes how to perform the functions available on Desktop, Thin Client, Mobile Tablet, and Mobile Handheld.
- A list of Xstore POS supported devices and operating systems can be found in the *Oracle Retail Xstore Suite Implementation and Security Guide*.

Back Office Touch-Screen Navigation

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



Note:

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

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

Figure 1-1 Touch-Screen Selection Navigation

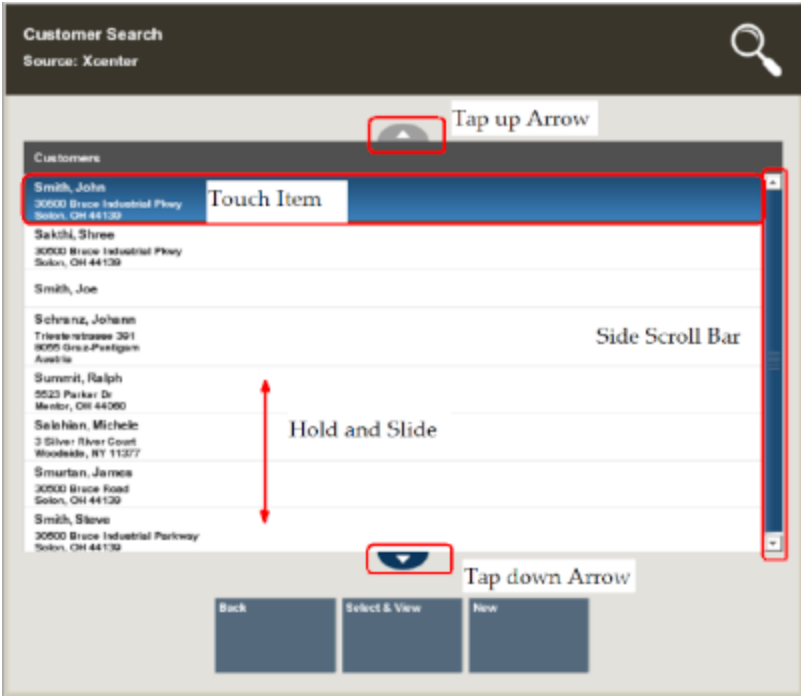


Table 1-2 Touch-Screen Navigation

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



Note:

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

Active Keyboard Keys

Use the following guidelines to navigate through the Xstore Classic system using a keyboard:

Table 1-3 Active Keyboard Keys

Key	Description
arrows	Use the up and down arrow keys to browse through list boxes.

Table 1-3 (Cont.) Active Keyboard Keys

Key	Description
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 Classic window, the F1 through F12 function keys correspond to the menu options. Press the function key that corresponds to the option to choose it. See Function Keys .
Home/End	Use these keys to jump to the top (Home) or bottom (End) of the current page of a report that you are viewing.
Plus (+)/Minus(-)	Use these two keys to increase (+) or decrease (-) the on-screen magnification level of a report that you are viewing.
Shift-Tab	Press Shift-Tab to move to the previous list box on an Xstore Classic window. When the first list box is reached, press Shift-Tab to activate the last list box on the window.
Tab	Press Tab to move from the first list box to the next list box on the window. When the last list box is reached, press Tab to activate the first list box on the window.
Spacebar	Press the spacebar to select items in multiple-select lists.
Ctrl-Tab	Press Ctrl-Tab to access the Information, Task, Message, and Sales Goals tabs and move one tab forward on the Register Login screen and the Back Office Login screen.
Ctrl-Shift-Tab	Press Ctrl-Shift-Tab to access the Information, Task, Message, and Sales Goals tabs and move one tab backward on the Register Login screen and the Back Office screen.

Back Office Screen Conventions

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



Note:

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

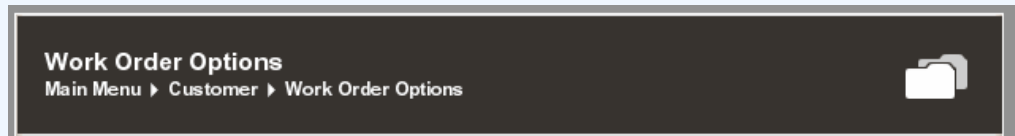
Bread Crumbs

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



Note:

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



Menu List Options

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

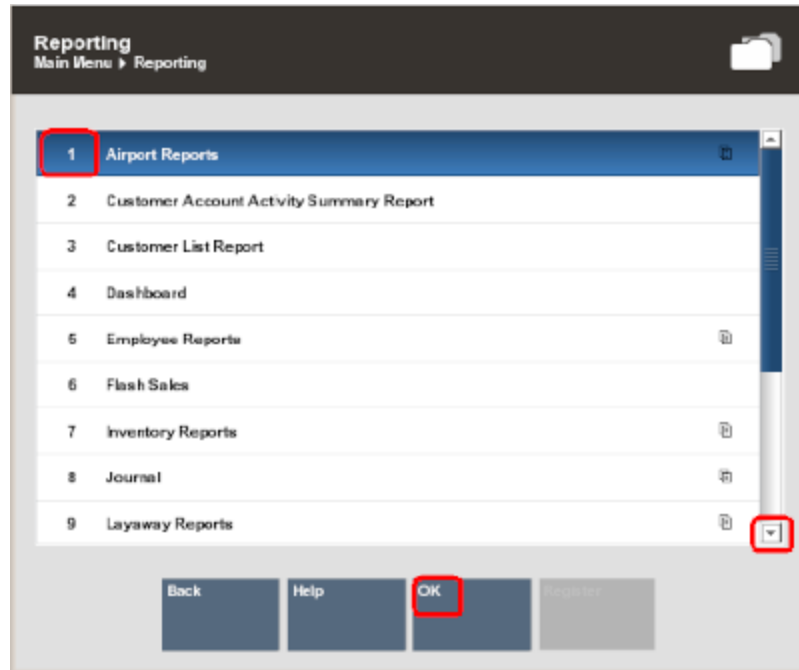
The Back Office menu has been restructured into seven options:

- Associate
- Till
- Customer
- Employee
- System Admin
- Inventory
- Reporting

There are several ways to select a menu item:

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

Figure 1-2 Back Office Reporting Menu

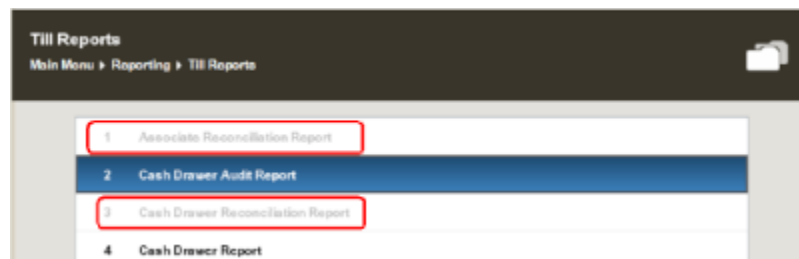


The number to the left of a menu option represents the keyboard number that executes this option. For example, pressing the number 3 on the keyboard launches the Customer List Report option as shown in [Figure 1-2](#) above.

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

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

Figure 1-3 Option Grayed Out



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

Figure 1-4 Option with Key Icon



Screen Layout

Figure 1-5 Screen Layout Areas

The screenshot displays a customer profile for 'Greyly Campbell' (Customer ID: C0999012). The interface includes a top navigation bar with tabs: Dashboard, Contact Information, Associations, Purchase History, Accounts, Awards, Tasks, Comments, Addresses, House Account, and Wish List. The main content area is divided into sections for Contact Information and Personal Information. A progress bar indicates the profile is 57% complete. At the bottom, there is a message bar with status indicators (Online, Corner Market 94, Register 1) and navigation buttons (Previous Tab, Next Tab). Numbered callouts highlight the following areas: 1. Customer ID field; 2. Accounts tab; 3. Contact Information section; 4. Back Office button; 5. Edit Customer button; 6. Corner Market 94 status indicator.

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

- [Static Information Area](#)
- [Tabs](#)
- [Information Areas](#)
- Screen Title (Changes per function)
- Menu Buttons (availability determined by function and the user's security). See [Menu Buttons](#)
- [Message Bar](#)

Tabs

To open tab screens:

- Select the Previous tab or Next tab menu button.
- Touch-screen users, can tap the desired tab.

Menu Buttons

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

Table 1-4 Icons

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

Function Keys



Note:

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

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

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



Note:

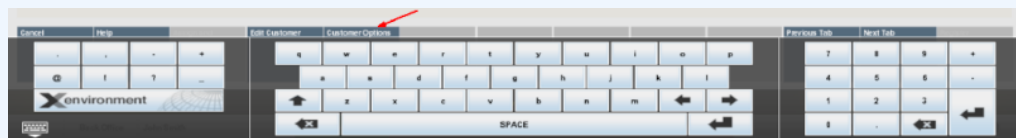
Due to the flexibility of the system, menu options in this guide are not identified by a function key number **F2**, **F3**, and so on. Instead, the procedures and processes that follow use the name of the button.

Figure 1-6 Back Office Menu Buttons



Note:

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



Message Bar

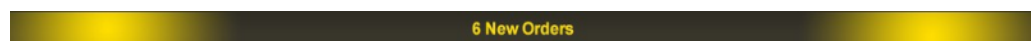
The message bar is located above the status bar and indicates if there are any new orders. The yellow portions fade in and out when messages are available.



Note:

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

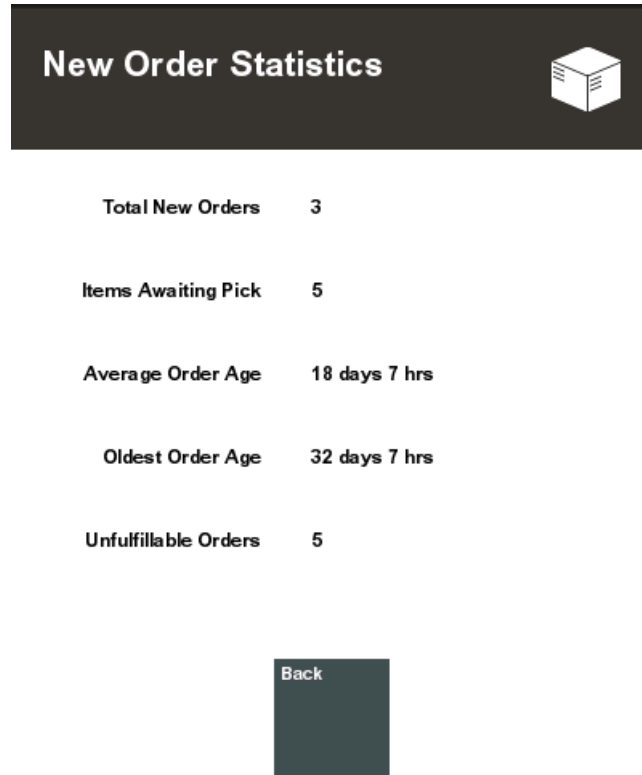
Figure 1-7 Message Bar



Select the message to view information.

- **Total New Orders** - The total number of new orders.

Figure 1-8 New Order Statistics



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

Status Bar

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

Urgency levels - Stoplight-like color indicators convey urgency:

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

Figure 1-9 Status Bar Components



Table 1-5 Status Bar Components

Component	Description
1. Keyboard icon	For touch screen monitors, this icon opens the keyboard.
2. Area Locator	Indicates where you are within the system (that is, Back Office).
3. Signed-In User Identifier	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. Touch-screen users tap the indicator to view the Datasource Status.

Datasource Status

Local Area Network	
Concurrent Store Local	Online
Concurrent Store CE	Online
Concurrent Store Xcenter	Online
Replication	Online
Store Primary	Online
Local	
Local	Online
Training	Online

Back

5. Store Identifier	Identifies your store name and store number.
6. Register Identifier	Identifies the register number.
7. Date	Displays the current register date.
8. Time	Displays the current register time. Touch-screen users swipe the clock area to clock-in/clock-out.
9. F1	This icon is available from all screens. Clicking or touching this icon opens the Xstore Classic's help feature. Note: The F1 key is a configurable key. It is not automatically assigned to the Help option. If the help option is enabled and available for the function, pressing the F1 key displays a context-sensitive HTML page.

Static Information Area

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

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

Figure 1-10 Static Information Area - Employee Maintenance Screen

The screenshot displays the 'Employee Maintenance Screen' for 'Steve J. Smith'. At the top, a horizontal bar contains the following information: 'Steve J. Smith', 'Customer ID: C81910001000012', and 'Customer Since: 11/09/2016'. Below this bar is a navigation menu with tabs: 'Dashboard', 'Contact Information', 'Associations', 'Purchase History', 'Accounts', 'Awards', 'Tasks', 'Comments', 'Addresses', 'House Account', and 'Wish List'. The 'Contact Information' tab is selected. The main area shows a profile picture placeholder and a form with fields for: First Name (Steve), Middle (J), Last (Smith), Company, Address (39500 Bruce Industrial Parkway), Postal Code (44139), City (Solon), Type (dropdown), Apartment, Country (US - United States), and State (OH - Ohio). Below this is a section for 'John Smith' with fields for Employee ID (100), Store (101), and Source (StorePrimary). A sub-menu below this section includes 'General', 'HR', 'Security', 'Fingerprint', and 'Comment'. The 'General' tab is selected, showing 'Name & Address' and 'Personal Information' fields. The 'Name & Address' section includes fields for First, Middle, Last, and Suffix. The 'Personal Information' section includes fields for SSN (***-**-4321) and Language (English (United States)).

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

Figure 1-11 Static Information Area - Electronic Journal

The screenshot displays the 'Electronic Journal' screen for 'Steve J. Smith'. At the top, a horizontal bar contains the following information: 'Steve J. Smith', 'Customer ID: C81910001000012', and 'Customer Since: 11/09/2016'. Below this bar is a navigation menu with tabs: 'Dashboard', 'Contact Information', 'Associations', 'Purchase History', 'Accounts', 'Awards', 'Tasks', 'Comments', 'Addresses', 'House Account', and 'Wish List'. The 'Contact Information' tab is selected. The main area shows a profile picture placeholder and a form with fields for: First Name (Steve), Middle (J), Last (Smith), Company, Address (39500 Bruce Industrial Parkway), Postal Code (44139), City (Solon), Type (dropdown), Apartment, Country (US - United States), and State (OH - Ohio). Below this is a section for 'John Smith' with fields for Employee ID (100), Store (101), and Source (StorePrimary). A sub-menu below this section includes 'General', 'HR', 'Security', 'Fingerprint', and 'Comment'. The 'General' tab is selected, showing 'Name & Address' and 'Personal Information' fields. The 'Name & Address' section includes fields for First, Middle, Last, and Suffix. The 'Personal Information' section includes fields for SSN (***-**-4321) and Language (English (United States)).

Start #	Start Date	Start Time	Cashier ID	Trans. Type	Customer
End # 1	End Date: 11/16/2017	End Time: 11:59:59 PM		Tender: <N/A>	
Systems Close	Date: 11/16/2017	Time: 01:20:16 AM			
Register: 1	Cashier: 100	Ticket: 783			
Customer:					
Total Sale:					
Bank Deposit	Date: 11/16/2017	Time: 01:20:19 AM			
Register: 1	Cashier: 100	Ticket: 782			
Customer:					
Total Sale:					
Workstation Close	Date: 11/16/2017	Time: 01:20:09 AM			
Register: 1	Cashier: 100	Ticket: 781			
Customer:					
Total Sale:					
End Count	Date: 11/16/2017	Time: 01:20:08 AM			
Register: 1	Cashier: 100	Ticket: 780			
Customer:					
Total Sale:					
Time Clock	Date: 11/16/2017	Time: 01:20:07 AM			
Register: 1	Cashier: 100	Ticket: 779			
Customer:					

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

Figure 1-12 Static Information Area - Customer Maintenance

The screenshot shows the 'Static Information' area for a customer record. At the top, a header bar displays 'Steve J. Smith', 'Customer ID: C0161000100012', and 'Customer Since: 11/09/2016'. Below this is a navigation bar with tabs: Dashboard, Contact Information, Associations, Purchase History, Accounts, Awards, Tasks, Comments, Addresses, House Account, and Wish List. The 'Contact Information' tab is selected. The main area contains a silhouette of a person on the left and a form on the right. The form fields are: First (Steve), Middle (J), Last (Smith), Company (empty), Address (39500 Bruce Industrial Parkway), Postal Code (44139), City (Solon), Type (dropdown), Apartment (empty), Country (US - United States), and State (OH - Ohio).

Information Areas

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

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

Figure 1-13 Information Display Area - Contact Information Tab

The screenshot shows the 'Information Display Area' for a customer record in the 'Contact Information' tab. The header bar is the same as in Figure 1-12. The navigation bar is the same, but the 'Contact Information' tab is selected. The main area contains a silhouette of a person on the left and a form on the right. The form fields are: First (John), Middle (empty), Last (Smith), Prefix (dropdown), Suffix (dropdown), Address (39500 Bruce Industrial Parkway), Postal Code (44139), City (Solon), State (OH - Ohio), Country (US - United States), Email (empty), and Phone (empty). Below the form, there are two sections: 'Personal Information' and 'Emergency Contact Information'. The 'Personal Information' section includes fields for SSN (***-**-4321), Language (English (United States)), Marital Status (Single), Birth Date (empty), Gender (dropdown), and Spouse Name (empty). The 'Emergency Contact Information' section includes fields for Name (empty) and Phone (empty).

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

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

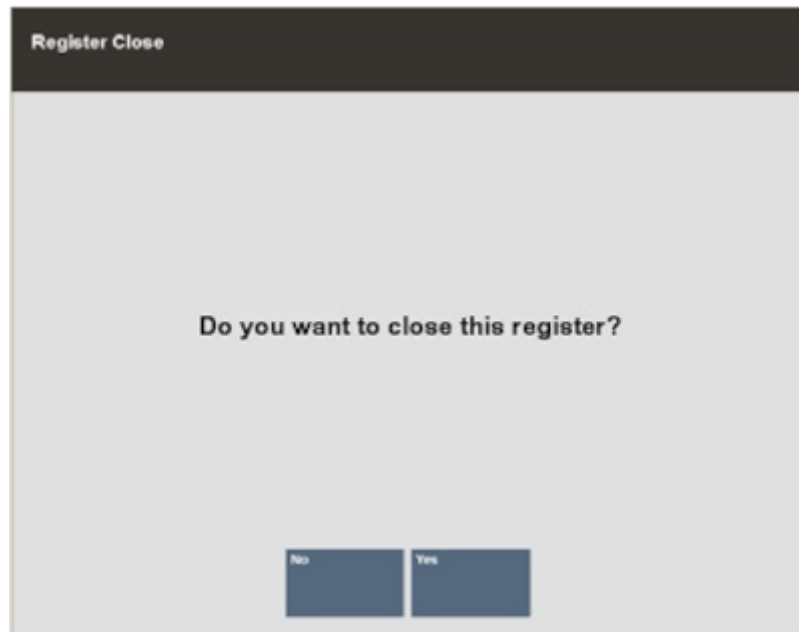
Prompts and Forms

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

Response Required Prompt

During a Back Office process, you may be required to confirm an action. For example, in [Figure 1-14](#), below, press **Y** (Yes) to confirm that you want to close the register or press **N** (No) to remove the prompt and return to the transaction.

Figure 1-14 Response Required Prompt



Selection Required Prompt

During a Back Office process, you may be required to select from a list of options. For example, in [Figure 1-15](#) below, you would select a shift from the list. Keyboard users can use the up and down arrow keys to select from the list. To continue with the process, press **Enter** to choose OK. To exit without selecting, press **Esc**.

Figure 1-15 Selection Required Prompt

The screenshot shows a screen titled "Shift Maintenance" with the instruction "Select a shift." Below this is a table with three columns: "Work Code", "Name", and "Hours". The table lists four shifts, with the second shift, "CASHIER - PM", highlighted in blue. At the bottom of the screen are three buttons: "Back", "New", and "OK".

Work Code	Name	Hours
CASHIER	Cashier - AM	9:00 AM - 1:00 PM
CASHIER	Cashier - PM	5:00 PM - 9:00 PM
CASHIER	Cashier - AM (Weekend)	8:00 AM - 1:30 PM
CASHIER	Cashier - Midnight (Sale)	8:00 AM - 1:30 PM

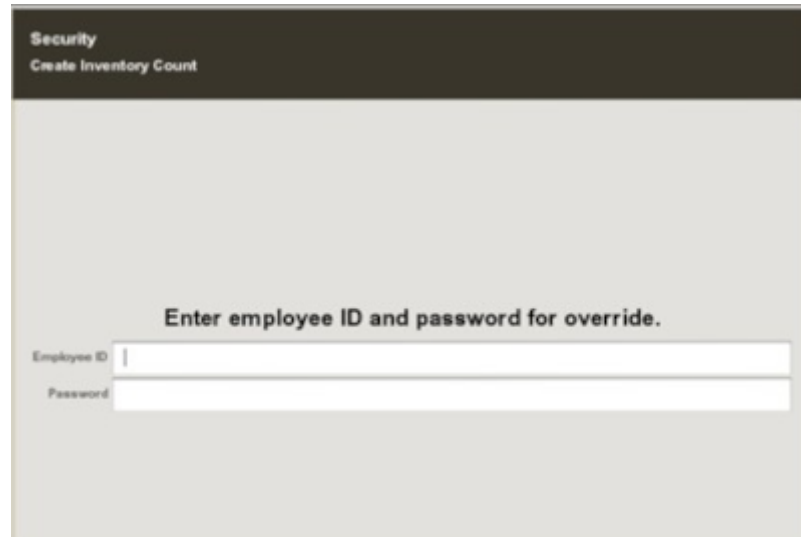
Back New OK

**Note:**

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

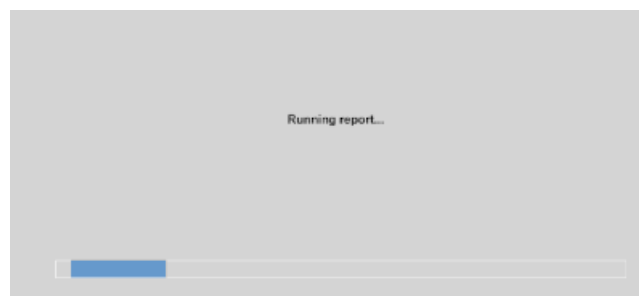
Required Prompt

During a Back Office process, you may be required to enter a value before continuing. For example, in [Figure 1-16](#) below, you are prompted to enter your employee ID number and password to continue. To continue with the process, enter your employee ID number and password and select Process to continue. To return to the previous screen, press **Esc** or select **Back**.

Figure 1-16 Entry Required PromptThe screenshot shows a web application interface. At the top, there is a dark header bar with the text 'Security' and 'Create Inventory Count' below it. The main content area is light gray. In the center, there is a bold prompt: 'Enter employee ID and password for override.' Below this prompt are two input fields. The first field is labeled 'Employee ID' and the second is labeled 'Password'. Both fields are empty and have a white background with a thin gray border.

System Information Prompt

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

Figure 1-17 System Information Message - Running ReportThe screenshot shows a light gray rectangular box. In the center, the text 'Running report...' is displayed. At the bottom of the box, there is a progress bar consisting of a blue segment followed by a white segment, indicating the progress of the report.

Search Forms

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

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

**Note:**

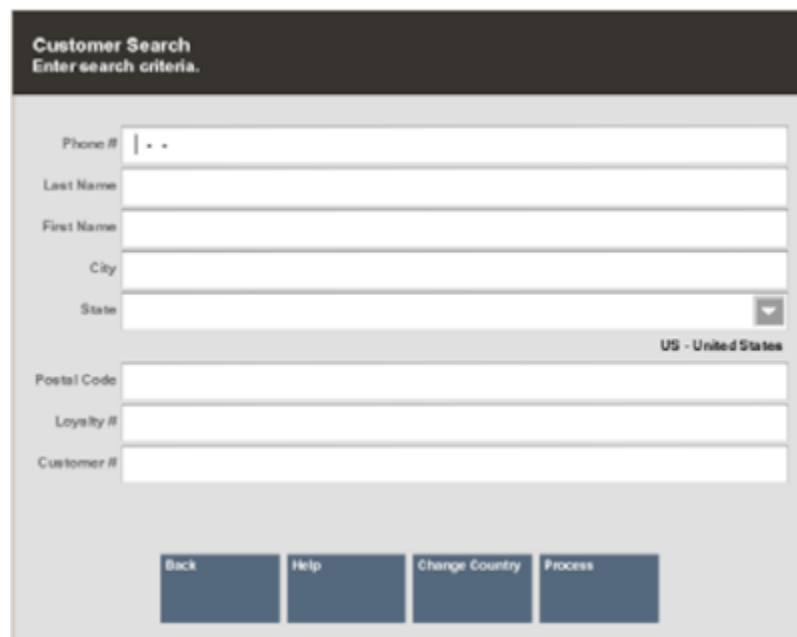
For example, the Employee Lookup form in the Back Office Employee Maintenance function may not require any criteria to be entered. If you select Process without entering criteria, all employee names are retrieved.

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

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

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

Figure 1-18 Customer Search Form



An arrow on the right side of a field indicates the information for this field must be selected from a drop-down list of options rather than typed into a free-text field.

Data Entry Form

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

Figure 1-19 Data Entry Form in Edit Mode

Steve J Smith

Customer ID: CB1010001000012

Customer Since: 11/09/2016

DashboardContact InformationAssociationsPurchase HistoryAccountsAwardsTasksCommentsAddressesHouse AccountWish List

First: SteveMiddle: JLast: Smith

Company: 38568 Bruce Industrial Parkway

Address: 38568 Bruce Industrial Parkway

Postal Code: 44129City: SolonState: OH - Ohio

Type: [dropdown]Apartment: [dropdown]Country: US - United States

Steve J Smith

Customer ID: CB1010001000012

Customer Since: 11/09/2016

DashboardContact InformationAssociationsPurchase HistoryAccountsAwardsTasksCommentsAddressesHouse AccountWish List

First: SteveMiddle: JLast: Smith

Company: 38568 Bruce Industrial Parkway

Address: 38568 Bruce Industrial Parkway

Postal Code: 44129City: SolonState: OH - Ohio

Type: [dropdown]Apartment: [dropdown]Country: US - United States

Contact Information

Home: 555-402-7896

Work: 440-555-8565 x.

Mobile: 216-555-8945

Personal Information

Contact: [checked]

Anniversary Date: 11/09/2016

Birth Date: 05/04/1994

Gender: Male

Table 1-6 Icons of the Data Entry Form

Icons	Description
	An arrow on the right side of a field indicates the information for this field must be selected from a drop-down list of options rather than typed into a free-text field.
	A red triangle in the upper left corner of a field indicates that information must be entered.
	A grayed out field indicates the field is non-editable. In some cases, select the Edit menu option to modify the field.

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

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2

Customer Maintenance

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

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



Note:

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

Accessing the Back Office



Note:

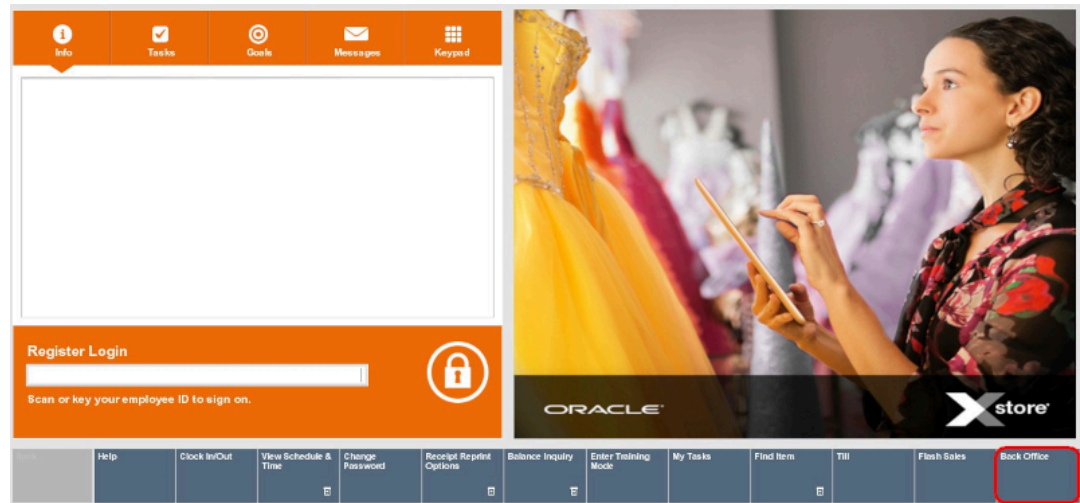
Because each Xstore Classic menu is configurable, the button functions and the menu options on your system may appear in a different order or have different text than the examples shown in this guide.

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

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

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

Figure 2-1 Back Office Menu Button



 Note:

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

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

Figure 2-2 Employee ID Prompt



3. Enter your password and press **Enter**.

Figure 2-3 Password Prompt



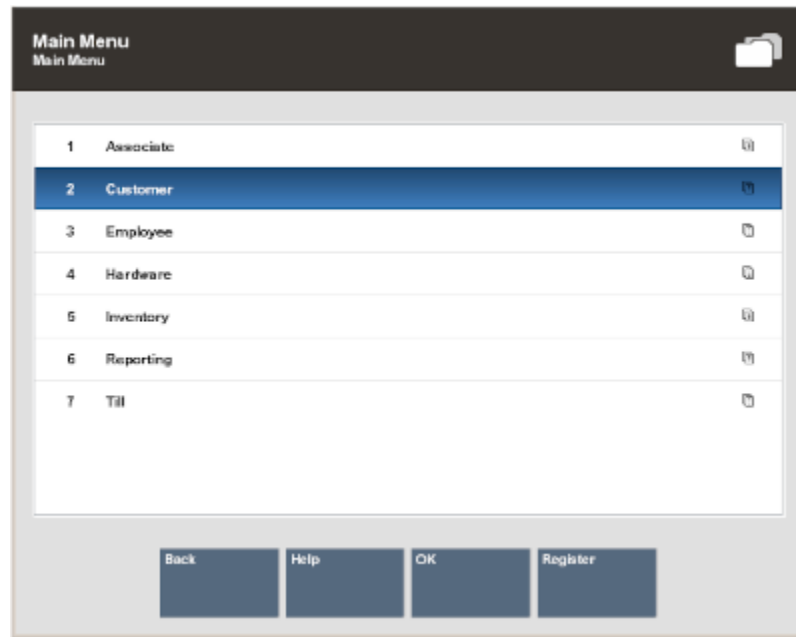
 Note:

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

Accessing Customer Maintenance and Accounts

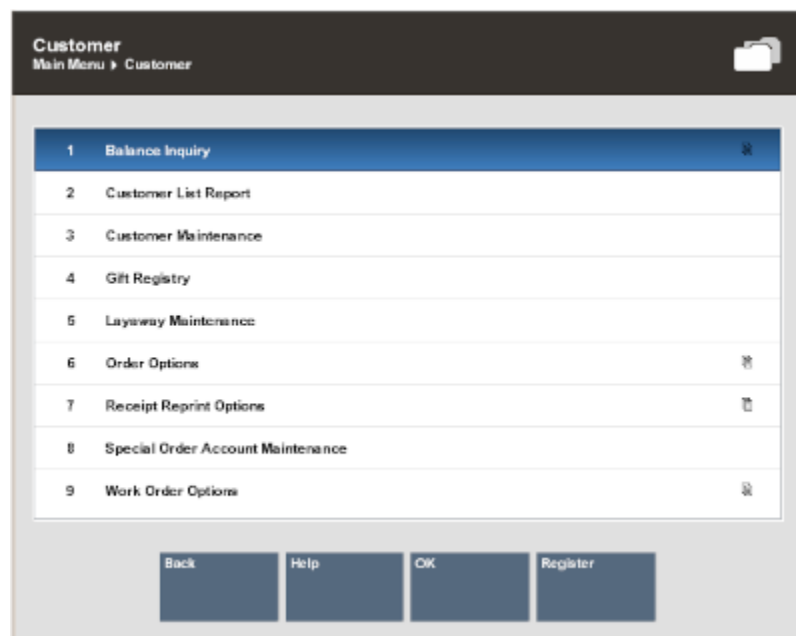
1. From the Back Office Main Menu, select the **Customer** option and press **Enter**.

Figure 2-4 Back Office Main Menu



2. Several sub-menu options appear:

Figure 2-5 Customer Options



- **Balance Inquiry** - Select this option to track the activities that are related to various customer-related transactions. Refer to [Balance Inquiry](#) for more information.
- **Customer List Report** - Select this option to run the Customer List Report.
Refer to the *Oracle Retail Xstore Point of Service Reports Guide* for more information about this report.
- **Customer Maintenance** - Select this option to maintain customer data as explained in this chapter.
- **Gift Registry** - Select this option to maintain gift registry accounts. Refer to [Gift Registry](#) for more information.
- **Layaway Maintenance** - Select this option to maintain customer layaway accounts. Refer to [Layaway Maintenance](#) for more information.
- **Order Options** - Select this option to maintain Oracle Retail Order Broker Cloud Service order accounts. Refer to [Order Broker Maintenance](#) for more information.
- **Receipt Reprint Options**
- **Special Order Account Maintenance** - Select this option to maintain special order accounts. Refer to [Special Order Maintenance](#).
- **Work Order Options** - Select this option to maintain customer work order accounts. Refer to [Work Order Maintenance](#) for more information.

Customer Maintenance

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

Figure 2-6 Customer Search Form

The screenshot displays the 'Customer Search' form. At the top, a dark header bar contains the text 'Customer Search' and 'Enter search criteria.' Below this, the form is organized into a series of input fields: 'Phone #' (with a small icon), 'Last Name', 'First Name', 'City', 'State' (a dropdown menu currently showing 'US - United States'), 'Postal Code', 'Loyalty #', and 'Customer #'. At the bottom of the form, there are four buttons: 'Back', 'Help', 'Change Country', and 'Process'.

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

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

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

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

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

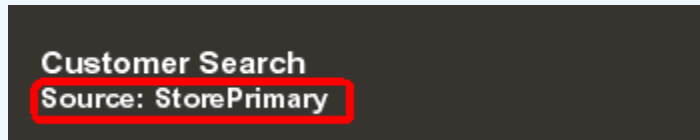
Figure 2-7 Customer Search Results

Customers
Smith, John 30500 Bruce Industrial Pkwy Solon, OH 44139
Smith, Joe
Smith, Steve 30500 Bruce Industrial Parkway Solon, OH 44139

Back Select & View New

 Note:

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



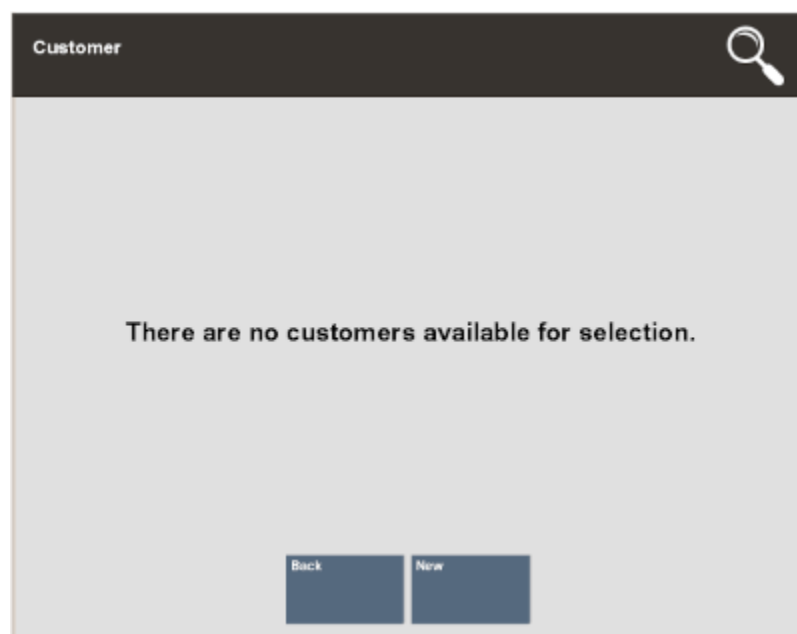
Depending upon your system's configuration, the system may automatically display the Customer Maintenance screen when only one name matches the search criteria, rather than showing a list with only one customer name.

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

Adding a New Customer Record

If you search for a customer name and it is not found in the customer database, you can create a new record for the customer. The system displays a message as shown in the [Figure 2-8](#) below if there is no current record.

Figure 2-8 Customer Not Found Message Screen



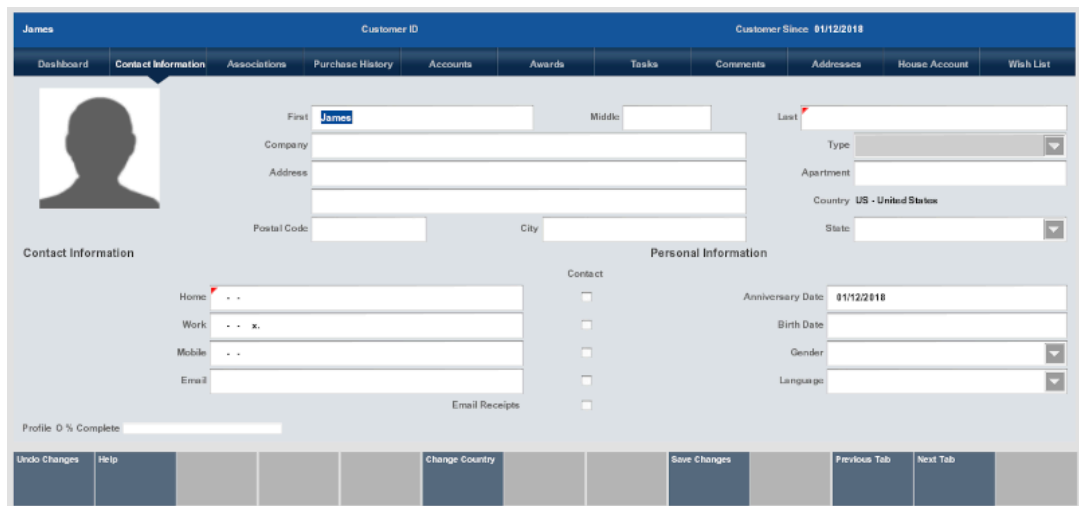
1. Select **New** to display the Customer Maintenance Screen in edit mode. The form consists of tabs, each containing a different type of information about the customer.

 Note:

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

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

Figure 2-9 Customer Maintenance Screen



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

 Note:

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

Table 2-1 Contact Information Fields

Field Name	Description
First name, middle initial, last name	The system automatically creates an initial cap for the first letter you type here if you don't press the Shift key when entering the customer's name.
Company	If you enter a company name here, the Organization Type field becomes active.
Type	Associated with Company entries, for example, Club, Company, School, and so on. This field is only active after a Company name is entered
Address	Two address lines are provided. This is the customer's primary address.
Apartment #	Optional field.
Postal Code	The system automatically supplies the city and state if it recognizes the Zip/Postal code that you enter.
City	Automatically populated if the system recognizes the Zip/Postal code that you entered first.
State/Province	If you begin typing, the system auto-fills the field with states/provinces defined for your store.
Country	Defaults to the country in which the store is located but can be changed using the Change Country option.
Phone Numbers	As you enter data in these fields, the associated contact permission check marks become active. Check mark whether or not it is okay to contact the customer by selecting the corresponding yes box.
Email address	Format this email address correctly so it can be used to contact the customer. If the customer would like to receive receipt copies via email, this must be a valid email address and the Email flag (Email?) must be set to "Yes".
Anniversary Date	This information can be used to display a message such as "Happy Anniversary" before or after the anniversary.
Birth Date	This information can be used to display a message such as "Happy Birthday John" before or after the customer's birthday.
Gender	The gender will determine the avatar picture in the contact information tab.
Language	The language code for the customer's preferred language.
Email Receipts	"Yes" indicates the customer would like to have email receipts automatically selected when purchasing items.

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

 Note:

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

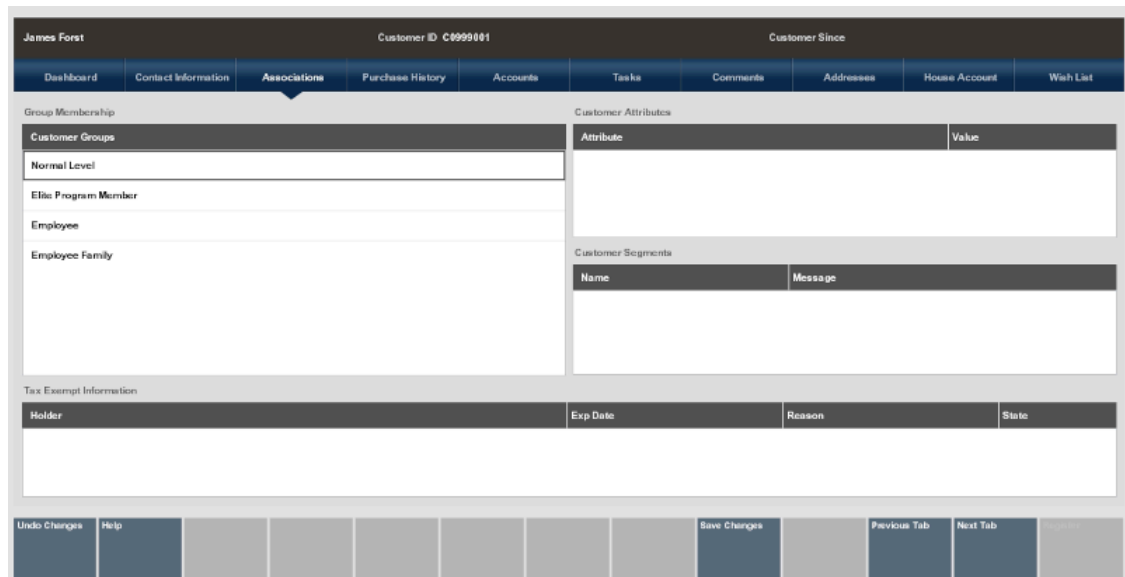
The Customer Account tab contains options to Print Balance Receipt and Print Account History, see the *Oracle Retail Xstore Point of Service Classic User Guide* Customer Maintenance chapter.

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

Associations Tab

Select the Associations tab to select a membership if applicable.

Figure 2-10 New Customer Association Tab



James Forst Customer ID C999001 Customer Since

Dashboard Contact Information **Associations** Purchase History Accounts Tasks Comments Addresses House Account Wish List

Group Membership

Customer Groups

Normal Level
Elite Program Member
Employee
Employee Family

Customer Attributes

Attribute	Value

Customer Segments

Name	Message

Tax Exempt Information

Holder	Exp Date	Reason	State

Undo Changes Help Save Changes Previous Tab Next Tab

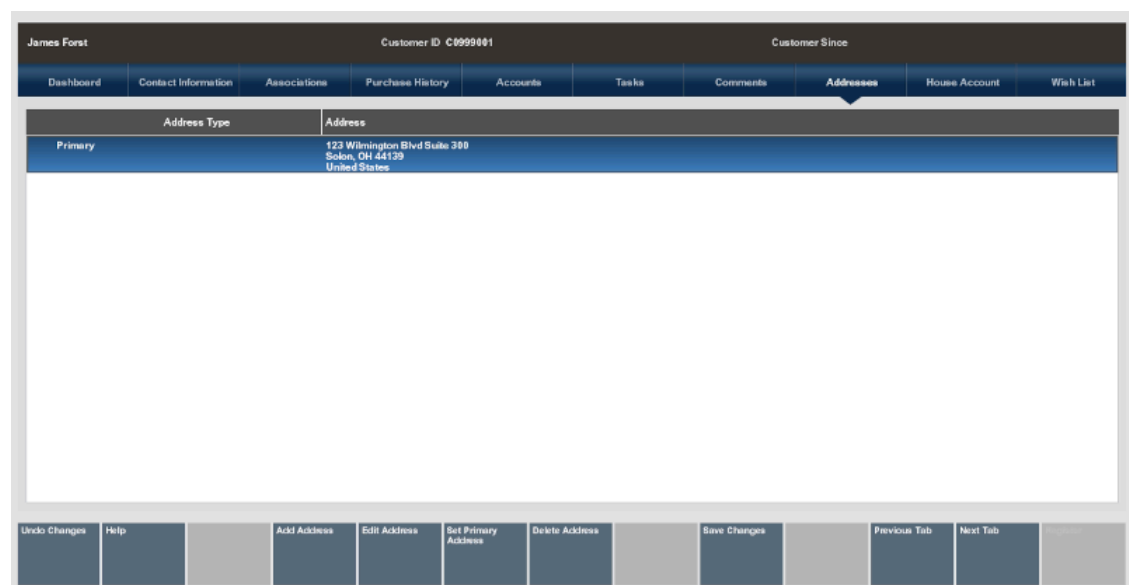
Table 2-2 Association Tab Fields

Field Name	Description
Group Membership	Select a membership if applicable. Your store may have badges such as silver  assigned to various group memberships. The badge appears on the header of the Customer Maintenance Screen as well as the Customer Loyalty Banner on various sales screens. A customer may be associated with one or more groups. If groups are not defined, no customer groups are listed in this section.
Customer Attributes NON-EDITABLE	Attribute categories are defined by the home office and provide additional information about the customer.
Customer Segments NON-EDITABLE	Segments are groupings that share common criteria. This information is provided by Oracle Retail Customer Engagement Cloud Services. Identifying a customer with a segment may be helpful in customer analysis and in sales promotions.
Tax Exempt Information	If a customer has a tax exemption, that information is displayed in this section. A customer may have one or more exemptions, and they may be updated as required. To add tax exempt information, see the <i>Oracle Retail Xstore Point of Service Classic User Guide</i> .

Addresses Tab

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

Figure 2-11 New Customer Address Tab



James Forst Customer ID C0999001 Customer Since

Dashboard Contact Information Associations Purchase History Accounts Tasks Comments **Addresses** House Account Wish List

Address Type	Address
Primary	123 Wilmington Blvd Suite 300 Solon, OH 44139 United States

Undo Changes Help Add Address Edit Address Set Primary Address Delete Address Save Changes Previous Tab Next Tab

Adding a Comment to a Customer Record

To add a comment to your new customer:

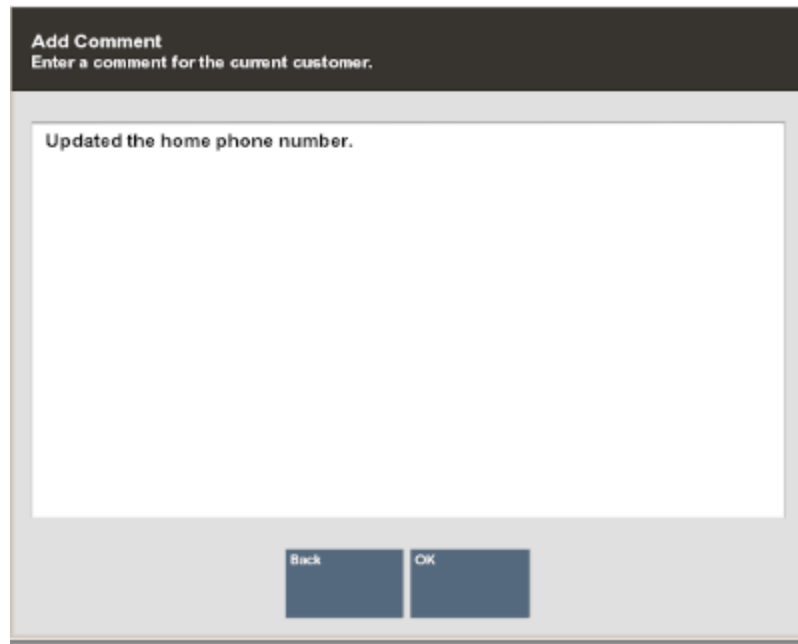
1. Select the **Comments** tab to view or add comments for this customer.
2. Select the **Add Comment** menu button.

 Note:

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

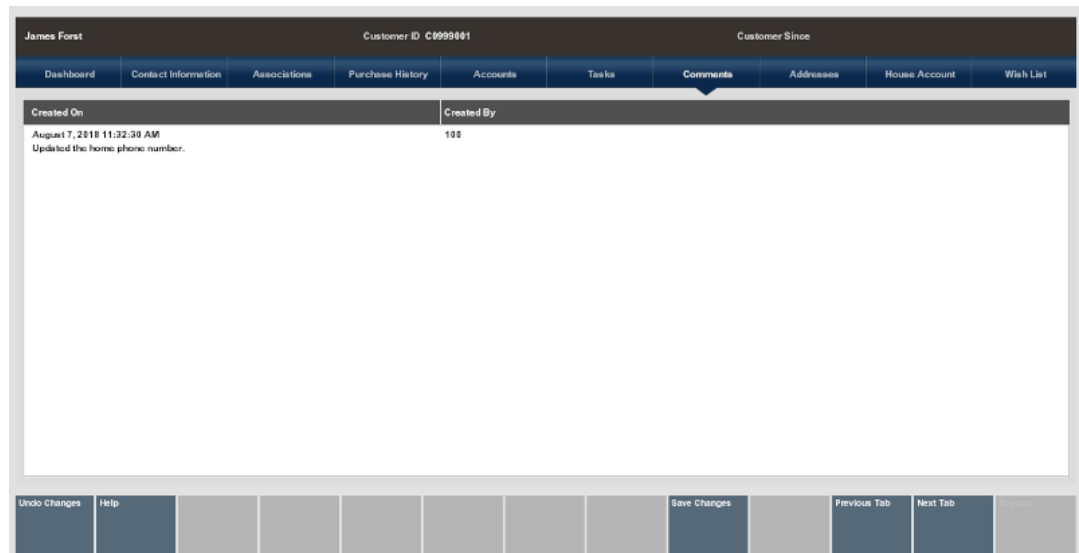
3. Type a comment.

Figure 2-12 Add Comment Form



4. Select **OK**. The comment displays on the Comments tab.

Figure 2-13 Comments Tab



Viewing a Customer Record

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

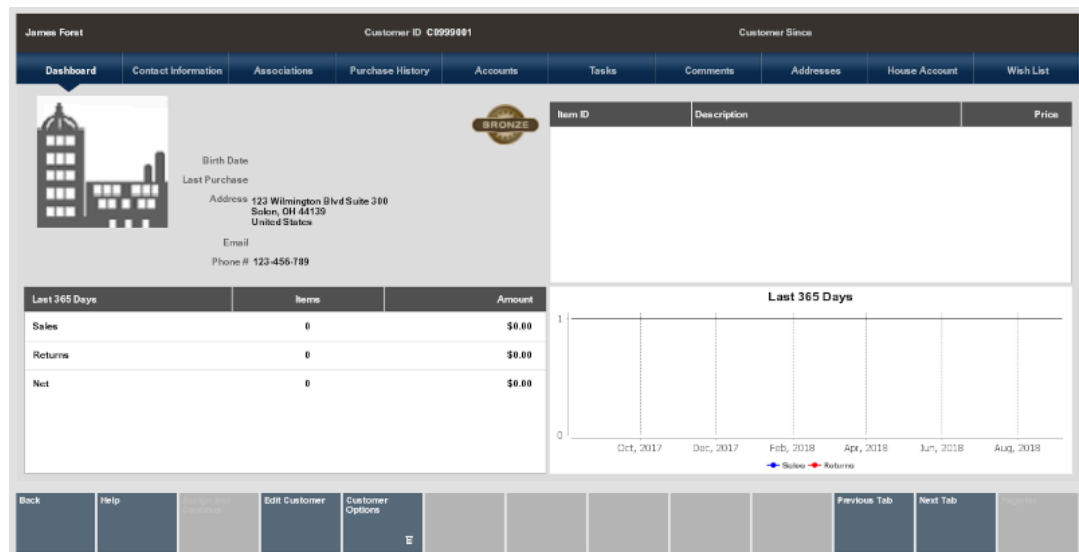
1. At the **Customer Search** form, select a customer name and select the **Select & View** option (see [Accessing Customer Maintenance and Accounts](#)).

Note:

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

The customer record opens in a read-only mode.

Figure 2-14 Customer Record in Read-Only Mode



Note:

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

2. Choose one of these options:
 - **Back** – Returns to the Customer Search form.
 - **Edit Customer** - Allows you to change information in the customer record.
 - **Customer Options** – Displays a list of customer options. Options include:

- Add a new customer record to the customer database
- Print the customer record
- Enroll the customer in the loyalty program
- Maintain the customer's tax exemption information
- Create a House Account for the customer

 Note:

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

3. Navigate between the tabbed sections on the customer record by selecting the **Previous Tab** and **Next Tab** menu options. This section provides an overview of the information available on each tab.
 - **Dashboard Tab:** This tab shows the customer's loyalty information, and purchase information over the last 365 days.
 - **Contact Information Tab:** This tab shows the customer's name, address, phone and email information, contact preferences, and profile completeness progress bar. Your store may be configured to display anniversary, birthday, and loyalty expiration messages.
 - **Associations:** Displays information about the customer group, customer attributes, segment, tax exempt record.
 - **Purchase History Tab:** Displays sales history information about the customer.
 - **Customer Account Tab:** Displays information about the customer's accounts, including loyalty, and other transaction-related accounts
 - **Tasks Tab:** Displays customer related tasks and appointments (see also [Reviewing Task Management Information](#)). You can add and edit tasks from this tab but updates to the status must be made from the My Tasks screen. See the *Oracle Retail Xstore Point of Service Classic User Guide* for instructions on how to update status.
 - **Comments Tab:** Displays comments that have been entered about the customer.
 - **Addresses Tab:** Displays the customer's primary address and any other addresses on file.
 - **House Account Tab:** Displays information about the House Account associated with this customer. This tab is only active if the customer has a house account.
 - **Wish List Tab:** If your system is set up to use Oracle Retail Customer Engagement Cloud Services, this tab displays the customer's wish list items. Otherwise, this tab is not active.

 Note:

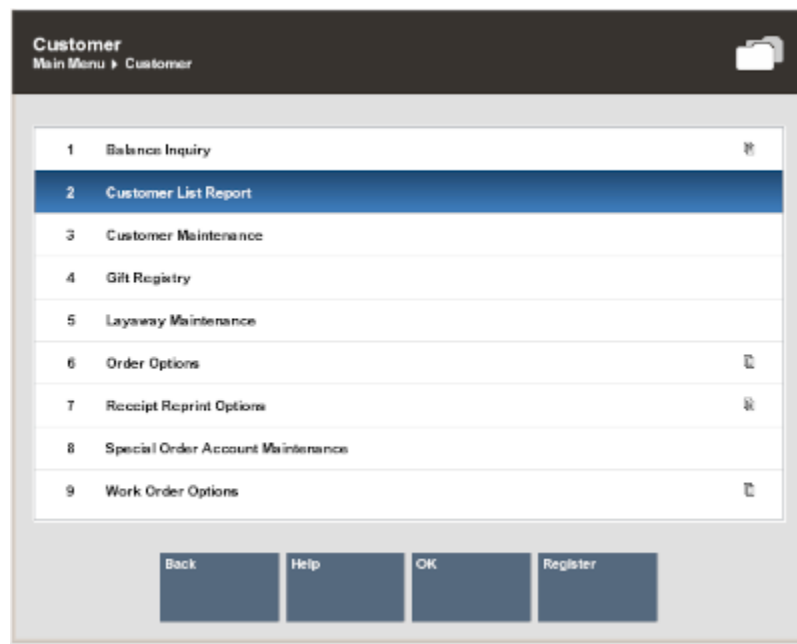
Refer to the *Oracle Retail Xstore Point of Service Classic User Guide*, Customer Maintenance chapter for information about each tab section and how to modify a customer. The instructions are the same.

Customer List Report

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

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

Figure 2-15 Customer Menu



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

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



Note:

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

Figure 2-16 Customer List Report

Customer List

Store: 401 - Store_401

Date Range: Current Week (10/22/2017 - 10/28/2017)
Purchase Range: All
Returned Range: All

Show Merch Level: Yes
Merchandise Level: Department
Assigned Associate: All

City: All
State: All
Post Code: All
Sort Order: Customer Last Name

Name: Campbell, Greyly

ID	Home	Work	Email	Birthdate	Mail Flag
C0999002	123-456-7890	123-123-1231 x.2312	gc@email.com		No

Address

Primary	Type	Address
Yes		4422 Stony Parkway Bldg F, Solon OH 44139 US

Purchase History

Last Activity Date	Sale Amount	Number of Sales	Return Amount	Number of Returns
10/25/2017	\$538.99	4	\$0.00	0

Merchandise

Department	Description	Count	Amount
25003	Jewelry	1	\$315.00
25099	GENERAL CLOTHES	3	\$218.99
NP		3	\$5.00
Total		7	\$538.99

Name: Clark, Vanessa

ID	Home	Work	Email	Birthdate	Mail Flag
401001000002	216-333-3333 x.333		clark@email.com	1/2/70	Yes

3

Gift Registry

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

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

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

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

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

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

Accessing the Gift Registry

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

Figure 3-1 Gift Registry

The screenshot shows a software interface titled "Customer" with a breadcrumb "Main Menu > Customer". A list of menu items is displayed, with "4 Gift Registry" highlighted in blue. The other items are: 1 Balance Inquiry, 2 Customer List Report, 3 Customer Maintenance, 5 Layaway Maintenance, 6 Order Options, 7 Receipt Reprint Options, 8 Special Order Account Maintenance, and 9 Work Order Options. At the bottom are four buttons: Back, Help, OK, and Register.

Item	Label	Icon
1	Balance Inquiry	
2	Customer List Report	
3	Customer Maintenance	
4	Gift Registry	
5	Layaway Maintenance	
6	Order Options	
7	Receipt Reprint Options	
8	Special Order Account Maintenance	
9	Work Order Options	

Buttons: Back, Help, OK, Register

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

Figure 3-2 Gift Registry Search Prompt

The screenshot shows a "Gift Registry Search" prompt with the instruction "Enter search criteria." Below this are five input fields: Registry #, Registry Name, Owner Last Name, Owner First Name, and Event Type (a dropdown menu). At the bottom are four buttons: Back, Help, New, and Process.

Gift Registry Search
Enter search criteria.

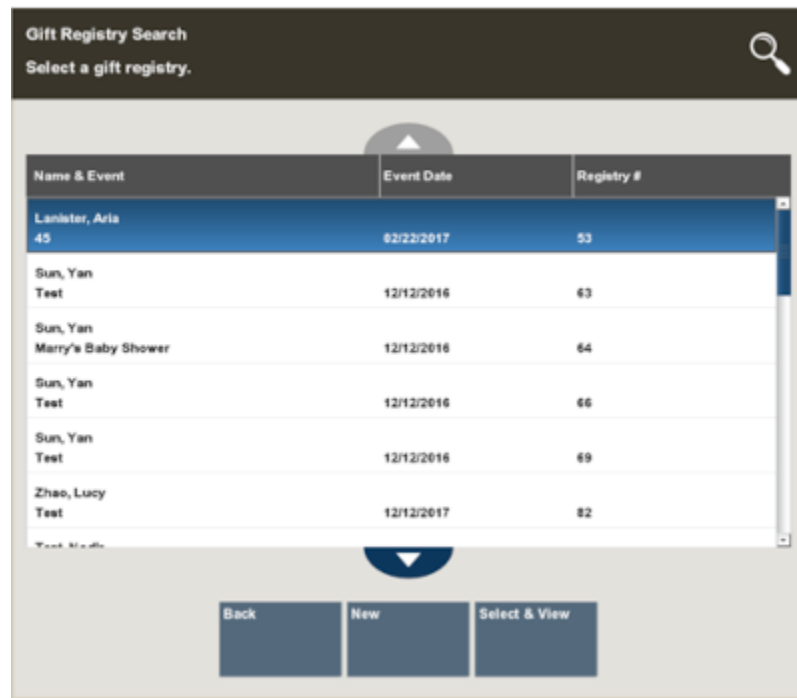
Registry #
Registry Name
Owner Last Name
Owner First Name
Event Type

Buttons: Back, Help, New, Process

- To create a new registry, select **New**. Skip to [Creating a New Registry](#).

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

Figure 3-3 Multiple Search Results



Name & Event	Event Date	Registry #
Lanister, Aria 45	02/22/2017	53
Sun, Yan Test	12/12/2016	63
Sun, Yan Marry's Baby Shower	12/12/2016	64
Sun, Yan Test	12/12/2016	66
Sun, Yan Test	12/12/2016	69
Zhao, Lucy Test	12/12/2017	82

 Note:

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

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

Figure 3-4 Gift Registry Options

Item	Price	Qty Purchased	Qty Desired
PEASANT TOP JERSEY DRESS 1885	\$79.99	0	5
ROLL SLEEVE SWEATER DRESS 1886	\$79.99	0	6
ANIMAL PRINT CAP SLEEVE DRESS 1887	\$64.99	0	7
DRAWSTRING PEASANT DRESS 1888	\$89.99	0	8
MAXI LENGTH TANK DRESS 1889	\$69.99	0	9
Blue & Tan Shirt 330001	\$12.99	0	100

Registry #: 64
Registry Name: Marry's Baby Shower
Event Type: Baby Shower
Event Date: 12/12/2016
Expiration Date: 12/12/2017
Customer #: 318355
Customer Name: Yan Sun
Comments:

Scan Item or UPC
Scan or enter an item to add to the registry.

Line Count: 6 Total Registry Items: 135

Cancel Help Change Qty Desired Delete Item View Details View Owners View Attributes View Addresses Print Registry Register

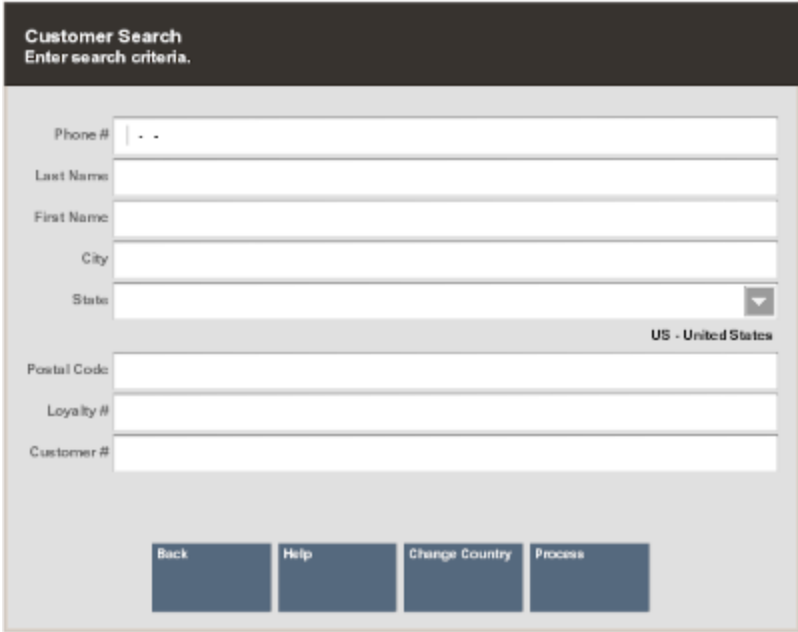
You have the following options at this screen:

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

Creating a New Registry

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

Figure 3-5 Customer Search Form



The form is titled "Customer Search" with the instruction "Enter search criteria." It contains several input fields: "Phone #" with a placeholder "- -", "Last Name", "First Name", "City", "State" (a dropdown menu), "Postal Code", "Loyalty #", and "Customer #". To the right of the "State" dropdown, the text "US - United States" is displayed. At the bottom of the form, there are four buttons: "Back", "Help", "Change Country", and "Process".

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

Figure 3-6 Registry Details

The screenshot shows a web form titled "Registry Details" with the instruction "Enter the gift registry information." The form contains the following fields and values:

- Customer #: 318355
- Customer Name: Yan Sun
- Registry Name: Marry's Baby Shower
- Event Type: Baby Shower (selected from a dropdown menu)
- Event Date: 12/12/2016
- Expiration Date: 12/12/2017
- Comments: Party Hosted by best friend, Holly

At the bottom of the form are three buttons: Back, Help, and Process.

Table 3-1 Gift Registry Fields

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

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

Figure 3-7 New Registry Setup

Item	Price	Qty Purchased	Qty Desired
PEASANT TOP JERSEY DRESS	\$79.99	0	5
ROLL SLEEVE SWEATER DRESS	\$79.99	0	6
ANIMAL PRINT CAP SLEEVE DRESS	\$64.99	0	7
DRAWSTRING PEASANT DRESS	\$89.50	0	8
MAXI LENGTH TANK DRESS	\$69.50	0	9
Blue S Tee Shirt	\$12.50	0	100

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

Modifying a Gift Registry

1. With a gift registry displayed ([Figure 3-4](#) and [Figure 3-7](#)), add or modify the registry information as needed.
 - to add an item, refer to [Adding Items](#)
 - to change the quantity, refer to [Changing the Quantity](#)
 - to delete an item, refer to [Deleting an Item](#)
 - to view/modify details, refer to [Viewing and Modifying Details](#)
 - to view/modify owners, refer to [Viewing and Modifying Owners](#)
 - to view/modify attributes, refer to [Viewing and Modifying Attributes](#)
 - to view/modify addresses, refer to [Viewing and Modifying Addresses](#)

Adding Items

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

Figure 3-8 Enter Quantity

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

Figure 3-9 View Port - Line Count and Item Quantity

Item	Price	Qty Purchased	Qty Desired
PEASANT TOP JERSEY DRESS 1005	\$79.99	0	5
ROLL SLEEVE SWEATER DRESS 1006	\$79.99	0	6
ANIMAL PRINT CAP SLEEVE DRESS 1007	\$64.99	0	7
DRAWSTRING PEASANT DRESS 1008	\$89.50	0	8
MAXI LENGTH TANK DRESS 1009	\$69.50	0	9
Blue S Tee Shirt 330001	\$12.50	0	100

Line Count: 6	Total Registry Items: 135

View Attributes	View Addresses	Print Registry	Register

Changing the Quantity

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

Deleting an Item

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

Viewing and Modifying Details

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

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

Figure 3-10 View and Modify Registry Details

The screenshot shows a web form titled "Registry Details" with the instruction "Enter the gift registry information." The form contains the following fields and values:

- Customer #: 318355
- Customer Name: Yan Sun
- Registry Name: Marry's Baby Shower
- Event Type: Baby Shower (with a dropdown arrow)
- Event Date: 12/12/2016
- Expiration Date: 12/12/2017
- Comments: Party Hosted by best friend, Holly

At the bottom of the form are three buttons: "Back", "Help", and "Process".

Viewing and Modifying Owners

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

Figure 3-11 Registry Owners List

Registry Owners				
The following owners are associated with this registry.				
Primary	Customer #	Name		
	318355	Yan Sun		
Back	Make Primary	New	Edit	Delete

To Modify the Primary Owner

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

1. From the Registry Owners list, select the owner you wish to change to the primary.
2. Select the **Make Primary** button.
3. When prompted, press **Y** to confirm the change.
4. The new primary owner is moved to the top of the list and has a green check mark by the name.

To Create a New Owner

Perform the following steps to create a new owner.

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

 Note:

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

3. If more than one customer matches your search criteria, select the customer from the retrieved list.
4. Verify the address, modify if needed, and select **Save Changes**.

Figure 3-12 Gift Registry Owner Information

Gift Registry Owner Information
Enter the gift registry owner information.

Owner: Yan Sun

Nickname: Yan Sun

Address:

Postal Code: State: US - United States

City: Apartment:

Email: yanling.sun@oracle.com Phone #:

Back Help Change Country Process

Note:

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

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

To Edit Registry Owner Information

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

Figure 3-13 Gift Registry Owner Information - Edit Mode

Gift Registry Owner Information
Enter the gift registry owner information.

Owner: Yan Sun

Nickname: Yan Sun

Address:

Postal Code: State: US - United States

City: Apartment:

Email: yanling.sun@oracle.com Phone #:

Back Help Change Country Process

4. Select **Save Changes**.

To Delete an Owner

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

Note:

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

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

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

Viewing and Modifying Attributes

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

Figure 3-14 Gift Registry Screen - Attributes Area Display

Item	Price	Qty Purchased	Qty Desired
PEASANT TOP JERSEY DRESS 1885	\$79.99	0	5
ROLL SLEEVE SWEATER DRESS 1886	\$79.99	0	6
DRAWSTRING PEASANT DRESS 1888	\$89.50	0	8
MAXI LENGTH TANK DRESS 1889	\$69.50	0	9
Blue S Tee Shirt 339881	\$12.50	0	90

Line Count: 5 Total Registry Items: 118

To Create a New Attribute

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

Figure 3-15 Registry Attributes List

Name	Value
FAVORITE_COLORS	RED

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

Figure 3-16 Select Attribute List

Select Attribute
Select the gift registry attribute.

GMG
BPG
FAVORITE_COLORS
BMG

Back OK

4. When prompted, enter the Attribute value and press **Enter**. The new attribute will be associated with this gift registry.

Figure 3-17 Select Attribute Value

Attribute Values
Select the values for FAVORITE_COLORS.

RED
ORANGE
YELLOW
GREEN
BLUE
INDIGO
VIOLET

Back OK

5. Select **Back** to return to the Gift Registry screen.

To Edit an Attribute

1. From the Gift Registry screen, select the **View Attributes** menu button.
2. From the Registry Attributes list (Figure 3-15), select the attribute you wish to edit.
3. Select **Edit**.
4. Depending on the type of attribute, you may need to add a value to the attribute value focus bar or select from a list of values then press **Enter**. The attribute value is updated accordingly.

To Delete an Attribute

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

Viewing and Modifying Addresses

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

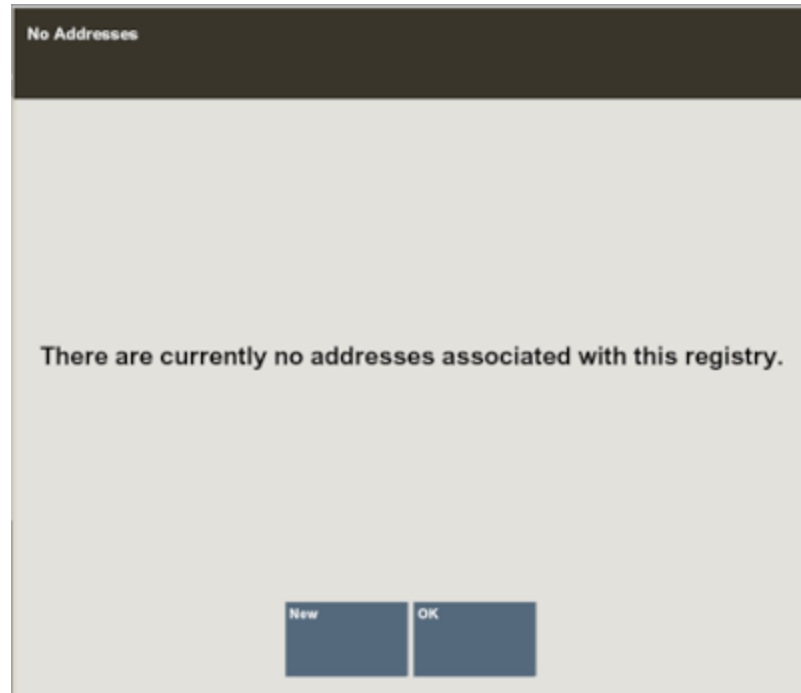
Figure 3-18 Gift Registry Address List

The screenshot shows a mobile application interface for 'Registry Addresses'. At the top, a dark header bar contains the title 'Registry Addresses' and a subtitle 'The following addresses are associated with this registry.' Below this is a table with two columns: 'Type' and 'Address'. The table contains one entry with 'Before Event' as the type and 'Premiere Events' as the address, with a detailed address '145 State Rd Painesville, OH 44077' below it. At the bottom of the screen, there are four blue buttons labeled 'Back', 'New', 'Edit', and 'Delete'.

Type	Address
Before Event	Premiere Events 145 State Rd Painesville, OH 44077

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

Figure 3-19 No Address Prompt



To Create a New Address

1. From the Gift Registry screen, select the **View Addresses** menu option.
2. From the Gift Registry address list ([Figure 3-18](#)) or the No Address on file prompt ([Figure 3-19](#)), select **New**.
3. When prompted, enter the required fields:

Figure 3-20 Address Information Form

The screenshot shows a web form titled "Gift Registry Address Information" with the instruction "Enter the gift registry address information." The form contains the following fields and controls:

- Address Type:** A dropdown menu with a downward arrow.
- Address Name:** A text input field containing the text "Venue".
- Address:** A multi-line text input area containing the text "Before Event" and "After Event".
- Postal Code:** A text input field.
- State:** A dropdown menu with a downward arrow, currently showing "US - United States".
- City:** A text input field.
- Apartment:** A text input field.

At the bottom of the form, there are four buttons: "Back", "Help", "Change Country", and "Save Changes".

4. Select **Save Changes**.

To Edit an Existing Address

1. From the Gift Registry screen, select the **View Addresses** menu option.
2. From the Gift Registry address list (Figure 3-18), select the address you wish to edit.
3. Select **Edit**.
4. Modify the information and then select **Save Changes**.

To Delete an Existing Address

1. From the Gift Registry screen, select the **View Addresses** menu option.
2. From the Gift Registry address list (Figure 3-18), select the address you wish to delete.
3. Select **Delete**.
4. When prompted, press **Y** to confirm that you want to delete the address.

Print Registry

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

Figure 3-21 Gift Registry Menu Buttons Options

The screenshot shows the Oracle Retail Xstore Point of Service interface. At the top, there are menu buttons: Info, Messages, Tasks, Orders, and Keypad. Below the menu, the registry details are displayed: Registry # 64, Registry Name: Mary's Baby Shower, Event Type: Baby Shower, Event Date: 12/12/2016, Expiration Date: 12/12/2017, Customer # 318355, Customer Name: Yan Sun, and Comments. A section for scanning items or UPCs is visible. Below the registry details, a list of items is shown with columns for Item, Price, Qty Purchased, and Qty Desired. The items listed are: PEASANT TOP JERSEY DRESS (1005, \$79.99, 0, 5), ROLL SLEEVE SWEATER DRESS (1006, \$79.99, 0, 6), ANIMAL PRINT CAP SLEEVE DRESS (1007, \$64.99, 0, 7), DRAWSTRING PEASANT DRESS (1008, \$89.50, 0, 8), MAXI LENGTH TANK DRESS (1009, \$69.50, 0, 9), and Blue S Tee Shirt (330001, \$12.50, 0, 100). At the bottom, there are buttons for Cancel, Help, Change Qty Desired, Delete Item, View Details, View Owners, View Attributes, View Addresses, Print Registry, and Register.

Item	Price	Qty Purchased	Qty Desired
PEASANT TOP JERSEY DRESS 1005	\$79.99	0	5
ROLL SLEEVE SWEATER DRESS 1006	\$79.99	0	6
ANIMAL PRINT CAP SLEEVE DRESS 1007	\$64.99	0	7
DRAWSTRING PEASANT DRESS 1008	\$89.50	0	8
MAXI LENGTH TANK DRESS 1009	\$69.50	0	9
Blue S Tee Shirt 330001	\$12.50	0	100

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

Figure 3-22 Gift Registry Report

The screenshot shows the Oracle Retail Xstore Point of Service Gift Registry Report. The report header includes the Oracle logo, the title "Gift Registry", and the store information "Store: 570 - Corner Market". The event details are: Event Name: Mary's Baby Shower, Event Date: 12/12/2016, Line Count: 6, and Total Registry Items: 125. A barcode is displayed with the Registry ID: 64. Below the header, a table lists the items with columns for Item, Description, Price, Purchased, and Desired. The items listed are: 1005 PEASANT TOP JERSEY DRESS (\$79.99, 0.00, 5.00), 1006 ROLL SLEEVE SWEATER DRESS (\$79.99, 0.00, 6.00), 1007 ANIMAL PRINT CAP SLEEVE DRESS (\$64.99, 0.00, 7.00), 1008 DRAWSTRING PEASANT DRESS (\$89.50, 0.00, 8.00), 1009 MAXI LENGTH TANK DRESS (\$69.50, 0.00, 9.00), and 330001 Blue S Tee Shirt (\$12.50, 0.00, 90).

Item	Description	Price	Purchased	Desired
1005	PEASANT TOP JERSEY DRESS	\$79.99	0.00	5.00
1006	ROLL SLEEVE SWEATER DRESS	\$79.99	0.00	6.00
1007	ANIMAL PRINT CAP SLEEVE DRESS	\$64.99	0.00	7.00
1008	DRAWSTRING PEASANT DRESS	\$89.50	0.00	8.00
1009	MAXI LENGTH TANK DRESS	\$69.50	0.00	9.00
330001	Blue S Tee Shirt	\$12.50	0.00	90

Note:

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

Note:

See the *Oracle Retail Xstore Point of Service Reports Guide* for more information about reports.

4

Employee Maintenance

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



Note:

Because each Xstore Classic menu is configurable, the button functions and the menu options on your system may appear in a different order or have different text than the examples shown in this manual.

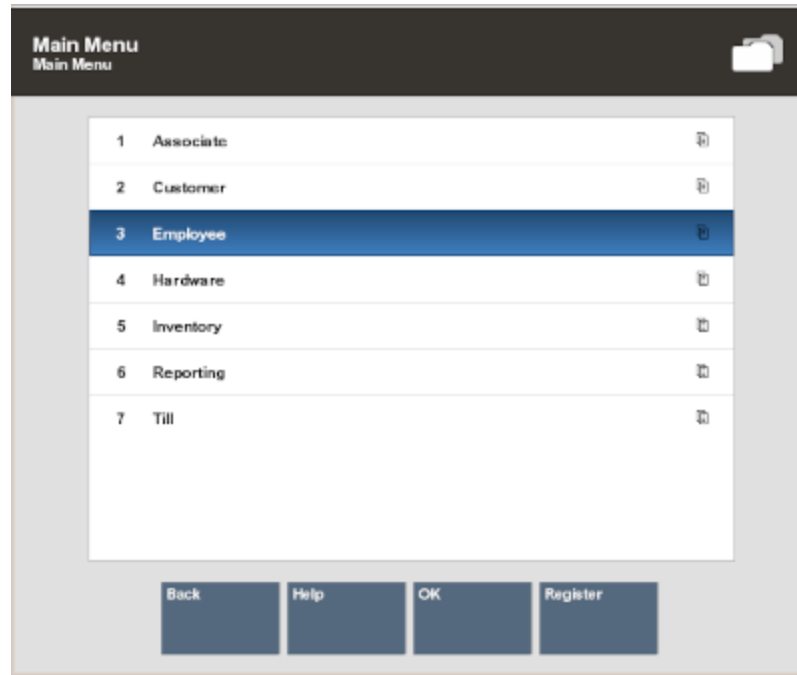
This chapter contains the following sections:

- [Accessing Back Office Employee Maintenance Functions](#)
- [Maintaining Employee Information](#)
- [Viewing an Employee Record](#)
- [Editing an Employee Record](#)
- [Employee Maintenance Tabs Overview](#)
- [Borrow Employee](#)
- [Employee Productivity Report](#)
- [Associate Advance](#)

Accessing Back Office Employee Maintenance Functions

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

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



 Note:

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

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

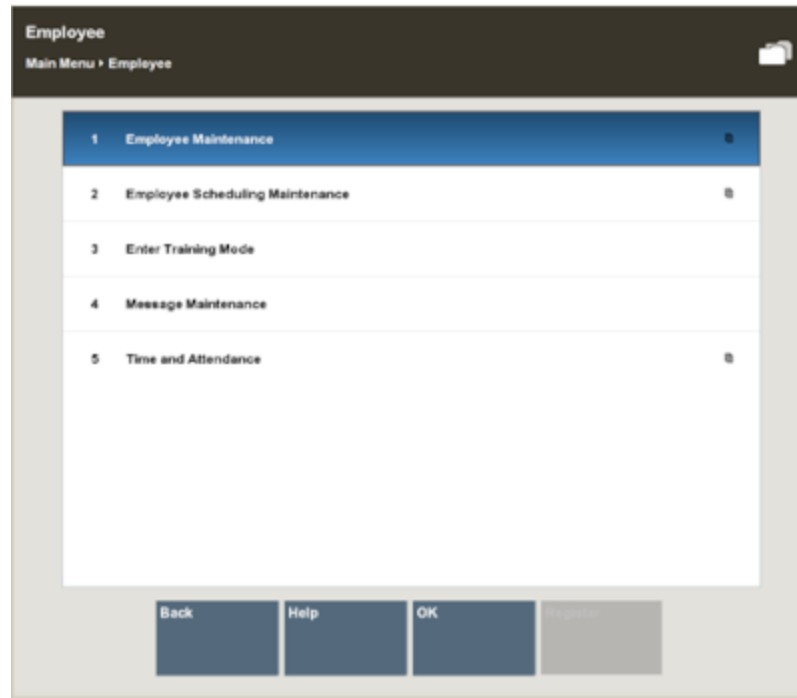
The following options are available:

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

Maintaining Employee Information

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

Figure 4-2 Employee Maintenance Menu



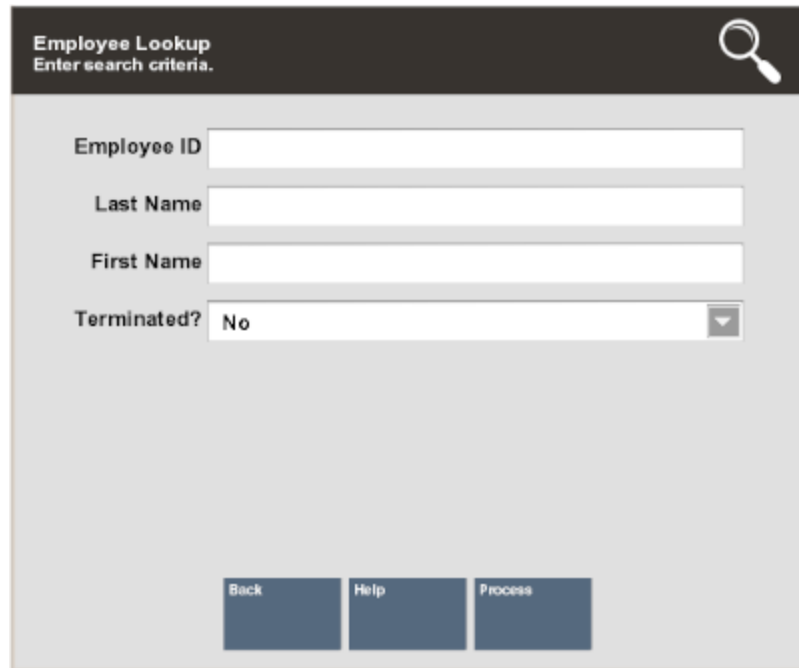
 Note:

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

Note: The following options are also available here:

- **Employee Borrow** - Select this option to borrow an associate from another store to work in your store for a specific and limited period. Refer to [Borrow Employee](#).
- **Employee Productivity Report** - Select this option to run the Employee Productivity Report. Refer to [Employee Productivity Report](#) and the *Oracle Retail Xstore Point of Service Reports Guide* for more information.
- **Associate Advance** - Select this option to provide payment in advance of an employee's scheduled payday. Refer to [Associate Advance](#).
- Xstore Classic displays the Employee Lookup form, prompting for employee information.

Figure 4-3 Employee Lookup Form

The image shows a web form titled "Employee Lookup" with the subtitle "Enter search criteria." in the top left corner. A magnifying glass icon is in the top right corner. The form contains four input fields: "Employee ID", "Last Name", "First Name", and "Terminated?". The "Terminated?" field is a dropdown menu with "No" selected. At the bottom of the form are three buttons: "Back", "Help", and "Process".

Employee Lookup
Enter search criteria.

Employee ID

Last Name

First Name

Terminated?

Back Help Process

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

 Note:

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

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

Figure 4-4 Employee Lookup Results List

Employee Lookup
Source: StorePrimary
Smith, John 30500 Bruce Industrial Pkwy Solon, OH 44139
Sakthi, Shree 30500 Bruce Industrial Pkwy Solon, OH 44139
Smith, Joe
Schanz, Johann Triesterstrasse 351 8055 Graz-Puntigam Austria

Back New Select & View

Choose one of these options:

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

Viewing an Employee Record

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



Note:

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

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

The screenshot displays the 'Employee Record (Read-Only Mode)' for Hai Chen. The interface features a top navigation bar with five tabs: General, HR, Security, Fingerprint, and Comment. The 'General' tab is currently selected. Below the tabs, the record is organized into three main sections: 'Name & Address', 'Personal Information', and 'Emergency Contact Information'. The 'Name & Address' section includes fields for First Name (Hai), Middle Name (Chen), Last Name, Prefix, Suffix, Address (21 Jiaquomemai Dajie), Postal Code (100020), City (BEIJING), State, Country (CN - China), Email, and Phone (Home/Other). The 'Personal Information' section includes fields for SSN (1231243270), Language (Chinese (China)), Marital Status (Single), Birth Date, Gender, and Spouse Name. The 'Emergency Contact Information' section includes fields for Name and Phone. At the bottom of the interface, there is a row of buttons: Back, Help, Edit Employee, Change Password, New Employee, Password Challenge Questions, Previous Tab, and Next Tab.

Editing an Employee Record

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

1. With the employee record displayed, select the **Edit Employee** option to go into an editing mode. The fields are no longer grayed out.
2. Use the **Next Tab** and **Previous Tab** menu options to navigate to the tab you want.
3. To make changes to any of the fields, select the field you want to change, and replace the old entry by typing over it with the new information.
 - Any fields that require entries are marked with a red triangle in the upper left corner of the field.
 - Any fields that have lists attached display a down arrow on the right side of the field.

Figure 4-6 Employee Record in Edit Mode

4. Save any changes you made before exiting from the Employee Maintenance screen.

Select the **Save Changes** option to keep your changes. If you decide not to keep the changes you made, select the **Undo Changes** option.

 Note:

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

Changing an Employee's Password

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

 Note:

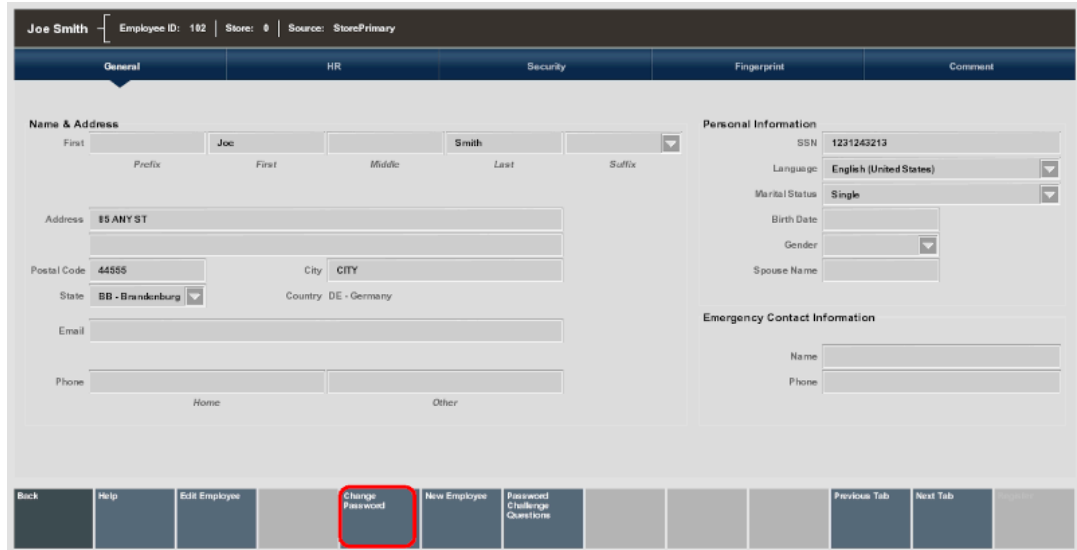
This option allows you to change a password for an employee. Passwords for new employees are created when a new employee's record is added to the database. You must have security privileges in the system to change a password.

1. Open the employee record for the user whose password you want to change.
2. Select the **Change Password** option.

 Note:

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

Figure 4-7 Change Password Menu Option



3. Oracle Retail Xstore Point of Service may prompt to verify your identity. If prompted, enter your own employee ID and password to verify that you have security privileges to change an employee's password. If you enter this information incorrectly, the system displays the message "The password entered was incorrect." Select OK to continue and re-enter the information.
4. Oracle Retail Xstore Point of Service prompts you to enter a new password for the employee. Type the new password for the employee and retype the same new password on the line below to confirm it.

Figure 4-8 Prompt for New Employee Password and Confirmation

The screenshot shows a web interface titled "New Password" with the instruction "Enter and confirm a new password." Below this, there are two input fields. The first field is labeled "Enter the new password." and the second is labeled "Confirm the new password." Both fields contain masked text represented by asterisks. At the bottom of the form, there are three buttons: "Back", "Help", and "Process".

 Note:

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

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

 Note:

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

Establish Password Challenge Questions

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

To establish password challenge questions:

1. Open the employee record for the user whose challenge questions you want to maintain.
2. Select the **Password Challenge Questions** menu option.

Figure 4-9 Password Challenge Questions Menu Option

The screenshot shows the 'Joe Smith' employee record page. The top navigation bar includes 'General', 'HR', 'Security', 'Fingerprint', and 'Comment'. The 'Security' tab is active. The page displays various fields for 'Name & Address' and 'Personal Information'. At the bottom, a row of buttons includes 'Back', 'Help', 'Edit Employee', 'Change Password', 'New Employee', 'Password Challenge Questions' (highlighted with a red rectangle), 'Previous Tab', and 'Next Tab'.

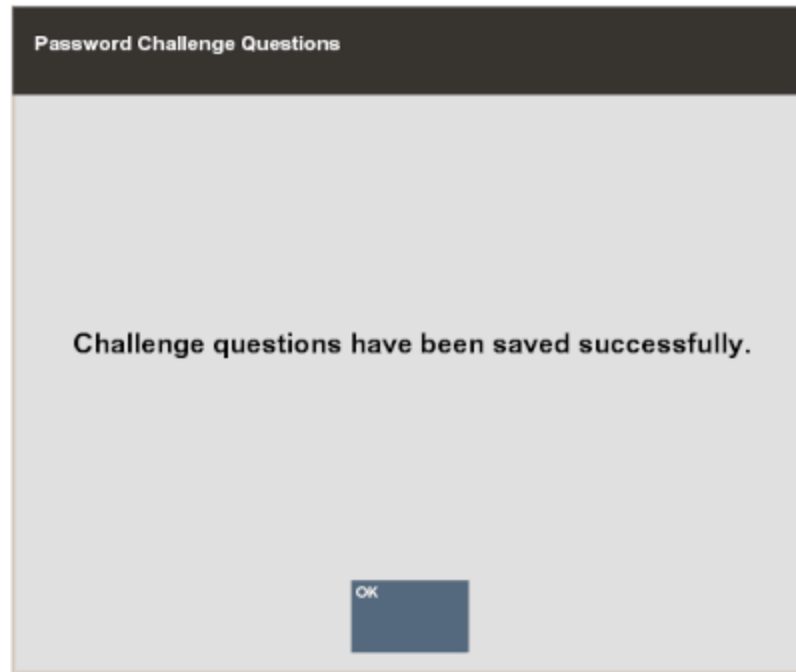
3. Select a Challenge Question from the drop-down menu and type the answer in the Challenge question answer field.
4. Select **Next Question**.

Figure 4-10 Password Challenge Questions Maintenance

The screenshot shows the 'Password Challenge Questions' maintenance screen. The header indicates 'You must answer 3 password challenge questions'. The main content area displays 'Question 1 of 3'. Below this, there is a section titled 'Choose a challenge question' with a dropdown menu. The dropdown menu is open, showing the option 'In what city were you born?'. Below the dropdown is a text field labeled 'Challenge question answer'. At the bottom of the screen, there are three buttons: 'Back', 'Help', and 'Next Question'.

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

Figure 4-11 Challenge Questions Saved



 Note:

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

Setting Up an Employee Fingerprint Record

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

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

 Note:

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

- If you are in view-only mode, the Fingerprint Enrollment Status screen displays. See [Setting Up an Employee Fingerprint Record](#).

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

- If you are already in edit mode, the Fingerprint Scans screen displays. See [Setting Up an Employee Fingerprint Record](#).

2. If you are in view-only mode, the **Fingerprint Enrollment Status** screen displays the employee's current fingerprint enrollment status in the Finger Selected panel of the screen. In the following example, the employee has no fingerprint records on file (currently Enrolled Count=0).

3. Select the **Edit Employee** menu option to begin the enrollment process.

 Note:

On the hand image, a green finger represents the finger selected for enrollment.

4. Select a finger from the **Fingerprint Enrollment** list.
5. In edit mode, begin the fingerprint scan by following the on-screen prompts.

 Note:

Selecting the **Save Changes** menu option at the **Fingerprint Scans** screen returns to the **Fingerprint Enrollment Status** screen.

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

6. Instruct the employee to place a finger on the biometric device. This process must be repeated 4 times to enroll the finger. An image of the fingerprint is shown in the **Fingerprints Scans** panel during the enrollment process.
7. When the scan is complete, select **OK**. The system returns to the **Fingerprint Scans** screen where the employee can enroll another finger or you can select **Save Changes** to complete the employee fingerprint enrollment process.

 Note:

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

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

Adding a Comment

Xstore Classic allows you to add a text comment to an employee's record. The comment can be viewed on the Comment tab window and printed.

 Note:

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

1. Select the **Comment** tab.
2. Select the **Add Comment** option. Xstore Classic displays a text form where you can enter a comment.

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

Adding a New Employee

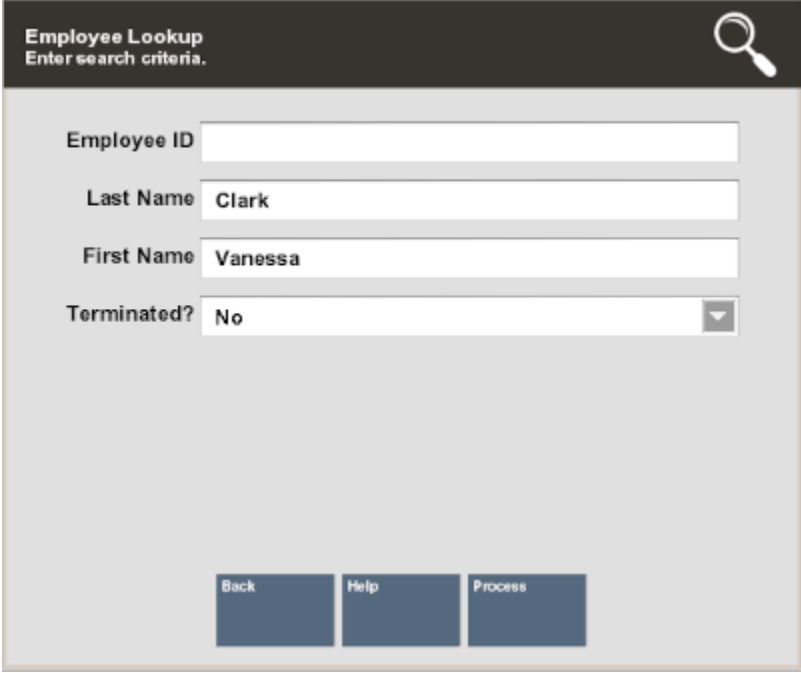
Although some employee records may be downloaded from the home office automatically, you may need to create a new employee record at the store level.

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

 Note:

You may search by partial names if needed.

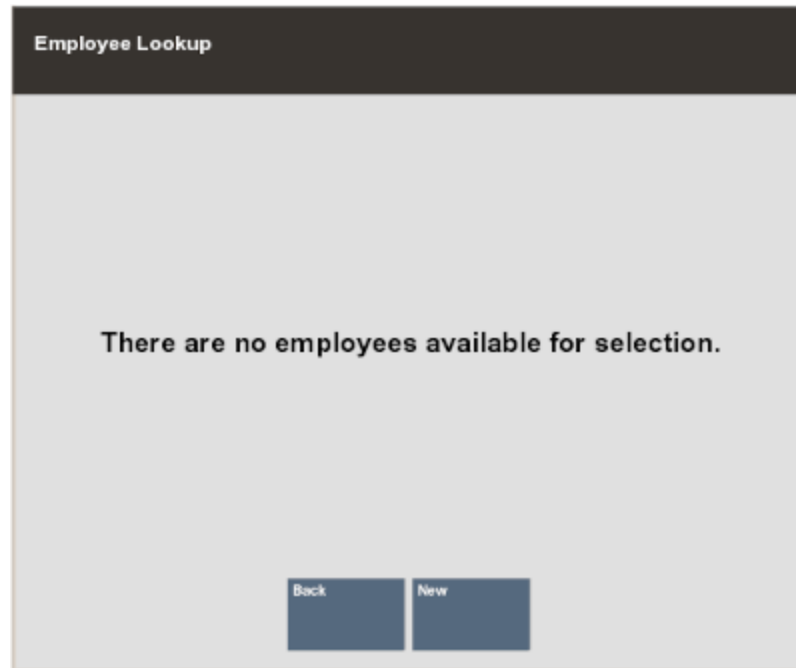
Figure 4-12 Employee Lookup Form



The image shows a screenshot of the 'Employee Lookup' form. The form has a dark header bar with the title 'Employee Lookup' and the instruction 'Enter search criteria.' on the left, and a magnifying glass icon on the right. Below the header, there are four input fields: 'Employee ID' (empty), 'Last Name' (containing 'Clark'), 'First Name' (containing 'Vanessa'), and 'Terminated?' (a dropdown menu with 'No' selected). At the bottom of the form, there are three buttons: 'Back', 'Help', and 'Process'.

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

Figure 4-13 No Employee Record Found Message



 Note:

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

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

Figure 4-14 New Password Form

New Password
Enter and confirm a new password.

Enter the new password. [masked]

Confirm the new password. [masked]

Back Help Process

 Note:

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

6. Select **Process** to continue. The system displays a blank form with the five tab sections.

 Note:

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

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

Figure 4-15 Employee Maintenance General Tab

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

Voiding (Terminating) an Employee Record

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

- Open the record of the employee that you want to terminate.
- Navigate to the **Human Resources (HR)** tab; the system displays the HR information.
- Select **Edit Employee**.

Figure 4-16 HR Tab

- Select the drop-down arrow on the Status field to list the available options.
- Select the **Terminated** option from the list.

6. The Termination Date field is now a required entry as indicated by the red triangle in the field. Enter the employee's termination date.

Figure 4-17 HR Tab - Changing Employee Status

The screenshot shows the 'HR' tab in the Oracle HR system. The top bar indicates 'Shree Sakthi' and 'Employee ID: 101 | Store: 401 | Source: StorePrimary'. The 'Employee Profile' section includes fields for Hire Date, Status (set to 'Terminated'), Active Date, Term Date (marked with a red triangle), Group, Department, Position (set to 'Default'), Type (set to 'Default'), Job Title (set to 'TEST CASHIER'), Overtime Eligible? (set to 'Yes'), Clock In Required? (set to 'No'), Last Review, and Next Review. The 'Time Off' section includes Sick Days, Vacation Days, Personal Days, Sick Used, Vacation Used, and Personal Used. The 'Discount Groups' section includes Normal Level, Elite Program Member, and Employee. The bottom bar includes buttons for Undo Changes, Help, Save Changes, Previous Tab, Next Tab, and Register.

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

Note:

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

The screenshot shows the 'Employee Lookup' form with the title 'Enter search criteria.' and a magnifying glass icon. The form includes input fields for Employee ID, Last Name, and First Name. The 'Terminated?' dropdown menu is open, showing 'Yes' and 'No' options, with 'Yes' highlighted. The bottom bar includes buttons for Back, Help, and Process.

Employee Maintenance Tabs Overview

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



Note:

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

- [General Tab](#)
- [Human Resources Tab](#)
- [Security Tab](#)
- [Fingerprint Tab](#)
- [Comment Tab](#)

General Tab

General Tab - Displays employee name, address, contact and personal information.

Figure 4-18 Employee Maintenance - General Tab

The screenshot displays the 'General' tab of the Employee Maintenance window. At the top, a header bar shows the employee's name 'Vanessa Clark', ID '8461001000002', store '401', and source 'StorePrimary'. Below this, a tabbed interface has 'General' selected, with other tabs for 'HR', 'Security', 'Fingerprint', and 'Comment'. The main form is divided into two columns. The left column, 'Name & Address', contains fields for Name (First: Vanessa, Middle: Clark, Last: Clark, Suffix: dropdown), Address (12345 Chatham Circle), Postal Code (44087), City (Twinsburg), State (OH - Ohio), Country (US - United States), Email, and Phone (216-333-3333 x.333). The right column, 'Personal Information', contains fields for SSN (***-**-2222), Language (English (United States)), Marital Status (Married), Birth Date (01/02/1970), Gender (Female), and Spouse Name (Bob). Below these is the 'Emergency Contact Information' section with fields for Name and Phone. At the bottom, a navigation bar includes buttons for Back, Help, Edit Employee, Change Password, New Employee, Password Challenge Questions, Previous Tab, Next Tab, and Register.

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

Table 4-1 Employee Maintenance - Fields General Tab

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

Human Resources Tab

Human Resources (HR) Tab - Displays information about hiring date, employee status, and pay status, title, salary, vacation and personal time, and discount group membership.

Figure 4-19 Employee Maintenance - Human Resources Tab

The screenshot displays the 'Employee Maintenance - Human Resources Tab' for an employee named Vanessa Clark. The interface is divided into several sections:

- Header:** Shows the employee's name (Vanessa Clark), ID (0401001000002), Store (401), and Source (StorePrimary).
- Tabs:** General, HR (selected), Security, Fingerprint, and Comment.
- Employee Profile:**
 - Hire Date: [Text Field]
 - Status: Active (Dropdown)
 - Active Date: [Text Field]
 - Term Date: [Text Field]
 - Group: Closing Staff (Dropdown)
 - Department: [Text Field]
 - Position: [Text Field]
 - Type: [Text Field]
 - Job Title: Sales (Text Field)
 - Overtime Eligible?: Yes (Dropdown)
 - Clock In Required?: Yes (Dropdown)
 - Last Review: [Text Field]
 - Next Review: [Text Field]
- Time Off:**
 - Sick Days: 5 (Text Field)
 - Vacation Days: 5 (Text Field)
 - Personal Days: 2 (Text Field)
 - Discount Groups: Normal Level (Dropdown)
 - Elite Program Member: [Text Field]
 - Employee: [Text Field]
 - Employee Family: [Text Field]
 - Pay Status: Hourly (Dropdown)
 - Base Pay: [Text Field]
 - Extra Withheld: [Text Field]
- Footer:** Includes buttons for Undo Changes, Help, Save Changes, Previous Tab, Next Tab, and Register.

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

Table 4-2 Employee Maintenance - Fields Human Resources Tab

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

Table 4-2 (Cont.) Employee Maintenance - Fields Human Resources Tab

Section	Fields
Employee Group Information	Vacation Used
	Personal Used
	Discount Groups

Security Tab

Security Tab - Displays information about the groups with which the employee is associated to determine system privileges.

Figure 4-20 Employee Maintenance - Security Tab

Vanessa Clark | Employee ID: 0401001000002 | Store: 401 | Source: StorePrimary

General | HR | **Security** | Fingerprint | Comment

Security Profile

Training Status: Exempt | Login ID: |

Primary Group: Everyone | Locked Out?: No

Groups:

- Everyone
- Trainee
- Cashier
- Keyholder

Store Assignment

Store Assignment	Beginning	Ending	Temporary?
401	10/23/2017		No

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

Table 4-3 Employee Maintenance - Fields Security Tab

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

Fingerprint Tab

The Fingerprint Tab provides the ability to create an employee fingerprint data record in addition to the conventional user ID and password data. This tab is only active if you are using a fingerprint device.

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

Fingerprint Scans Panel

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

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

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

Finger Selected Panel

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

This image shows which finger(s) on each hand are recorded in the system:

- Blue indicates this finger is successfully recorded in the system
- Green indicates the finger to scan next, but can be changed if you prefer to use a different finger
- A count of the maximum number of fingers that may be enrolled and the number of enrolled fingers is also shown here.

Figure 4-21 Maximum Enrolled Fingers



Comment Tab

Comment Tab - Displays notes and comments about the associate.

Figure 4-22 Employee Maintenance - Comment Tab

The screenshot shows a web application interface for employee maintenance. At the top, a header bar displays the employee's name 'Vanessa Clark' and details: 'Employee ID: 0401001000002', 'Store: 401', and 'Source: StorePrimary'. Below this is a navigation bar with tabs: 'General', 'HR', 'Security', 'Fingerprint', and 'Comment'. The 'Comment' tab is selected. The main content area is titled 'Comments' and contains a text box with the following text: 'Created On: October 23, 2017 04:32:26 PM', 'Created By: 100', and 'Kathy will be in charge of the new employee training session on November 1st.' At the bottom of the interface is a footer bar with buttons: 'Back', 'Help', 'Edit Employee', 'Add Comment', and several other buttons that are partially obscured or disabled.

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

Borrow Employee

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

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

Figure 4-23 Employee Maintenance Menu - Employee Borrow Option

The screenshot shows a web application interface titled "Employee Maintenance". Below the title is a breadcrumb trail: "Main Menu > Employee > Employee Maintenance". The main content area contains a list of four menu items, each with a number and a label: "1 Associate Advance", "2 Employee Borrow", "3 Employee Maintenance", and "4 Employee Productivity Report". The "Employee Borrow" item (number 2) is highlighted with a blue background. At the bottom of the interface, there are four buttons: "Back", "Help", "OK", and "Cancel".

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

Figure 4-24 Employee Borrow Search Form

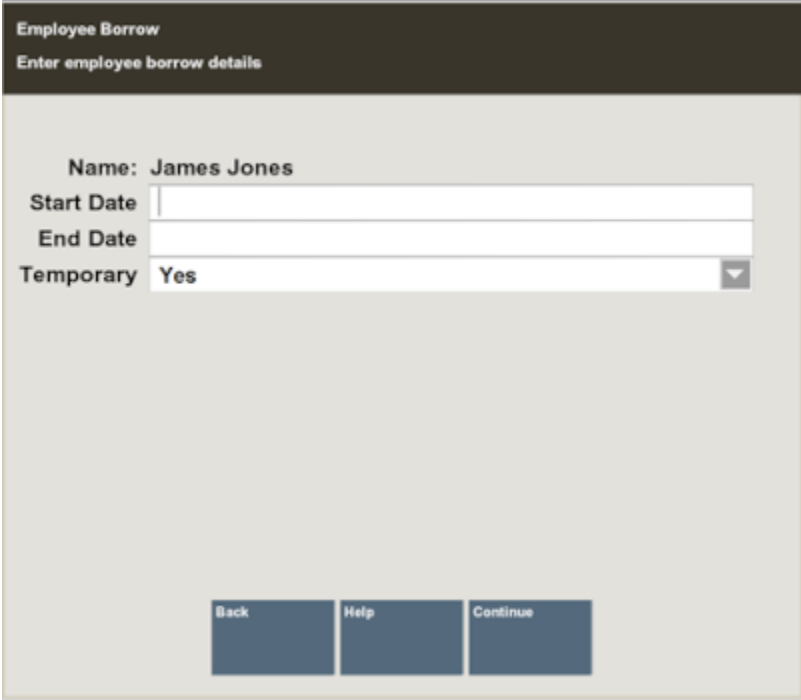
The screenshot shows a web application interface titled "Employee Borrow". Below the title is a prompt: "Enter search criteria." and a magnifying glass icon. The main content area contains three input fields labeled "Employee ID", "Last Name", and "First Name". At the bottom of the interface, there are three buttons: "Back", "Help", and "Process".

 Note:

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

3. If the results include more than one employee, choose the employee you want and select the **Select & Continue** option.
4. After you select one of the employees listed, or if only one employee is found, the **Employee Borrow Details** form displays:

Figure 4-25 Employee Borrow Detail Form



Employee Borrow
Enter employee borrow details

Name: James Jones

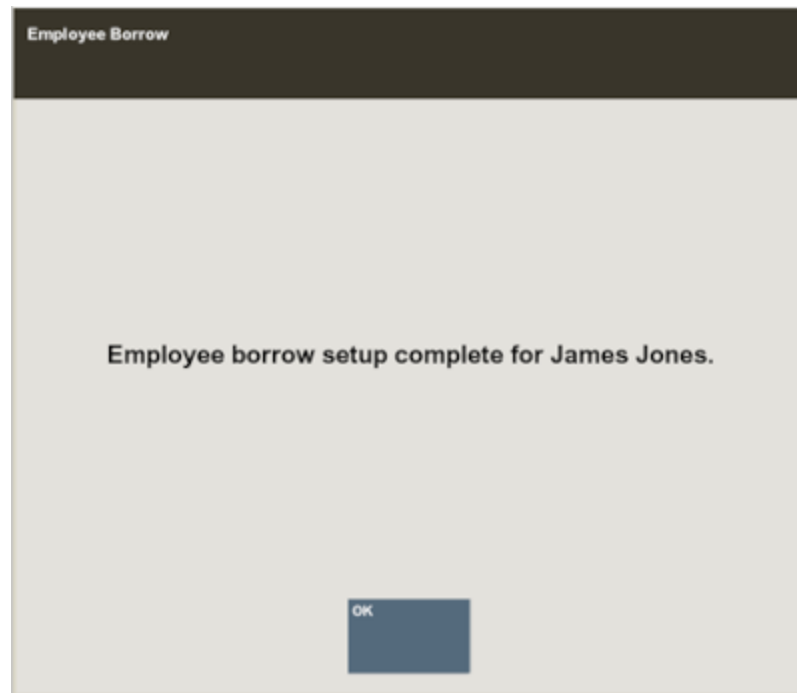
Start Date

End Date

Temporary Yes

- a. Enter the Start Date and End Date.
 - b. Indicate whether the employee is being borrowed temporarily by selecting **Yes** or **No** from the list in the Temporary field.
5. Select **Continue**.
 6. The system displays a confirmation message when the process for borrowing an employee is complete.

Figure 4-26 Employee Borrow Completion



Select **OK** to continue. The system returns to the Main Menu.

This employee is now available for employee functions in the borrowing store.

 Note:

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

Employee Productivity Report

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

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

This report includes the following information:

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

- Returns % to Total - Percentage of total returns per employee.
- Markdowns % to Total - Percentage of total markdowns per employee.

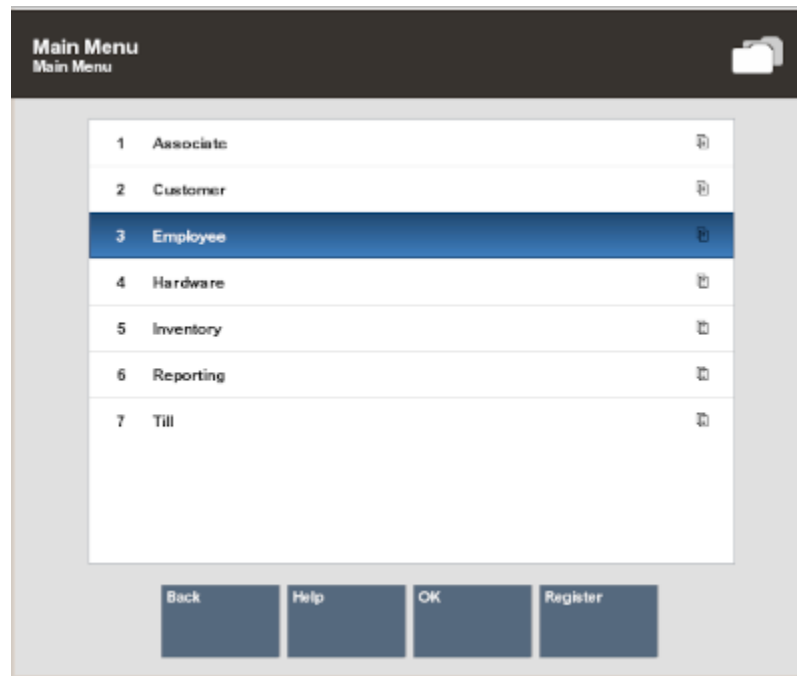
Refer to the *Oracle Retail Xstore Point of Service Reports Guide* for more details about the Employee Productivity Report.

Associate Advance

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

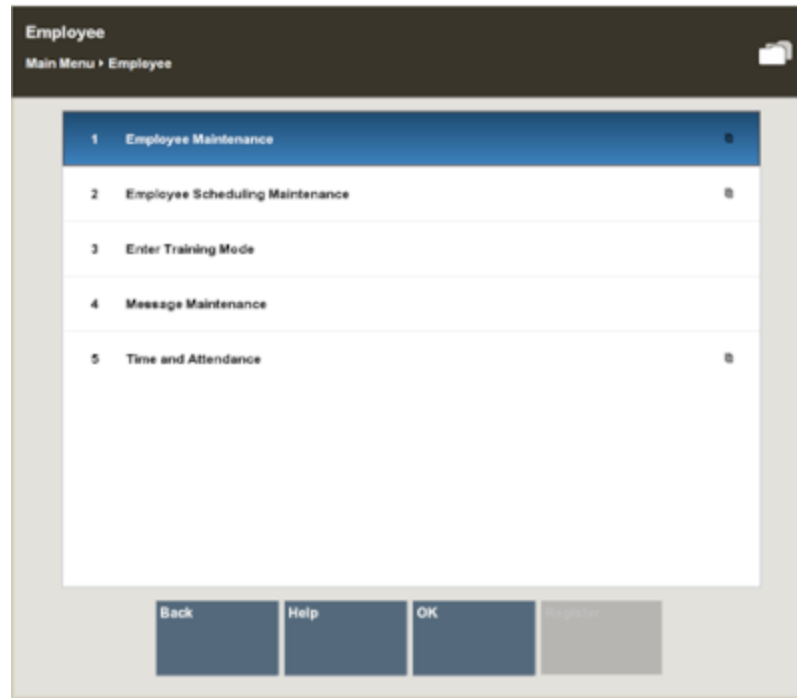
1. After logging in to the Back Office, select **Employee** and press **Enter**.

Figure 4-27 Main Menu - Employee Menu Option



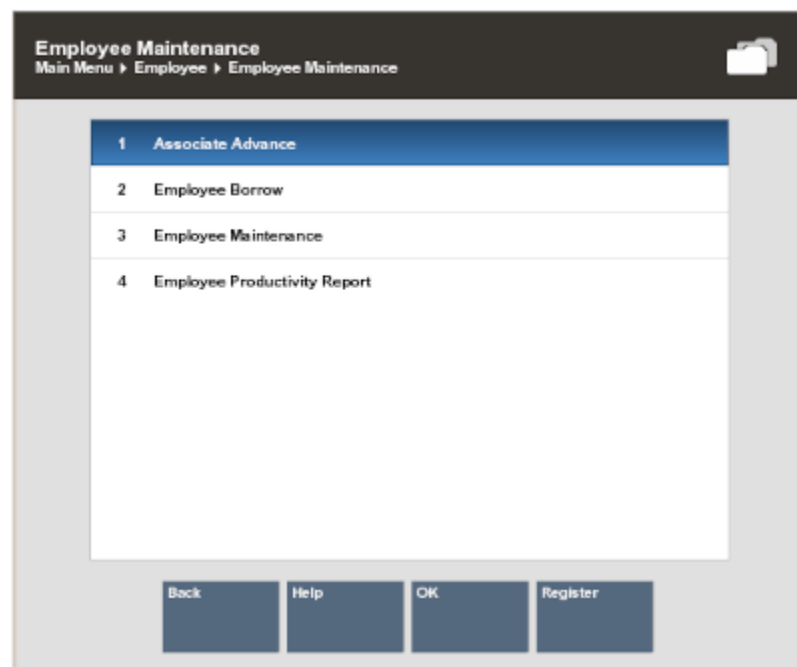
2. Select **Employee Maintenance** and press **Enter**.

Figure 4-28 Employee Maintenance Menu



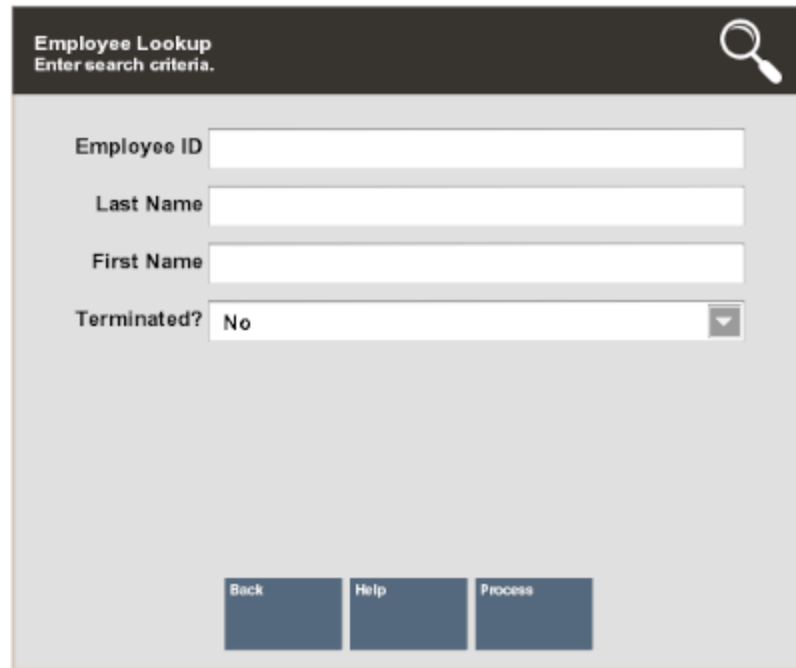
3. Select **Associate Advance** and press **Enter**.

Figure 4-29 Associate Advance Menu Option



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

Figure 4-30 Employee Lookup Form



The form is titled "Employee Lookup" with the instruction "Enter search criteria." in the top left corner. A magnifying glass icon is in the top right corner. The form contains four input fields: "Employee ID", "Last Name", "First Name", and "Terminated?". The "Terminated?" field is a dropdown menu currently showing "No". At the bottom of the form are three buttons: "Back", "Help", and "Process".

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

Figure 4-31 Cash Advance Amount Prompt

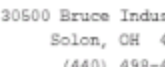


The prompt is titled "Amount" and has the instruction "Enter amount." below it. It features a single-line text input field. To the right of the input field is a large dollar sign icon inside a circle.

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

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

Figure 4-32 Associate Advance Receipt Example



Xstor

30500 Bruce Industrial Pkwy
Solon, OH 44139
(440) 498-4414

Ticket: 14	Date: 1/31/06
Store: 301	Register: 1
Cashier: 03010001000002	
Session ID:	

Associate Advance

Associate ID	03010001000003
Name	David Ender
Amount	100.00

Associate agrees to the corporate terms for an advance.

x _____
Employee's Signature



111000112211 JANC0704

The cash drawer opens to remove the cash advance.

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

5

Employee Scheduling

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

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

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

Work Shifts

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

Time Off

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

Reports

The following scheduling reports are available:

- Employee Performance Report - This report shows the scheduled hours for an employee or all employees, the hours worked, and the difference between scheduled and worked hours. The employee's total sales and average sales for the period are also shown.
- Employee Schedule Detail - This report shows the employees who are scheduled for each day in the selected week. Each day of the week is listed, the employees scheduled, their individual start and end times, and the total hours for each day. This report also includes the total scheduled hours for the week.
- Employee Time Off Summary Report - This report lists all employees who have time off scheduled for the selected week, and it shows the time-off days, hours (if less than a full day), and the reason for the time-off.



Note:

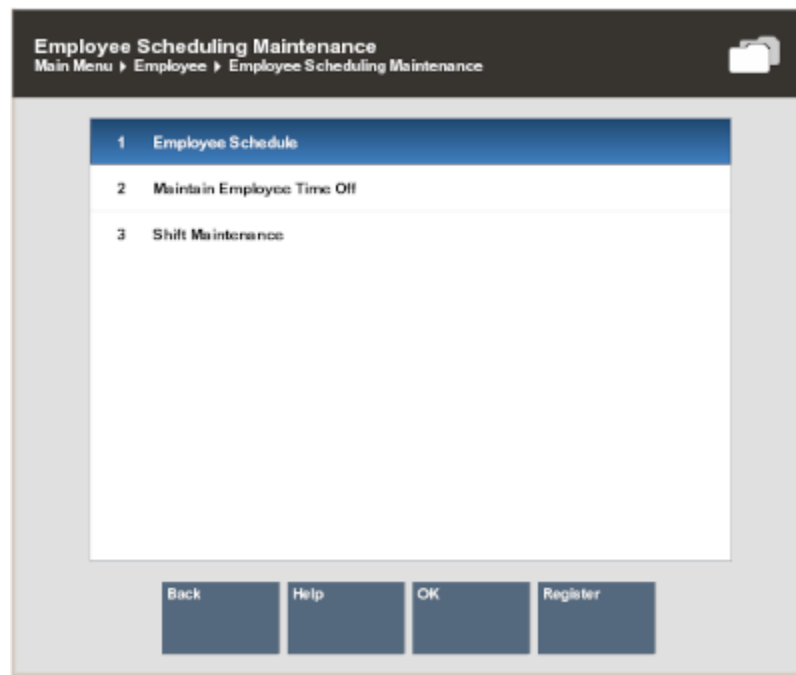
Refer to the *Oracle Retail Xstore Point of Service Reports Guide* for detailed information about these reports.

Creating An Employee Schedule

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

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

Figure 5-1 Employee Scheduling Maintenance Menu



4. Xstore Classic prompts for the week to be scheduled. Select the week you want to schedule, and press **Enter** to continue.

Figure 5-2 Schedule Weeks List

Schedule Weeks
Select a week.

Begin Date		End Date
09/10/2017	...	09/16/2017
09/17/2017	...	09/23/2017
09/24/2017	...	09/30/2017
10/01/2017	...	10/07/2017
10/08/2017	...	10/14/2017
10/15/2017	...	10/21/2017
10/22/2017	...	10/28/2017

Back OK

Note:

The current week is selected by default.

- The system displays the **Employee Schedule** screen for the selected week. This is the view used to create an employee schedule.

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

Figure 5-3 Employee Schedule Screen

Employee Schedule		Schedule Hours: 180.00			Schedule Amount: 0.00		From: 11/05/2017		To: 11/11/2017	
	Total Hours	Sun 11/5/17	Mon 11/6/17	Tue 11/7/17	Wed 11/8/17	Thu 11/9/17	Fri 11/10/17	Sat 11/11/17		
Alves, Tomas	Break: 0.00 Working: 20.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales			
Bissette, Camille	Break: 0.00 Working: 20.00		5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales			
Black, Jeff	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales			
Brown, Sarah	Break: 0.00 Working: 20.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales			
Chen, Hai	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...			
Clark, Vanessa 2163333333333										
Dos Santos, Mar...	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales			
Dubois, Marie										
Back	Help	Edit	Schedule Dates	Previous Week	Next Week	Print Schedule			Register	

Several options are provided for creating a new schedule:

Create New Schedule Options

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

Note:

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

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

Note:

Scheduling Exceptions...

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

<OR>

- Select the **Remove From Schedule** option to remove the conflicted shift(s) from the schedule.
- You cannot edit records for any date that precedes the current date.

Note:

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

Adding a Manual Shift

Use this option to create a new shift for an employee on the schedule.

...continued from step 5.

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



Note:

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

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

Employee Schedule		Schedule Hours: 180.00			Schedule Amount: 0.00		From: 11/05/2017		To: 11/11/2017	
	Total Hours	Sun 11/5/17	Mon 11/6/17	Tue 11/7/17	Wed 11/8/17	Thu 11/9/17	Fri 11/10/17	Sat 11/11/17		
Alves, Tomas	Break: 0.00 Working: 20.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales			
Bissette, Camille	Break: 0.00 Working: 20.00		5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales			
Black, Jeff	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales			
Brown, Sarah	Break: 0.00 Working: 20.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales			
Chen, Hai	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...			
Clark, Vanessa 2163333333333										
Dos Santos, Mar...	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales			
Dubois, Marie										
Back	Help	Edit	Schedule Dates	Previous Week	Next Week	Print Schedule			Register	

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



Note:

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

3. The system prompts for schedule information for the selected employee and date. Enter the information as required, then select **OK** to continue:

Figure 5-5 Employee Schedule Data Form

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

The system totals the scheduled hours for the week and calculates the scheduled budget amount (if it is configured for your store) as you build the schedule. The total scheduled hours and scheduled dollar amount is shown in the top panel of the screen. It is updated automatically each time you add or remove a shift.

Xstore Classic displays the **Weekly Summary Scheduling** screen that shows the shift you created for the employee on the scheduled day.

Information on this screen includes the starting and ending times, the work code, break times, and the amount of working time.

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

Employee Schedule		Schedule Hours: 184.00			Schedule Amount: 0.00		From: 11/05/2017		To: 11/11/2017		
	Total Hours	Sun 11/5/17	Mon 11/6/17	Tue 11/7/17	Wed 11/8/17	Thu 11/9/17	Fri 11/10/17	Sat 11/11/17			
Alves, Tomas	Break: 0.00 Working: 20.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales				
Bissette, Camille	Break: 0.00 Working: 20.00		5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales				
Black, Jeff	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales				
Brown, Sarah	Break: 0.00 Working: 20.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales				
Chen, Hai	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...				
Clark, Vanessa 21633333333333	Break: 0.00 Working: 4.00		5:00 PM 9:00 PM Inventory/Stock								
Doe Santos, Mar...	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales				
Doe Santos, Mar...											
Back	Help	Add Manual Shift	Add Shift From List	Change Shift	Delete Shift	Copy Day Schedule	Copy Week Schedule	Save Changes			Register

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

Note:

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

Adding a Pre-Defined Shift

Use this option to apply an existing shift type to the schedule for a selected employee/ day.
...continued from step 5.

Note:

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

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

Note:

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

Figure 5-7 Selecting the Cell for a Defined Shift

Employee Schedule		Schedule Hours: 184.00			Schedule Amount: 0.00		From: 11/05/2017		To: 11/11/2017	
	Total Hours	Sun 11/5/17	Mon 11/6/17	Tue 11/7/17	Wed 11/8/17	Thu 11/9/17	Fri 11/10/17	Sat 11/11/17		
Alves, Tomas	Break: 0.00		9:00 AM	9:00 AM	9:00 AM	9:00 AM	9:00 AM	9:00 AM		
	Working: 20.00		1:00 PM General Sales	1:00 PM General Sales	1:00 PM General Sales	1:00 PM General Sales	1:00 PM General Sales	1:00 PM General Sales		
Bissette, Camille	Break: 0.00		5:00 PM	5:00 PM	5:00 PM	5:00 PM	5:00 PM	5:00 PM		
	Working: 20.00		9:00 PM General Sales	9:00 PM General Sales	9:00 PM General Sales	9:00 PM General Sales	9:00 PM General Sales	9:00 PM General Sales		
Black, Jeff	Break: 0.00		9:00 AM	9:00 AM	9:00 AM	9:00 AM	9:00 AM	9:00 AM		
	Working: 40.00		5:00 PM Commission Sales	5:00 PM Commission Sales	5:00 PM Commission Sales	5:00 PM Commission Sales	5:00 PM Commission Sales	5:00 PM Commission Sales		
Brown, Sarah	Break: 0.00		9:00 AM	9:00 AM	9:00 AM	9:00 AM	9:00 AM	9:00 AM		
	Working: 20.00		1:00 PM General Sales	1:00 PM General Sales	1:00 PM General Sales	1:00 PM General Sales	1:00 PM General Sales	1:00 PM General Sales		
Chen, Hai	Break: 0.00		9:00 AM	9:00 AM	9:00 AM	9:00 AM	9:00 AM	9:00 AM		
	Working: 40.00		5:00 PM Administrative/Back...	5:00 PM Administrative/Back...	5:00 PM Administrative/Back...	5:00 PM Administrative/Back...	5:00 PM Administrative/Back...	5:00 PM Administrative/Back...		
Clark, Vanessa 21633333333333	Break: 0.00		5:00 PM							
	Working: 4.00		9:00 PM Inventory/Stock							
Doe Santos, Mar...	Break: 0.00		9:00 AM	9:00 AM	9:00 AM	9:00 AM	9:00 AM	9:00 AM		
	Working: 40.00		5:00 PM Commission Sales	5:00 PM Commission Sales	5:00 PM Commission Sales	5:00 PM Commission Sales	5:00 PM Commission Sales	5:00 PM Commission Sales		
Details Menu										
Back	Help	Add Manual Shift	Add Shift From List	Change Shift	Delete Shift	Copy Day Schedule	Copy Week Schedule	Save Changes	Register	

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



Note:

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

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

Figure 5-8 List of Pre-Defined Shifts

Shift List
Select a shift to be applied to - Vanessa Clark
Tuesday, November 7, 2017

Work Code	Name	Hours
CASHIER	Cashier - AM	9:00 AM - 1:00 PM
CASHIER	Cashier - PM	5:00 PM - 9:00 PM
ADMIN	Manager - AM	9:00 AM - 5:00 PM
ADMIN	Manager - PM	5:00 PM - 9:00 PM
SALES	Sales - AM	9:00 AM - 5:00 PM
SALES	Sales - PM	5:00 PM - 9:00 PM
CASHIER	Cashier - AM (Weekend)	8:00 AM - 1:30 PM

Back
OK

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

Figure 5-9 Pre-defined Shift Added

Employee Schedule		Schedule Hours: 192.00		Schedule Amount: 0.00		From: 11/05/2017		To: 11/11/2017	
	Total Hours	Sun 11/5/17	Mon 11/6/17	Tue 11/7/17	Wed 11/8/17	Thu 11/9/17	Fri 11/10/17	Sat 11/11/17	
Aves, Tomas	Break: 0.00 Working: 20.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales		
Bissette, Camille	Break: 0.00 Working: 20.00		5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales		
Black, Jeff	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales		
Brown, Sarah	Break: 0.00 Working: 20.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales		
Chen, Hai	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...		
Clark, Vanessa 2163333333333	Break: 0.00 Working: 12.00		5:00 PM 9:00 PM Inventory/Stock	9:00 AM 5:00 PM Administrative/Back...					
Dos Santos, Mar...	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales		
Duke, Mark									
Back	Help	Add Manual Shift	Add Shift From List	Change Shift	Delete Shift	Copy Day Schedule	Copy Week Schedule	Save Changes	Register

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

Copying a Day Schedule

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



Note:

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

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

p.m. on Monday, Tuesday and Wednesday.

...continued from step 5.

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

 Note:

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

Figure 5-10 Copying the Monday Schedule

Employee Schedule		Schedule Hours: 192.00			Schedule Amount: 0.00		From: 11/05/2017		To: 11/11/2017			
	Total Hours	Sun 11/5/17	Mon 11/6/17	Tue 11/7/17	Wed 11/8/17	Thu 11/9/17	Fri 11/10/17	Sat 11/11/17				
Alves, Tomas	Break: 0.00 Working: 20.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales					
Bissette, Camille	Break: 0.00 Working: 20.00		5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales					
Black, Jeff	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales					
Brown, Sarah	Break: 0.00 Working: 20.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales					
Chen, Hai	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...					
Clark, Vanessa 21633333333333	Break: 0.00 Working: 12.00		5:00 PM 9:00 PM Inventory/Stock	9:00 AM 5:00 PM Administrative/Back...								
Dos Santos, Mar...	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales					
Duke, Mark												
Back	Help	Add Manual Shift	Add Shift From List	Change Shift	Delete Shift	Copy Day Schedule	Copy Week Schedule	Save Changes				Register

2. Select the **Copy Day Schedule** option from the Edit menu.
3. Xstore Classic prompts for the day (or days) you want to copy the selected day schedule to. In this example, select the day or days you want to copy Monday's schedule to, and press **Enter**.

Figure 5-11 Copy Day Schedule Form

Copy Day Schedule

Select the days of the week to populate from the Monday schedule

Sunday

Tuesday

Wednesday

Thursday

Friday

Saturday

Back

OK

 Note:

To select multiple days, use the Spacebar to select each day. In this example, Monday's schedule is copied to Thursday, and Friday.

Xstore Classic copies the schedule to each day you selected. The system totals the scheduled hours for the week as you build the schedule and the scheduled budgeted amount (if configured for your store).

Figure 5-12 Copied Day Schedule

Employee Schedule		Schedule Hours: 200.00		Schedule Amount: 0.00		From: 11/05/2017		To: 11/11/2017	
	Total Hours	Sun 11/5/17	Mon 11/6/17	Tue 11/7/17	Wed 11/8/17	Thu 11/9/17	Fri 11/10/17	Sat 11/11/17	
Alves, Tomas	Break: 5.00 Working: 20.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales		
Bissette, Camille	Break: 0.00 Working: 20.00		5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales		
Black, Jeff	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales		
Brown, Sarah	Break: 0.00 Working: 20.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales		
Chen, Hai	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...		
Clark, Vanessa 2163333333333	Break: 0.00 Working: 20.00		5:00 PM 9:00 PM Inventory/Stock	9:00 AM 5:00 PM Administrative/Back...		5:00 PM 9:00 PM Inventory/Stock	5:00 PM 9:00 PM Inventory/Stock		
Dos Santos, Mar...	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales		
Dubois, Marie									
Back	Help	Add Manual Shift	Add Shift From List	Change Shift	Delete Shift	Copy Day Schedule	Copy Week Schedule	Save Changes	Register

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

 Note:

If configured, Xstore Classic warns of an attempt to schedule an employee when it conflicts with your store's hourly constraints or other restrictions.

Copying a Week Schedule

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

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

Figure 5-13 Copy Week Schedule Option

The screenshot shows the 'Employee Schedule' window. At the top, it displays 'Schedule Hours: 0' and 'Schedule Amount: 0.00'. Below this is a header row for the days of the week: Sun 11/12/17, Mon 11/13/17, Tue 11/14/17, Wed 11/15/17, Thu 11/16/17, Fri 11/17/17, and Sat 11/18/17. A list of employees is on the left, including Alves, Tomas; Bisette, Camille; Black, Jeff; Brown, Sarah; Chen, Hai; Clark, Vanessa; and Doe Santos, Mar... The 'Copy Week Schedule' button in the bottom toolbar is highlighted with a red box.

5. Xstore Classic displays a list of weeks that have been scheduled previously. Use the up and down arrow keys to select a week from the list and press **Enter** to continue.

Figure 5-14 Copy Week Schedule

The 'Copy Week Schedule' dialog box prompts the user to 'Select the date of the schedule you want to copy.' It contains a table with two columns: 'Begin Date' and 'End Date'. The table lists several weeks, with the first row (11/05/2017 to 11/11/2017) highlighted in blue. At the bottom, there are 'Back' and 'OK' buttons.

Begin Date	End Date
11/05/2017	11/11/2017
10/29/2017	11/04/2017
10/22/2017	10/28/2017
10/15/2017	10/21/2017
10/08/2017	10/14/2017
10/01/2017	10/07/2017

Xstore Classic copies the schedule from the displayed week to the selected week. The system totals the scheduled hours for the week as you build the schedule and the scheduled budgeted amount (if that is configured for your store).

Figure 5-15 Copied Week Schedule

Employee Schedule		Schedule Hours: 200.00			Schedule Amount: 0.00		From: 11/12/2017		To: 11/18/2017	
	Total Hours	Sun 11/12/17	Mon 11/13/17	Tue 11/14/17	Wed 11/15/17	Thu 11/16/17	Fri 11/17/17	Sat 11/18/17		
Alves, Tomas	Break: 5.00 Working: 20.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales			
Bissette, Camille	Break: 0.00 Working: 20.00		5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales			
Black, Jeff	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales			
Brown, Sarah	Break: 0.00 Working: 20.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales			
Chen, Hai	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...			
Clark, Vanessa 21633333333333	Break: 0.00 Working: 20.00		5:00 PM 9:00 PM Inventory/Stock	9:00 AM 5:00 PM Administrative/Back...		5:00 PM 9:00 PM Inventory/Stock	5:00 PM 9:00 PM Inventory/Stock			
Dos Santos, Mar...	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales			
Doyle, Mark										
Back	Help	Add Manual Shift	Add Shift From List	Change Shift	Delete Shift	Copy Day Schedule	Copy Week Schedule	Save Changes	Register	

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

Editing a Schedule

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

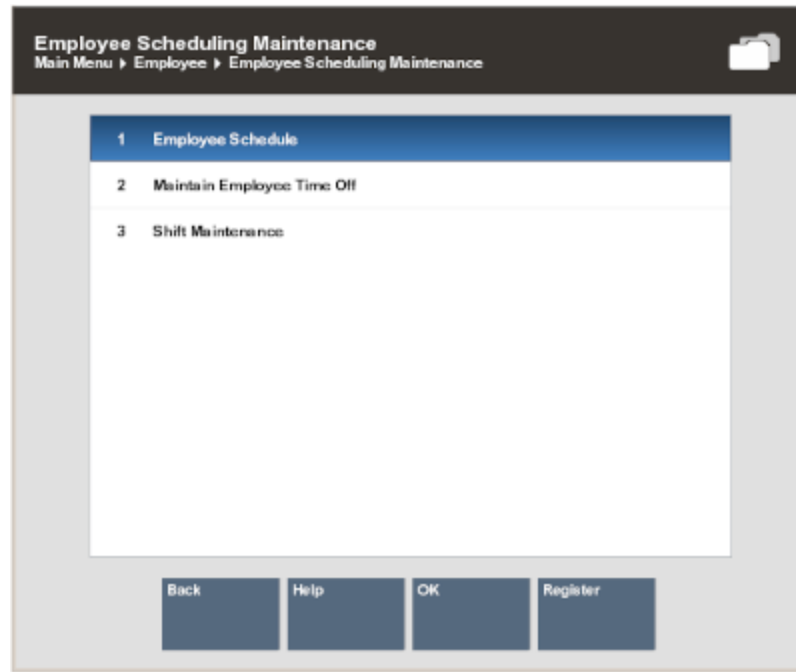


Note:

Schedule records from previous days cannot be edited.

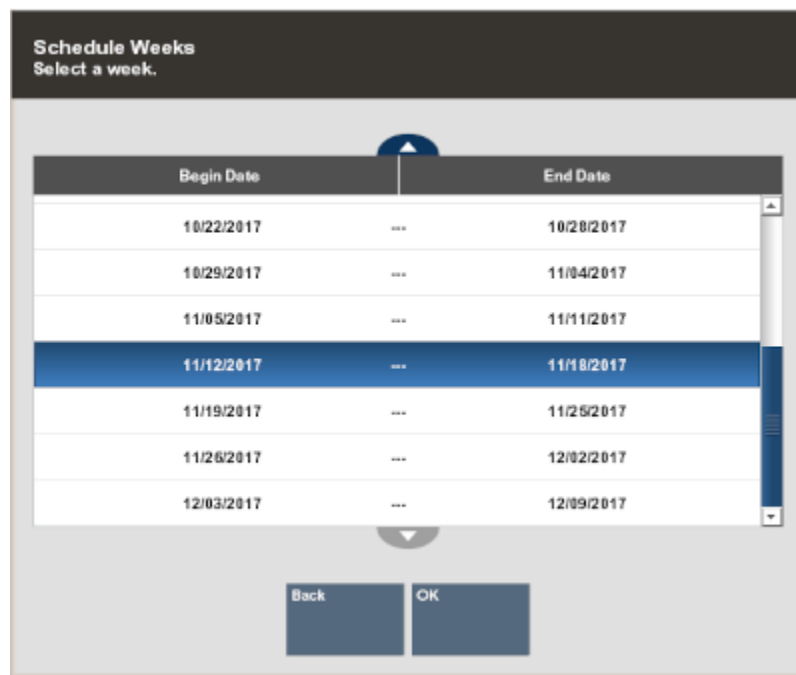
- At the Back Office Main Menu, select **Employee** and press **Enter**.
- At the Employee Menu, select **Employee Scheduling Maintenance** and press **Enter**.
- At the Employee Scheduling Maintenance Menu, select **Employee Schedule** and press **Enter**.

Figure 5-16 Employee Scheduling Maintenance Menu



4. Xstore Classic prompts for a schedule week. Use the up and down arrow keys to select the week that you want to edit, and press **Enter** to continue.

Figure 5-17 Schedule Weeks List



 Note:

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

5. Xstore Classic displays the **Employee Schedule** screen for the selected week. This is the view used to edit the existing employee schedule. Select the **Edit** option to begin editing this employee schedule.

 Note:

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

```

9/8/13 - 9/14/13

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

```

6. Xstore Classic provides several options for editing an existing schedule.

Figure 5-18 Weekly Summary Scheduling Screen - Edit Mode

Employee Schedule		Schedule Hours: 200.00		Schedule Amount: 0.00		From: 11/12/2017		To: 11/18/2017				
	Total Hours	Sun 11/12/17	Mon 11/13/17	Tue 11/14/17	Wed 11/15/17	Thu 11/16/17	Fri 11/17/17	Sat 11/18/17				
Alves, Tomas	Break: 0.00 Working: 20.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales					
Bissette, Camille	Break: 0.00 Working: 20.00		5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales					
Black, Jeff	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales					
Brown, Sarah	Break: 0.00 Working: 20.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales					
Chen, Hai	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...					
Clark, Vanessa 2163333333333	Break: 0.00 Working: 20.00		5:00 PM 9:00 PM Inventory/Stock	9:00 AM 5:00 PM Administrative/Back...		5:00 PM 9:00 PM Inventory/Stock	5:00 PM 9:00 PM Inventory/Stock					
Dos Santos, Mar...	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales					
Duke, Mark												
Back	Help	Add Manual Shift	Add Shift From List	Change Shift	Delete Shift	Copy Day Schedule	Copy Week Schedule	Save Changes				Register

Edit Existing Schedule Menu Options

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

Changing a Shift

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

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

Note:

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

Figure 5-19 Selected Cell Containing the Shift to be Changed

Employee Schedule		Schedule Hours: 200.00			Schedule Amount: 0.00			From: 11/12/2017		To: 11/18/2017	
	Total Hours	Sun 11/12/17	Mon 11/13/17	Tue 11/14/17	Wed 11/15/17	Thu 11/16/17	Fri 11/17/17	Sat 11/18/17			
Alves, Tomas	Break: 0.00 Working: 20.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales				
Bissette, Camille	Break: 0.00 Working: 20.00		5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales				
Black, Jeff	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales				
Brown, Sarah	Break: 0.00 Working: 20.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales				
Chen, Hai	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...	9:00 AM 5:00 PM Administrative/Back...				
Clark, Vanessa 2163333333333	Break: 0.00 Working: 20.00		5:00 PM 9:00 PM Inventory/Stock	9:00 AM 5:00 PM Administrative/Back...		5:00 PM 9:00 PM Inventory/Stock	5:00 PM 9:00 PM Inventory/Stock				
Dos Santos, Mar...	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales				
Back											
Back	Help	Add Manual Shift	Add Shift From List	Change Shift	Delete Shift	Copy Day Schedule	Copy Week Schedule	Save Changes		Register	

2. Select the **Change Shift** option.
3. Xstore Classic displays the **Employee Scheduling Data** form that shows the current schedule information for the selected shift. Change the information as required:

Figure 5-20 Employee Scheduling Data Form

Employee Scheduling
Employee Schedule Data

Enter a start time and end time, and select a work code for:
Brown, Sarah
Monday, November 13, 2017

Shift Start Time: 09:00 AM

Shift End Time: 01:00 PM

Work Code: General Sales

Number of Non-Working Hrs: 0 Hours 0 Mins

Back Help OK

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

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

Figure 5-21 Schedule before Shift Change

Employee Schedule		Schedule Hours: 200.00		Schedule Amount: 0.00	
	Total Hours	Sun 11/12/17	Mon 11/13/17	Tue 11/14/17	Wed 11/15/17
Alves, Tomas	Break: 0.00 Working: 28.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales
Bissette, Camille	Break: 0.00 Working: 28.00		5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales
Black, Jeff	Break: 0.00 Working: 48.00		9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales
Brown, Sarah	Break: 0.00 Working: 28.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales

Figure 5-22 Schedule after Shift Change

Employee Schedule		Schedule Hours: 294.00		Schedule Amount: 0.00	
	Total Hours	Sun 11/12/17	Mon 11/13/17	Tue 11/14/17	Wed 11/15/17
Alves, Tomas	Break: 0.00 Working: 20.00		9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales
Bissette, Camille	Break: 0.00 Working: 20.00		5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales	5:00 PM 9:00 PM General Sales
Black, Jeff	Break: 0.00 Working: 40.00		9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales	9:00 AM 5:00 PM Commission Sales
Brown, Sarah	Break: 0.00 Working: 20.00		9:00 AM 5:00 PM General Sales	9:00 AM 1:00 PM General Sales	9:00 AM 1:00 PM General Sales

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

 Note:

If configured, Xstore Classic warns you if an employee's schedule conflicts with hourly constraints or other restrictions as determined by your store.

Deleting a Shift

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

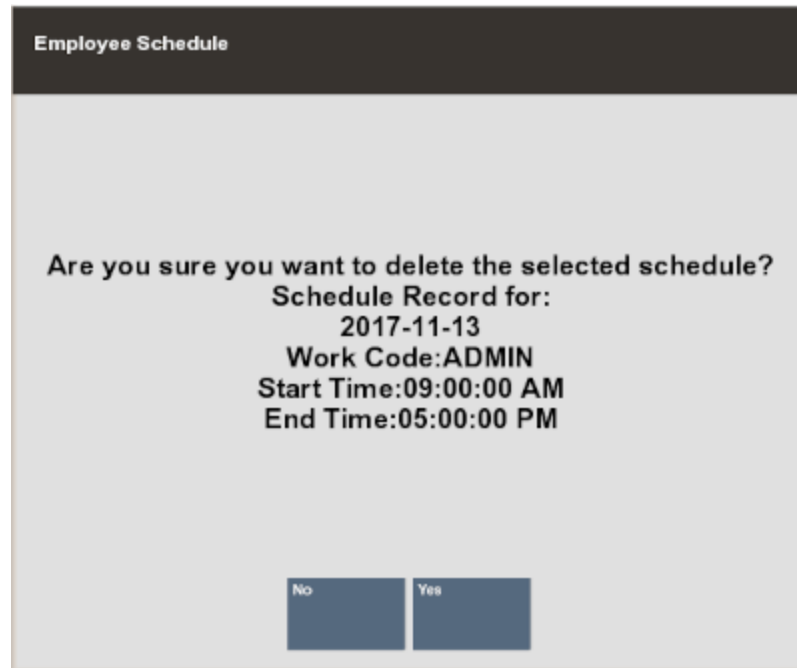
1. Select the shift you want to remove from the schedule. Use the arrow keys to navigate the scheduling screen grid. The highlighted area indicates the selected shift in the grid.

 Note:

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

2. Select the **Delete Shift** option. Xstore Classic displays a prompt to verify that the selected shift is the one you want to delete.

Figure 5-23 Delete Shift Verification Prompt



3. Press **Yes** to delete the shift from the schedule.

Xstore Classic displays the **Weekly Summary Scheduling** screen, removing the shift you deleted for the employee/day. The system also recalculates the scheduled hours for the week and the scheduled budget amount (if configured for your store) as you edit the schedule.

4. Continue making any changes to the schedule as needed and select the **Save Changes** option to save the edited schedule.

Maintaining Employee Time-Off Schedules

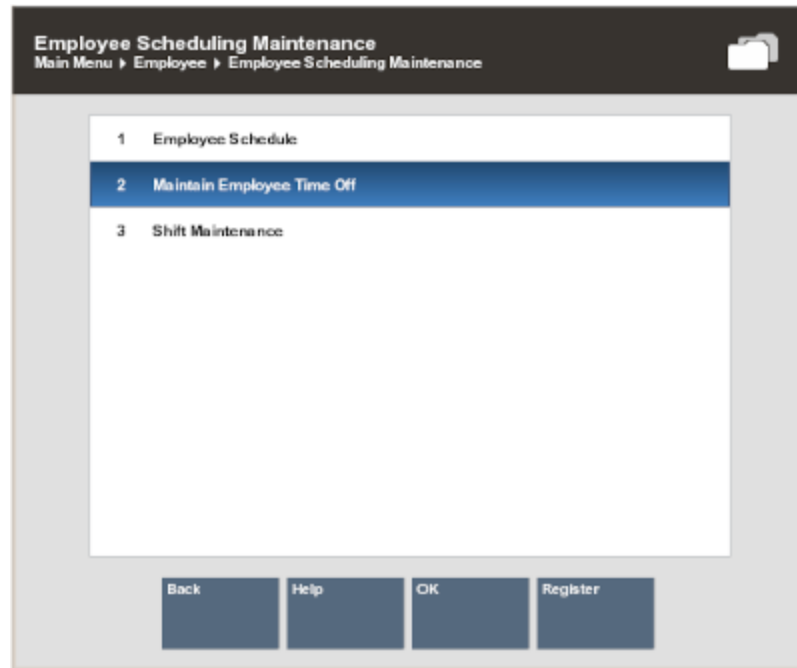
To create and edit time-off events, Xstore Classic prompts you for information such as the type of time-off period (whole day, half day, partial day), whether the time-off period spans multiple days or a single day, and the dates and times of the time-off period. This information is shown during the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

Adding Time-Off Periods

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

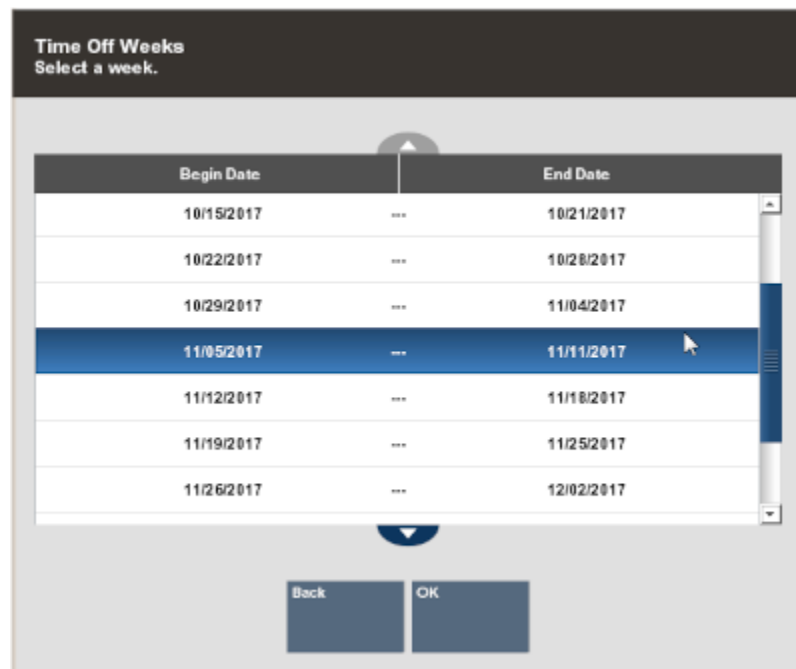
From the Back Office **Employee Scheduling Maintenance** menu, select the **Maintain Employee Time Off** option and press **Enter**.

Figure 5-24 Employee Scheduling Maintenance Menu



1. Xstore Classic prompts you to select a schedule week. Select the week for the time-off event and press **Enter** to continue.

Figure 5-25 Schedule Weeks List - Time Off

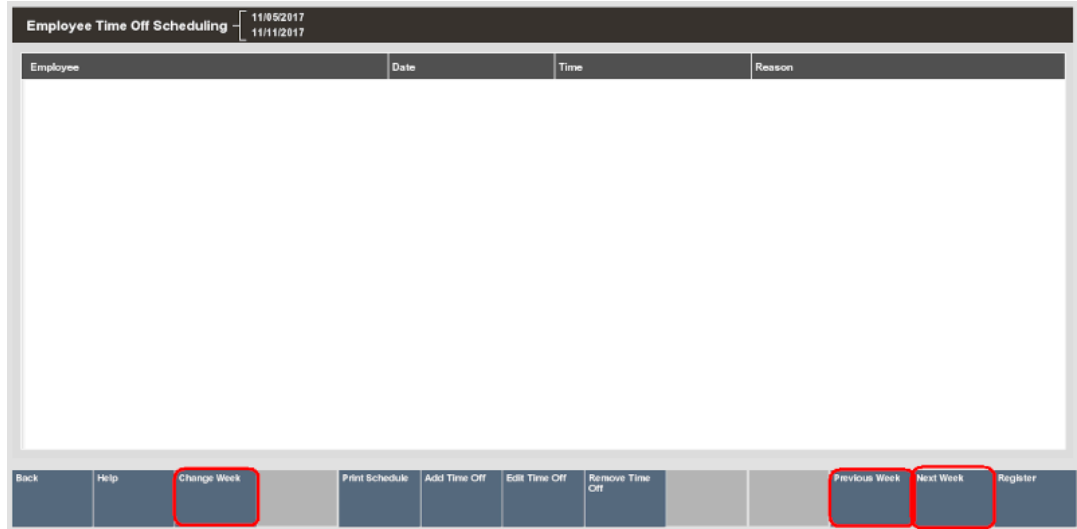


 Note:

The current week is selected by default.

2. Xstore Classic displays the **Employee Time Off Scheduling** screen showing any previously scheduled time-off events for this week. Select the **Add Time Off** option to create a new time-off event for an employee.

Figure 5-26 Employee Time Off Scheduling Screen



 Note:

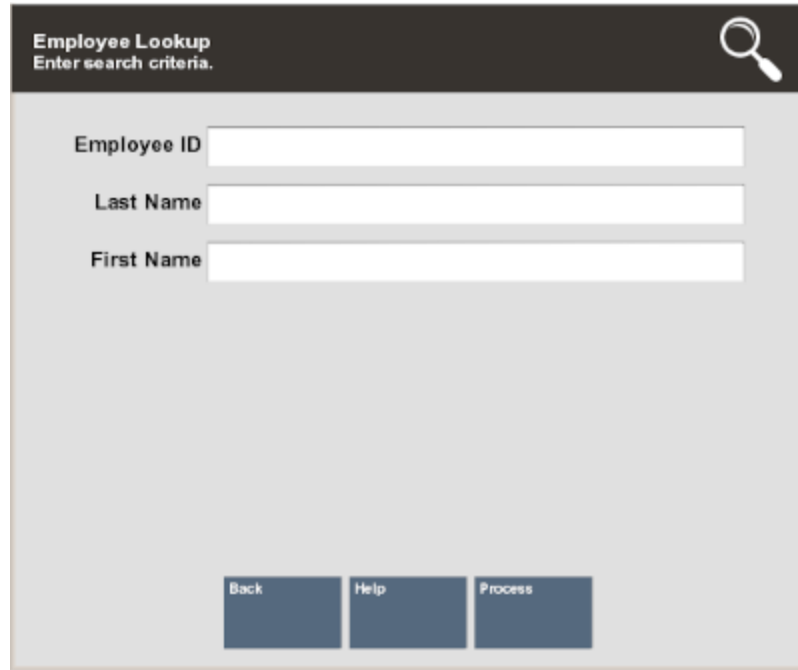
Select **Previous Week** to view time-off from the week before the week that is displayed.

Select the **Next Week** option to view time-off for the week after the week that is displayed.

To view any other time-off schedule, select the **Change Week** option to select a specific schedule date from the list of weeks.

3. Xstore Classic prompts for the employee's information. Enter the employee's information and select **Process** to continue.

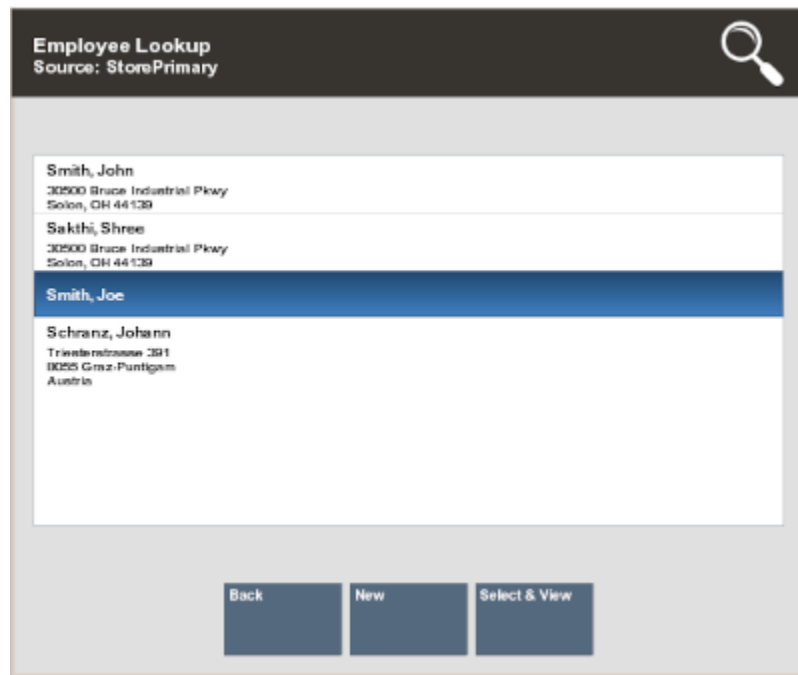
Figure 5-27 Employee Search Form



The screenshot shows the 'Employee Lookup' form. At the top, it says 'Employee Lookup' and 'Enter search criteria.' with a magnifying glass icon. Below this are three input fields: 'Employee ID', 'Last Name', and 'First Name'. At the bottom, there are three buttons: 'Back', 'Help', and 'Process'.

4. Xstore Classic displays a list of employees who match the search criteria. Select an employee from the list and choose **Select & Continue**.

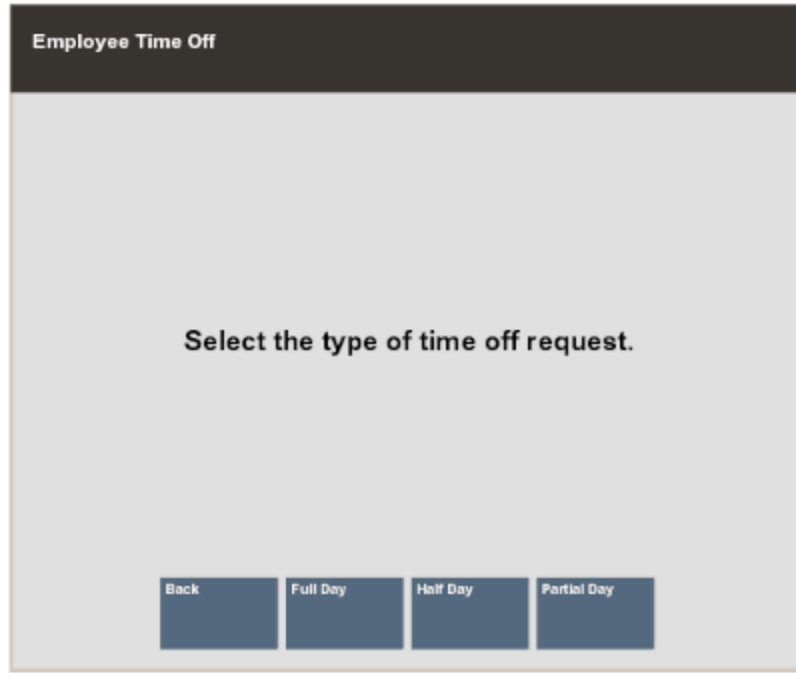
Figure 5-28 List of Matching Employees



The screenshot shows the 'Employee Lookup' screen with the source 'StorePrimary'. It displays a list of matching employees. The first three entries are: 'Smith, John' (30500 Bruce Industrial Pkwy, Solon, OH 44139), 'Sakthi, Shree' (30500 Bruce Industrial Pkwy, Solon, OH 44139), and 'Smith, Joe' (highlighted in blue). Below these is 'Schrantz, Johann' (Trindlersstrasse 291, 8055 Graz-Puntigam, Austria). At the bottom, there are three buttons: 'Back', 'New', and 'Select & View'.

5. After the employee has been selected, Xstore Classic prompts for the type of time-off event information. Select the time-off type to continue:

Figure 5-29 Time-off Event Type Prompt



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

Figure 5-30 Time Off Date Prompt

The screenshot shows a web interface titled "Scheduling Time Off" with a subtitle "Scheduling Time Off". Below the title, it says "Please enter the time off date." There is a label "Time Off Date:" followed by a text input field. At the bottom of the form, there are three buttons: "Back", "Help", and "Save Changes".

- **FULL DAY** - If you chose the full day option, Xstore Classic prompts for the number of days for this time-off event. Enter the number of full days the employee has requested off and select **Save Changes** to continue. Go to step 7.

Figure 5-31 Number of Days Prompt

The screenshot shows a web interface titled "Scheduling Time Off" with a subtitle "Scheduling Time Off". Below the title, it says "Enter the number of days off including the start date". There is a label "Number of Days:" followed by a text input field. At the bottom of the form, there are three buttons: "Back", "Help", and "Save Changes".

- **HALF DAY** - If you chose the half day option, Xstore Classic prompts for the part of day. Select whether the time off is morning (AM) or afternoon (PM). Go to step 7.

Figure 5-32 Half Day Time-Off Prompt



Employee Time Off

Which half day?

Back AM PM

 Note:

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

- **PARTIAL DAY** - If you chose the partial day option, Xstore Classic prompts for the start and end times. Enter the information as required and select **Save Changes**. Go to step 7.

Figure 5-33 Partial Time-Off Prompt

Scheduling Time Off
Scheduling Time Off

Please enter the start and end time for time off.

Time Off Start Time

Time Off End Time

Back Help Save Changes

7. Xstore Classic prompts for the time-off reason. Select a reason for the time-off event from the list and press **Enter** to continue.

Figure 5-34 List of Time-Off Reasons

Reason Code
Select a reason code from the list.

Reasons
Medical
Jury Duty
Personal Time Off

Back OK

Xstore Classic adds the employee's time-off event to the **Employee Time Off Scheduling** screen for the selected week.

Figure 5-35 Employee Time Off Scheduling Screen

Employee Time Off Scheduling			
Employee	Date	Time	Reason
Smith, Joe	11/8/17 - 11/9/17	10:00 AM - 3:00 PM	Medical

Back	Help	Change Week		Print Schedule	Add Time Off	Edit Time Off	Remove Time Off			Previous Week	Next Week	Register

 Note:

Time Off Exception

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

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

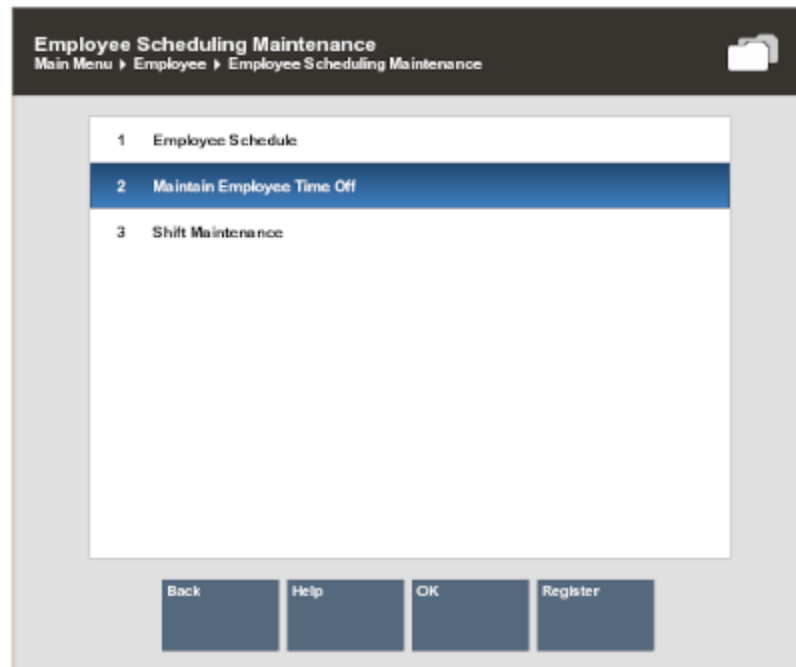
Time Off Exception
Sarah Brown has already been scheduled from Thursday, November 9, 2017 09:00:00 AM through Thursday, November 9, 2017 01:00:00 PM. Are you sure you want to continue? Back Add To Schedule

Removing an Employee Time-Off Period

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

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

Figure 5-36 Maintain Employee Time Off Menu Option



2. Xstore Classic prompts for a schedule week. Select the week for the time-off event and press **Enter** to continue.

Figure 5-37 Schedule Weeks List

Begin Date	End Date
10/15/2017	10/21/2017
10/22/2017	10/28/2017
10/29/2017	11/04/2017
11/05/2017	11/11/2017
11/12/2017	11/18/2017
11/19/2017	11/25/2017
11/26/2017	12/02/2017

Note:

The current week is selected by default.

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

Figure 5-38 Employee Time Off Scheduling Screen - Remove Time Off Option

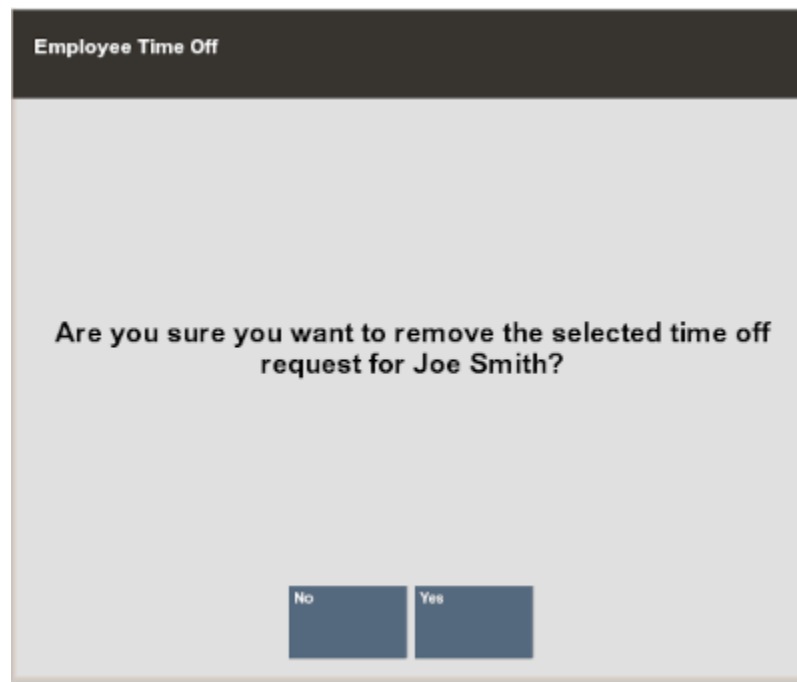
Employee	Date	Time	Reason
Smith, Joe	11/8/17 - 11/9/17	10:00 AM - 3:00 PM	Medical

 Note:

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

3. Xstore Classic prompts you to confirm the time-off event to be removed from the schedule. Press **Yes** to remove the selected employee time-off event. Xstore Classic removes the selected time-off event from the schedule.

Figure 5-39 Confirm Employee Time Off Prompt

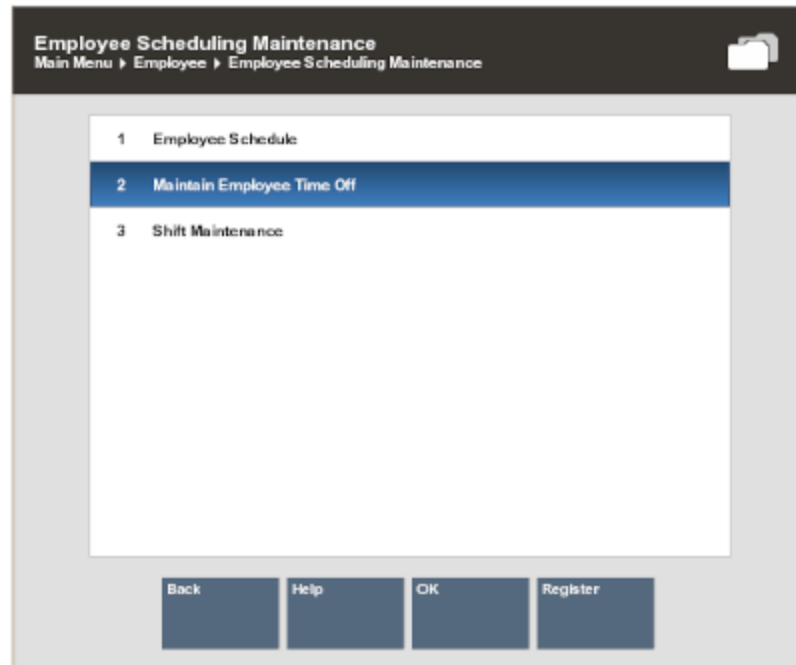


Editing an Employee Time-Off Period

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

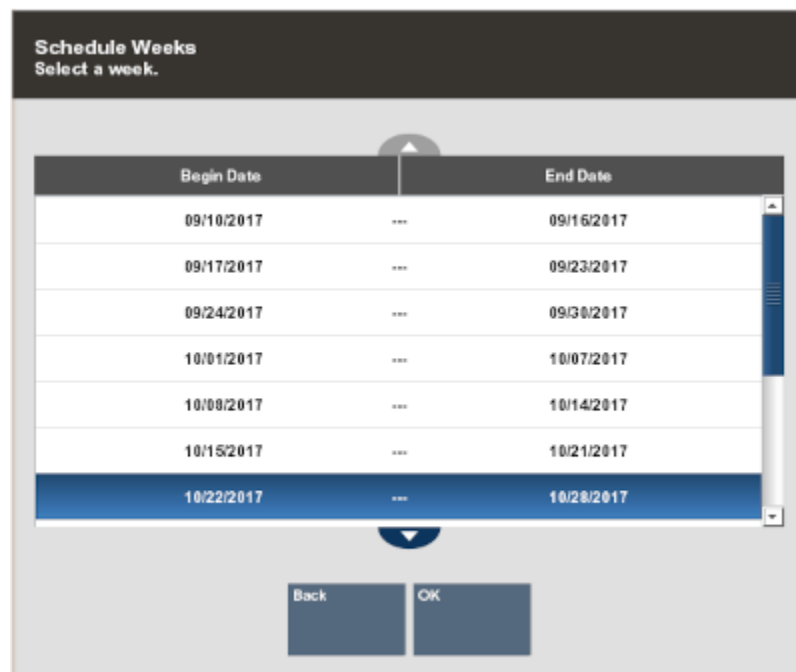
1. From the Back Office **Employee Scheduling Maintenance** menu, select the **Maintain Employee Time Off** menu option and press **Enter**.

Figure 5-40 Maintain Employee Time Off



2. Xstore Classic prompts for a schedule week. Select the week for the time-off event and press **Enter** to continue.

Figure 5-41 Schedule Weeks List

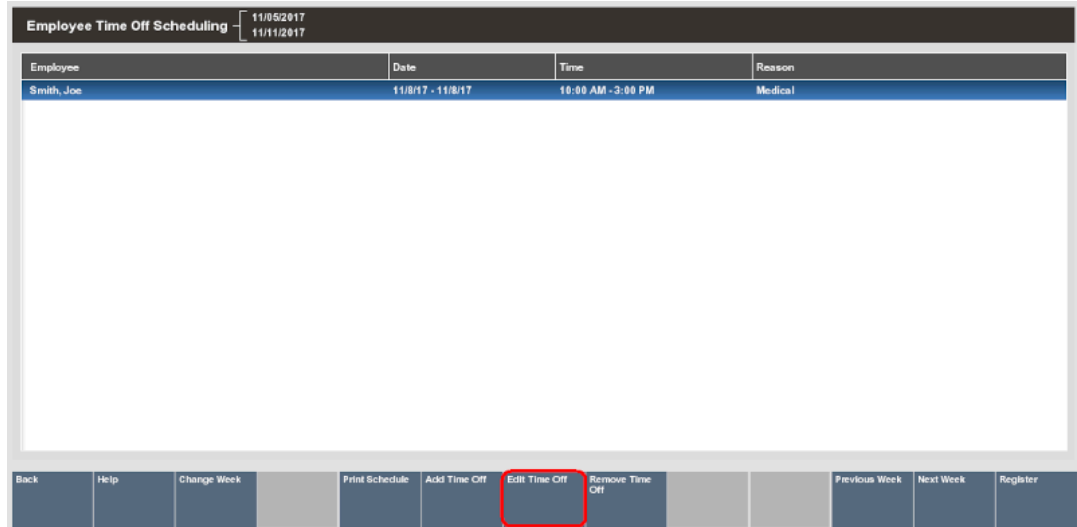


 Note:

The current week is selected by default.

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

Figure 5-42 Employee Time Off Scheduling Screen - Edit Time Off



Employee	Date	Time	Reason
Smith, Joe	11/8/17 - 11/9/17	10:00 AM - 3:00 PM	Medical

Back Help Change Week Print Schedule Add Time Off **Edit Time Off** Remove Time Off Previous Week Next Week Register

 Note:

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

4. Xstore Classic prompts for the type of time off (full day, half day or partial day), the time off date, and other information as required. Refer to [Adding Time-Off Periods](#) for detailed information about the time-off prompts.

Enter/select the time-off information as required. Xstore Classic replaces the employee's original time-off event on the schedule with the updated request.

Printing the Time-Off Schedule

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

Figure 5-43 Employee Time Off Summary Report

ORACLE®

Time Off Summary

Store: 101 - Corner Market

Date Range: 01/01/2017 - 11/28/2017

Name	ID	Date	Time	Reason
Dos Santos, Maria	321	11/28/2017	Half Day	Medical
Pereira, Alfonso	320	11/28/2017	Half Day	Medical
Weber, Stephan	220	11/28/2017	Partial Day	Medical

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

Figure 5-44 Employee Schedule Report Menu Option

Employee Schedule Reports
Main Menu ▶ Reporting ▶ Employee Reports ▶ Employee Schedule Reports

- 1 Employee Performance
- 2 Employee Schedule Detail Report
- 3 Employee Time Off Summary Report**

Time Off Summary

Date Range: 10/17/2017

10/17/2017

Specific Date

Show Criteria

- Specific Date
- Today (10/17/2017 - 10/17/2017)
- Current Week (10/15/2017 - 10/21/2017)
- Current Month (10/01/2017 - 10/31/2017)
- Current Quarter (10/01/2017 - 12/31/2017)
- Current Year (01/01/2017 - 12/31/2017)
- Yesterday (10/16/2017 - 10/16/2017)
- Previous Week (10/08/2017 - 10/14/2017)

Back Help Run Report Save Print



Note:

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

Maintaining Employee Shifts

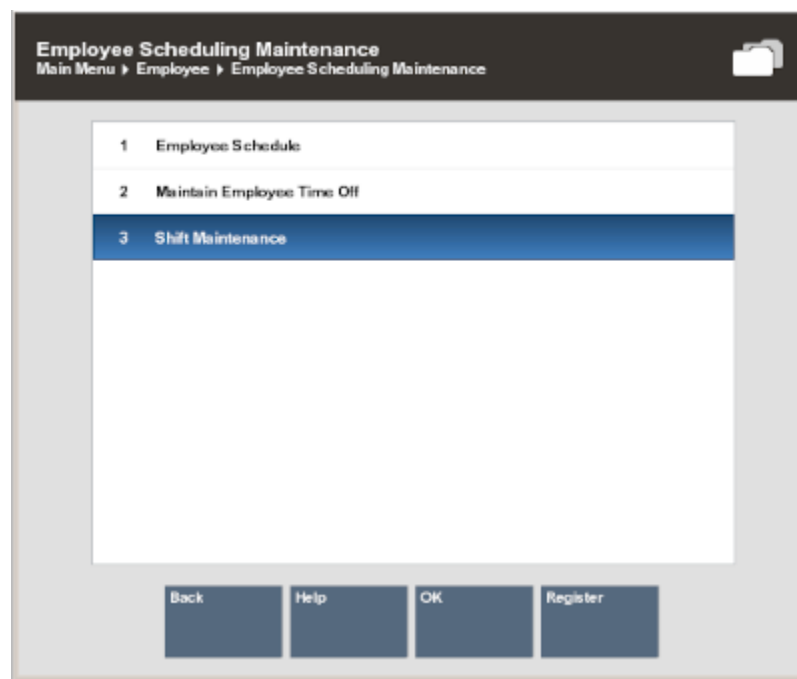
To make employee scheduling easier, you can create and edit pre-defined shifts that may be applied during the employee scheduling function.

Creating a New Shift

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

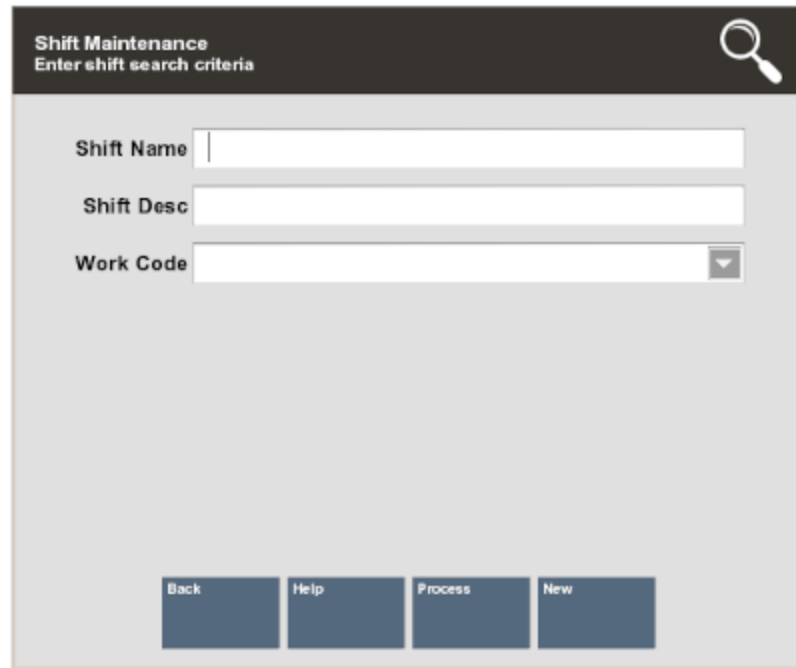
1. From the Back Office **Employee Scheduling Maintenance** menu, select the **Shift Maintenance** menu option and press **Enter**.

Figure 5-45 Shift Maintenance Menu Option



2. Xstore Classic prompts for the shift information. Select the **New** option to create a new shift type.

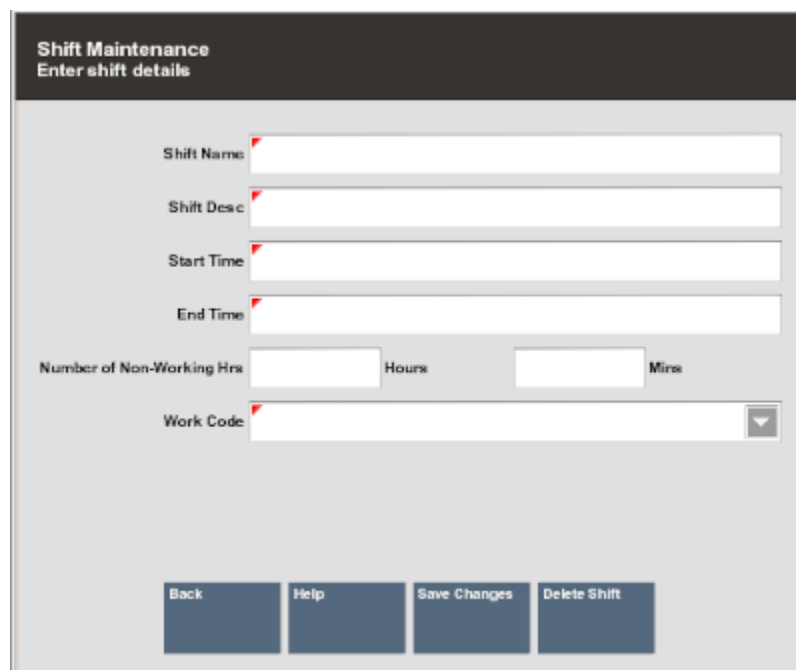
Figure 5-46 Shift Criteria Prompt



The form is titled "Shift Maintenance" with the subtitle "Enter shift search criteria". It features a search icon in the top right corner. The form contains three input fields: "Shift Name" (a text box), "Shift Desc" (a text box), and "Work Code" (a dropdown menu). At the bottom, there are four buttons: "Back", "Help", "Process", and "New".

3. Xstore Classic prompts for the shift detail information. Enter the information for the new shift:

Figure 5-47 Shift Detail Prompt



The form is titled "Shift Maintenance" with the subtitle "Enter shift details". It contains several input fields: "Shift Name" (text box), "Shift Desc" (text box), "Start Time" (text box), "End Time" (text box), "Number of Non-Working Hrs" (text box) followed by "Hours" and "Mins" (text boxes), and "Work Code" (dropdown menu). At the bottom, there are four buttons: "Back", "Help", "Save Changes", and "Delete Shift".

- **Shift Name** - Enter a name for this shift. This is the label that is shown in the list of pre-defined shifts.

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

 Note:

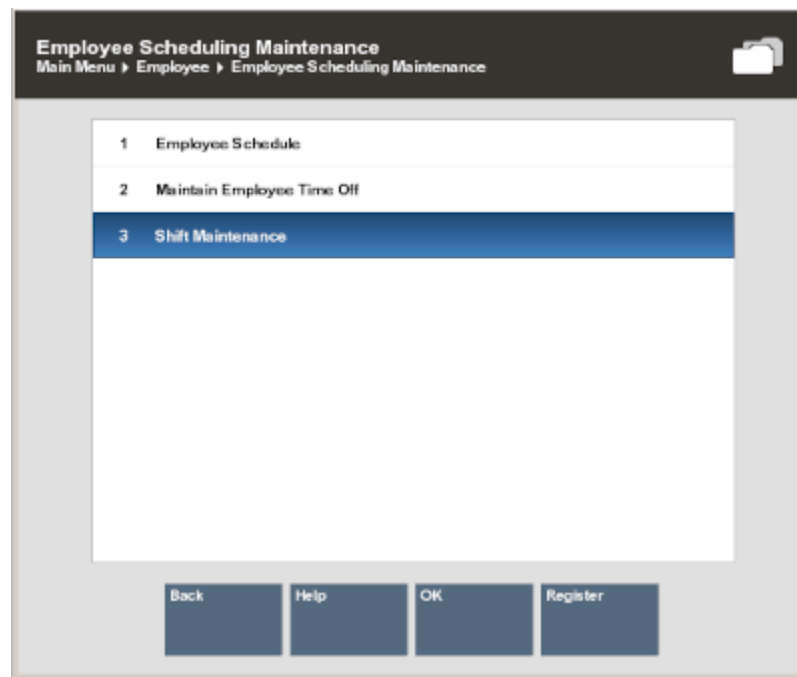
During employee scheduling, this new shift is available as an option in the pre-defined list of shifts. See [Adding a Pre-Defined Shift](#) for detailed information about using the **Add Shift From List** schedule option.

Editing an Existing Shift

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

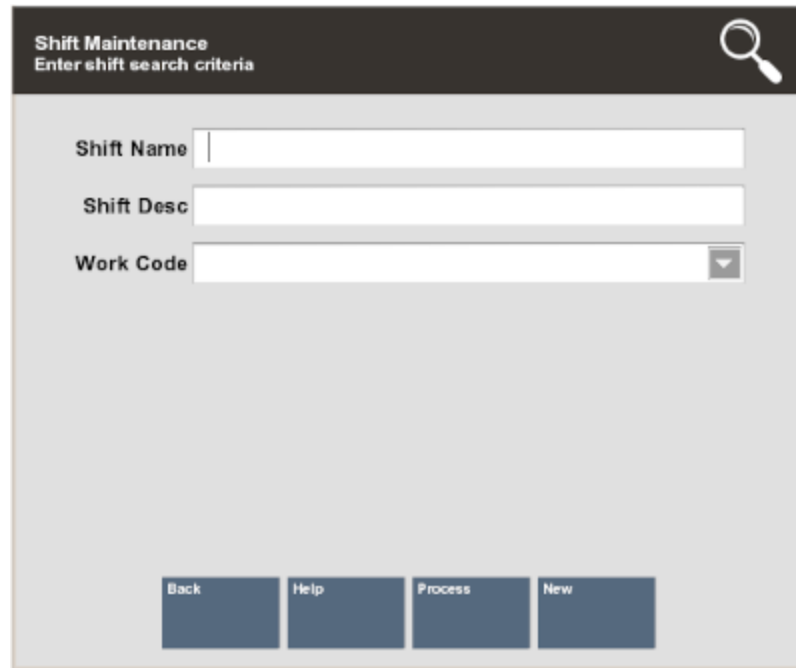
1. From the Back Office **Employee Scheduling Maintenance** menu, select the **Shift Maintenance** option and press **Enter**.

Figure 5-48 Shift Maintenance Option



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

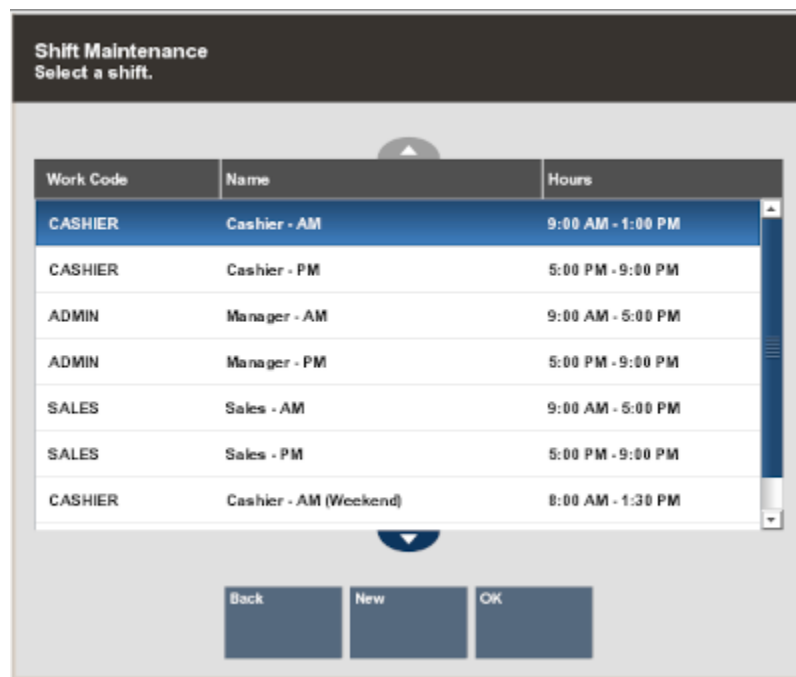
Figure 5-49 Shift Maintenance Form



The Shift Maintenance Form is a web-based interface for managing employee shifts. It features a dark header bar with the title "Shift Maintenance" and the instruction "Enter shift search criteria". A magnifying glass icon is located in the top right corner. Below the header, there are three input fields: "Shift Name", "Shift Desc", and "Work Code". The "Work Code" field is a dropdown menu. At the bottom of the form, there are four buttons: "Back", "Help", "Process", and "New".

If more than one pre-defined shift matches the search criteria you entered, Xstore Classic displays a list of shifts. Select the shift you want to change from the list and press **Enter** to continue.

Figure 5-50 Shift List



The Shift List is a web-based interface for managing employee shifts. It features a dark header bar with the title "Shift Maintenance" and the instruction "Select a shift.". Below the header, there is a table with three columns: "Work Code", "Name", and "Hours". The table contains eight rows of shift information. At the bottom of the table, there are three buttons: "Back", "New", and "OK".

Work Code	Name	Hours
CASHIER	Cashier - AM	9:00 AM - 1:00 PM
CASHIER	Cashier - PM	5:00 PM - 9:00 PM
ADMIN	Manager - AM	9:00 AM - 5:00 PM
ADMIN	Manager - PM	5:00 PM - 9:00 PM
SALES	Sales - AM	9:00 AM - 5:00 PM
SALES	Sales - PM	5:00 PM - 9:00 PM
CASHIER	Cashier - AM (Weekend)	8:00 AM - 1:30 PM

3. Xstore Classic displays the shift's detail information.

Figure 5-51 Shift List Detail Example

The screenshot shows a web form titled "Shift Maintenance" with the subtitle "Enter shift details". The form contains the following fields and controls:

- Shift Name:** A text input field containing "CASHIER_AM".
- Shift Desc:** A text input field containing "Cashier - AM".
- Start Time:** A text input field containing "09:00 AM".
- End Time:** A text input field containing "01:00 PM".
- Number of Non-Working Hrs:** Two input fields for "Hours" and "Mins", both containing "0".
- Work Code:** A dropdown menu with "General Sales" selected.
- Buttons:** Four buttons at the bottom: "Back", "Help", "Save Changes", and "Delete Shift".

Note:

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

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

Schedule Reports

Note:

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

Schedule reports are available from the Schedule Reports menu.

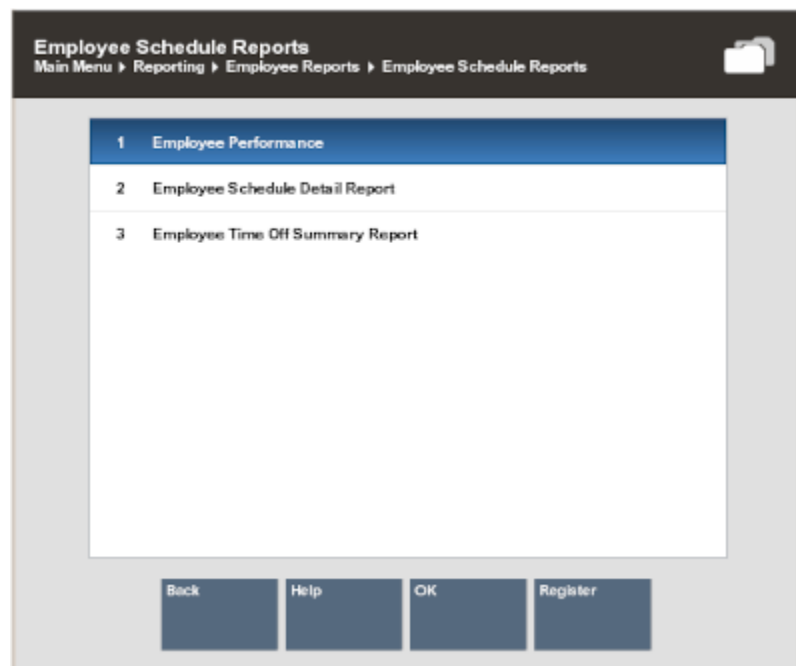
1. At the Back Office Main menu, select **Reporting** and press **Enter**.
2. At the Reporting menu, select **Employee Reports** and press **Enter**.
3. At the Employee Reports menu, select **Employee Schedule Reports**.

Figure 5-52 Employee Reports Menu



4. Select a report from the Schedule Reports list.

Figure 5-53 Schedule Reports List



Employee Time Off Summary Report

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

Figure 5-54 Time Off Summary Report

ORACLE® Time Off Summary					Store: 101 - Corner Market
Date Range: 01/01/2017 - 11/28/2017					
Name	ID	Date	Time	Reason	
Dos Santos, Maria	321	11/28/2017	Half Day	Medical	
Pereira, Alfonso	320	11/28/2017	Half Day	Medical	
Weber, Stephan	220	11/28/2017	Partial Day	Medical	

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

Employee Performance Report Overview

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

This report includes the following employee information:

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

Figure 5-55 Employee Performance Report

ORACLE®

Employee Performance

Store: 101 - Corner Market

Date Range: 11/28/2017 - 11/28/2017

Work Code: All

Employee: 100

Employee	Hours	Difference	Number of	Average Sale	Net Sales	
ID	Name	Scheduled	Worked	Sales	Per Trans	Per Hour
No data to display						

Schedule Detail Report Overview

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

- Date
- Employee name
- Work Code
- The individual start and end times and hours scheduled for sales and non-sales (work code)

- Total hours for each employee per day
- A report total for the schedule week is shown on the last page of the report

Figure 5-56 Employee Schedule Detail Report

ORACLE® Employee Schedule Detail						
Date Range: Current Quarter (10/01/2017 - 12/31/2017)						Store: 401 - Store_401
						Employee Range: All
Date	ID	Name	Work Code	Start Time	End Time	Hours
10/24/2017	300	Alves, Tomas	General Sales	09:00:00 AM	01:00:00 PM	4.00
10/25/2017	300	Alves, Tomas	General Sales	09:00:00 AM	01:00:00 PM	4.00
10/26/2017	300	Alves, Tomas	General Sales	09:00:00 AM	01:00:00 PM	4.00
10/27/2017	300	Alves, Tomas	General Sales	09:00:00 AM	01:00:00 PM	4.00
11/06/2017	300	Alves, Tomas	General Sales	09:00:00 AM	01:00:00 PM	4.00
	260	Bissette, Camille	General Sales	05:00:00 PM	09:00:00 PM	4.00

6

Message Maintenance and Task Management

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

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

The following topics are covered:

- [Creating and Maintaining Messages](#)
 - [Creating a New Message](#)
 - [Editing a Message](#)
 - [Deleting a Message](#)
- [Reviewing Task Management Information](#)
 - [Viewing Task Progress](#)
 - [Viewing Black Book Customers](#)

Creating and Maintaining Messages

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

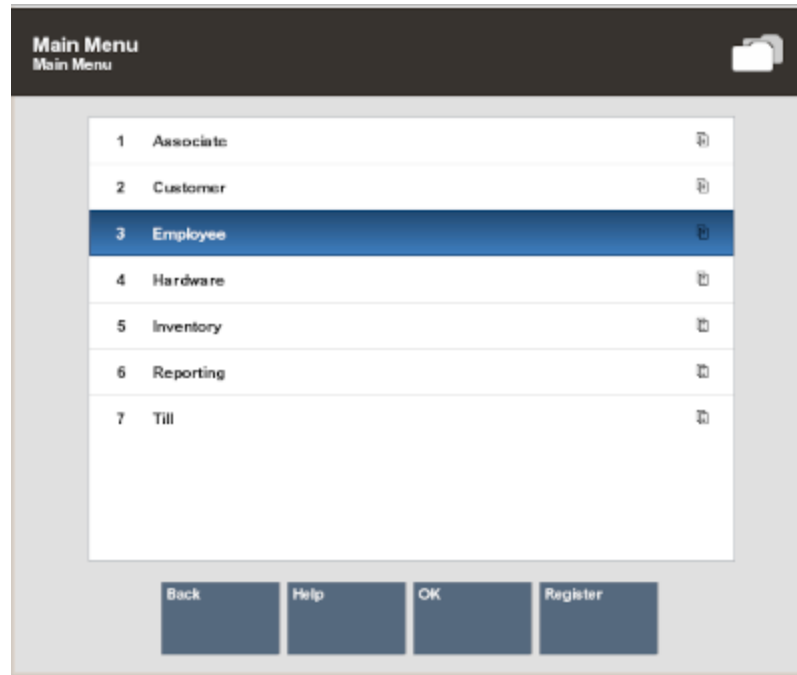
Messages can be store-based or register-based and provide the ability for both the corporate office and the store managers to share information with all employees.

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

Perform the following steps to create and maintain messages:

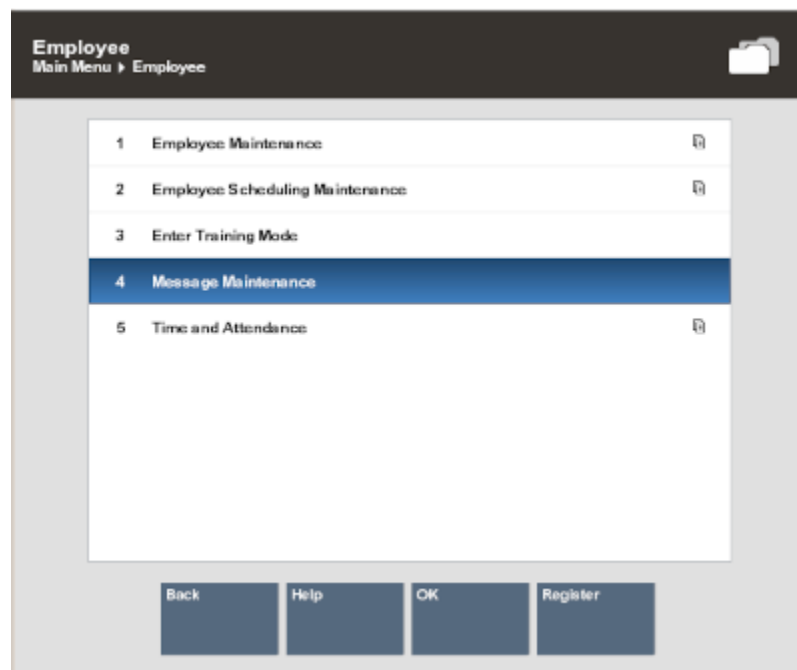
1. At the Back Office Main Menu, select the **Employee** menu option and press **Enter**.

Figure 6-1 Employee Option - Main Menu

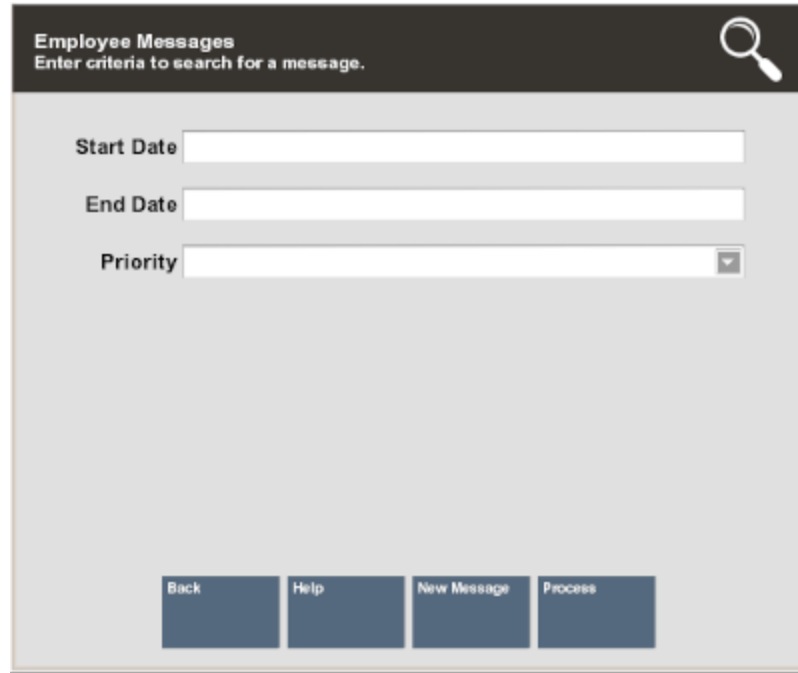


- At the Employee menu, select the **Message Maintenance** menu option and press **Enter**.

Figure 6-2 Employee Menu



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

Figure 6-3 Employee Messages Search FormThe image shows a web form titled "Employee Messages" with the subtitle "Enter criteria to search for a message." and a magnifying glass icon. The form contains three input fields: "Start Date", "End Date", and "Priority" (a dropdown menu). At the bottom, there are four buttons: "Back", "Help", "New Message", and "Process".

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

Search fields include:

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

<OR>

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

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

Creating a New Message

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

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

Note:

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

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

Figure 6-4 Employee Messages - New Message Form

Employee Messages
Message Maintenance

Store Created: **Yes**

Start Date: 10/31/2017

End Date: 11/30/2017

Priority: Medium

Register Specific: No

Register #:

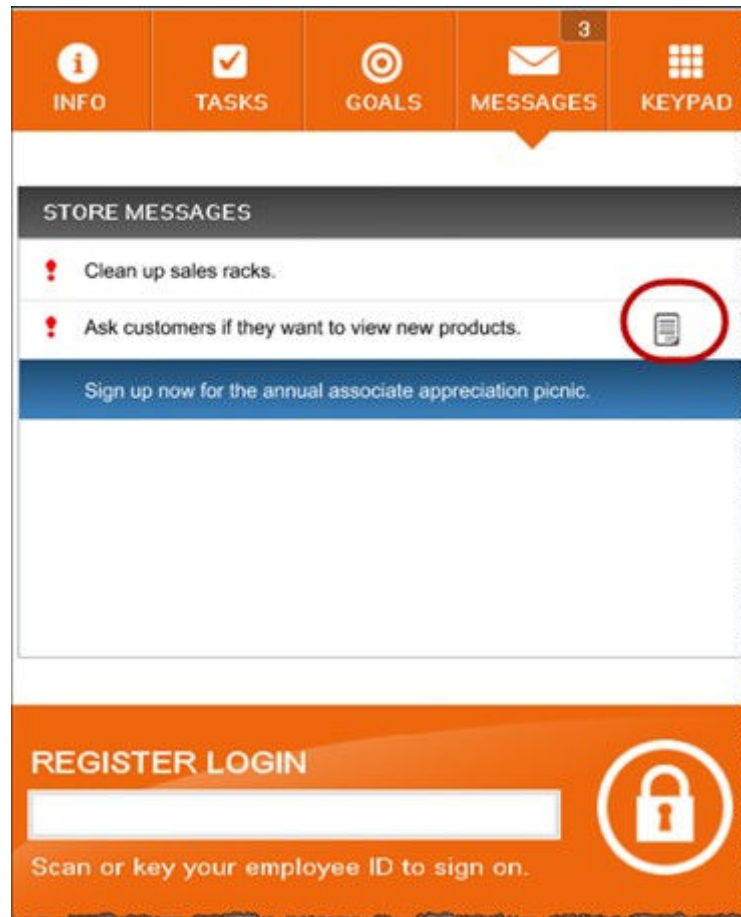
Message URL:

Message: Sign up now for the annual associate appreciation picnic.

Back Help Save Changes

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

Figure 6-5 Register Store Message with URL attachment



Editing a Message

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

Note:

To find and display the list of store-created messages, refer to step 3

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

Figure 6-6 Employee Messages List

Start Date	Message
10/17/2017	Clean up sales racks.
11/05/2017	Ask customers if they want to view new products.
10/31/2017	Sign up now for the annual associate appreciation picnic.

Back New Message OK

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

Figure 6-7 Employee Messages Menu Option

Store Created: Yes

Start Date 10/31/2017

End Date 11/30/2017

Priority Medium

Register Specific No

Register #

Message URL:

Message Sign up now for the annual associate appreciation picnic.

Back Help Edit Message Delete Message New Message

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

Figure 6-8 Employee Messages Maintenance Form - Active View

Employee Messages
Message Maintenance

Store Created: Yes

Start Date: 10/31/2017

End Date: 11/30/2017

Priority: Medium

Register Specific: No

Register #:

Message URL:

Message: Sign up now for the annual associate appreciation picnic.

Back Help Save Changes

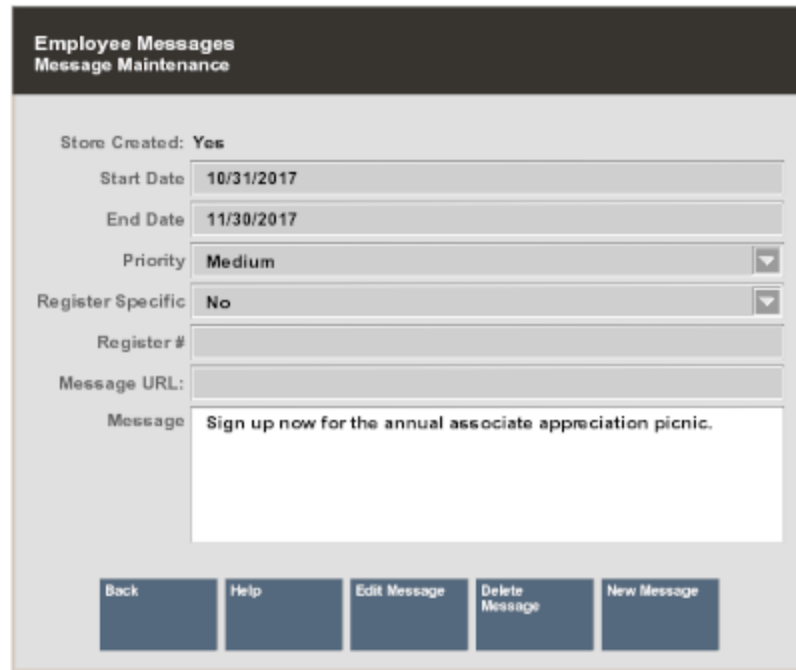
- **Start Date:** The date the message is to be displayed.
 - **End Date:** The date the message is to be removed from the message list.
 - **Priority:** The message importance: High, Medium, Low.
 - **Register Specific/Register #:**
 - **Register Specific:** **Yes** or **No** - If no, the message is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

Deleting a Message

Only messages created at the store level can be deleted.

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

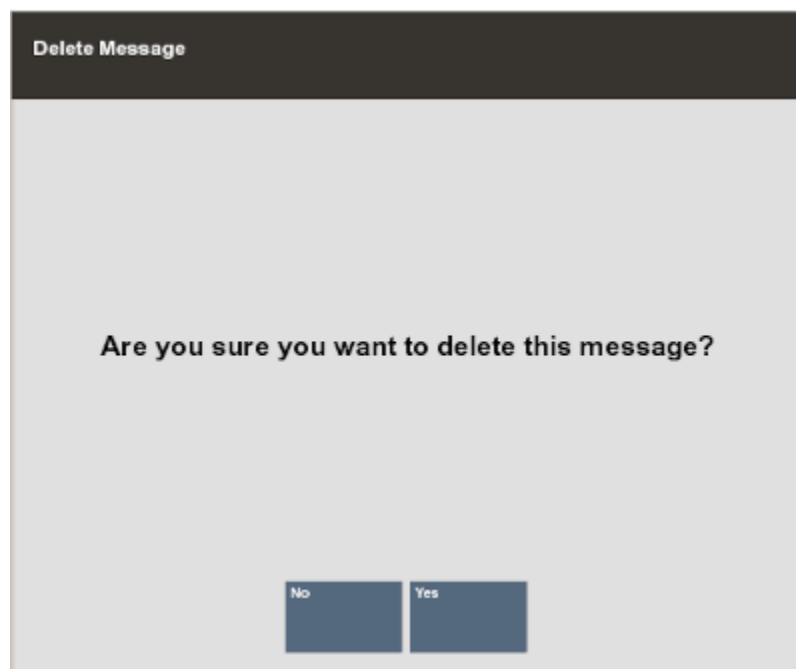
Figure 6-9 Employee Messages Maintenance Form - Delete Message



The screenshot shows the 'Employee Messages Maintenance' form. At the top, it says 'Employee Messages Message Maintenance'. Below this, there are several fields: 'Store Created: Yes', 'Start Date' (10/31/2017), 'End Date' (11/30/2017), 'Priority' (Medium), 'Register Specific' (No), 'Register #', 'Message URL:', and 'Message' (Sign up now for the annual associate appreciation picnic.). At the bottom, there are five buttons: 'Back', 'Help', 'Edit Message', 'Delete Message', and 'New Message'.

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

Figure 6-10 Delete Message Confirmation Prompt



The screenshot shows a confirmation prompt titled 'Delete Message'. The main text asks 'Are you sure you want to delete this message?'. At the bottom, there are two buttons: 'No' and 'Yes'.

Reviewing Task Management Information

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

Viewing Task Progress

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

Figure 6-11 Filter Bar

Associate All		Activity All		Status All	Start Date 10/17/2017	End Date 12/16/2017
P	Date	Start Time	Duration	Activity	Status	Associate
	11/23/2017	6:00 PM	6 hours	Inventory	TODO	Open
	Broom in the hall closet					
	11/16/2017	11:00 AM	1 hour	Clean Back Room	Appointment	Closed
	11/16/2017	11:00 AM	6 hours	PreSale Setup	TODO	In Progress



Note:

You can also use the following menu options to filter:

- Associate List Filter
- Activity List Filter
- Status List Filter

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

Figure 6-12 Associate List Filtering

Filter by Associate
Select an associate to filter the results.

Name	Employee ID
All	
Tiffanie Thompson	0330171
Marsha Gorski	0570001000002
Damon Wrightson	0570001000003
Olga Vyce	0570001000004
Eddie Money	0570001000005

Back OK

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

Figure 6-13 Activity Filtering

Filter by Activity
Select an activity to filter the results.

Activity
All
ADMIN
APPOINTMENT
EVENT
TODO

Back OK

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

Figure 6-14 Status Filtering

The screenshot shows a dialog box titled "Filter by Status" with the instruction "Select a status to filter the results." Below the title bar is a list of activity statuses: "All", "Open", "In Progress", "Cancelled", and "Closed". The "All" status is currently selected and highlighted in blue. At the bottom of the dialog are two buttons: "Back" and "OK".

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

Figure 6-15 Date Filtering

The screenshot shows a dialog box titled "Task Details" with the instruction "Enter the task information." It contains two input fields: "Start Date" with the value "10/17/2017" and "End Date" with the value "12/16/2017". At the bottom of the dialog are three buttons: "Back", "Help", and "Save".

Xstore Classic displays tasks that meet your filter values.

Figure 6-16 Filtering Results

Associate All		Activity All		Status All	Start Date 10/17/2017	End Date 12/16/2017
P	Date	Start Time	Duration	Activity	Status	Associate
	11/16/2017	11:00 AM	1 hour Clean Back Room	Appointment	Open	
	11/16/2017	11:30 AM	6 hours PreSale Setup	TODD	Open	
Back	Help	Add Task	Add Note	View Notes	Edit Task	Begin Task
						Reopen Task
						Complete Task
						Cancel Task
						View Customer
						More...
						Register

Table 6-1 Task List Fields

Field	Description
Priority (P)	The Importance of the task (High (indicated by an exclamation mark), Medium (none), or Low (indicated by a down arrow)).
Date	The date the task should be started.
Start Time	The time the task should begin.
Duration	The length of time for the task.
Activity	Type of task.
Description	Detailed description the task.
Customer	The customer assigned to the task. Note: Select View Customer to view the Tasks tab of the Customer Maintenance screen which displays all tasks assigned to the customer. See description in the <i>Oracle Retail Xstore Point of Service Classic User Guide</i> for more information.
Status	Indicates the progress of the task: Open - The appointment is open, but not started. In Progress - The appointment has been started, but not completed. Cancelled - The appointment has been cancelled and cannot be reopened or edited. Closed - The appointment has been completed and cannot be reopened or edited.
Associate	The employee or employee group responsible for completing the task.



Note:

The *Oracle Retail Xstore Point of Service Classic User Guide* for editing tasks and adding comments.

Viewing Black Book Customers

Oracle Retail Customer Engagement Cloud Services only

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

Figure 6-17 Associate List Filtering

Filter by Associate
Select an associate to filter the results.

Name	Employee ID
James Jones	103
Jeff Black	104
Jean Gagnon	200
Marie Dubois	201
Simon Johnson	210
Sarah Brown	211
Stephen Weber	220

Back OK

Xstore Classic displays the primary customers assigned to the associate you selected.

Figure 6-18 Black Book Screen

My Customers		Associate Gayle Graham
CUSTOMER NAME	EMAIL	PHONE
Levi Aaron	leviaaron@gmail.com	954-392-3344
Lise Aaron	liseraaron@yahoo.com	386-627-6129
Sabrina Aaron	sabrinaaaron@yahoo.com	918-784-7410
Steve Aaron	stevesaaron@yahoo.com	712-346-8385
Natalie Aaston	geraldcliley@gmail.com	441-231-5465
Peter Abate	peterabate@gmail.com	360-793-0593
Peter Abate	dawnrory@gmail.com	408-526-7159
Pamela Brown	pamelabrown@gmail.com	521-225-2222 x.13212
Brenda Zanghi	michaelpierce@yahoo.com	816-903-7827

Table 6-2 Black Book Fields

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

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

**Note:**

Refer to step 3 (Purchase History Tab) as well as the *Oracle Retail Xstore Point of Service Classic User Guide* Customer Maintenance chapter.

Payroll and Timecard Maintenance

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

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



Note:

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

The following topics are covered:

- [Accessing Back Office Payroll & Timecard Maintenance Functions](#)
- [Payroll and Timecard Maintenance](#)
 - [Payroll Maintenance Tab](#)
 - [Payroll Comments Tab](#)
 - [Timecard Maintenance Tab](#)
 - [Timecard Comment Tab](#)
- [Reports](#)
 - [Posted Timecard Report](#)
 - [Open Timecard Report](#)
 - [Payroll Summary Report](#)
 - [Payroll Detail By Employee Report](#)

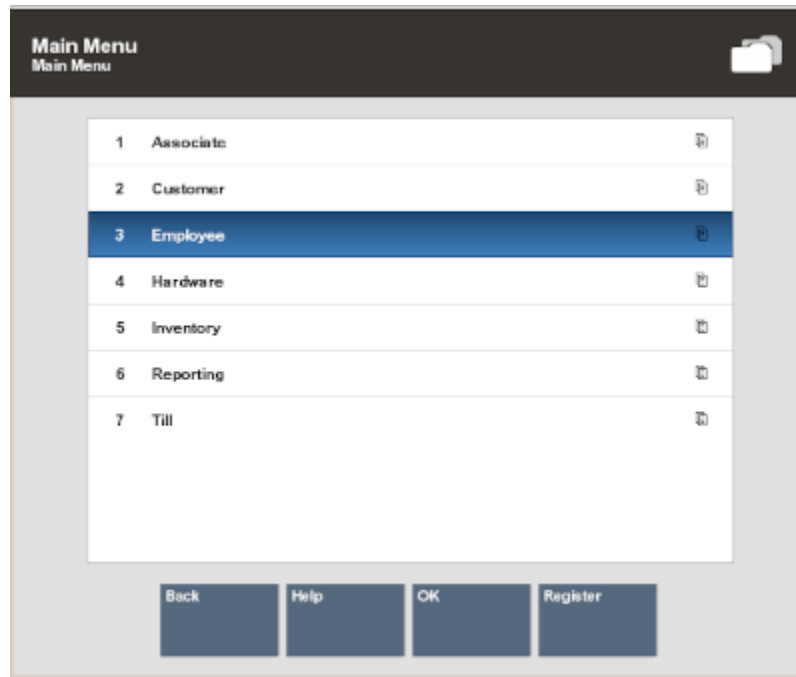
Accessing Back Office Payroll & Timecard Maintenance Functions

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

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

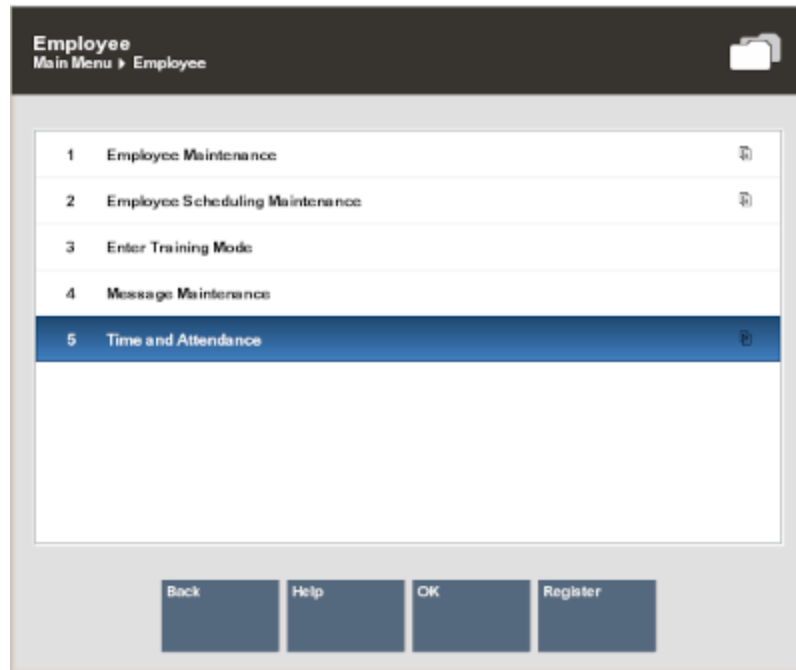
1. Select the Back Office option.
2. After logging in to the Back Office (see [Accessing the Back Office](#)), select the **Employee** option from the Main Menu.

Figure 7-1 Employee Option



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

Figure 7-2 Time and Attendance Option

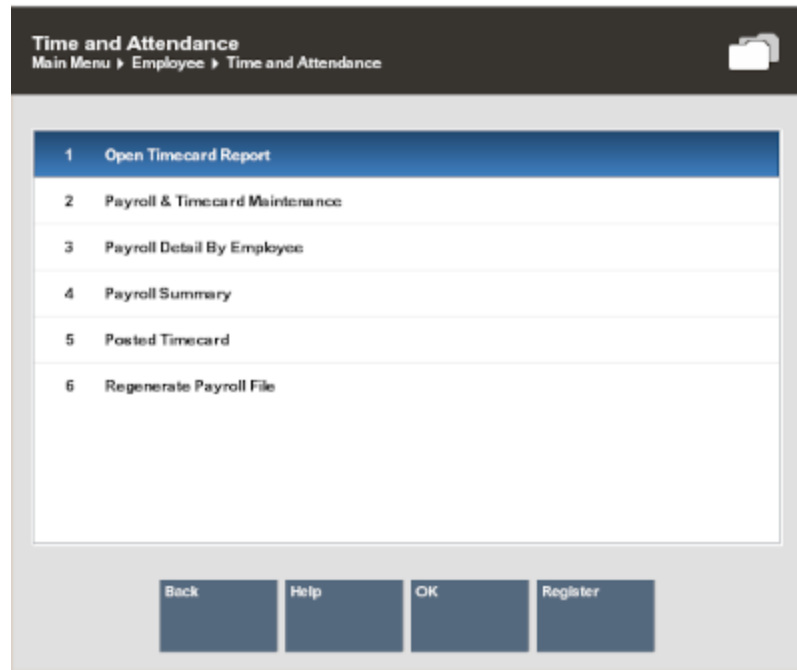


 Note:

Because each Xstore Classic menu is configurable, the button functions and the menu options on your system may appear in a different order or have different text than the examples shown in this manual.

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

Figure 7-3 Time and Attendance Menu Options



The following options are available:

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

Payroll and Timecard Maintenance

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

Note:

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

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

Figure 7-4 Payroll Week List

Begin Date		End Date
11/26/2017	—	12/02/2017
11/19/2017	—	11/25/2017
11/12/2017	—	11/18/2017
11/05/2017	—	11/11/2017
10/28/2017	—	11/04/2017
10/22/2017	—	10/28/2017

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

Figure 7-5 Employee Lookup Form

Employee ID

Last Name

First Name

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

Figure 7-6 Employee Results List

The screenshot shows a mobile application interface titled "Employee List" with the instruction "Select an employee." Below the title is a table with three columns: "Employee ID", "Employee Name", and "Department". The table contains six rows of data. The first row is highlighted in blue. Below the table are three buttons: "Back", "Sort List", and "OK".

Employee ID	Employee Name	Department
398	Alves, Tomas	
269	Bissette, Camille	
164	Black, Jeff	
211	Brown, Sarah	
279	Chen, Hai	
321	Dos Santos, Maria	

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

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

Payroll Maintenance Tab

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

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

Figure 7-7 Payroll Maintenance Screen

Payroll Maintenance									
Store: 401 - Store_401		Payroll Start Date: 10/22/17		Payroll Reviewed Date: 10/17/17		Payroll End Date: 10/26/17		Payroll Post Date: 10/25/17	
Payroll Maintenance		Timecard Maintenance		Payroll Comment		Timecard Comment			
Employee ID: 100		Employee Name: Smith, John				Department:			
	Sun 10/22/17	Mon 10/23/17	Tue 10/24/17	Wed 10/25/17	Thu 10/26/17	Fri 10/27/17	Sat 10/28/17	Total Hour	
Hours Worked	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Overtime Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Double Overtime Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Vacation Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Sick Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Personal Hours	10.00	0.00	0.00	0.00	0.00	0.00	0.00	10.00	
Other Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Holiday Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Bereavement	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Total	10	0	0	0	0	0	0	10	

Back	Help	Employee List	Edit Non-Working	Review Payroll	Previous Employee	Next Employee	Post Employee	Post Payroll	Previous Tab	Next Tab	Register

The **Payroll Maintenance** tab shows the following information:

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

**Note:**

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

The following options are available from the **Payroll Maintenance** screen:

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

The following section covers these topics:

- [Editing a Payroll Record](#)
- [Reviewing a Payroll Record](#)
- [Posting the Employee's Payroll Record](#)
- [Posting all Employee Payroll Records at One Time](#)
- [Viewing and Editing Posted Payroll Records](#)
- [Payroll Posting Day](#)

Editing a Payroll Record

**Note:**

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

1. To make a change to a non-working-hour payroll record select the Edit Non Working option from the Payroll Maintenance screen ([Figure 7-7](#)).

2. Select a non-working hour payroll record and make the change by typing the number of hours in the selected field:

Figure 7-8 Payroll Maintenance - Edit Non Working Hours

	Sun 10/22/17	10
Hours Worked	0.00	
Overtime Hours	0.00	
Double Overtime	0.00	
Vacation Hours	0.00	
Sick Hours	0.00	
Personal Hours	0.00	
Other Hours	0.00	
Holiday Hours	0.00	

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

Reviewing a Payroll Record

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

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

Xstore Classic marks the record as reviewed. This information is displayed in the information panel at the top of the **Payroll Maintenance** screen as shown below.

Figure 7-9 Payroll Reviewed Timestamp

The screenshot shows the 'Payroll Maintenance' screen with a header bar containing the following information: 'Store: 401 - Store_401', 'Payroll Start Date: 10/22/17', 'Payroll End Date: 10/28/17', and 'Payroll Reviewed Date: 10/17/17'. The 'Payroll Reviewed Date' is highlighted with a red box. Below the header bar are four tabs: 'Payroll Maintenance', 'Timecard Maintenance', 'Payroll Comment', and 'Timecard Comment'.

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

Posting the Employee's Payroll Record

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



Note:

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

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

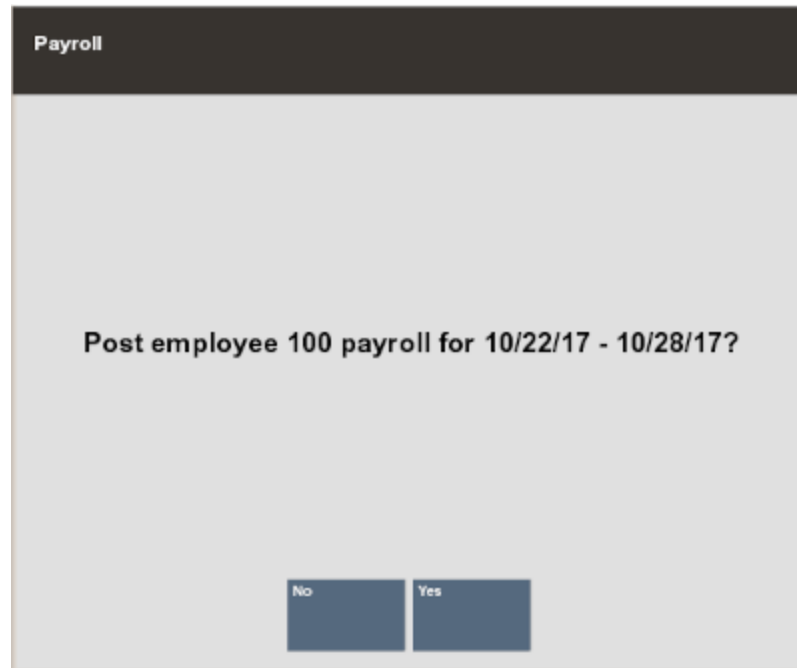


Note:

If you have not marked this employee payroll record as reviewed before choosing to post the record, Xstore Classic displays a message asking if you want to post the record anyway.

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

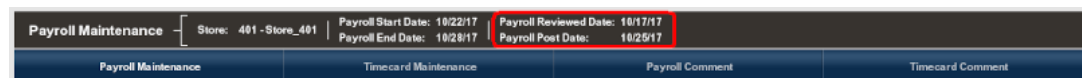
Figure 7-10 Post Employee Payroll Record Confirmation Prompt



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

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

Figure 7-11 Payroll Posted Timestamp



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

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

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

Figure 7-12 Payroll Errors at Posting

Employee ID:	Employee Name:	Department:
102	Smith, Joe	

 Note:

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

Posting all Employee Payroll Records at One Time

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

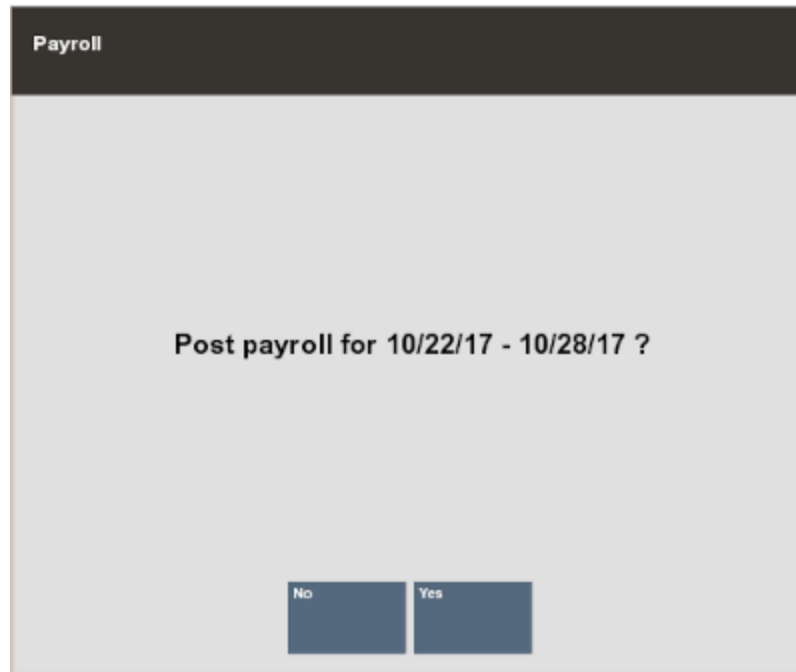
1. To post the entire payroll to the home office, select the **Post Payroll** option.

 Note:

If the system identifies a payroll exception error (as determined by your store policy) when you post payroll records, you are notified that a payroll exception exists. See [Figure 7-12](#)

Xstore Classic prompts to confirm the selection.

Figure 7-13 Post Payroll Confirmation Prompt



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

Figure 7-14 List of Non-reviewed Employee Payroll Records

Payroll
The payroll for the following employees has not yet been reviewed. Please select an employee to review.

Employee ID:	Employee Name:	Department:
102	Smith, Joe	

Back Continue Post Payroll OK

When payroll has been posted, Xstore Classic displays a message indicating that the records have been posted and marks all records with a timestamp for the posted date.

Figure 7-15 Payroll Posted Message

Payroll

Payroll has been posted.

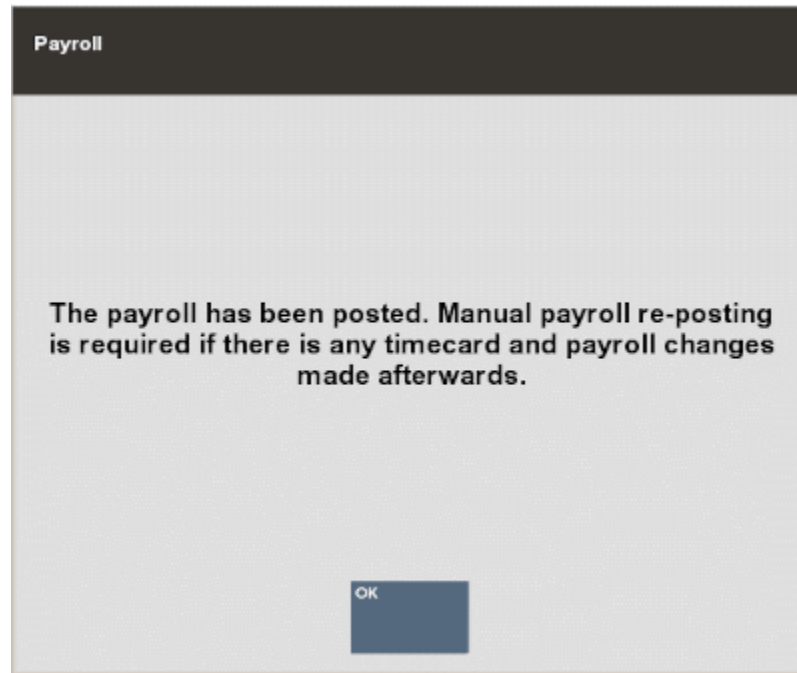
OK

Viewing and Editing Posted Payroll Records

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

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

Figure 7-16 Payroll Posted - Edit Message

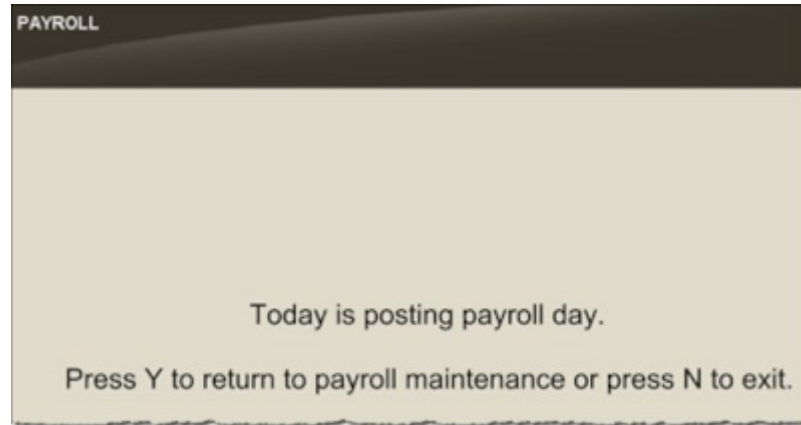


2. Select **OK** to acknowledge this message and make your edits as required.

Payroll Posting Day

On the day payroll must be posted to the home office, Xstore Classic may display a message indicating that payroll records are due. This message displays when you exit the **Payroll Maintenance** function without posting the payroll records. Select **Yes** to continue maintaining the payroll records or **No**, to exit **Payroll Maintenance**.

Figure 7-17 Payroll Posting Day Prompt



Payroll Comments Tab

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

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

Figure 7-18 Payroll Comments

Payroll Maintenance		Store: 401 - Store_401		Payroll Start Date: 10/22/17	Payroll Reviewed Date:
			Payroll End Date: 10/20/17	Payroll Post Date: 10/25/17	
Payroll Maintenance	Timecard Maintenance	Payroll Comment		Timecard Comment	
Created By: 100 Created Date: 10/25/17 Need to review payroll with Deb.					
Back	Help	Add Comment		Previous Tab	Next Tab
				Register	

Adding Comments

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

1. To add a comment to the payroll record, select the Add Comment option (Figure 7-18 above). Xstore Classic displays the **Add Comment** form.
2. Type a comment and select **OK** to add the comment to the employee's payroll record.

Figure 7-19 Add Comment Prompt

Add Comment
Enter a comment for the timecard record.

Need to review payroll with Deb.

Back OK

Timecard Maintenance Tab

The Timecard Maintenance tab shows the following information:

Figure 7-20 Timecard Maintenance Tab

Payroll Maintenance Store: 101 - Corner Market Payroll Start Date: 11/26/17 Payroll End Date: 12/2/17 Payroll Reviewed Date: Payroll Post Date:

Payroll Maintenance Timecard Maintenance Payroll Comment Timecard Comment

Employee ID: 190 Employee Name: Smith, John Department:

Sun 11/26/17	Mon 11/27/17	Tue 11/28/17	Wed 11/29/17	Thu 11/30/17	Fri 12/1/17	Sat 12/2/17
		Administrative/Back office 12:23 AM				
		Temporary Help 12:37 AM				

Scheduled

Actual

Total Hours: 0.52

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

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

 Note:

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

- The work code and the times the employee clocked in and out for each work code.
- If the employee uses multiple work codes while clocking in during the day, multiple entries display. For example, in [Figure 7-20](#), on Monday, the employee worked on the selling floor (Cashier) and then worked in the Back Office (Admin).
- An icon  associated with a timeclock record indicates that it has been entered or modified through Timecard Maintenance and it is not the original clock-in or clock-out record, or that the record has an exception to a timecard rule. Select the record and the View History option for details about this modified record.
- The hours scheduled for each day. Available if the scheduling option is used.
- The actual hours worked each day.
- The total number of hours worked for the week.

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

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

This section covers the following topics:

- [Editing a Timecard Record](#)
- [Adding a Timecard Record](#)
- [Changing a Timecard Record](#)
- [Deleting a Timecard Record](#)
- [Viewing Timecard Exception Records](#)
- [Viewing Timecard Record History](#)

Editing a Timecard Record

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

Figure 7-21 Timecard Maintenance Screen

The screenshot displays the 'Timecard Maintenance' interface. At the top, it shows 'Payroll Maintenance' with details for Store 101 - Corner Market, Payroll Start Date 11/26/17, Payroll End Date 12/2/17, Payroll Reviewed Date, and Payroll Post Date. Below this is a header bar with 'Payroll Maintenance', 'Timecard Maintenance', 'Payroll Comment', and 'Timecard Comment'. The main area shows 'Employee ID: 100', 'Employee Name: Smith, John', and 'Department:'. A table lists days from Sun 11/26/17 to Sat 12/2/17. Under 'Tue 11/28/17', there are two timecard entries: 'Administrative/Back office' from 12:23 AM to 12:37 AM, and 'Temporary Help' from 12:37 AM to 12:54 AM. Below the table, there are 'Scheduled' and 'Actual' hour bars, with 'Total Hours: 6.52' displayed. The bottom navigation bar includes buttons for 'Back', 'Help', 'Payroll Dates', 'Employee List', 'Edit Timecard' (highlighted with a red box), 'View History', 'Previous Employee', 'Next Employee', 'Exception List', 'Previous Tab', and 'Next Tab'.

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

Adding a Timecard Record

1. Select **Edit Timecard**.
2. Select the day to be edited and select **Add Timecard**.
3. Xstore Classic displays the **Timecard Maintenance** form. You must select a work code and enter the start time and end time for the timecard record.

Figure 7-22 Timecard Maintenance Form

Timecard Maintenance
Timecard Data

Timecard Record for: 11/26/2017

Work Code

Clock In Time:

Clock Out Time:

General Sales
Commission Sales
Break for Lunch
Inventory/Stock
Administrative/Back office
Product Demonstration
Event Commission
Holiday Sales

Back Help Save Changes

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

Figure 7-23 Timecard Comment Form

Add Comment
Enter a comment for the timecard record.

Back OK

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

Figure 7-24 Edit Timecard Record Receipt - Forgot to Clock In and Out

Timecard Acceptance Form

Timecard Entry:
 Authorizing Manager ID:1
 Employee ID:03010001000002
 Employee Name:
 Edna Adams

Timecard Date: XX/XX/XX
 Work Code: SALES
 Clock In: 08:00 AM
 Clock Out: 03:00 PM

Comments:
 Forgot to clock in and out.

X _____
 Employee's Signature

X _____
 Manager's Signature

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

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

Changing a Timecard Record

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

Note:

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

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

Figure 7-25 Timecard Maintenance Form - Timecard Record Insert

The screenshot shows the 'Timecard Maintenance' application window. The 'Timecard Data' section is active. It contains the following elements:

- Timecard Record for:** 11/28/2017
- Work Code:** A dropdown menu is open, displaying a list of work codes. 'Administrative/Back office' is the currently selected option.
- Clock In Time:** (Empty field)
- Clock Out Time:** (Empty field)
- Buttons:** 'Back', 'Help', and 'Save Changes' are located at the bottom of the form.

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

Figure 7-26 Timecard Comment Form

This screenshot is identical to Figure 7-25, showing the 'Timecard Maintenance' application window with the 'Timecard Data' section. It displays the date 11/28/2017, a dropdown menu for 'Work Code' with 'Administrative/Back office' selected, and empty fields for 'Clock In Time' and 'Clock Out Time'. The 'Back', 'Help', and 'Save Changes' buttons are visible at the bottom.

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

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

Ticket: 2132 Date: 12/12/10
Store: 110 Register: 1

Timecard Acceptance Form

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

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

Comments:
 Forgot to clock out at end of shift.

x _____
 Employee's Signature

x _____
 Manager's Signature

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

Deleting a Timecard Record

1. Select **Edit Timecard**.
2. Select the day to be edited and select **Delete Timecard**.
3. Xstore Classic prompts to confirm that you want to delete the selected record. Select **Yes** to delete the record.

Figure 7-28 Delete Timecard Record Confirmation Prompt

The screenshot shows a confirmation dialog box titled "Timecard Maintenance". The text inside asks, "Are you sure you want to delete timecard information?". Below this, it lists the details of the record to be deleted: "Timecard Record for: 2017-10-23", "Work Code: General Sales", "Clock In Time: 08:00:00 AM", and "Clock Out Time: 12:00:00 PM". At the bottom, there are two buttons labeled "No" and "Yes".

4. Depending upon your store policy, you may be prompted to enter a comment for this change to the timecard record. If prompted, type a comment and select **OK** to continue. The system prints receipts for your records.

Figure 7-29 Delete Timecard Record Receipt

The screenshot shows a receipt titled "Xstore Timecard Acceptance Form". It contains the following information:

Timecard Entry:
Authorizing Manager ID: 1
Employee ID: 03010001000002
Employee Name:
Edna Adams

DELETED
Timecard Date: 5/2/06
Work Code: SALES
Clock In: 2:00 PM
Clock Out: 4:30 PM

Comments:
My error, entered record for the wrong associate.

At the bottom, there are two signature lines, each preceded by an "x". The first line is labeled "Employee's Signature" and the second line is labeled "Manager's Signature".

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

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

Viewing Timecard Exception Records

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

1. At the **Timecard Maintenance** screen, select the **Exception List** option.
2. Xstore Classic displays a list of employees with exceptions for the current payroll date. Select a name from the list and select **OK** to view the timecard record with the exception.

Figure 7-30 List of Employees with Timecard Exceptions

Employee ID	Employee Name	Department
100	Smith, John	

3. Xstore Classic displays the **Timecard Maintenance** tab for the selected employee:
 - To view the details about the exception, select the record and then select the **View History** option. Refer to [Posted Timecard Report](#) for more information.
 - To edit the exception record, select the record and then select the **Edit Timecard** option. Refer to [Editing a Timecard Record](#) for more information.

Viewing Timecard Record History

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

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

Xstore Classic displays the history for the selected timecard record.

Figure 7-31 Timecard Record History

Timecard Record History

11/28/2017 12:23:12 AM	
Action:	Create
Created/Modified By	John Smith 166
Work Code	ADMIN
Clock In Time:	12:23 AM
Clock Out Time:	12:37 AM

OK

2. Press **Esc** to return to the **Timecard Maintenance** screen.

Timecard Comment Tab

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

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

Figure 7-32 Timecard Record Comments

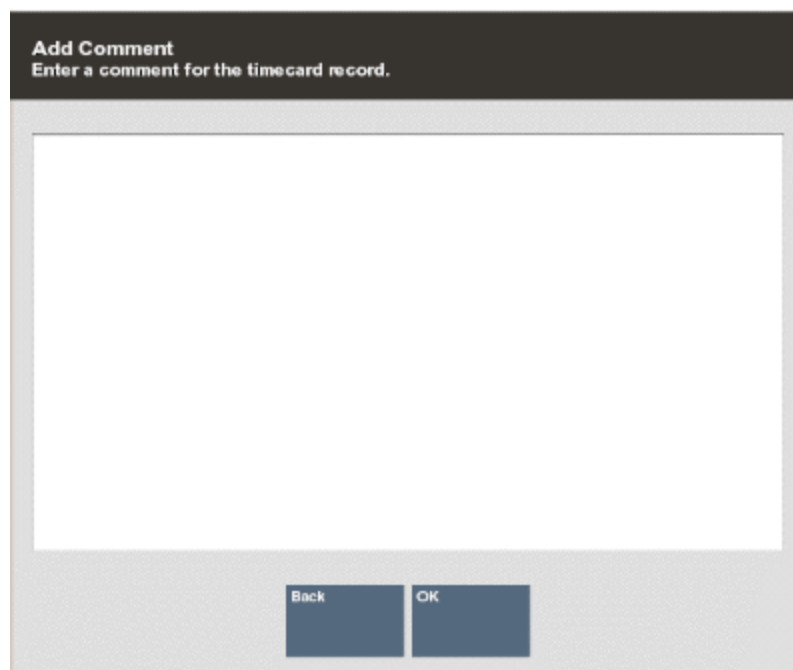
Payroll Maintenance		Store: 401 - Store_401		Payroll Start Date: 10/15/17		Payroll Reviewed Date:	
		Payroll End Date: 10/21/17		Payroll Post Date:			
Payroll Maintenance		Timecard Maintenance		Payroll Comment		Timecard Comment	
Timecard Date:	10/15/2017	Created On:	10/25/2017 12:48:38 PM	Created By:	100		
Sarah wa sick							
Timecard Date:	10/16/2017	Created On:	10/25/2017 12:49:21 PM	Created By:	100		
Sarah wa sick							

Back
Help
Add Comment
Previous Tab
Next Tab
Register

Adding Comments

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

1. To add a comment to the timecard record, use the **Previous Tab** and **Next Tab** options to navigate to the **Timecard Comment** tab.
2. Select the **Add Comment** option (Figure 7-32 above).
3. Xstore Classic displays the **Add Comment** form. Type a comment and press **Enter** to add the comment to the timecard record.

Figure 7-33 Add Comment FormThe image shows a software dialog box titled "Add Comment". Below the title bar, there is a subtitle "Enter a comment for the timecard record." followed by a large, empty white rectangular area for text input. At the bottom of the dialog, there are two buttons: "Back" and "OK".

Reports

The following Payroll and Timecard reports are available:

- [Posted Timecard Report](#)
- [Open Timecard Report](#)
- [Payroll Summary Report](#)
- [Payroll Detail By Employee Report](#)

Posted Timecard Report

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

This report includes the following information:

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

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

Open Timecard Report

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

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

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

Payroll Summary Report

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

This report includes the following information:

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

 Note:

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

Figure 7-34 Payroll Summary Report

ORACLE® Payroll Summary					
Store: 401 - Store_401					
Payroll Period Current Month (10/01/2017 - 10/31/2017)					
Employee: All					
100 Smith John					
Date Range:	Regular	Overtime	Double time	Non-working	Total
10/22/2017 Sunday	0.00	0.00	0.00	10.00	10.00
10/23/2017 Monday	0.00	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	10.00	10.00
102 Smith Joe					
Date Range:	Regular	Overtime	Double time	Non-working	Total
10/22/2017 Sunday	0.00	0.00	0.00	24.00	24.00
10/23/2017 Monday	0.00	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	24.00	24.00

Payroll Detail By Employee Report

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

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

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



Note:

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

Figure 7-35 Payroll Detail By Employee Report

ORACLE®

Payroll Detail By Employee

Store: 401 - Store_401

Date Range: Current Month (10/01/2017 - 10/31/2017)

Employee: 102

102 Smith, Joe

Payroll Period	Regular	Overtime	Double time	Vacation	Personal	Sick	Funeral	Other	Total
10/22/2017 Sunday	0.00	0.00	0.00	0.00	24.00	0.00	0.00	0.00	24.00
10/23/2017 Monday	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Totals	0.00	0.00	0.00	0.00	24.00	0.00	0.00	0.00	24.00

Date:

Employee Signature:

8

Register Open and Close

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



Note:

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



Note:

Refer to the chapter [24/7 Store Environment](#) for processes on 24/7 trading.

This chapter contains the following sections:

- [Accessing the Back Office Register Open/Close Functions](#)
- [Closing the Register](#)
 - [Standard Close](#)
 - [Cash Drawer Close](#)
- [Forcing a Register to Close](#)
- [Print Till Summary Receipt](#)
- [Opening the Register](#)
 - [Standard Open](#)
 - [Cash Drawer Open](#)
- [Changing Business Date](#)

Accessing the Back Office Register Open/Close Functions

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

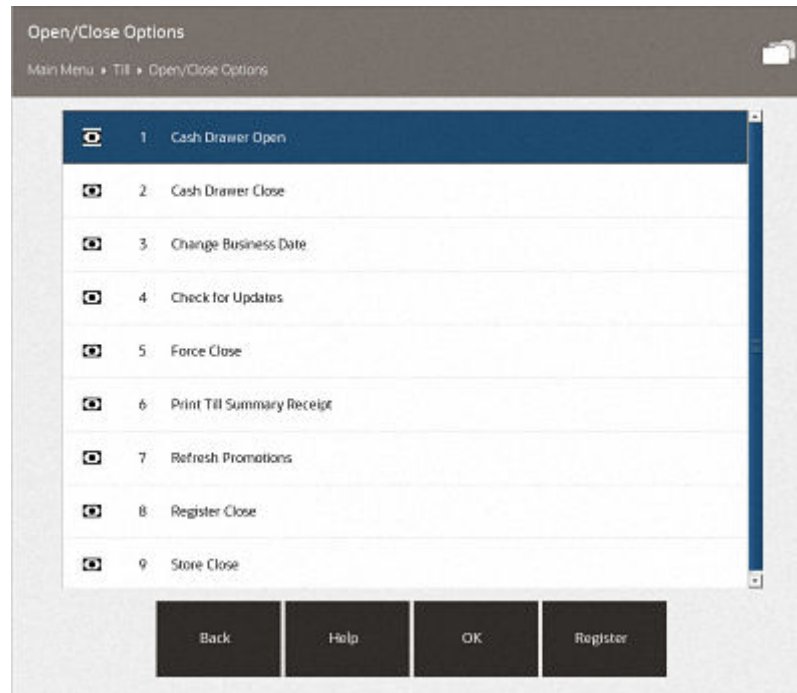


Note:

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

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

Figure 8-1 Open/Close Options Menu

 **Note:**

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

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

Closing the Register

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

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

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

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

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

Standard Close

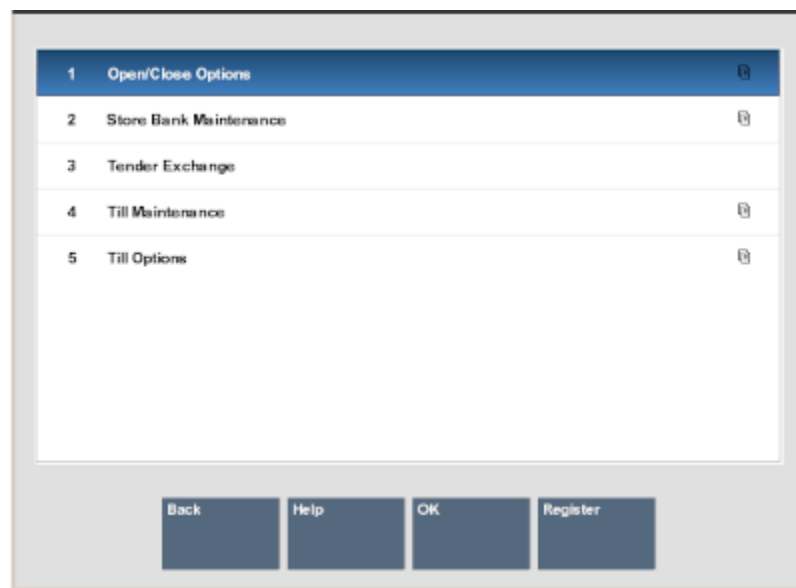


Note:

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

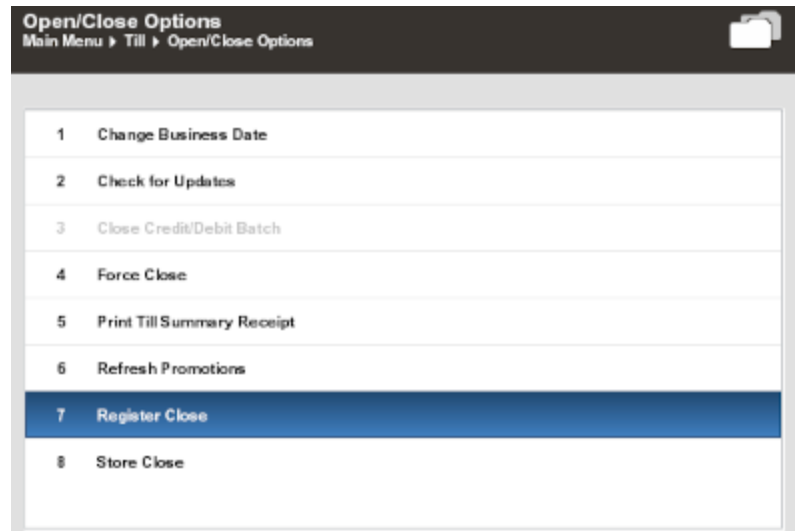
1. From the register to be closed, select the **Back Office** option on the menu. Follow any prompts to log in to the Back Office as required.
2. At the Till menu, use the up and down arrow keys to select **Open/Close Options** and press **Enter**, or press the number associated with the menu option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

Figure 8-2 Till Menu - Open/Close Options



3. Xstore Classic 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.

Figure 8-3 Register Close Option

 **Note:**

Note that the Register option toggles between open and close. If the option is **Register Close**, the register is currently open. If the option is **Register Open**, the register is currently closed.

4. Oracle Retail Xstore Point of Service displays a confirmation prompt: Do you want to close this register? Press **Yes** to close the register.

 Note:

Pressing **No** 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 Classic 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.

Figure 8-4 Close Count Summary Screen

Count Summary				Balance Summary Over/Short
Cashier ID: 100 Till Name: Test Till 1				
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	
Miscellaneous	\$0.00	\$0.00	\$0.00	
Store Credit	\$0.00	\$0.00	\$0.00	
US Traveler Check	\$0.00	\$0.00	\$0.00	
Gift Card	\$0.00	\$0.00	\$0.00	
Cash	\$0.00	\$88.11	(\$88.11)	
Sweden Cash	\$0.00	\$0.00	\$0.00	
Mexico Cash	\$0.00	\$0.00	\$0.00	

Note:

Depending upon the configuration of your system and your store policy, the over/short amounts as shown above may not be displayed.

6. Enter each value as required in the focus bar and press **Enter**. The tender type you select, and your system's configuration determine the type of count you must perform. The following table shows Xstore Classic base examples.

Table 8-1 Tender Count Screen Xstore Base Examples - Standard

Tender Count	Example
Credit Card (Totals Count)	The focus bar prompts to enter the Count and then the Amount.

Table 8-1 (Cont.) Tender Count Screen Xstore Base Examples - Standard

Tender Count	Example
Cash (Denomination Count)	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	Qty	Q	Amount
Penny	0	0.010000	\$0.00
Nickel	0	0.050000	\$0.00
Dime	0	0.100000	\$0.00
Quarter	0	0.250000	\$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	1	50.000000	\$50.00
Hundred Dollar	0	100.000000	\$0.00
Half Dollar	0	0.500000	\$0.00
Dollar Coin	0	1.000000	\$0.00
Total			\$50.00

Check (Totals 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.

Serial #	Amount
12345	\$5.19
123123	\$5.00
Total	\$5.19

Note:

A Totals Count prompts for a total number of the tender type and the total amount.

A Denomination Count requires that you specify the number of items (Count) and the value of each item in the tender group (Amount) that you selected.

 Note:

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.

 Note:

Select **Prior Group** to go back to the previous count screen.

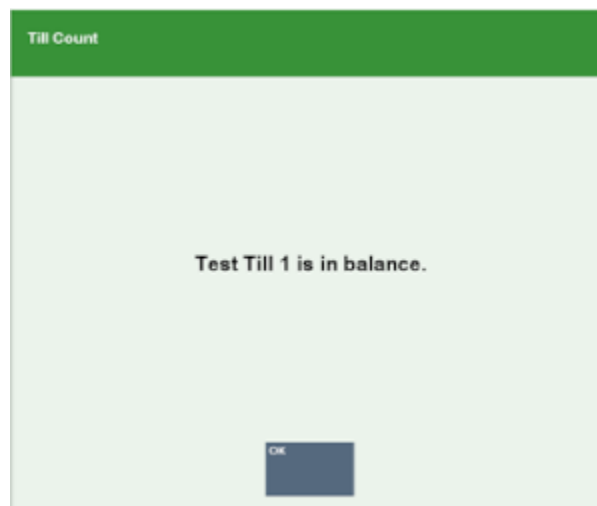
8. Repeat steps 6-7 until all tenders are counted. Select **Summary** to return to the **Count Summary** screen.
9. Review the amounts. If the totals are correct, select the **Counting Complete** button.

 Note:

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](#).

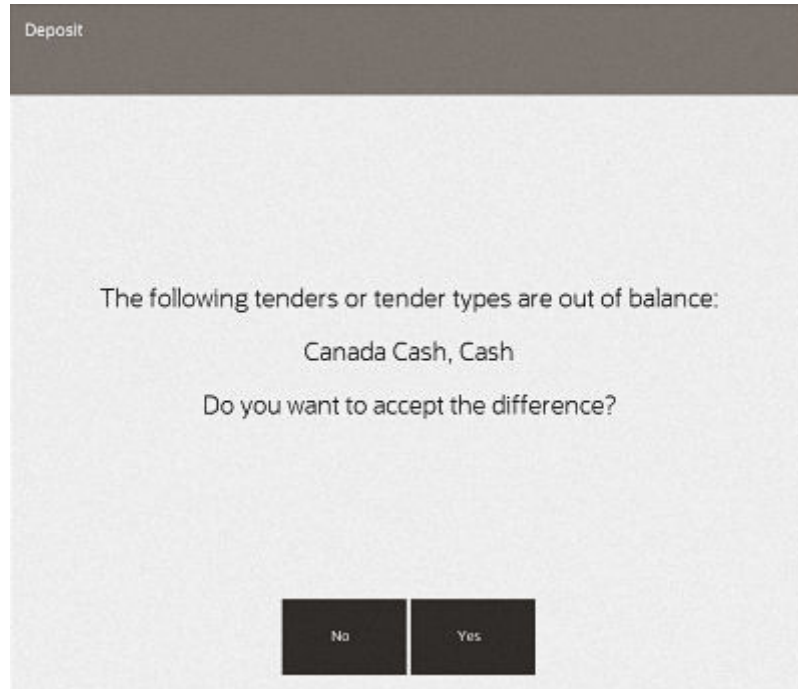
If the till is in balance, a confirmation message displays. Press **Enter** to continue the register close.

Figure 8-5 Till in Balance



10. If any tenders are out of balance-your counts do not match the system expected amounts, Xstore Classic displays a list of tenders that are out of balance.

Figure 8-6 Tenders Out of Balance Prompt



The screenshot shows a software interface titled "Deposit". The main text area contains the following text: "The following tenders or tender types are out of balance:", "Canada Cash, Cash", and "Do you want to accept the difference?". At the bottom of the screen, there are two buttons: "No" and "Yes".

- 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 Classics re-displays the Close Count screen where you can make your changes as needed. See [Editing Tender Group Counts](#).
11. 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 12.
 - Select **Change Deposit** to enter an amount to be deposited:
 - You are prompted to enter the amount to be deposited. Enter the amount and press **Enter** to continue the register close.

 Note:

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.

12. 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 in to the system.

1. At the Count Summary screen (Figure 8-4), select the tender group that must be recounted and select the **Count Selected** option to display the tender group count screen.
2. Recount the tender and enter the new count values. Most tenders allow you to override the denomination count by selecting the row and then adding values into the focus bar prompts. When you press **Enter** the count value changes. For checks, however, you must select the **Remove Count** button to delete the row and then re- enter the **Serial #** and **Amount**.

Figure 8-7 Remove Count Option

Serial #	Amount
12245	\$0.10
123123	\$5.08
Total	
\$5.18	

3. Select the **Summary** option to view the changes and return to the Tender Group Summary screen.
4. Repeat steps 1-3 for each tender group that is not balanced. When you have completed editing the tender groups, select the **Counting Complete** option. If there are tender groups that are still out of balance, a screen displays prompting whether you want to recount the tenders or accept the count and continue with the register close process.
5. Depending upon your system's configuration, you may be prompted with the suggested deposit amount. See step 10 to complete the register close process.

Cash Drawer Close

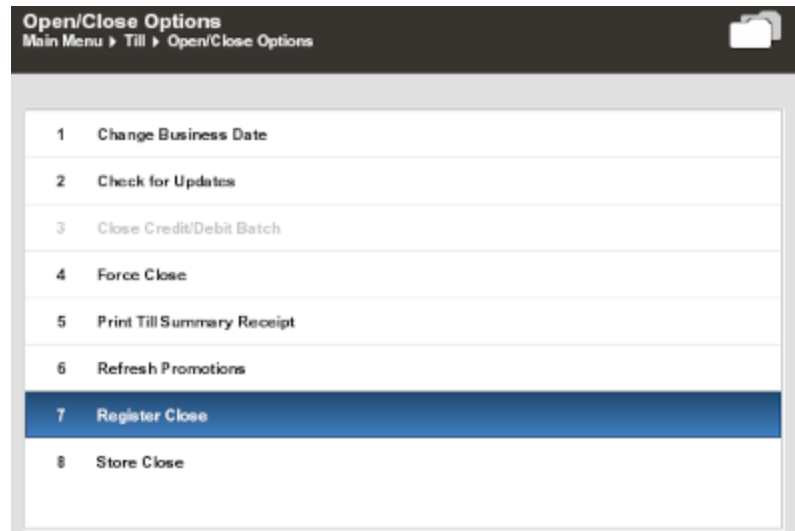
If your system is configured to use networked cash drawers, closing the register is done by closing the cash drawer.

You must remove the till before closing the cash drawer. See [Removing a Cash Drawer Till](#) for more information.

To close the cash drawer:

1. In the Back Office menu, select **Open/Close Options**.

Figure 8-8 Open/Close Options - Register Close



2. Select **Cash Drawer Close**. A list of open cash drawers displays.
3. Select the drawer to close.
4. Select **OK**. A confirmation prompt opens.
5. Select **Yes**.
6. The physical cash drawer opens, and Oracle Retail Xstore Point of Service displays the Close Count Summary screen. Each count group (tender type) is counted individually. Specific groups require additional information as determined by the home office. Select the tender type to be counted and then select the Count Selected option to display the tender group's count screen.

Figure 8-9 Close Count Summary Screen

Count Summary				Balance Summary Over/Short							
Cashier ID: 100 Till Name: Test Till 1											
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							
Miscellaneous	\$0.00		\$0.00	\$0.00							
Store Credit	\$0.00		\$0.00	\$0.00							
US Traveler Check	\$0.00		\$0.00	\$0.00							
Gift Card	\$0.00		\$0.00	\$0.00							
Cash	\$0.00		\$88.11	(\$88.11)							
Sweden Cash	\$0.00		\$0.00	\$0.00							
Mexico Cash	\$0.00		\$0.00	\$0.00							
Back	Help	Count Selected	Counting Complete								

 Note:

Depending upon the configuration of your system and your store policy, the over/short amounts as shown above may not be displayed.

7. Enter each value as required in the focus bar and press **Enter**. The tender type you select, and your system's configuration determine the type of count you must perform. The following table shows Xstore base examples.

Table 8-2 Tender Count Screen Xstore Base Examples - Cash Drawer

Tender Count	Example
Credit Card (Totals Count)	The focus bar prompts to enter the Count and then the Amount.
Cash (Denomination Count)	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.

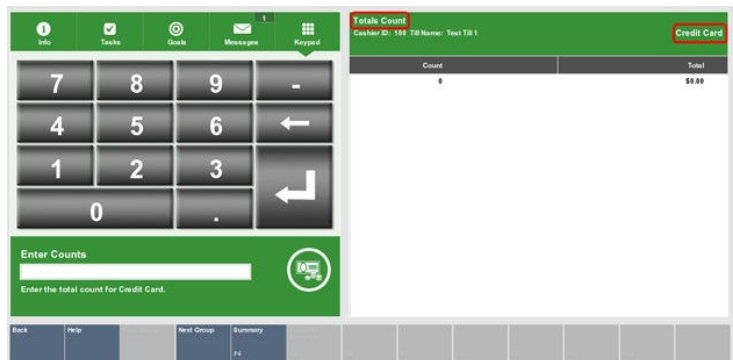
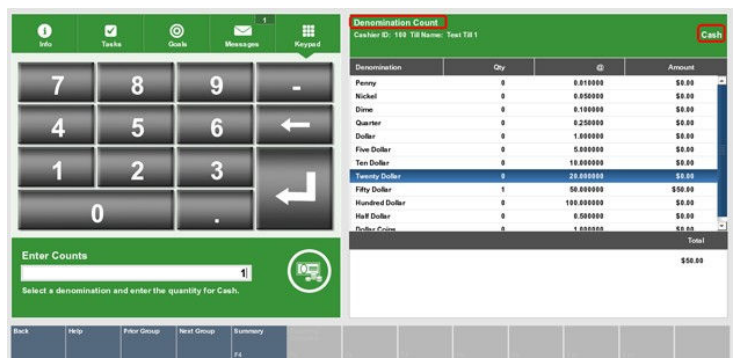



Table 8-2 (Cont.) Tender Count Screen Xstore Base Examples - Cash Drawer

Tender Count	Example
Check (Totals 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.

The screenshot shows the 'Totals Count' screen for a 'Check' tender type. At the top, there's a header bar with 'Totals Count' and 'Cashier ID: 100 TID Name: Test TID 1'. Below this is a table with two columns: 'Serial #' and 'Amount'. The table contains two rows of data: 12345 for \$9.10 and 123123 for \$5.00. On the left side, there's a numeric keypad with digits 0-9, a decimal point, and a minus sign. Below the keypad is a section labeled 'Enter Serial #' with a text input field and a '#' icon. At the bottom, there's a 'Total' section showing '\$5.10'. The bottom navigation bar includes buttons for 'Back', 'Help', 'Prior Group', 'Next Group', 'Remove Count', and 'Summary'.

Note:

A Totals Count prompts for a total number of the tender type and the total amount.

A Denomination Count requires that you specify the number of items (Count) and the value of each item in the tender group (Amount) that you selected.

Note:

The type of count is labeled on the upper left portion of the count screen view port. The tender type is identified in the upper right portion of the count screen view port.

8. Select **Next Group** to display the next count screen.

Note:

Select **Prior Group** to go back to the previous count screen.

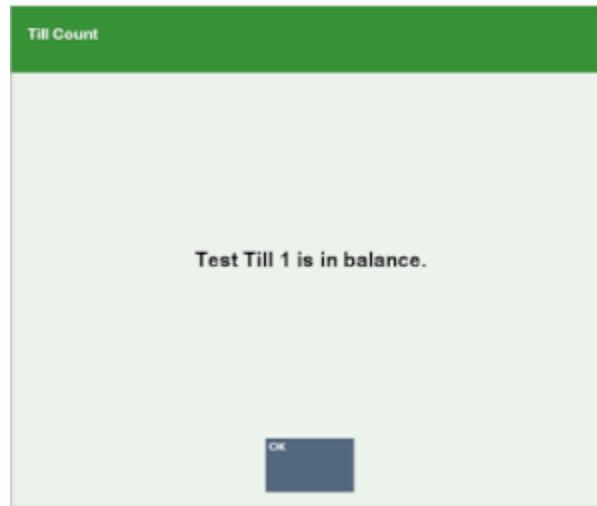
9. Repeat steps 6-7 until all tenders are counted. Select Summary to return to the Count Summary screen.
10. Review the amounts. If the totals are correct, select the **Counting Complete** button.

 Note:

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](#).

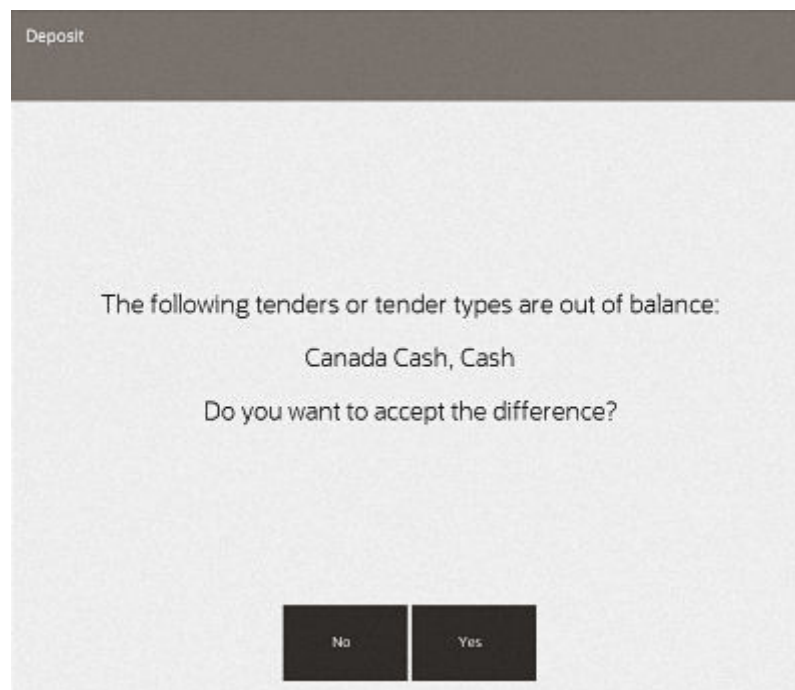
If the till is in balance, a confirmation message displays. Press **Enter** to continue the cash drawer close.

Figure 8-10 Till 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.

Figure 8-11 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. Oracle Retail Xstore Point of Service re-displays the Close Count screen where you can make your changes as needed. See [Editing Tender Group Counts](#).
12. Depending upon your system's configuration, you may be prompted with the suggested deposit amount.
- Select **Accept Deposit** to confirm the amount to be deposited and go to step 12.
 - Select **Change Deposit** to enter an amount to be deposited:
 - You are prompted to enter the amount to be deposited.
 - Enter the amount and press **Enter** to continue the cash drawer close.

 Note:

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 Cash Drawer Closed receipt.

Figure 8-12 End Count Deposit Receipt Sample

```
Count Type: END COUNT
Till ID: T1111

Tender
-----
Check
  Declared Amount      50.00
  System Total         50.00
  Difference            0.00
Cash
  Declared Amount      742.07
  System Total         742.07
  Difference            0.00
US Traveler's Check
  Declared Amount       0.00
  System Total          0.00
  Difference            0.00

Total Declared Amount      792.07

Local Currency

Till Opening Amount
Total Cash Amount          742.07
Total Cash Deposit         442.07
Cash Remained In Till      300.00

Total Cash Pickup          25.00

Aruban Guilder

Exchange Rate              1.77
Foreign Amount             0.00
Converted Amount           0.00
```

Figure 8-13 Close Receipt Sample

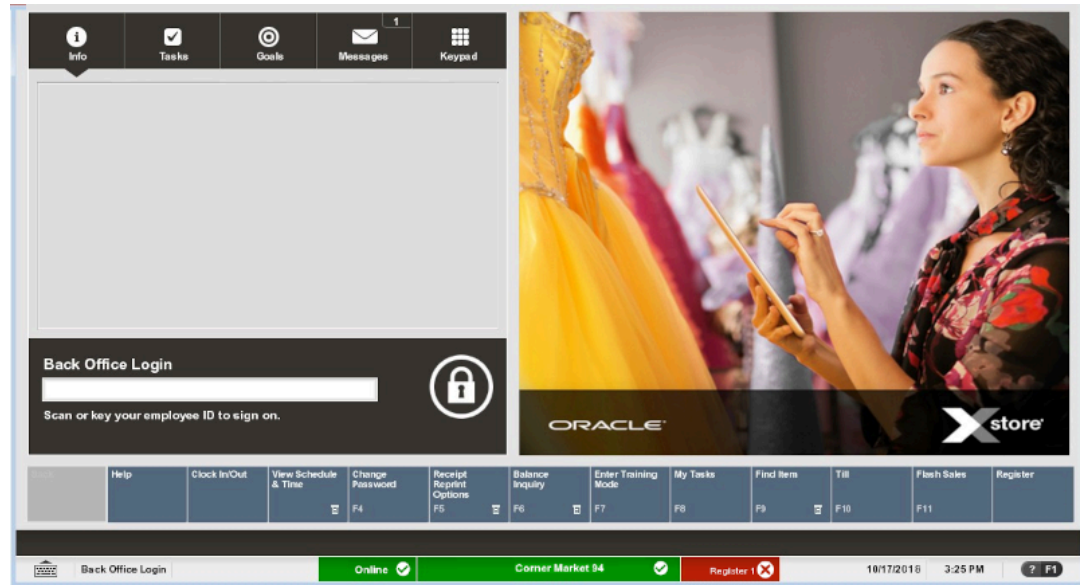
```

Date: 3/22/06
Store: 301      Register: 1
Cashier: 1

*****
  R e g i s t e r   C l o s e d
*****
```

14. Close the physical cash drawer to complete the close process. This register is now closed as indicated by the Register indicator color change (from green to red).

Figure 8-14 Back Office View - Register Closed



 Note:

If configured, you can still access functions that do not require a till such as Clock In and Clock Out, Item Lookup, and View Timecard even though the register is closed for sale transactions.

Forcing a Register to Close

If register equipment fails for any reason and a register cannot be closed using the normal procedure, the Force Close option may be used. By forcing a register to close, despite equipment failure, the store closing procedure may then be started.

1. At the Back Office Main Menu, select **Open/Close Options** press **Enter**.
2. Select **Force Close** and press **Enter**.

Xstore Classic displays a list of any open registers (if no registers are still open, Xstore Classic displays a message).

3. Select the register that you want to close from the list. Use the up and down arrow keys to go to the register you want to close and press **Spacebar** to select it. Press **Enter** to continue.

Xstore Classic displays a message indicating that the register has been forced to close.

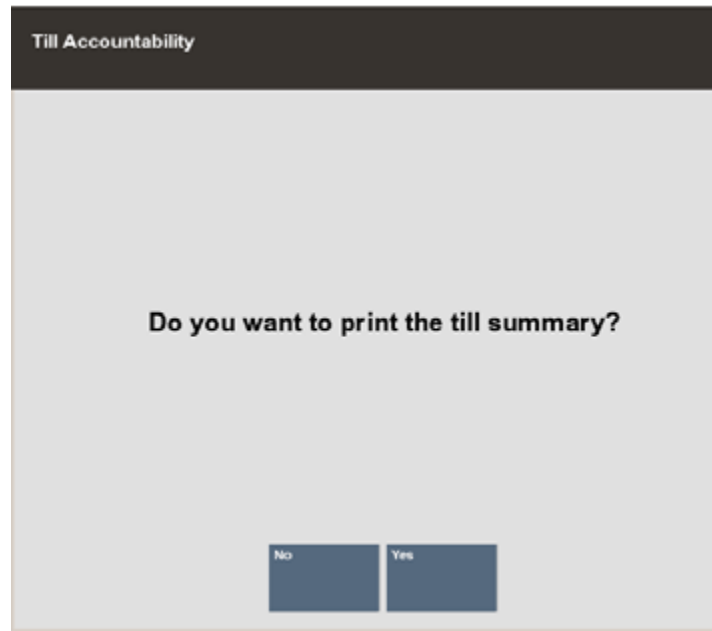
Print Till Summary Receipt

This option allows you to print a summary recorded during the last till count.

1. At the Back Office Main Menu, select **Open/Close Options** press **Enter**.
2. Select **Print Till Summary Receipt**.

3. When prompted, select **Yes** to print the receipt. The system prints the till summary for the register to a receipt printer. The receipt includes a breakdown of the various tenders (quantity and amount), a configurable list of various transactions that occurred at the register (/paid out, returns, refunds, discounts, account setups, and so on, and the quantity and amount for each), and taxes.

Figure 8-15 Till Summary Receipt Prompt



Opening the Register

Opening the register is a process that can be quickly completed by managers or associates who have the proper security privileges. The process is highly configurable, and your process may be different from the instructions below. Every effort has been made to include notes or examples of additional steps that may be configured for your store.

The register open process depends upon whether your register is configured for a standard open and close process, or if it is configured for 24/7 processing.

- [Standard Open](#) process.
- [24/7 Store Environment](#) trading open process.

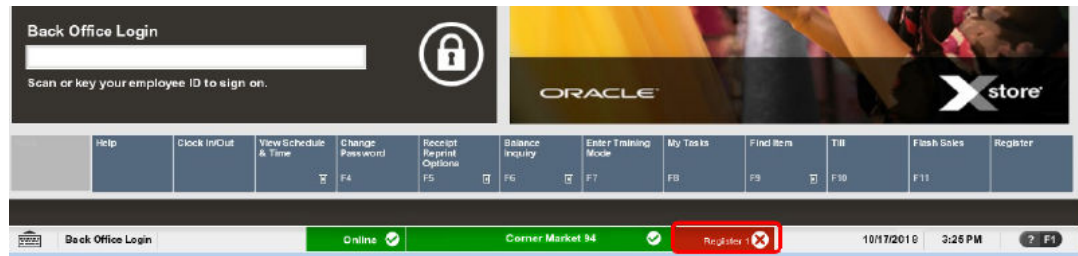
Standard Open

1. After logging on at the Back Office (see [Accessing the Back Office](#)), select the **Open/Close** Options from the Main Menu and then press **Enter**.

Note:

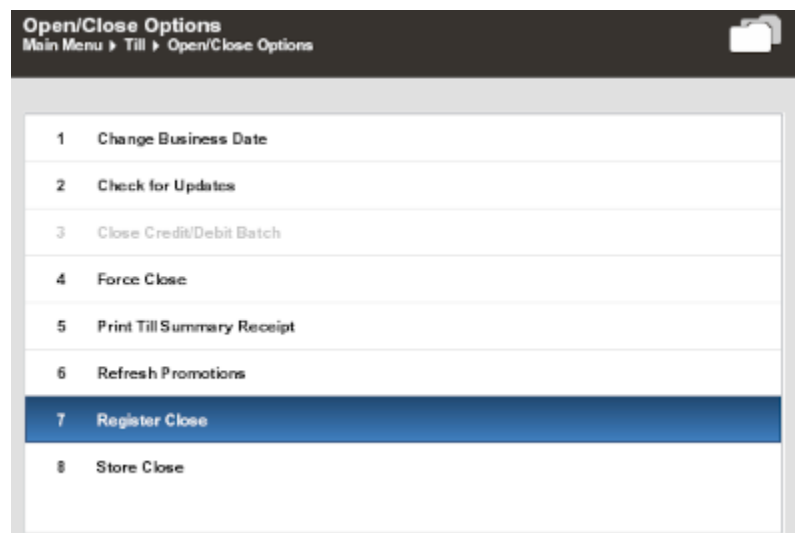
Touch-screen users tap the register status bar to open the register. The focus bar prompts for your employee ID and password. Enter the information when prompted. Proceed to step 3.

Figure 8-16 Back Office - Register Closed



2. Select the **Register Open** option and press **Enter**, or press the number associated with the menu option on the keyboard.

Figure 8-17 Open/Close Options - Register Close



 Note:

The Register menu option toggles between open and close. If the available menu option is **Register Close**, the register is currently open. If the available menu option is **Register Open**, the register is currently closed.

3. Xstore Classic prompts: Do you want to open this register? Press **Yes** to open this register. Depending upon the configuration of your system, you may be prompted to perform an opening count. Refer to [To Perform a Begin Count](#) for procedural information.
If your register has more than one cash drawer, you are prompted to select the drawer from a list of available cash drawers and attach the till before performing an opening count. Refer to [Till Management](#) for more information.
If you are not prompted to count the till, the register is opened at this time.

To Perform a Begin Count

1. After confirming that you want to open the register, the Count Summary screen displays, select the tender type to be counted and then select the **Count Selected** button to display the tender group's count screen.

Figure 8-18 Begin Count Summary Screen

Count Group	Declared Amount	System Amount	Balance Summary 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)

2. Enter each value as required in the focus bar and press **Enter**. Xstore will highlight the next denomination in the list.

 Note:

Depending upon the configuration of your system, you may be prompted to enter the total opening amount rather than prompted to count by denomination. See [Table 8-1](#)

Figure 8-19 Denominations Count - Cash

Denomination Count
Cashier ID: 100 Till Name: Test Till 1

Denomination	Qty	@	Amount
Penny	0	0.010000	\$0.00
Nickel	0	0.050000	\$0.00
Dime	0	0.100000	\$0.00
Quarter	0	0.250000	\$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
Half Dollar	0	0.500000	\$0.00
Dollar Coins	0	1.000000	\$0.00
Total			\$0.00

Enter Counts
Select a denomination and enter the quantity for Cash.

Back Help Prior Group Next Group Summary Counting Complete

3. Select **Next Group** until all tenders are counted.

**Note:**

Select **Prior Group** to go back to the previous count screen.

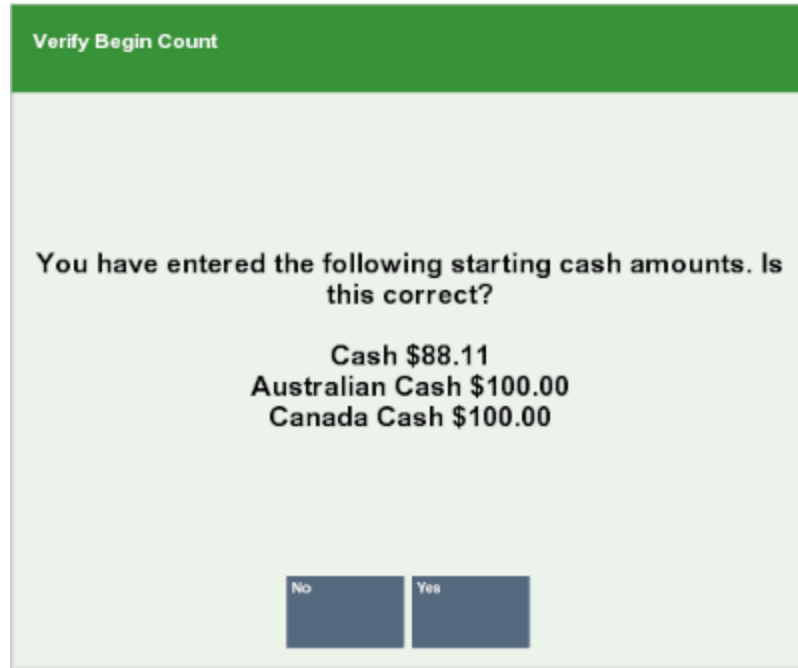
4. Repeat steps 2-3 until all tenders are counted and then select **Summary** to return to the Count Summary screen.
5. Review the amounts. If the totals are correct, select the **Counting Complete** button.

**Note:**

Check the Over/Short column to see if your till is balanced with the system values for each tender type.

6. If the starting cash amount matches, the system prompts to confirm the amount for all cash currencies you entered and opens the register after you acknowledge the system amount.:

Figure 8-20 Verify Begin Count Prompt



Verify Begin Count

You have entered the following starting cash amounts. Is this correct?

Cash \$88.11
Australian Cash \$100.00
Canada Cash \$100.00

No Yes

- Select **Yes** if the amount is correct.
- Select **No** to recount the starting amount.

If configured, the system prints a Begin Count receipt showing the amount of starting cash in the till and signature lines for the cashier and manager to sign confirming this open amount.

If the currency amounts do not match, the system displays a prompt to either recount the till or to accept the difference.

Figure 8-21 Recount or Accept Difference Prompt

Till Accountability

The starting cash total is different than the issued starting cash amount for the following tenders:

Cash, Australian Cash, Canada Cash

Do you want to accept the difference?

No Yes

- Press **Y** to accept the amount you counted and continue opening the register. You are prompted to enter/select the reason for the discrepancy between the counted amount and the expected amount. You may be required to enter a comment and then press **Enter**.
- <OR>
- Press **N** to recount the till.

If you counted the till from the Back Office, select the **Register** option to display the register screen. The register is now open and a till has been counted and attached to the current register. The system may print a receipt indicating the register number that is open and the cashier ID who is at the register.

Figure 8-22 Register Open Receipt

Date: 8/19/13
Register: 1
Store: 1973
Cashier: 100

Register Open

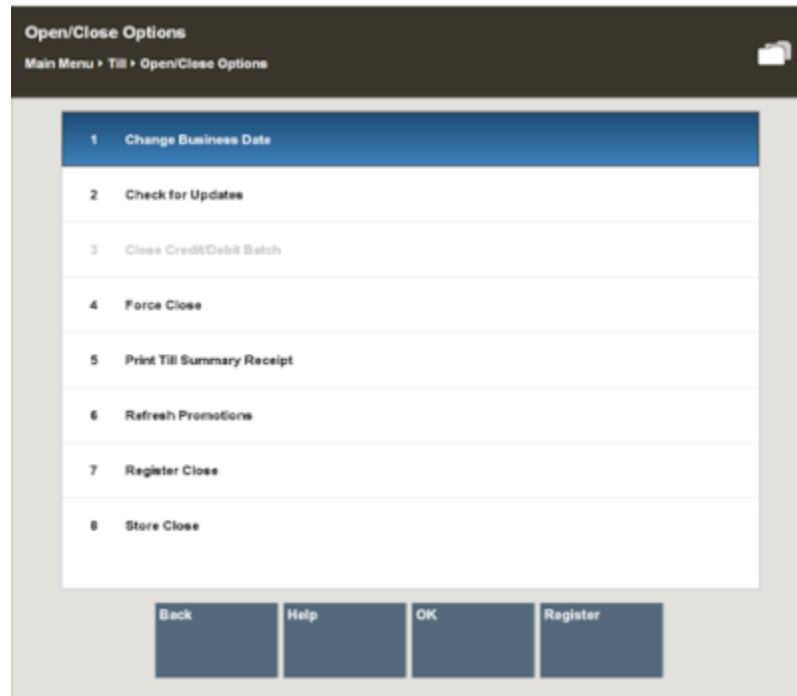
Cash Drawer Open

If your system is configured to use networked cash drawers, opening the register is done by opening the cash drawer. Any register's back office can be used to open the networked cash drawers. If there are no available networked cash drawers to open the Cash Drawer Open button is disabled.

To open the cash drawer:

1. In the Back Office menu, select **Open/Close Options**.

Figure 8-23 Open/Close Options Menu



2. Select **Cash Drawer Open**. A list of available networked cash drawers opens.
3. Select the drawer to open.
4. Select **OK**. A confirmation prompt opens.
5. Select **Yes**. A list of tills opens.
6. Select the till to use.
7. Select **OK**.
8. The Count Summary screen displays, select the tender type to be counted and then select the **Count Selected** button to display the tender group's count screen.

Figure 8-24 Begin Count Summary Screen

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)

9. Enter each value as required in the focus bar of the count screen and press **Enter**. Xstore will highlight the next denomination in the list.

Note:

Depending upon the configuration of your system, you may be prompted to enter the total opening amount rather than prompted to count by denomination. See [Table 8-2](#).

Figure 8-25 Denomination Count - Cash

Denomination	Qty	Amount	Amount
Penny	0	\$0.010000	\$0.00
Nickel	0	\$0.050000	\$0.00
Dime	0	\$0.100000	\$0.00
Quarter	0	\$0.250000	\$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
Half Dollar	0	\$0.500000	\$0.00
Dollar Coins	0	\$1.000000	\$0.00
Total			\$0.00

10. Select **Next Group** to display the next count screen.
11. Repeat steps 9-10 until all tenders are counted and then select **Summary** to return to the Count Summary screen.

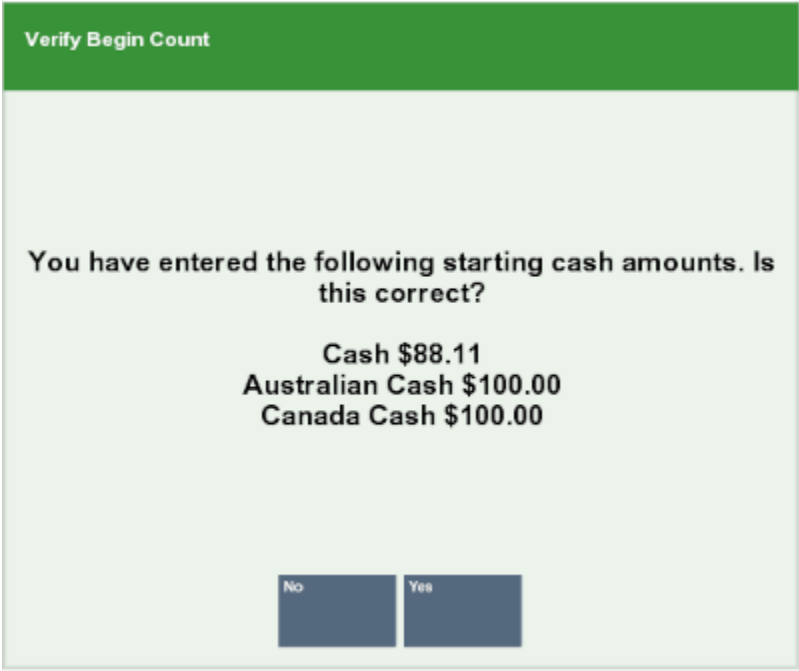
12. Review the amounts. If the totals are correct, select the **Counting Complete** button.

 Note:

Check the Over/Short column to see if your till is balanced with the system values for each tender type. To modify counts see [Editing Tender Group Counts](#).

13. If the starting cash amount matches, the system prompts to confirm the amount for all cash currencies you entered and opens the cash drawer after you acknowledge the system amount.

Figure 8-26 Verify Begin Count Prompt



Verify Begin Count

You have entered the following starting cash amounts. Is this correct?

Cash \$88.11
Australian Cash \$100.00
Canada Cash \$100.00

No Yes

If configured, the system prints a Begin Count receipt showing the amount of starting cash in the till and signature lines for the cashier and manager to sign confirming this open amount.

14. If the currency amounts do not match, the system displays a prompt to either recount the till or to accept the difference:

Figure 8-27 Starting Cash Difference Prompt

Till Accountability

The starting cash total is different than the issued starting cash amount for the following tenders:

Cash, Australian Cash, Canada Cash

Do you want to accept the difference?

No Yes

- Press **Y** to accept the amount you counted and continue opening the cash drawer. You are prompted to enter/select the reason for the discrepancy between the counted amount and the expected amount. You may be required to enter a comment and then press **Enter**.
- <OR>
- Press **N** to recount the till.
15. Open the till to associate with the Cash Drawer. See Open a Till- Cash Drawer in the *Oracle Retail Xstore Point of Service User Guide* for more information.
 16. If you counted the till from the Back Office, select the **Register** option to display the register screen. The register is now open and a till has been counted and attached to the current register. The system may print a receipt indicating the register number that is open and the cashier ID who is at the register.

Changing Business Date

The **Change Business Date** option can be used in a non 24/7 store if the system is configured to prompt to enter the business date when opening the store. If you enter the business date, but you want to change it, prior to entering any opening counts, you can use that option to change the date.

The business date may be changed if a retailer may have incorrectly entered the business date during the store open process or in the event the retailer had to close and reopen the store in the middle of the day. The system automatically moves to the next date so the business date would not equal the system date.

To change the Business date:

1. At the Till menu, select **Change Business Date**, or press the number associated with the menu option on the keyboard.

2. Enter the date required.

9

Store Open and Close

Store Close

The store is closed to lock out certain business transaction functionality. The store close process clears daily data, accepts downloads from the home office, and prepares your store to open for a new business day. The store close is divided into multiple, individual processes. Oracle Retail Xstore Point of Service guides you through each step in the process.

Store Open

The store open process opens the store for the new business day. The store is opened to allow business transactions in the system. The store open process begins when an associate signs on for the first time after a store close is finished. Oracle Retail Xstore Point of Service guides you through each step in the process.

This chapter covers the following topics:

- [Closing the Store](#)
- [Opening the Store](#)
- [Calling the Update Service](#)
- [Manually Refresh Promotions](#)

Closing the Store

Prerequisites: To begin the store close, all the tills and registers must be closed for the business date and all associates should be signed off, except for the closing associate and the till open for that register. The store bank must be counted and reconciled.

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

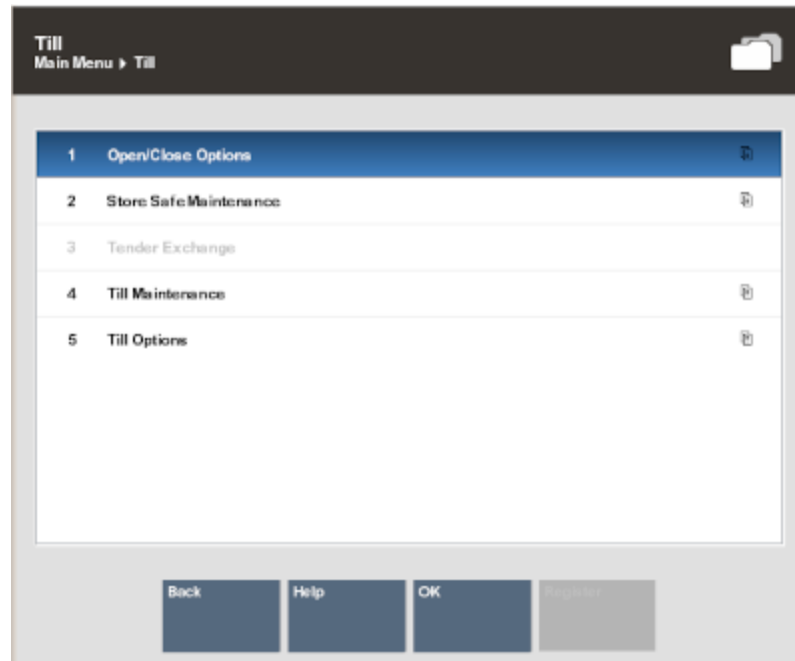


Note:

If your store has a lead register where the database is hosted, the lead register must be the last register closed. If you attempt to close the lead register before all other registers are closed, the system prompts you to close the other registers before closing the lead register.

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

Figure 9-1 Back Office Main Menu - Open/Close Options



 Note:

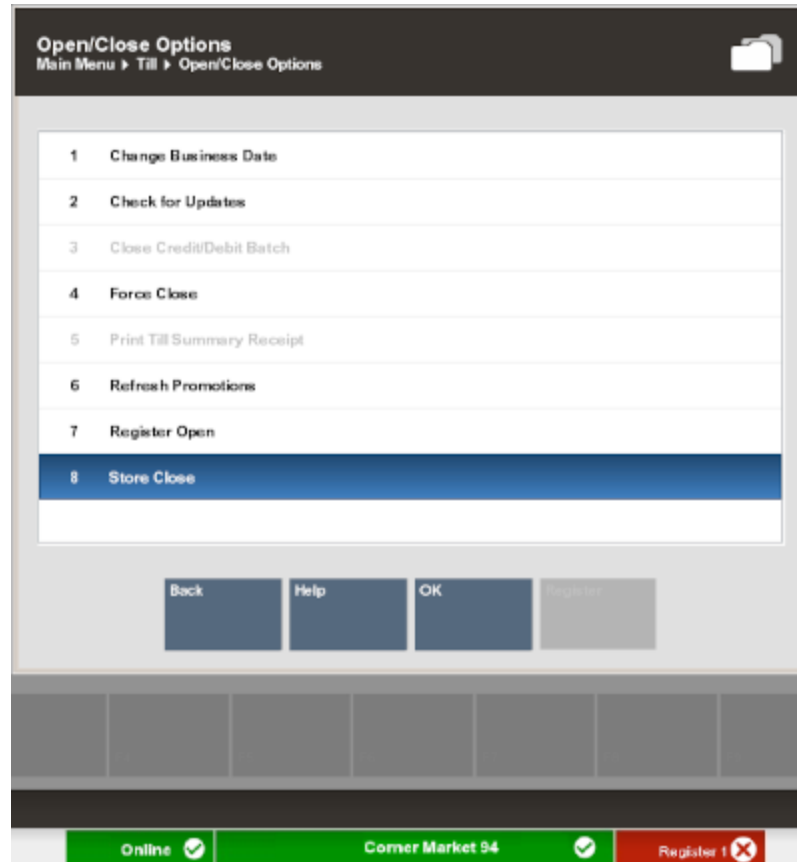
Store Open and Store Close activities are controlled by user security. An employee must have the proper security privileges to open and close the store.

 Note:

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

2. At the Open/Close Options Menu, select the **Store Close** option and select **OK**.

Figure 9-2 Open/Close Options - Store Close

 **Note:**

The **Register Close** and **Store Close** menu options toggle between open and close. In [Figure 9-2](#) above, note that the register menu option is **Register Open**. This indicates that all registers are closed, and you can begin closing the store. The **Store Close** option tells you that the store is currently open.

3. The system prompts: Do you want to close this store? Select Yes to begin the store close process.
4. Oracle Retail Xstore Point of Service verifies that all registers are closed. If any registers are still open, the system displays a list of open registers and prompts you to close each register before the store close process can continue.

Refer to chapter [Register Open and Close](#), for more information about closing the register.

5. Oracle Retail Xstore Point of Service searches for and lists any transactions created on the current business date that were suspended and not subsequently resumed and completed or cancelled. If any suspended transactions are found, the system displays a list showing the suspended transactions.

You have the following options:

- Press **Enter** (Continue) to automatically cancel all listed transactions and continue with the store close process (step 6. below).

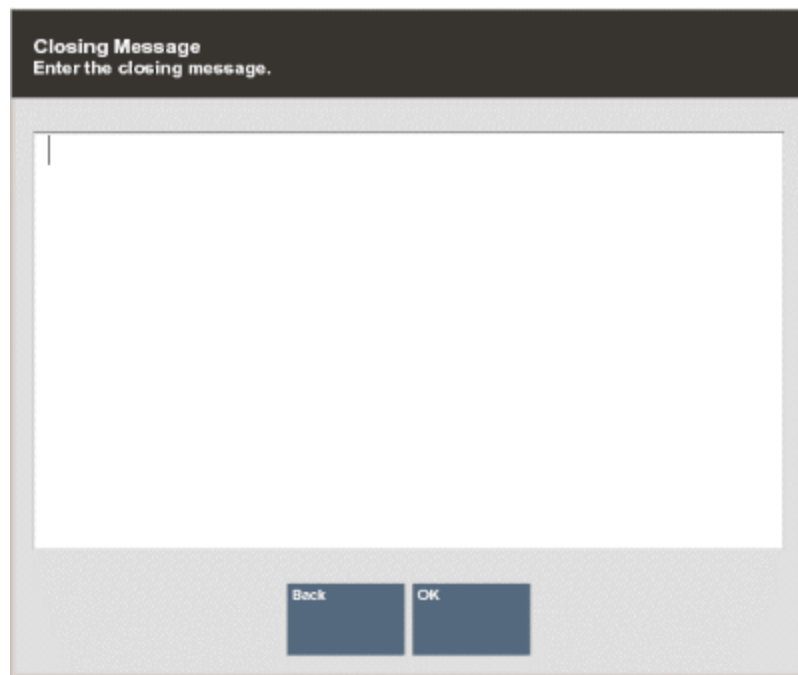
<OR>

- Press **Esc** (Back) to cancel the store close process and reconcile the suspended transactions per your store policy.

In addition, the system may also list any pending orders that require attention. The associate performing the store close can either cancel the store close process or allow Oracle Retail Xstore Point of Service to continue with the store close. The pending orders retain the same status and are not changed in any way by this notification prompt.

6. If prompted, select the bank or institution for the bank deposit and press **Enter**.
7. Depending upon the configuration of your system, you may be prompted to enter a message that displays when the store is opened for the next business day. If prompted, type a message and press **Enter**.

Figure 9-3 Closing Message Prompt

The image shows a software interface for entering a closing message. It has a dark header bar with the text "Closing Message" and "Enter the closing message." below it. The main area is a large white rectangle with a vertical cursor on the left side, indicating it's a text input field. At the bottom, there are two blue buttons labeled "Back" and "OK".

8. Depending upon your system's configuration, you may be prompted to respond to a store closing question. If prompted, select an answer to the question and press **Enter**.

Figure 9-4 Store Closing Question Prompt

Classify Your Day
How was the weather today?

- Sunny and Warm
- Cloudy and Cool
- Rain
- Snow
- Closed Due to Weather

Back OK

9. Depending upon your system's configuration, you may be prompted with other messages concerning the status of various functions within the store. For example, you may be notified that a cycle count for inventory is due or that items are ready to be received. Acknowledge these messages by pressing **Enter** to continue with the store close process.
10. If configured, you may be prompted to count the amount to be deposited in the store safe at the Store Safe Deposit Count screen. If prompted, count the tenders for deposit and select the **Done Counting** option when you are finished. Follow instructions for a [Till Audit](#).

If there is a difference between your count and the amount that the system expected, a message is displayed. You may return to the Count Summary screen and make changes or accept the difference.

When the counting is complete, a Confirm Safe Deposit prompt displays. Select yes, the system prints deposit receipts for your records.
11. If prompted, press **Enter** to begin the nightly close process. Some events that occur during a nightly close are configurable. For example, certain reports may be generated at every closing.

From this point on, no user intervention is required and the store closing process begins. The Message indicator on the status bar may display information about the process as it is occurring.

 Note:

Depending upon your store policy, you may have access to some Back Office functions while the store is closed.

The system prints receipts as required by your system configuration and store policy.

Figure 9-5 Store Safe Deposit Receipt

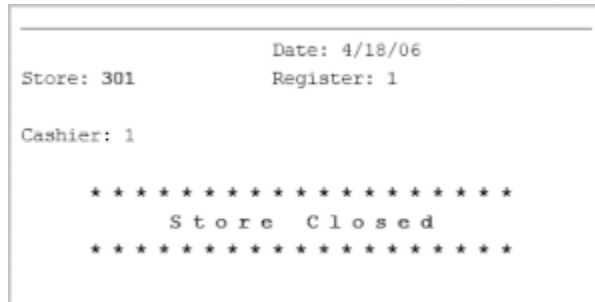
Count Type: BANK DEPOSIT	
Till ID: STOREBANK	
<u>Tender</u>	
Check	
Declared Amount	50.00
System Total	50.00
Difference	0.00
Cash	
Declared Amount	767.07
System Total	767.07
Difference	0.00
US Traveler's Check	
Declared Amount	0.00
System Total	0.00
Difference	0.00
Total Declared Amount	817.07
Local Currency	
Total Cash Amount	767.07
Total Cash Deposit	167.07
Cash Remained In Till	600.00
Total Cash Pickup	25.00
Aruban Guilder	
Exchange Rate	1.77
Foreign Amount	0.00
Converted Amount	0.00

Yen	
Exchange Rate	117.28
Foreign Amount	0.00
Converted Amount	0.00
Mexican Peso	
Exchange Rate	10.74
Foreign Amount	0.00
Converted Amount	0.00
Mexican Traveler's Check	
Exchange Rate	10.74
Foreign Amount	0.00
Converted Amount	0.00
Employee's Signature	
x	_____
Manager's Signature	
x	_____

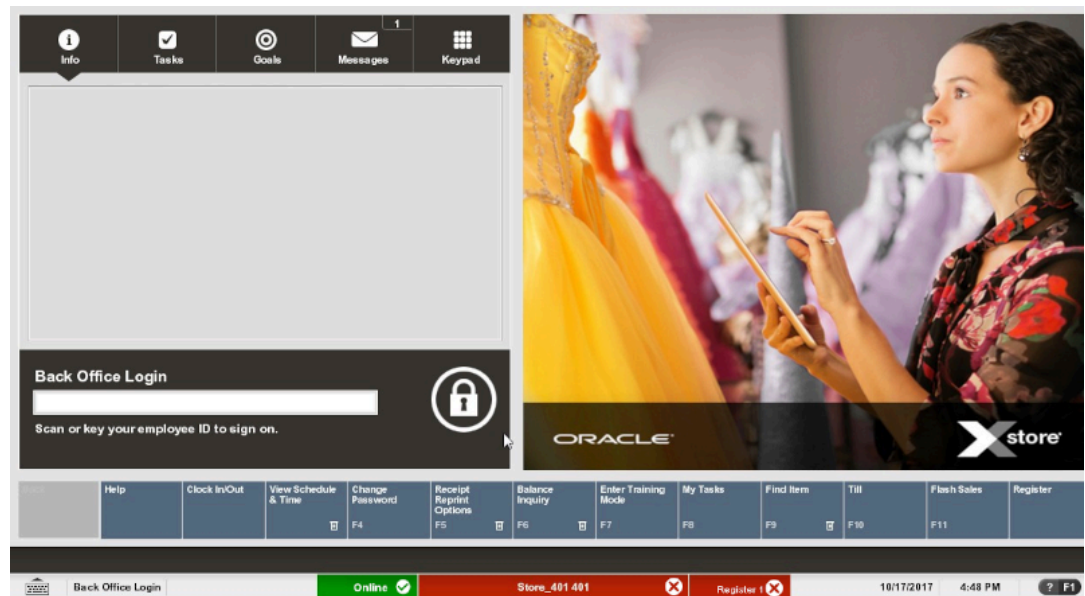
Figure 9-6 Deposit Receipt Sample

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

Ticket: 34	Date: 3/22/06
Store: 301	Register: 1
Cashier: 1	
Session ID:	
Total Cash Deposit	167.07
Aruban Guilder	0.00
Canadian Cash	0.00
Canadian Traveler's Check	0.00
Check	50.00
Yen	0.00
Mexican Peso	0.00
Mexican Traveler's Check	0.00
US Traveler's Check	0.00
Total Deposit Amount	217.07

Figure 9-7 Store Close Receipt

The closed store status is indicated by the color change in the store status area of the screen.

Figure 9-8 Back Office - Store Closed Status

Opening the Store

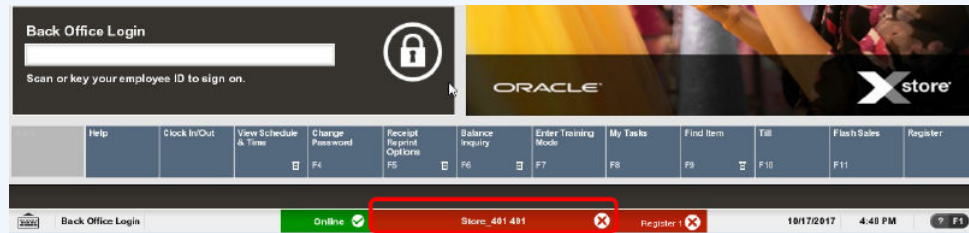
The store open process is performed on only one register. The store open procedure signals that the store is open to all registers. Once the store is open, sales cannot be rung until the register is opened and a till is counted for the register.

During the store open process, the system may also list any pending orders that require attention. Once the store is open, the associate can take any action as needed on the orders.

1. At the Back Office Login screen, log in with your user name and password.

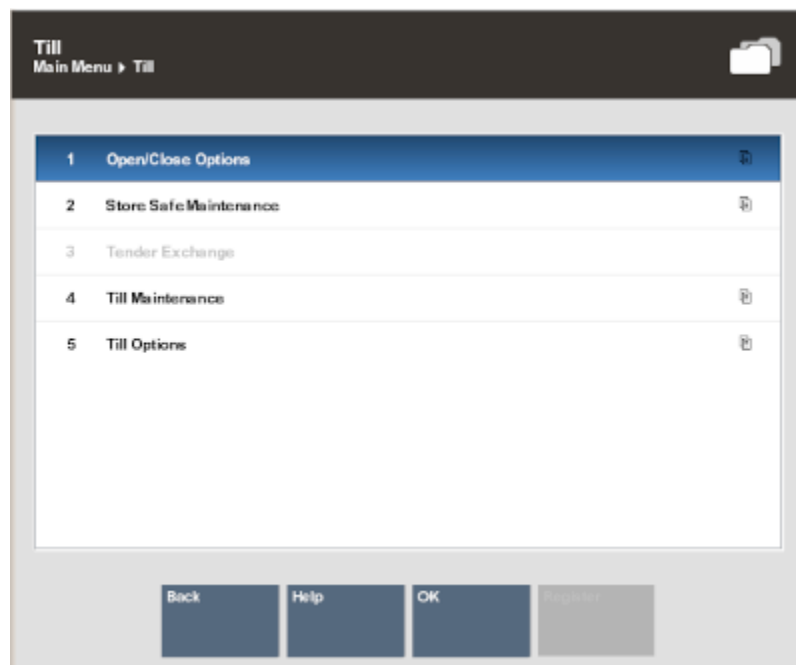
 Note:

Touch-screen users tap the store status bar to open the store. The focus bar prompts for your employee ID and password. Enter the information when prompted. Proceed to step 4.



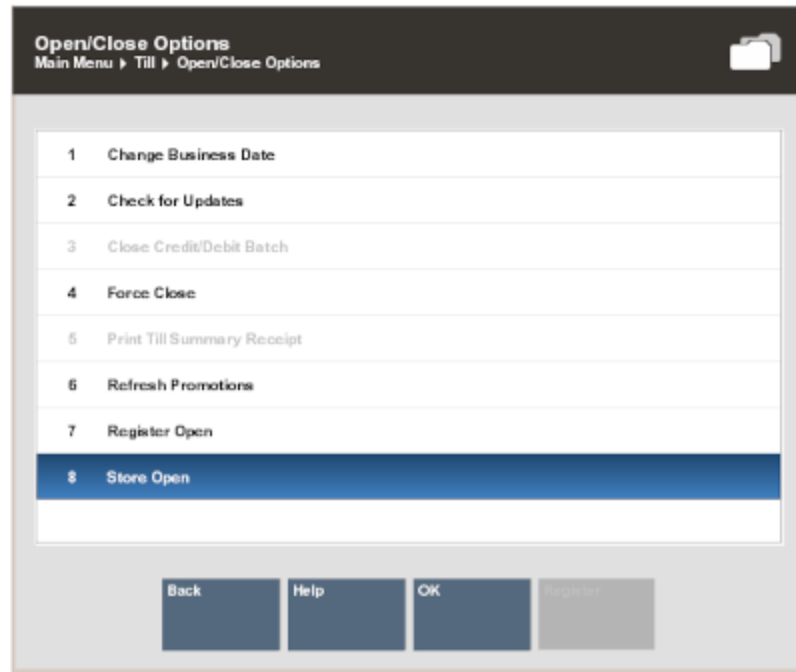
2. The Back Office Main Menu displays. Select the **Open/Close Options** menu option and press **Enter**.

Figure 9-9 Back Office - Open/Close Options



3. At the Open/Close Options menu, select the **Store Open** option and select **OK**.

Figure 9-10 Open/Close Options - Store Open



 Note:

The **Register Open** and **Store Open** menu options toggle between open and close. The Store Open menu option indicates that this store is currently closed. The Register Open menu option indicates that this register is also closed.

4. The system prompts: Do you want to open this store? Select Yes to continue with the store open process.
5. If prompted to confirm the business date, verify the default date shown is correct (today's date) and press **Enter**.

Figure 9-11 Business Date Prompt



 Note:

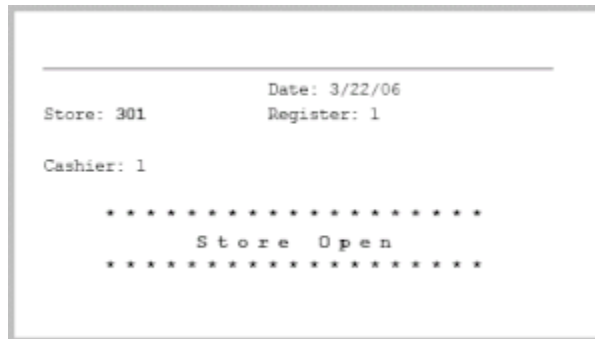
If this date is incorrect, enter the new business date at the prompt. Oracle Retail Xstore Point of Service prompts you to confirm the date you entered.

This function is controlled by security.

6. Oracle Retail Xstore Point of Service displays a prompt showing the date the store has been opened for. Press **Enter** for Ok to continue the store open process.
7. Depending upon the configuration of your system, you may be prompted with other messages concerning the status of various functions within the store. If prompted, acknowledge these messages to continue with the store open process.

For example, you may be notified that a cycle count for inventory is due or that items are ready to be received.
8. A message that was entered during the store close may be displayed. If displayed, press **Enter** to acknowledge this message and continue with the store open process.
9. If prompted, enter the starting cash amount for the store safe. Refer to [Store Safe Maintenance](#) for more information about opening the store safe.
10. The system may print a store open receipt for your records.

Figure 9-12 Store Open Receipt



 Note:

Note that the store status indicator



has changed to green indicating the store is now open. However, the Register status indicator is red with a cross mark indicating that this register is still closed.

11. The system prompts: Do you want to open this register? Select **Yes** to open the register. Refer to [Register Open and Close](#) for more information about opening the register.

The store and register are opened for the new business day.

 Note:

If you select **No** at the Open Register prompt, the system returns to the Open/Close Options menu.

Once the store is open, sales cannot be rung until the register is opened and a till is counted for the register.

Calling the Update Service

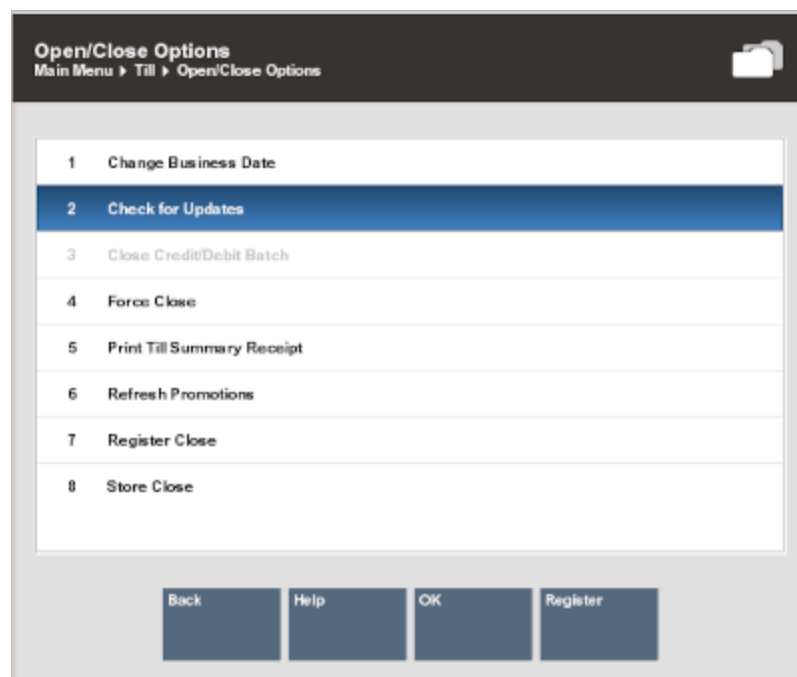
 Note:

This process is controlled by user security and is only available for authorized users.

The Check for Updates process allows Oracle Retail Xstore Point of Service to request the download manifest on demand. This option provides the ability to bypass the scheduler normally run during the store close, and to initiate the download manifest when called.

1. Select the Back Office option and log in with your user name and password.
2. The Back Office Main Menu displays. Select the **Check for Updates** menu option and press **Enter**.

Figure 9-13 Check for Updates Menu Option



3. The system prompts: Xstore has requested updates. Press **Enter** to confirm.

 Note:

Some system updates may not take immediate effect in Oracle Retail Xstore Point of Service.

Manually Refresh Promotions

Typically a promotion is updated with new information during a register restart. Use this process to update new promotions that are cached without having to restart that register, such as in the middle of the day.

 Note:

Applies to registers only and you would need to perform this action on each register to update its cache for promotions.

To refresh the promotion cache for a register:

1. In the Back Office menu, select **Open/Close Options**.
2. Select **Refresh Promotions**.
3. Oracle Retail Xstore Point of Service displays a confirmation prompt: Are you sure you want to refresh promotions? This may take several minutes.
4. Press **Y** to continue. A progress bar is displayed until the update is complete.

 Note:

Pressing **N** at the Refresh Promotions confirmation prompt cancels the refresh process and returns you to the Open/Close Options menu.

5. When the update is complete, a prompt is displayed: "Promotions have been refreshed as of (time and day)." Select **OK** to exit.

24/7 Store Environment

A store can function 24 hours a day and seven days a week.

If your system is configured to support a 24-hour store environment, the store will perform a rolling close on registers. Each register will be rolled over to the next retail period (business day) one by one; always keeping at least one register available for use.

A retail period is the period in which the retailer defines as their store hours (for example, 12:00 am - 11:59 pm).

A retail session is defined as the time in which a register is opened until it's closed. Multiple retail sessions can occur within a retail period.

The 24-hour store environment is supported for both register accountability and till accountability. Register accountability is where a till is assigned to a register and can be used by any cashier that uses the register. Till accountability is where a till is assigned to a specific cashier. The assigned till can be attached to any register the cashier may work on during the day.

Deferred cash management allows the retailer to open a store on the next business day without reconciling, closing the store, or ending the retail period. These processes have been separated so they can be completed later.

This chapter covers the following topics:

- [Store Opening](#)
- [Daily 24/7 Flows](#)
- [Rolling Close](#)
- [Store Closure](#)
- [System Updates](#)

Store Opening

Full store opening is usually only done with the first initial opening of the store. It is performed on only one register. The store open procedure signals that the store is open to all registers. See [Opening the Store](#) for more information.

Once the store is open, sales cannot be rung until the register is opened and a till is counted for the register.

Daily 24/7 Flows

For systems using 24/7 trading, the register open process must be performed on each register every day. Depending upon the configuration of your system and the time that the register is opened, the system may prompt you to open the register for the previous day or the next day.

You have different options to configure the system about the desired process in the 24-hour environment. During the 24-hour flow, the system may ask the cashier to re-open the register

during the close register process automatically. Alternatively, the register is not opened automatically, which would require the cashier to log in to open the register.

Depending on your system's configuration, the float can be configured so:

- the cashier is prompted to enter the float amount
- the cashier starts with the pre-defined float
- the remaining cash balance on the register being carried over as the new float amount
- the remaining cash currencies being adjusted to the approximate default, known as the Float Balance

Once the float has been defined, the register is open, and the new retail session has begun.

After an open register is approaching the end of a retail period, [Warning Messages](#) are displayed to encourage the closing of the register and to move to the next retail period. You can continue to perform transactions on the register until the end of a configurable grace period. At the end of the grace period, you must close the register. This ensures that all the registers are moved forward to the next retail period.

The rolling close process is separated from the register reconciliation process in a register accountability configuration. This means that register reconciliation is not required before closing a register or retail period.

If the register is configured to open automatically after the [Register/Till Close](#) process without user interaction, you may be prompted to enter a new amount, or a new till is inserted into the drawer with a pre-determined float amount.

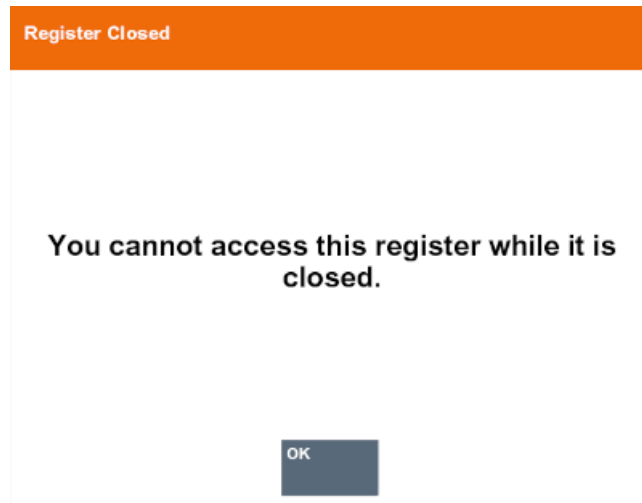
Use the following steps to complete a full daily cycle:

- [Register/Till Open](#)
- [Reconcile Register/Till](#)
- [Warning Messages](#)
- [Register/Till Close](#)
- [New Business Period](#)
- [Define Float](#)

Register/Till Open

To open a register that is configured for 24/7 trading, follow these steps:

1. When you attempt to log in to the system, Xstore Classic 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 **OK** to close the message.

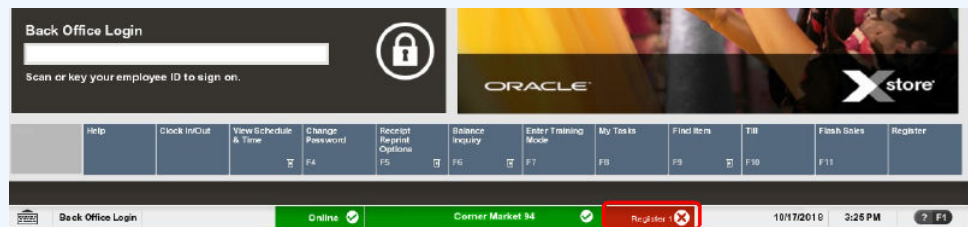
Figure 10-1 No Access - Register Closed

The red register indicator on the status bar also shows that the register is closed.

Figure 10-2 Status Bar - Register Closed

 Note:

If you are using a touchscreen, 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.



2. Select the **Back Office** option on the Register menu to open the register from the Back Office Main Menu.

 Note:

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

3. Xstore Classic prompts for your employee ID to log in to the back office. Enter your employee ID and then press **Enter**.

Figure 10-3 Back Office Login



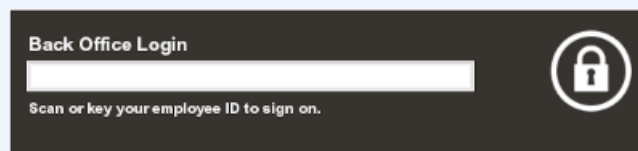
Back Office Login

Scan or key your employee ID to sign on.

 Note:

If your system is set up to use a Biometric Fingerprint device, an Employee ID Login prompt displays. Use the device to scan your fingerprint rather than entering your user ID and password.

Scanned and keyed entry is also supported at this prompt.

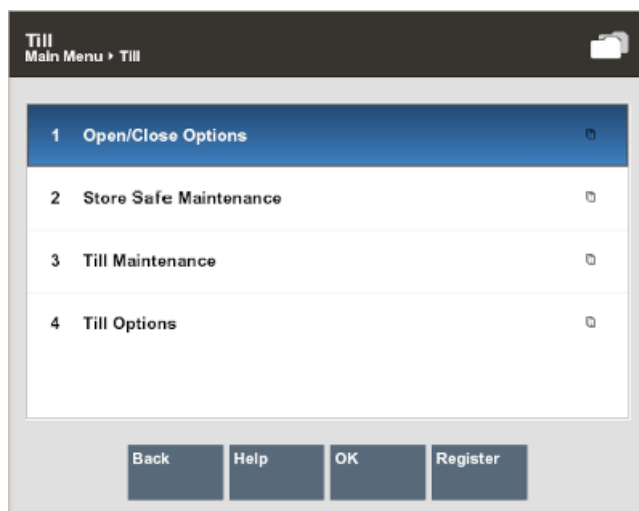


Back Office Login

Scan or key your employee ID to sign on.

4. Xstore Classic prompts for your employee password to complete the login process. Enter your employee password and then press **Enter**.
5. At the Back Office Main Menu, select **Till** and then 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 10-4 Till Menu - Open/Close Options



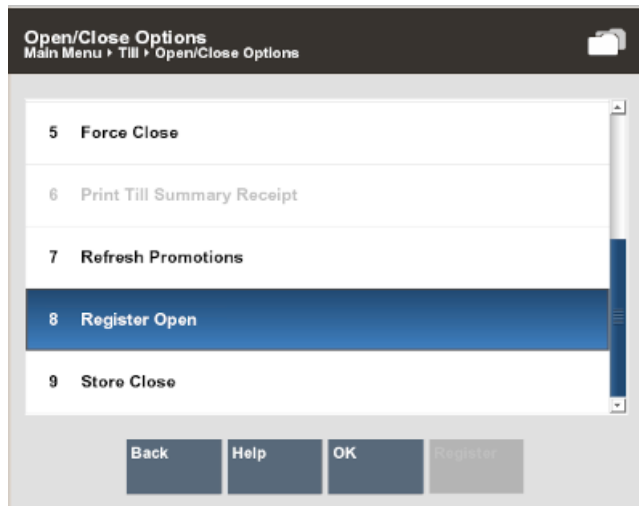
Till
Main Menu > Till

1	Open/Close Options	
2	Store Safe Maintenance	
3	Till Maintenance	
4	Till Options	

Back Help OK Register

- 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 10-5 Open/Close Options - Register Open

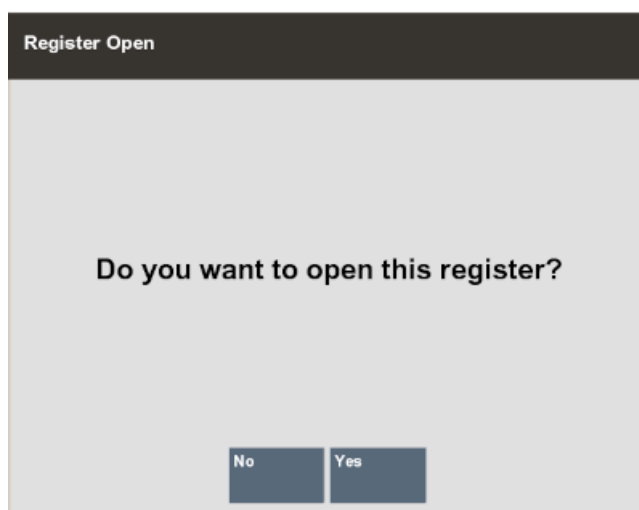


 Note:

The Register menu option toggles between Open and Close. If the available menu option is **Register Close**, the register is currently open. If the available menu option is **Register Open**, the register is currently closed.

- Xstore Classic prompts: Do you want to open this register? Press **Yes** to confirm that you want to open this register.

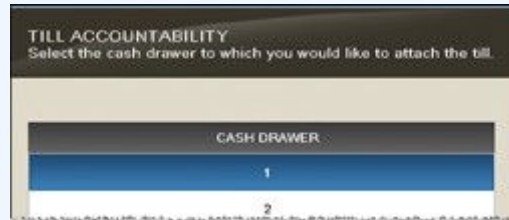
Figure 10-6 Register Open Prompt



 Note:

The following prompts are optional depending on your configuration:

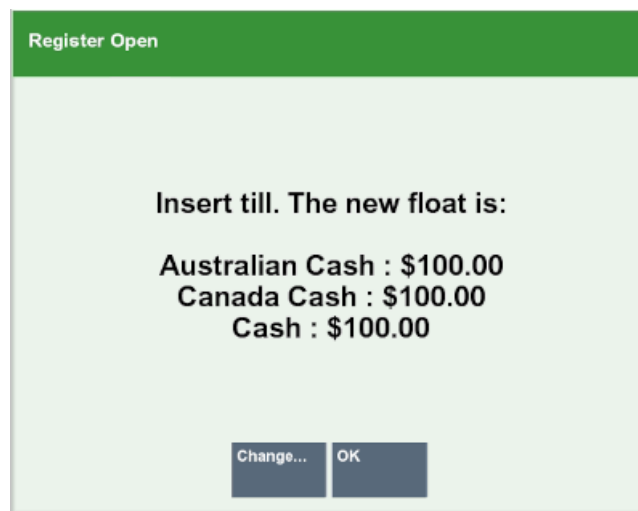
- If your register has more than one cash drawer, you are prompted to select the drawer from a list of available cash drawers.



- The system may be configured to print a Register Open receipt.

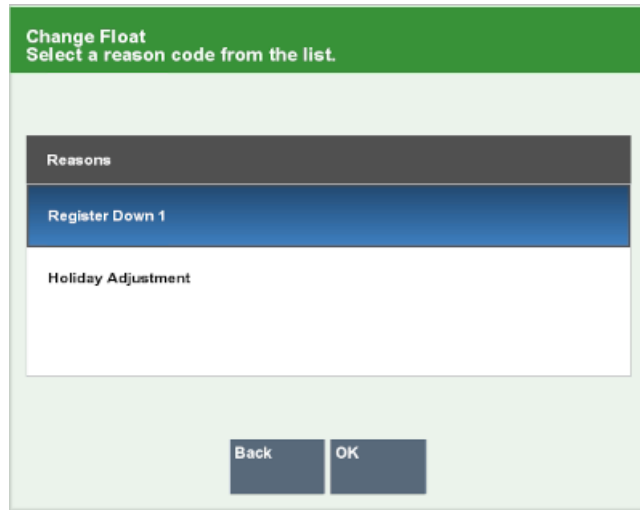
8. Depending upon your system configuration, there are different float options when opening the till:
 - For example, if **Prompt for Float** is configured, all money is removed during close. A new till is inserted and counted during open. You are required to enter the float value.
 - If **Pre-defined Float** is configured, all money is removed during close. A new till is inserted during open but not counted. You are prompted to insert the till. The float amount of the till is displayed.

Figure 10-7 Pre-defined Float Amount



- a. Press **OK** to confirm the float amount.
- b. Press **Change Float** to enter a new float amount for the till.
You are prompted for a reason.

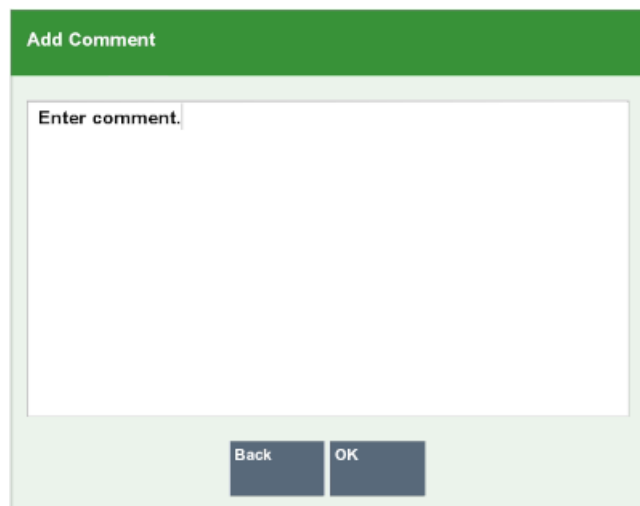
Figure 10-8 Change Float



The dialog box has a green header bar with the text "Change Float" and "Select a reason code from the list." Below the header is a list titled "Reasons" with two items: "Register Down 1" (highlighted in blue) and "Holiday Adjustment". At the bottom are "Back" and "OK" buttons.

Select the reason and press **OK**.
You are prompted to enter a comment.

Figure 10-9 Add Comment



The dialog box has a green header bar with the text "Add Comment". Below the header is a text input field with the placeholder text "Enter comment.". At the bottom are "Back" and "OK" buttons.

If necessary, enter additional comments and press **OK**.
Select a currency to change.

Figure 10-10 Change Float Select Currency

Enter the new amount in the **Change Float Amount** field.

Figure 10-11 Change Float Amount

Press the **Enter** button.

Click **Yes** to confirm the new amount. Return to the Insert Till screen.

If necessary, click **Change** to repeat these steps for a different currency.

- If the **Carried Over Float Amount** is configured, all cash is left in the drawer and you are prompted to remove all non-cash tenders (that is, checks, traveler's checks and so on). During the register open process, the end balance of the register during the register close process is carried over to the next retail period as the new float amount. You are not prompted to count the drawer at register open.
- If **Float Balance** is configured, during the register close process, you are prompted to perform a cash pickup to skim the till to match the approximate float amount. You are also prompted to remove all non-cash tenders (that is, checks, traveler's checks and so on).

If there are suspended transactions from the previous retail period, the transactions are displayed. Press **OK** to cancel these transactions.

 Note:

You can configure the time period to look back when searching for suspended transactions. By default, all suspended transactions older than 12 hours are cancelled.

You can start your sales transactions as the new retail session has begun.

Reconcile Register/Till

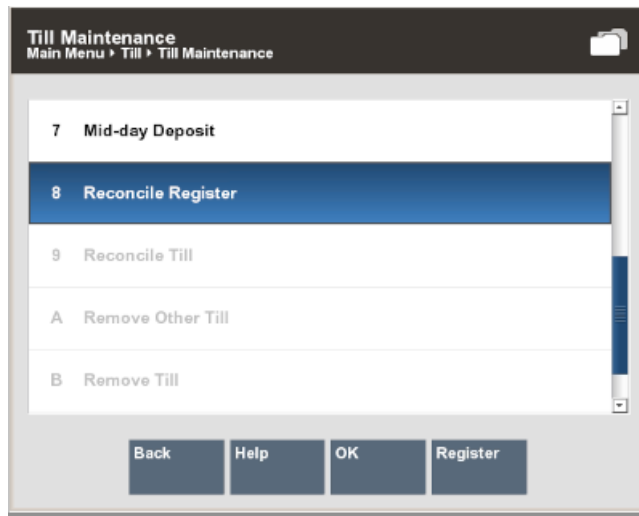
Register/Till reconciliation is performed separately from the [Register/Till Close](#) process and is used to count drawers after the register is closed. It is not necessary to reconcile before the register is opened again and can be performed later.

Reconcile Register is used when in Register Accountability mode and Reconcile Till when in Till Accountability mode.

In a register accountability configuration, it is not mandatory to complete register reconciliation before closing a register or business period. To begin the register reconciliation process, at least one register must be closed.

1. At the Back Office Main Menu, select **Till Maintenance** and press **Reconcile Register/Till**.

Figure 10-12 Till Maintenance Options



The Closed Register Summary list displays.

Figure 10-13 Closed Register Summary

Register ID	Session
1	0004 5/14/19 4:47 PM - 5/17/19 3:53 AM
1	0005 5/17/19 4:04 AM - 5:40 AM

Back OK

2. Select a till to reconcile. Each one is counted individually.

Figure 10-14 Reconcile Register

Do you want to reconcile the following register?

Register 1
Session 0005 5/17/19 4:04 AM - 5:40 AM

No Yes

Select **Yes** to confirm the correct register is selected.

3. All available tender types are displayed in the Count Summary screen, with the following amounts.
 - **Declared Amount:** The declared amount is the amount you enter in the Denomination Count screen.
 - **System Amount:** The system amount is the expected amount from the system.
 - **Over/Short Amount:** The over/short amount shows the difference between system and declared amount.

Figure 10-15 Count Summary

Count Group	Declared	System	Over/Short
Credit Card	\$0.00	\$0.00	\$0.00
Issue Store Credit	\$0.00	\$0.00	\$0.00
Store Credit	\$0.00	\$0.00	\$0.00
US Traveler Check	\$0.00	\$0.00	\$0.00
Gift Card	\$0.00	\$0.00	\$0.00
Australian Cash	\$0.00	\$180.00	(\$180.00)
Canada Cash	\$0.00	\$100.00	(\$100.00)
British Pound	£0.00	£0.00	£0.00
Mexico Cash	\$0.00	\$0.00	\$0.00
Sweden Cash	\$0.00	\$0.00	\$0.00
Cash	\$0.00	\$226.20	(\$226.20)
Euro Cash	€0.00	€0.00	€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

4. You are prompted to select a tender type for the till reconcile.
5. Select a tender type and press **Select Count**.
6. Depending on the configuration of the selected tender type, the displayed screens vary.
 - a. The Denomination Count screen appears.

Figure 10-16 Denomination Count

Denomination	Qty	@	Amount
Five Cent	0	0.05	\$0.00
Ten Cent	0	0.1	\$0.00
Twenty Cent	0	0.2	\$0.00
Fifty Cent	0	0.5	\$0.00
Dollar	0	1	\$0.00
Two Dollar	0	2	\$0.00
Five Dollar	0	5	\$0.00
Ten Dollar	0	10	\$0.00
Total			\$0.00

- You are prompted to select a denomination and enter the quantity.
- Select a denomination. Enter the quantity and press **Confirm Entry**. The amount for the denomination and the total amount is displayed on the Sales Display Panel.

Figure 10-17 Denomination Count After Entry

Denomination	Qty	@	Amount
Fifty Cent	0	0.5	\$0.00
Dollar	0	1	\$0.00
Two Dollar	0	2	\$0.00
Five Dollar	0	5	\$0.00
Ten Dollar	0	10	\$0.00
Twenty Dollar	4	20	\$80.00
Fifty Dollar	0	50	\$0.00
Hundred Dollar	1	100	\$100.00
Total			\$180.00

- Repeat this process for all available denominations.
 - After you have entered all denominations for the tender type, press **Complete**. The system returns to the Count Summary.
- b. If no denominations are configured, the Total Count screen appears.

Figure 10-18 Totals Count Screen

Count	Total
0	\$0.00

- You are prompted to enter the total count for the selected tender type.
 - Enter the total count and press **Confirm Entry**. The count is displayed on the Sales Display Panel.
 - You are prompted for the total amount of the selected tender type.
 - Enter the total amount and press **Confirm Amount**. The total amount is displayed on the Sales Display Panel.
 - Then select **Complete**. The system returns to the Count Summary.
- c. If the Check tender type is selected to count, the Totals Count screen is displayed.

Figure 10-19 Check Tender Type

Totals Count	
Register ID: 1	Check
Session: 0007 5/17/19 9:07 AM - 10:00 AM	
Serial #	Amount
Total	
\$0.00	

- You are prompted to enter the serial number for the tender type.
- Enter the serial number and press **Confirm Entry**.
- You are prompted for the amount of the selected tender type.
- Enter the amount and press **Confirm Amount**. The serial number and the entered amount are displayed on the Sales Display Panel.
- Then press **Complete**. The system returns to the Count Summary.

**Note:**

Use the **Remove Count** button to remove an entered count from the Sales Display Panel.

7. Depending on whether or not your till is out of balance the displayed message varies.
 - a. **Out of balance:** If tender types are out of balance, you are prompted to accept the difference.

Figure 10-20 Out of Balance Example

The screenshot shows a green header bar with the text "Deposit". Below the header, the main area is light green and contains the following text: "The following tenders or tender types are out of balance:", "Canada Cash, Cash", and "Do you want to accept the difference?". At the bottom, there are two dark blue buttons labeled "No" and "Yes".

- **Yes** - accept the difference and close register.
You are prompted for the reason. Select the reason and press **OK**.
You can also add additional comments. Enter a comment and press **OK**.
 - **No** - repeat till count again.
- b. **In balance:** If all entered tender types are in balance, an Information prompt "Till is in balance" is shown.

Figure 10-21 Till in Balance

The screenshot shows a green header bar with the text "Till Count". Below the header, the main area is light green and contains the text "Test Till 1 is in balance.". At the bottom, there is a dark blue button labeled "OK".

Press **OK** to close the Information prompt.

8. The register/till is reconciled.

Once all the registers are reconciled within a retail period, you can perform [End Retail Period](#).

Warning Messages

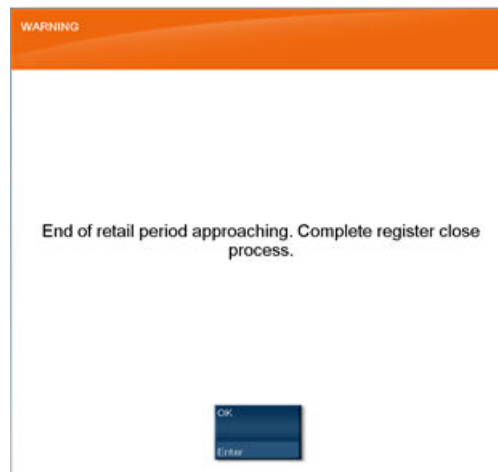
Warning messages inform you that the end of retail period is approaching, and you should start the [Register/Till Close](#) process. The default time frame for the 24/7 rolling close functionality is 24 hours (but this can be configured). A grace period allows you to close the register within a configurable gap. Once the grace period has ended, you must close the register and move to the next retail period. The following messages are displayed.

1. By default, a warning message is displayed one hour before the end of the retail period. This message appears at the beginning of a transaction, every 10 minutes until the register close process has been started.

 Note:

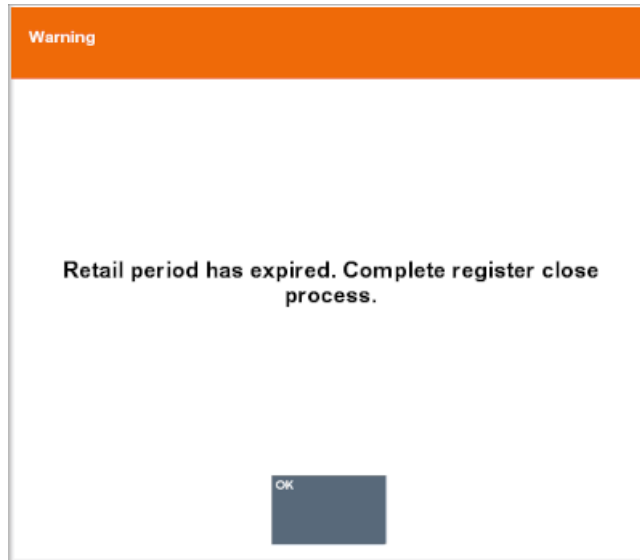
The time frame for the warning messages is configurable.

Figure 10-22 End of Retail Period Approaching Warning



2. When the configured end of retail period time has passed, another message is displayed on each register. The message informs you that the retail period has expired and that you must close the register.

Figure 10-23 Retail Period Expired



3. If you try to open a register within the warning or grace period (two hours by default), you are prompted if you want to change to the next retail period, or if you want to open the register within the current retail period.
 - Select **Next** to open the register in the next available retail period.

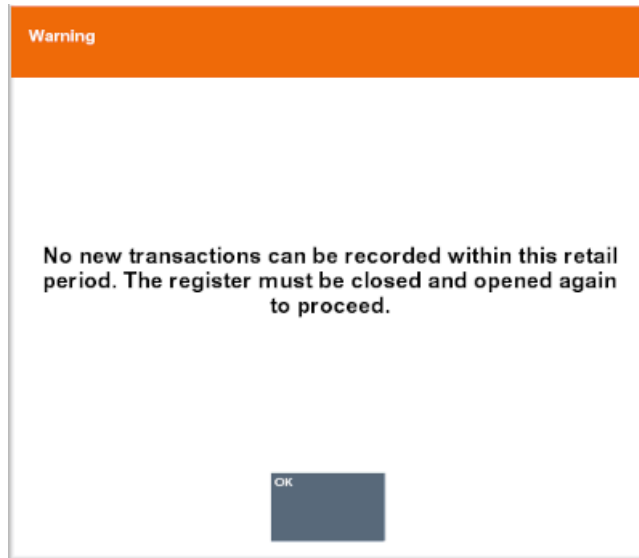


Note:

The register is closed and moved to the next retail period. You cannot re-open the previous retail period.

- Select **Current** to open the register within the current retail period.
4. After the configured store hours' time frame and the grace period have passed, all registers that have not been moved to the next retail period are locked. You cannot start new transactions.

You receive a warning message that you cannot start new transactions within the current retail period. You must close and open the register again to start a new transaction.

Figure 10-24 No New Transactions

Register/Till Close

Rolling Close must be configured in order to remove the Count Process from the Register Close. Close each individual register one at a time manually without the need for till reconciliation. Count the drawer, denominations, and if required open the register again.

The register close process must be performed on each opened register for it to be rolled over into the next day.

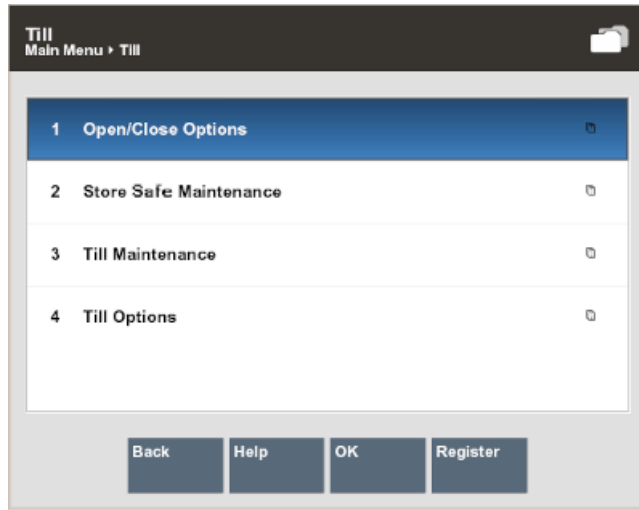
Note:

Near the end of day, (that is, close to or after the required close time), warning messages will appear on remaining open registers. If a register continues to stay open past the required close time, the register will eventually prevent the user from utilizing the register until it is closed and reopened for the next day. See [Warning Messages](#).

To close a register for the retail session:

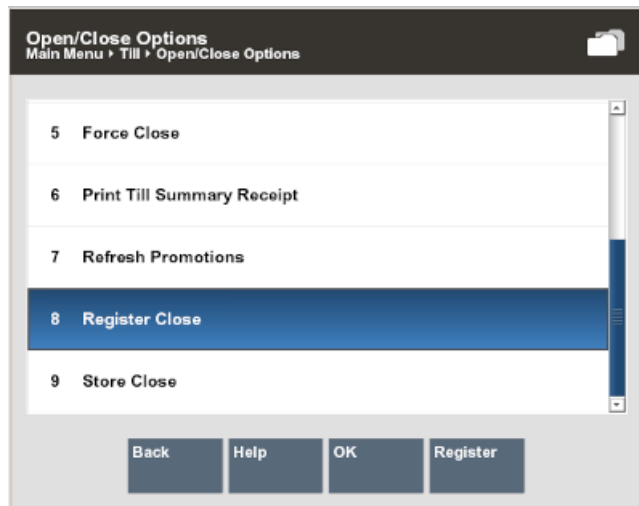
1. From the register to be closed, select the **Back Office** option on the menu. Follow any prompts to log in to the Back Office as required.
2. At the Till menu, use the up and down arrow keys to select **Open/ Close Options** and press **Enter**, or press the number associated with the menu option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

Figure 10-25 Till - Open/Close Options



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

Figure 10-26 Open/Close Options - Register Close



 Note:

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 Classic displays a confirmation prompt: Do you want to close this register? Press **Yes** to close the register. If the message is not configured, continue with step 5.

Figure 10-27 Close Register



 Note:

You will need sufficient security privileges to close the register.

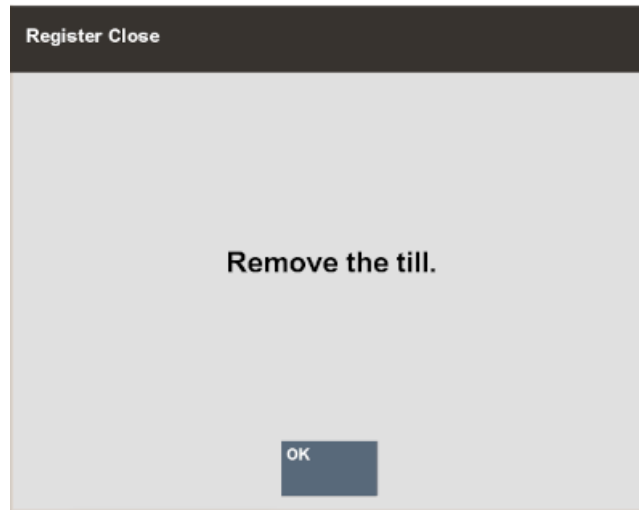
 Note:

Pressing **No** at the Register Close confirmation prompt cancels the register close process and returns you to the Open/Close Options menu.

The cash drawer opens.

5. Depending upon the configuration of your system, you may be prompted to either remove all non-cash tenders from the till or remove all the till contents. Follow the instructions on the screen, then click **OK** to continue.
 - For example, if [Prompt for Float](#) or [Pre-defined Float](#) is configured, all money is removed during close.

Figure 10-28 Remove Till Prompt



- If **Carried Over Float Amount** is configured, all cash is left in the drawer. You are prompted to remove all tenders, except for the default cash tenders (that is, checks, traveler's checks and so on). You are informed that the remaining balance will be the new float amount for the next retail period. You are not prompted to count the drawer.

Remove the corresponding tenders. Press **OK** to close the message.

- If **Float Balance** is configured, during the register close process, you are prompted to perform a cash pickup to bring the float down to match the approximate default float amount.

You are prompted to remove all non-cash tenders from the cash drawer (that is, checks, traveler's checks, and so on), and the excess amount above the configured threshold float. You are informed that the remaining tenders are adjusted to the approximate default float amount.

Remove all necessary tenders. Press **OK** to close the message.

- a. Change the suggested amount or confirm the suggested amount with **Enter**.
- b. Move the money to the cash deposit bag or safe.

 Note:

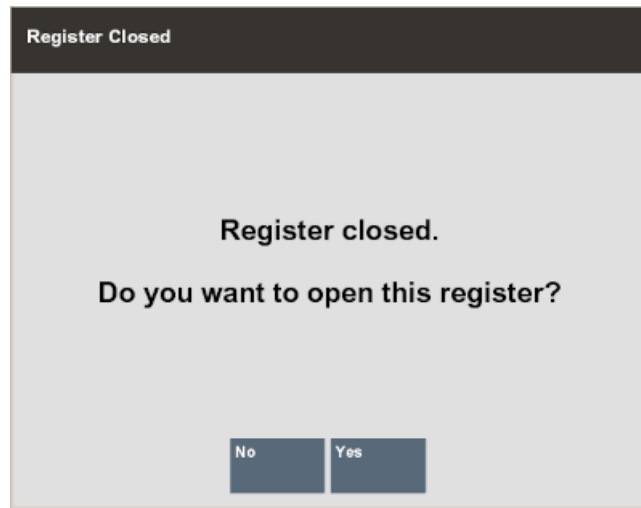
If the till amount needed to be picked up, is less than or equal to the configured float amount, no cash pickup is needed, and this step is omitted.

If multiple currencies are configured, this step is repeated until all float currencies have been completed.

6. The system may be configured to print a Closed Count receipt and a Register Closed receipt.

Close the cash drawer and the system closes the register.

7. After the register close is complete, you may be prompted whether to re-open the register.

Figure 10-29 Register Open Prompt

- Click **No** to keep the register closed.
- Click **Yes** to re-open the register.

New Business Period

The processes that typically happen behind the scenes during a traditional store close process happens when the first register is opened in a new retail period.

Define Float

How the float is handled when opening/closing a register can be configured in one of the following ways:

- [Prompt for Float](#)
- [Pre-defined Float](#)
- [Carried Over Float Amount](#)
- [Float Balance](#)

Prompt for Float

If the function Prompt for Float is enabled, all money is removed during close. A new till is inserted and counted during the register open process. The value of the float is entered.

At the register close you are prompted to remove the till, but no counting of the drawer is done at this time.

Pre-defined Float

All money is removed during close, but you are not prompted to count the drawer. A new till is inserted during open, but not counted.

During the register open process, you are prompted to insert a new till into the drawer which includes a pre-configured till amount. There is the option to Change Float if required.

Carried Over Float Amount

All cash is left in the drawer, but you are prompted to remove all non-cash tenders such as checks. The balance of the register amount during register close will carry over to the next business period as the new float amount.

During the register open process, the end balance of the register during the register close process is carried over to the next retail period as the new float amount. You are not prompted to count the drawer.

Float Balance

During the register close process, you are prompted to perform a pickup of the excess money above the configured float amount. During close, enough money is removed to bring the float down to the approximate default float. The prompt 'Remaining currencies will be adjusted to the approximate default float' is shown.

You are not prompted to count the drawer at register open.

Rolling Close

The register close process must be performed on each opened register for it to be rolled over into the next day.

Close each individual register one at a time manually without the need for till reconciliation. See [Register/Till Close](#).

All registers and tills must be closed for the business period(s) in order to complete [End Retail Period](#) process.

End Retail Period

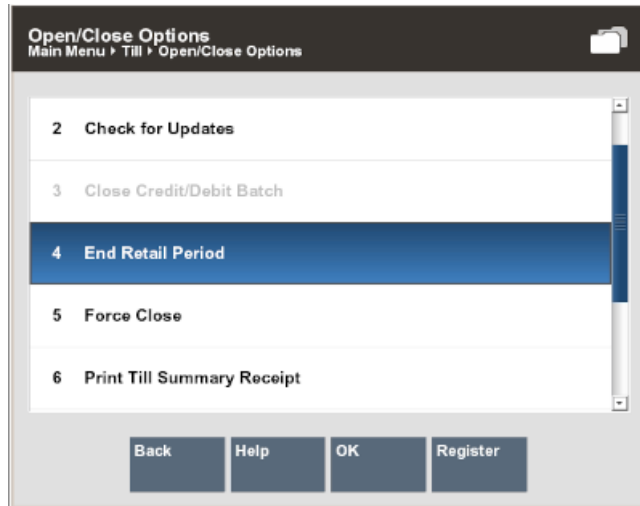
End Retail Period is a Back Office menu option that is required for 24-hour trading. It is initiated after all the tills have been counted using the Reconcile Register or Reconcile Till menu options. See [Reconcile Register/Till](#). The store safe is counted during this process and the deposits confirmed. The End of Retail Period can be deferred to a later date.

The end of retail period process is needed to close a business date after the business period has closed and till reconciliation has completed. The End Retail Period process closes the books on the business date.

To end a retail period:

1. Select **End Retail Period** from the Open/Close Options Back Office screen.

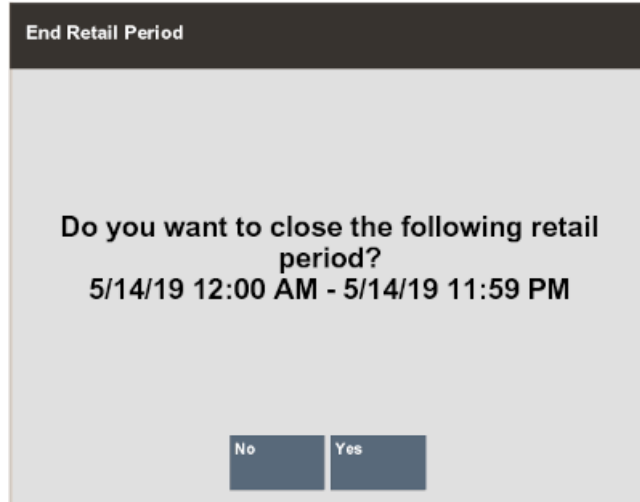
Figure 10-30 End Retail Period



The business periods are listed in chronological order by date.

2. Select the business period from a list of reconciled business periods and click **OK**.
3. The prompt "Do you want to close the following retail period?" is displayed.

Figure 10-31 Close Retail Period



Select **Yes**.

4. The Store Safe Deposit Count Summary and Count Denomination screens follow. Select a tender and enter the amount by denomination.

Figure 10-32 Safe Deposit Summary

The screen displays a keypad on the left and a 'Count Summary' table on the right. The keypad has buttons for digits 0-9, a decimal point, and a minus sign. Below the keypad is a green box with the text 'Count Summary' and 'Select a tender to count or select an option from the menu.' At the bottom of the screen are buttons for 'Cancel', 'Help', 'Count Selected', and 'Counting Complete'.

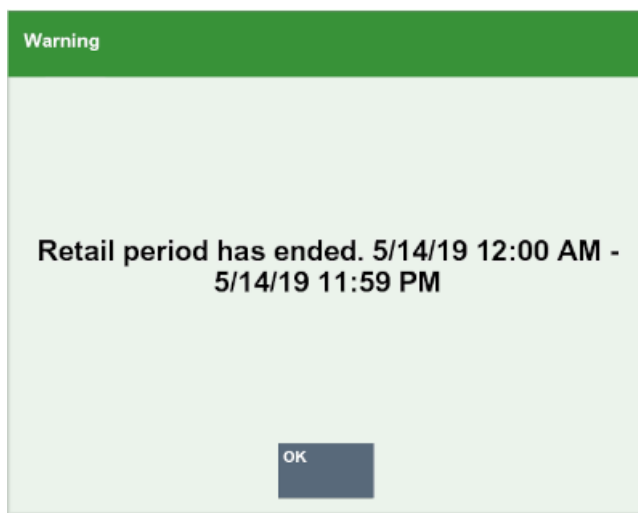
Count Summary			
Register ID: 1 Session: Store Bank			
		Balance Summary Over/Short	
Count Group	Declared	System	Over/Short
US Traveler Check	\$0.00	\$0.00	\$0.00
Australian Cash	\$180.00	\$0.00	\$180.00
Canada Cash	\$100.00	\$0.00	\$100.00
British Pound	£0.00	£0.00	£0.00
Mexico Cash	\$0.00	\$0.00	\$0.00
Sweden Cash	\$0.00	\$0.00	\$0.00
Cash	\$200.00	\$0.00	\$200.00
Euro Cash	€0.00	€0.00	€0.00
Check	\$0.00	\$0.00	\$0.00

5. When all amounts have been entered for the required tenders, select **Counting Complete**. The Confirm Safe Deposit screen confirms the bank deposit amounts.

Figure 10-33 Confirm Safe Deposit

The screen displays a confirmation message: 'You have indicated that you want to deposit the following amounts.' Below this is a list of deposit amounts: 'Is this correct?' followed by 'US Traveler Check: \$0.00', 'Australian Cash: \$180.00', 'Canada Cash: \$100.00', 'British Pound: £0.00', 'Mexico Cash: \$0.00', 'Sweden Cash: \$0.00', 'Cash: \$200.00', 'Euro Cash: €0.00', and 'Check: \$0.00'. At the bottom are 'No' and 'Yes' buttons.

Figure 10-34 Retail Period Ended Prompt



6. An End Retail Period message is displayed: "Retail period has ended. <date/time> - <date/time>". Select **OK** to continue.
7. Once the business period is closed, the user is returned to the Xstore Home screen.

Once the end of retail period has been processed, the period cannot be re-opened, and no further action can be performed.

Store Closure

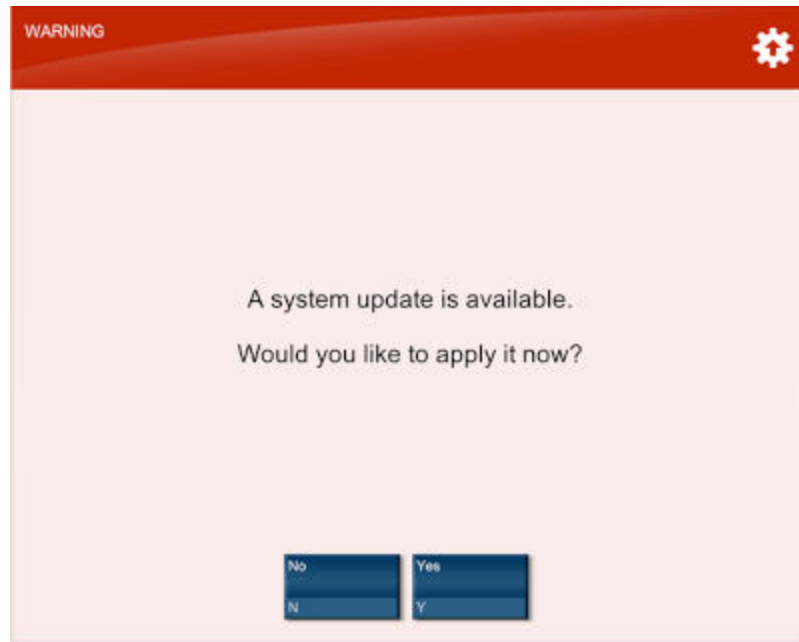
Full store closure is usually only done when closing/shutting down a store.

See [Closing the Store](#) for more information.

System Updates

Data updates are run automatically in the background while the system is running. When system updates require the application to be temporarily shut down, you are prompted when entering the Back Office at the end of a transaction.

Figure 10-35 System Update Warning



You can delay the system updates for a configurable grace period, so you are not forced to perform the updates immediately if you need time to prepare for them.

At the end of the grace period, there is a configurable time frame in which no new transactions can be started, but existing transactions will be completed. Then, the system updates are applied automatically.

Till Management

There are two types of till management: Register Accountability and Till Accountability. Register Accountability is the default system mode and is used unless the system is configured to use Till Accountability.

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

Alternatively, the till can be assigned to networked cash drawers.

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

Till Accountability: A till is assigned to a specific cashier. The assigned till can be attached to any register the cashier may work on during the day. The cashier must count the assigned till and then attach the till to a cash drawer/register before ringing transactions. The system can be configured to allow the cashier to enter a total amount counted, or to count by denomination. For denomination counts, the cashier counts and enters each denomination separately and each count is saved into the system.

At the end of the cashier's shift, the cashier must count and return the assigned till to the cash management office for reconciliation. This process transfers responsibility for the assigned till back to the cash manager.

Till Accountability also allows Dual Cash Drawer functionality, in which one register can use two separate cash drawers. This allows two cashiers to share a single POS register while keeping their tills separate.

**Note:**

Refer to the *Oracle Retail Xstore Point of Service User Guide* for detailed information about counting tills.

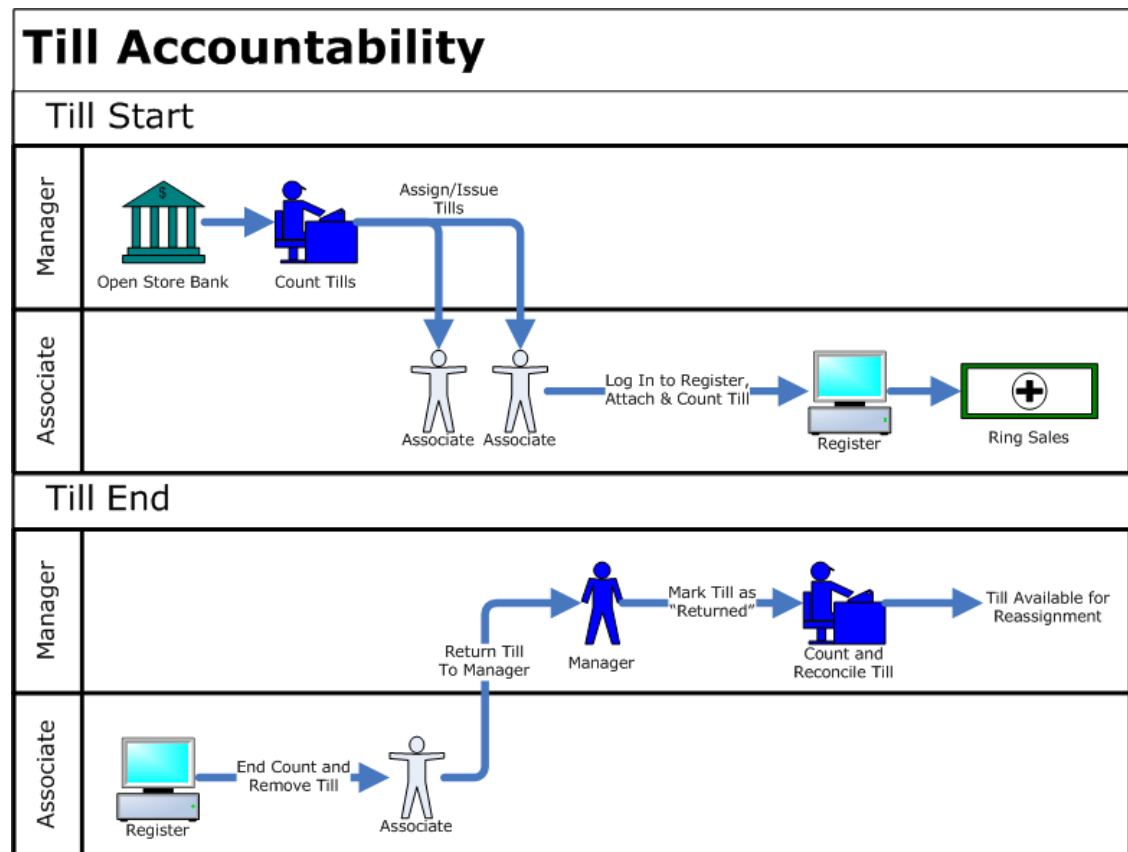
This chapter contains the following sections:

- [Till Accountability Process](#)
- [Accessing Back Office Till Management Functions](#)
- [About Till Options](#)
- [About Till Maintenance](#)
- [Register Accountability Mode Functions](#)
- [Till Accountability Mode Only Functions](#)

Till Accountability Process

The till accountability process follows a sequence of steps that require till counts whenever the till is moved or given to another person. These steps provide additional checks and balances each time the status of any till changes.

Figure 11-1 Till Accountability Process



Till Start

1. Manager opens and counts the store safe.
2. Manager assigns/issues tills to associates and confirms the starting cash amount in each till.
3. Associate picks up the assigned till and goes to a register.
4. Associate logs in to a register.
5. Associate is prompted to attach the till to the register. If multiple cash drawers are available, the associate is prompted to select a cash drawer.
6. Associate attaches the till to the cash drawer in the register.
7. Associate counts the beginning amount of cash in the till.
8. Associate is ready to ring sales.

Till End

1. Associate can either end count the till at the register (Count Till) or remove the till to count it in the Back Office (Remove Till). The counting process is the same in either location.
2. Associate counts the till.
3. Associate removes the till and returns the till to the manager.
4. Manager marks the till as Returned in the system. The manager has now accepted responsibility for the till.
5. Manager performs the reconciliation count on the returned till.
6. The till is now available and can be issued to another employee, starting the process over again.

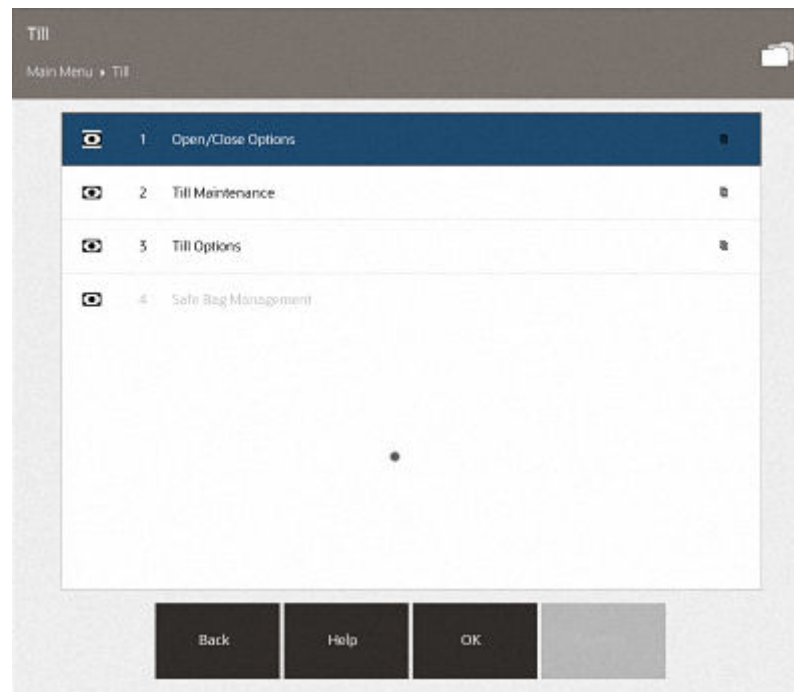
Accessing Back Office Till Management Functions

Associates with the proper security permissions may access Till Management from the Back Office Main Menu. The Back Office Till menu offers till management functions such as assigning and reconciling tills, till audit functions, changing the float amount, and making safe deposits.

1. After logging in to the Back Office, select the **Till** option from the Main Menu and press **Enter** for OK.

Depending on the configuration of your system, the Till Options may also be available from the employee login screen and the Register screen.

Figure 11-2 Till Menu



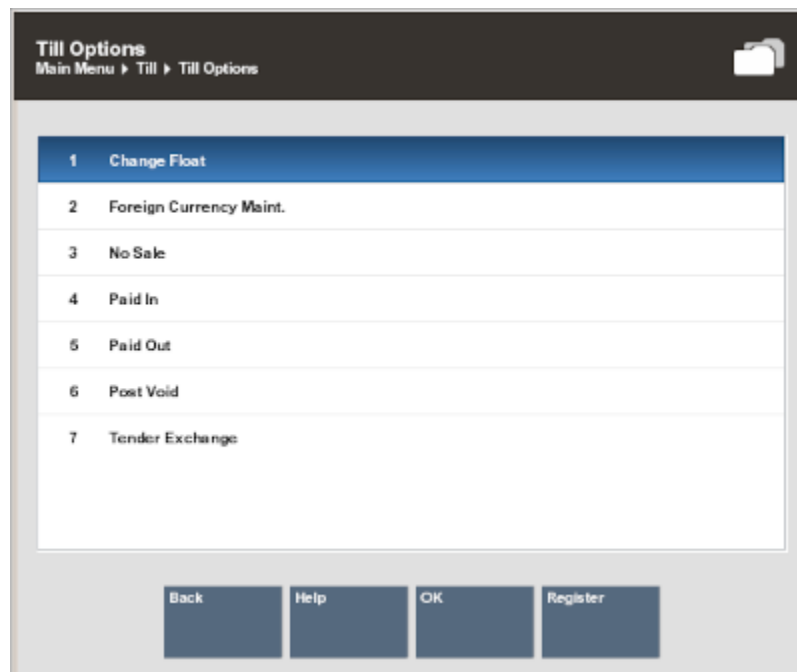
 Note:

You can also type the number associated with the menu option to access the function.

About Till Options

Select this option for all functions that apply to a till in use by the register.

Figure 11-3 Till Options Menu



The Till Options menu has the following options:

- Change Float - Select this option to change the amount of cash that remains in each till after the end count is performed. See [Changing the Float Amount](#).
- Foreign Currency Maint. - Select this option to update the exchange rate between the local currency and foreign currencies that are acceptable tenders. See [Foreign Currency Maintenance](#).
- No Sale - Select this option to perform a no sale transaction to open the cash drawer.

 Note:

Refer to the *Oracle Retail Xstore Point of Service User Guide* for a step-by- step procedure describing the no sale transaction.

- Paid In - Select this option to perform a paid in transaction. This option requires an attached till. See [Performing Paid In/Paid Out Transactions](#).

- Paid Out - Select this option to perform a paid out transaction. This option requires an attached till. See [Performing Paid In/Paid Out Transactions](#).
- Post Void - Select this option to perform a post void transaction. See [Attaching a Cash Drawer Till](#) for more information.
- Tender Exchange - Select this option to perform a tender exchange transaction, which allows you to exchange one form of tender for another. For example, accept a customer's check for some amount and give them the same amount as cash.

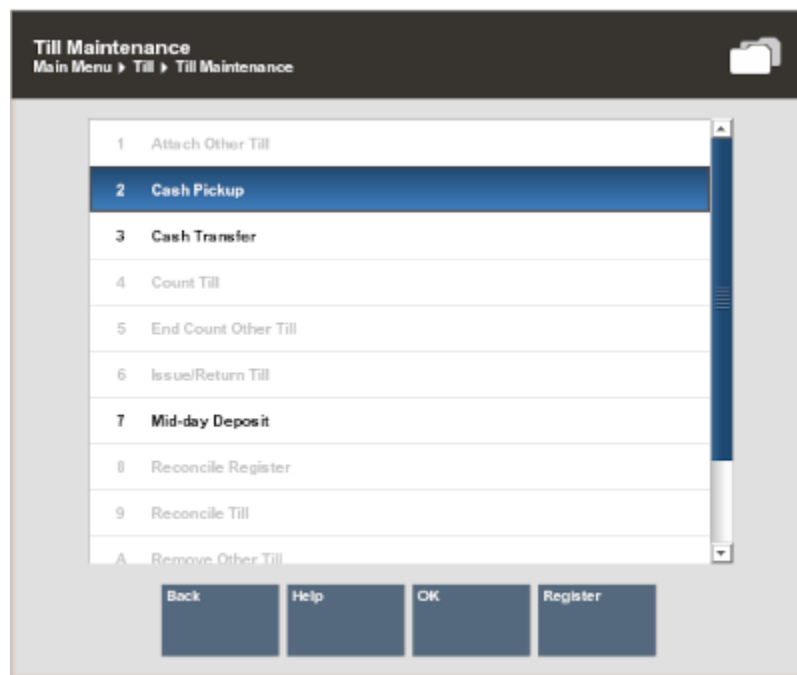
 Note:

Refer to the *Oracle Retail Xstore Point of Service User Guide* for a step-by- step procedure describing the tender exchange process.

About Till Maintenance

Select this option for all manager-level till functions, including the opening, issuing, attaching, removing, and closing of a till. Some options may also be available to non- managers, depending on your store policy.

Figure 11-4 Till Maintenance Menu



The following section is divided into two:

- [Register Accountability Mode Options](#)
- [Till Accountability Mode Only Options](#)

Register Accountability Mode Options

- Cash Pickup - Select this option to perform a cash pickup transaction. See [Cash Pickup](#).
- Cash Transfer - Select this option to transfer cash to a till. See [Cash Transfer](#).
- Till Audit - Select this option to perform a till audit (a count performed on an active till).

Note:

Till audit does not adjust the till counts; it is used only to count the till while it is attached to a register. See [Till Audit](#).

- Mid-day Deposit - Select this option to perform a mid-day deposit transaction, which allows a manager to place funds into a store safe during a working session. See [Attaching a Cash Drawer Till](#).
- Attach Cash Drawer Till - Only used when networked cash drawers are configured. See [Attaching a Cash Drawer Till](#).
- Remove Cash Drawer Till - Only used when networked cash drawers are configured. See [Removing a Cash Drawer Till](#).
- Reconcile Cash Drawer - Only used when networked cash drawers and 24/7 trading is configured. See [Reconciling a Networked Cash Drawer Till](#).

Till Accountability Mode Only Options

When using till accountability, the following options are available, in addition to the options listed above for register accountability.

- Issue/Return Till (Till Accountability Mode Only) - Select this option to assign a till to a cashier and to enter the starting cash amount or return an issued till. See [Issuing a Till \(Till Accountability Mode Only\)](#).
- Count Till (Till Accountability Mode Only) - Select this option to perform a begin count or close count on a till. If a begin count was not performed on the till, this option starts a begin count. If a begin count was performed on the till, this option starts a close count.
 - See [To Perform a Begin Count](#) for a description of the begin count procedure.
 - See [Closing the Register](#) for a description of the close count procedure.
- Attach Other Till (Till Accountability Mode Only) - Select this option to attach a till to the register. This option can attach a till that is assigned to you or to another associate. See [Attaching Other Till \(Till Accountability Mode Only\)](#).
- Remove Till (Till Accountability Mode Only) - Select this option to remove a till that is assigned to you and attached to the register. See [Removing a Till \(Till Accountability Mode Only\)](#).
- Remove Other Till (Till Accountability Mode Only) - Select this option to remove any employees till that is attached to the register. See [Removing a Till \(Till Accountability Mode Only\)](#).
- End Count Other Till (Till Accountability Mode Only) - Select this option to end count a till assigned to any employee. See [End Count Other Till \(Till Accountability Mode Only\)](#).

- **Reconcile Till (Till Accountability Mode Only)** - Select this option to count a returned till and compare your counts with the cashier's counts. See [Reconciling a Till \(Till Accountability Mode Only\)](#).
- **Store Safe Maintenance** - Select this option for all functions related to the store bank. This submenu contains the following functions:
 - **Open Store Safe (Till Accountability Mode Only)** - Select this option to open the store safe. See [Store Safe Opening with Safe Bag \(Till Accountability Mode Only\)](#).
 - **Reconcile Store Safe (Till Accountability Mode Only)** - Select this option to reconcile the store safe. See [Reconciling the Store Safe with a Safe Bag \(Till Accountability Mode Only\)](#).
 - **Safe Deposit** - Select this option to remove money from the store safe so that it can be deposited into a bank. See [Preparing the Bank Deposit using a Safe Bag](#).
 - **Store Safe Audit** - Select this option to perform an audit count of the store safe. See [Store Safe Auditing with a Safe Bag](#).
 - **Store Safe Cash Deposit** - Select this option to make a cash deposit into the store safe. See [Store Safe Cash Deposit using a Safe Bag](#).

Till Options

This section describes the available till options:

- [Changing the Float Amount](#)
- [Foreign Currency Maintenance](#)
- [Performing Paid In/Paid Out Transactions](#)
- [Post Voiding Transactions](#)

Changing the Float Amount

The Float is the total value of cash counted and removed from the till, but not included in the safe 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 safe deposit and can be adjusted per till. For example, you may want to change the float amount during the December holiday shopping season to plan for increased sale activity.

1. At the Till menu, select **Till Options**.
2. At the Till Options menu, select the **Change Float** option.

Figure 11-5 Till Options Menu - Change Float

The screenshot shows a software interface titled "Till Options" with a breadcrumb trail "Main Menu > Till > Till Options". A list of seven options is displayed, with the first option, "1 Change Float", highlighted in blue. The other options are: "2 Foreign Currency Maint.", "3 No Sale", "4 Paid In", "5 Paid Out", "6 Post Void", and "7 Tender Exchange". At the bottom of the screen, there are four buttons: "Back", "Help", "OK", and "Register".

3. The system prompts for the reason you are changing the float amount. Select a reason from the list and press **Enter** for OK to continue.

Figure 11-6 Change Float Reason List

The screenshot shows a screen titled "Change Float" with the instruction "Select a reason code from the list." Below this is a list box labeled "Reasons". The first item in the list, "Holiday Adjustment", is highlighted in blue. Below the list box, the text "Register Down 1" is visible. At the bottom of the screen, there are two buttons: "Back" and "OK".

4. Depending upon the reason you selected, you may be prompted for additional information/ comments. If prompted, enter the information as required and press **Enter** for OK.

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

Figure 11-7 Change Float - Currency List

The screenshot shows a screen titled "Change Float" with the instruction "Select currency to change." Below the title is a list of currencies: "Cash", "Australian Cash", and "Canada Cash". The "Canada Cash" option is highlighted in blue. At the bottom of the screen are two buttons: "Back" and "OK".

5. 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 the tills you want to change, press **Enter** for OK.

Figure 11-8 Till List - Two Tills Are Selected

The screenshot shows a screen titled "Change Float" with the instruction "Select tills to change for Canada Cash." Below the title is a table with three columns: "Register", "Till ID", and "Float Amount". The table lists six tills, with "TILL2" and "TILL5" highlighted in blue. At the bottom of the screen are two buttons: "Back" and "OK".

Register	Till ID	Float Amount
1	TILL1	\$100.00
2	TILL2	\$100.00
3	TILL3	\$100.00
4	TILL4	\$100.00
5	TILL5	\$100.00
6	TILL6	\$100.00

6. The system prompts for the new float amount for the selected tills. Enter the new float amount for the tills in the list and press **Enter**.

Figure 11-9 New Float Amount Prompt

The screenshot shows a software interface with a green header bar containing icons for Info, Tasks, Goals, Messages, and Keypad. Below the header is a numeric keypad with digits 0-9, a decimal point, and navigation arrows. A green box labeled 'Change Float Amount' contains a text input field and the instruction 'Enter the new float amount for Cash.' To the right, a table displays the current float amount for a selected till.

Register	Till ID	Float Amount
1	TLL1	\$150.00

At the bottom of the interface is a navigation bar with buttons for Back, Help, and Register.

7. The system prompts to confirm the new float amount for the selected tills. Press **Y** for Yes to accept the new float amount. The system updates the float amount to the new value for the selected tills and returns to the Main Menu.

Figure 11-10 Confirm New Float Amount Prompt

The screenshot shows a confirmation dialog box titled 'Change Float'. It has a green header bar. The main area is light green and contains the text 'Save \$200.00 as the new float amount for the selected tills?'. At the bottom, there are two buttons labeled 'No' and 'Yes'.

Foreign Currency Maintenance

You can edit the currency exchange rate for the foreign currencies that are accepted as tenders for sale transactions, if your store policy allows it. Some currency rates fluctuate frequently, so you can edit the exchange rate as often as necessary.

**Note:**

Your system's configuration may make Foreign Currency Maintenance available from the Register Till Options menu as well as from the Back Office Till menu.

1. At the Till menu, select the **Till Options** option.
2. From the Till Options menu (Figure 11-3), select the Foreign Currency Maint. option.
3. If the system prompts for a security login, enter your employee ID and password and select Process.
4. Oracle Retail Xstore Point of Service displays a list of currencies. Select the currency whose exchange rate you are changing, then press **Enter** for OK.

Figure 11-11 Foreign Currency List

Currency	Description	Exchange Rate
SEK	Sweden Cash	0.56
BRL	Brazilian Cash	3.3
AUD	Australian Cash	1.12
EUR	Euro Cash	0.85
MXN	Mexico Cash	16.8
CAD	Canada Cash	1.45
GBP	British Pound	0.75

5. The system displays the current information for the currency you selected. Enter the new exchange rate and a comment, then select **Save New Rate**.

Figure 11-12 New Exchange 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:
Update requested by J. Tellman

Cancel Help Save New Rate

6. Oracle Retail Xstore Point of Service prompts whether to change the exchange rate. Select **Yes** to continue.

Figure 11-13 Confirmation Prompt

Tender

Are you sure you want to change the USD to EUR (Euro Cash) exchange rate from 0.85 to 0.86?

No Yes

7. The new currency exchange rate is now effective, and the system prints a receipt with the new exchange rate. Oracle Retail Xstore Point of Service returns to the Main Menu.

 Note:

About exchange rate calculations in currency conversions:

- The exchange rate with the base currency ID of the local currency ID is the value that is used to calculate a converted currency amount. The exchange rate is stored as a factor of the local exchange rate.
- The conversion is calculated by multiplying the local currency by the exchange rate.

Performing Paid In/Paid Out Transactions

A Paid In transaction allows you to move funds into a till from non-sale sources such as returned check charges, found money, and change from a Paid Out transaction.

A Paid Out transaction moves funds out of a till for non-refund purposes such as business expenses and office supply purchases.

Store policy controls the list of valid reasons that you can select for performing a Paid In or Paid Out transaction. In addition, store policy controls whether receipts are produced by these two transactions.

The Paid In and Paid Out transactions may also be available on the Till Options Menu at the register.

 Note:

A till must be attached to the register to perform Paid In/Paid Out transactions. If a till is not attached and one of those options is selected, a message is displayed indicating that a till must be attached for the transaction to be performed.

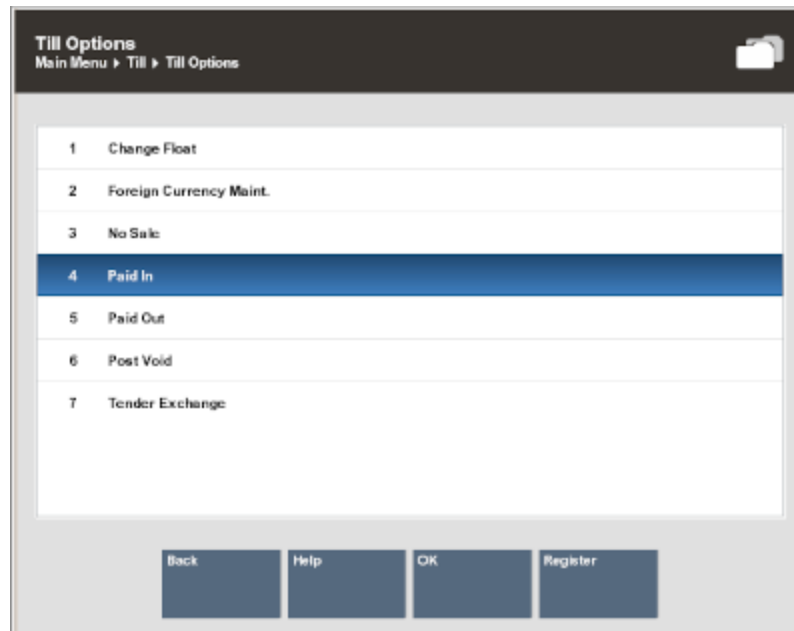
In an only networked cash drawer environment, you are required to scan the cash drawer barcode to link it to the transaction before the drawer pops.

In a mixed network/local cash drawer environment, select whether to use a network cash drawer.

Paid In Transaction

1. From the Till Menu, select the **Till Options** option.
2. From the Till Options menu, select the **Paid In** option.

Figure 11-14 Till Menu - Paid In Option



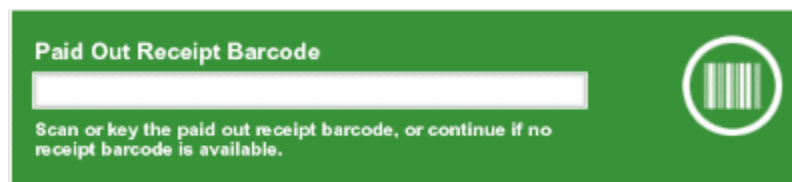
The screenshot shows a software interface titled "Till Options" with a breadcrumb trail "Main Menu > Till > Till Options". A list of seven options is displayed: 1 Change Float, 2 Foreign Currency Maint., 3 No Sale, 4 Paid In (highlighted in blue), 5 Paid Out, 6 Post Void, and 7 Tender Exchange. At the bottom, there are four buttons: Back, Help, OK, and Register.

 Note:

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

3. The system prompts you to enter a paid out receipt barcode. If you are now placing funds back into the till from a previous paid out transaction and you have the receipt, scan or enter the barcode and press **Enter**. Otherwise, just press **Enter** to bypass this prompt.

Figure 11-15 Paid Out Receipt Barcode Prompt



The screenshot shows a green screen with the title "Paid Out Receipt Barcode". Below the title is a white rectangular input field. Underneath the field, the text reads: "Scan or key the paid out receipt barcode, or continue if no receipt barcode is available." On the right side of the screen, there is a circular icon containing a barcode.

4. Select a reason for this Paid In transaction and press **Enter** for OK.

Figure 11-16 List of Paid In Reasons

 Note:

There may be additional prompts for information (such as a comment) depending upon the specific reason code that you select.

5. At the Amount prompt, enter the cash amount you are adding to the till and press **Enter**.

Figure 11-17 Enter Amount Prompt

6. Oracle Retail Xstore Point of Service prompts you to close the cash drawer (if configured to do so), prints a receipt, and returns to the Main Menu.

Figure 11-18 Paid In Receipt

Xstore

6573 Cochran Rd
Suite A
Solon, Oh 44139
330-555-1212

Ticket: 13 Date: 9/24/05
Store: 301 Register: 1
Cashier: 1
Session ID:

PAID IN
Till ID: Till1
Code: TcTransRC-3
Change from Paid Out

Transaction Ref #: T1131GK113111H4AFYER

Paid In Amount: 7.26

x _____
Employee's Signature



 Note:

Note the reference to the original paid out transaction number shown in this example. This information associates the original paid out transaction with the current paid in transaction for accounting purposes.

Paid Out Transaction

1. From the Till Menu, select **Till Options**.
2. From the Till Options menu, select the **Paid Out** option.

Figure 11-19 Till Menu - Paid Out Option

The screenshot shows a software interface titled "Till Options" with a breadcrumb trail "Main Menu > Till > Till Options". A list of seven options is displayed: 1 Change Float, 2 Foreign Currency Maint., 3 No Sale, 4 Paid In, 5 Paid Out (highlighted in blue), 6 Post Void, and 7 Tender Exchange. At the bottom, there are four buttons: Back, Help, OK, and Register.

Option Number	Option Name
1	Change Float
2	Foreign Currency Maint.
3	No Sale
4	Paid In
5	Paid Out
6	Post Void
7	Tender Exchange

Buttons: Back, Help, OK, Register

Note:

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

3. Select a reason for this Paid Out transaction and press **Enter** for OK.

Figure 11-20 List of Paid Out Reasons

The screenshot shows a software interface titled "Paid Out" with the instruction "Select a reason for performing a paid out." Below this is a list of reasons: Stocks (highlighted in blue), Contractor Services, Store Incentives, Postage, and Delivery. At the bottom, there are two buttons: Back and OK.

Reason
Stocks
Contractor Services
Store Incentives
Postage
Delivery

Buttons: Back, OK

 Note:

There may be additional prompts for information (such as a comment) depending upon the specific reason code that you select.

4. At the Amount prompt, enter the cash amount you are removing from the till and press **Enter**.

Figure 11-21 Enter Amount Prompt



5. Oracle Retail Xstore Point of Service prompts you to close the cash drawer (if configured to do so), prints a receipt, and returns to the Main Menu.

Figure 11-22 Paid Out Receipt Sample



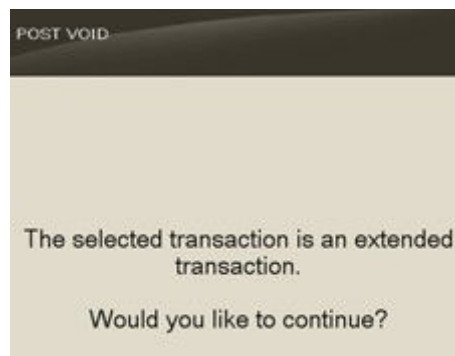
Post Voiding Transactions

Performing a Post Void transaction changes the status of a sales transaction to Void. Only transactions for the current business date can be post voided.

All records in the system are reset, almost as if they had never occurred during the original transaction, and the transaction record is retained in a voided state.

Certain kinds of sale transactions may involve extended transactions — activities related to the transaction that occur outside of the system. For example, special orders, work orders, and layaways are extended transactions.

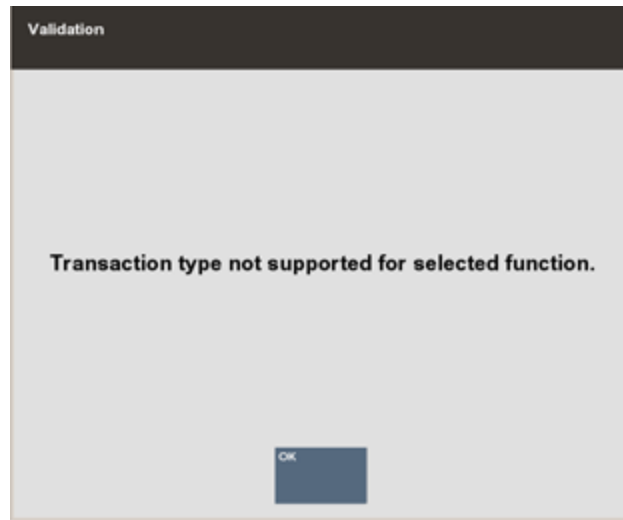
Figure 11-23 Post Void - Extended Transaction Prompt



Although the system checks for such conditions when a post void is executed, some aspects of the transaction may need to be reversed by an additional transaction such as a return. If the system detects an extended transaction, a prompt to continue or discontinue the post void process displays.

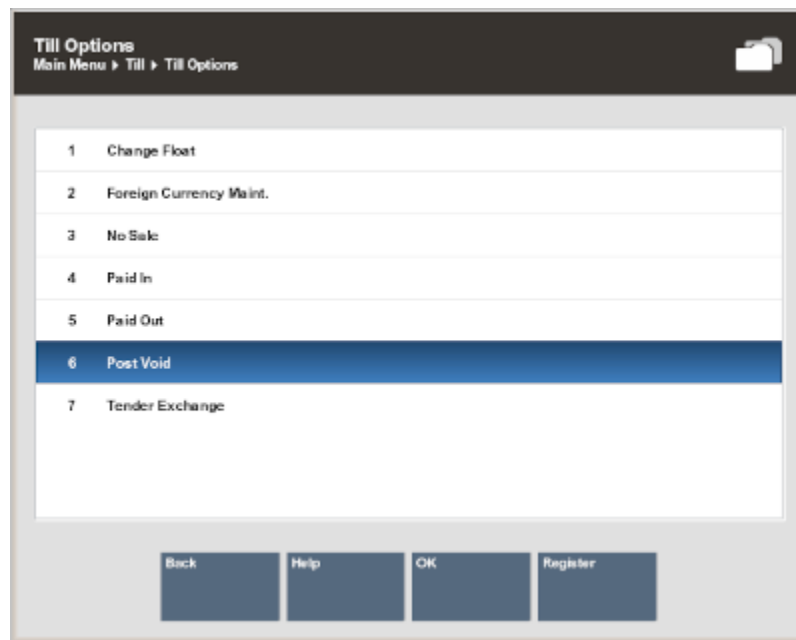
The types of transactions that may be post voided are determined by the home office.

If you scan or enter a barcode for a transaction type that cannot be post voided (such as a timecard transaction), the system displays a message indicating that the transaction type cannot be post voided. Press **Enter** for OK to acknowledge the message and the system returns to the Till menu.

Figure 11-24 Post Void - Transaction Type Not Supported

You can post void transactions from the register (see the *Oracle Retail Xstore Point of Service User Guide*), from the Electric Journal (see [Post Voiding a Transaction](#)), or from the Till menu.

1. At the Till menu, select **Till Options**.
2. From the Till Options menu, select the **Post Void** option.

Figure 11-25 Till Options Menu - Post Void Option

 Note:

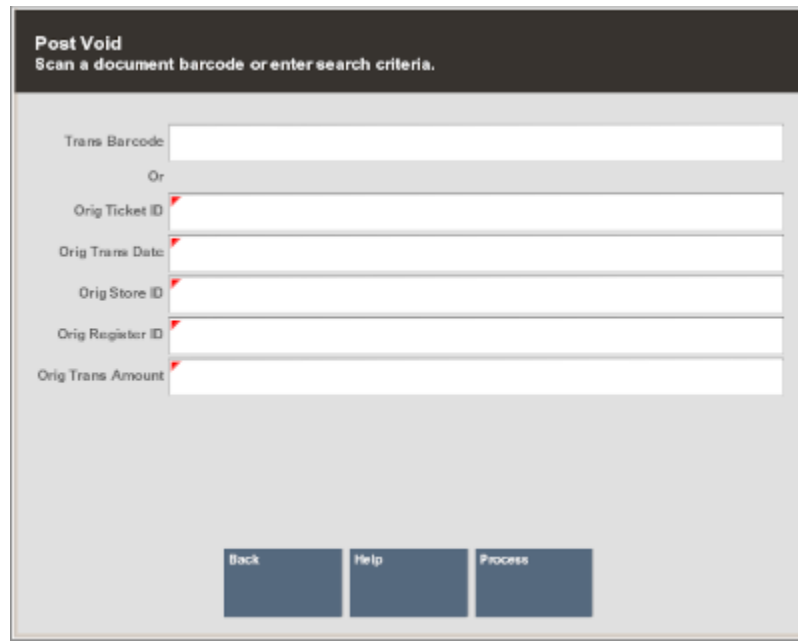
A till must be attached to the register to perform a transaction void. If a till is not attached, this option may be grayed out on the menu (Register Accountability mode), or a message may be displayed if the Post Void menu option is selected (Till Accountability mode). If the register has more than one cash drawer, you may be prompted to select the till to be used for this process.

In an only networked cash drawer environment, you are required to scan the cash drawer barcode to link it to the transaction before the drawer pops.

In a mixed network/local cash drawer environment, select whether to use a network cash drawer.

3. At the Post Void prompt, scan or enter the transaction information and select Process to continue.

Figure 11-26 Post Void Prompt



4. Oracle Retail Xstore Point of Service prompts: Are you sure you want to post void the selected transaction? Select **Yes** to continue with the post void transaction.
5. The system prompts for the reason you are performing the post void. Select a reason from the list and press **Enter** for OK.

Figure 11-27 Post Void Reasons

Reason Code
Select a reason code from the list.

Reasons
Cashier Error
Supervisors Discretion
Customer Satisfaction

Back OK

6. The system may prompt for a comment about the post void. If prompted, type a comment and press **Enter** for OK to continue.
7. Oracle Retail Xstore Point of Service post voids the transaction, prints receipts, and returns to the Main Menu.

Figure 11-28 Post Void Receipt

Ticket: 11	Date: 9/24/05		
Store: 301	Register: 1		
Cashier: 1			
DEFAULT SYSTEM USER			
VOID TRANSACTION			
Code:MGR_DISCRETION			
Manager's Discretion			
Item	Qty	Price	Amount
Navy Dress Leather Loafers			
1004			
	1	99.00	99.00
		Subtotal	99.00
	Tax	3.00%	5.94
		Total	104.94
Cash			105.00
Change			
Cash			(0.06)
Original Tran ID:10			
Original Cashier ID:1			
Original Register ID:1			
* * V O I D * * V O I D * * V O I D * *			

Register Accountability Mode Functions

This section describes the register accountability functions:

- [Cash Pickup](#)
- [Cash Transfer](#)
- [Till Audit](#)
- [Mid-day Deposit](#)
- [Cash Drawers](#)

Cash Pickup

Cash Pickup moves cash from the till to the store safe. It is a cash drawer feature that allows an operator to take cash from a till so that the amount does not exceed a specified threshold amount. Each tender type that is physically in the till can be picked up, for example, cash, foreign currencies, or coupons. The register shows a prompt, if the cash in the till is over the set maximum amount. See [Cash Pickup using a Safe Bag](#) if using a safe bag to collect the cash.

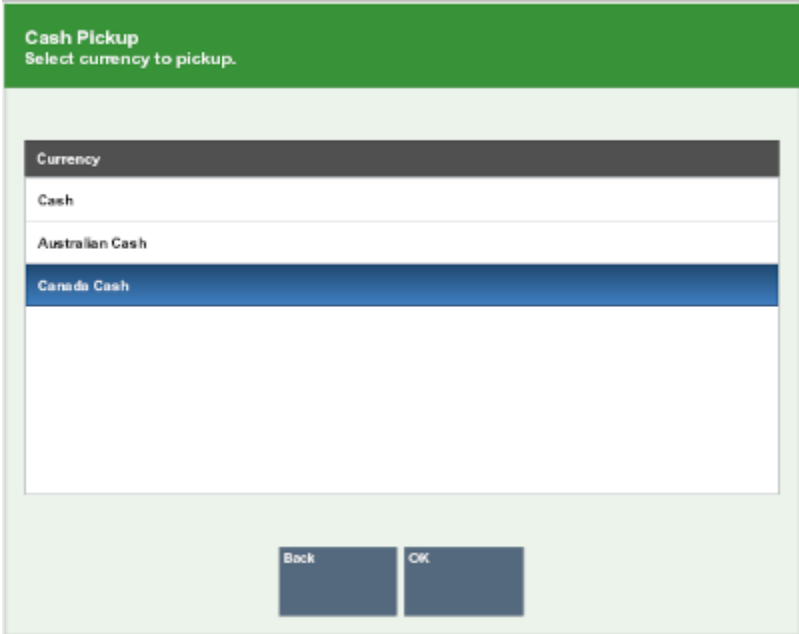
 Note:

This procedure may differ from the cash pickup transaction performed by a cashier. See the *Oracle Retail Xstore Point of Service User Guide* for more information about this transaction type.

To perform a Cash Pickup:

1. From the Till menu, select the **Till Maintenance** option.
2. From the Till Maintenance menu (Figure 11-4), select the Cash Pickup option.
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 11-29 Cash Pickup Currency List



Cash Pickup
Select currency to pickup.

Currency
Cash
Australian Cash
Canada Cash

Back OK

4. If the register has more than one cash drawer, you are prompted to select a till for the pickup. Select the till and press **Enter** for OK.

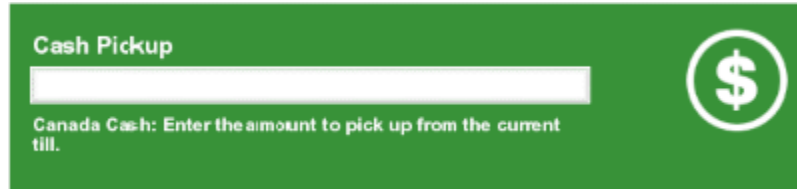
 Note:

In an only networked cash drawer environment, you are required to scan the cash drawer barcode to link it to the transaction before the drawer pops.

In a mixed network/local cash drawer environment, select whether to use a network cash drawer.

5. You are prompted to enter the amount of the pickup. Enter the amount and press **Enter**.

Figure 11-30 Cash Pickup Amount



6. A receipt prints for the Cash Pickup. Oracle Retail Xstore Point of Service returns to the Main Menu.

Cash Transfer

Cash Transfer moves cash from the store safe to a till.

To perform a Cash Transfer, do the following steps:

1. From the Till menu, select the **Till Maintenance** option.
2. From the Till Maintenance menu ([Figure 11-4](#)), select the Cash Transfer option.

Note:

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

In an only networked cash drawer environment, you are required to scan the cash drawer barcode to link it to the transaction before the drawer pops.

In a mixed network/local cash drawer environment, select whether to use a network cash drawer.

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

Figure 11-31 Cash Transfer Currency List

4. You are prompted to enter the amount of the Cash Transfer. Enter the amount, then press **Enter**.

Figure 11-32 Cash Transfer Amount Prompt

5. A receipt prints for the Cash Transfer and Oracle Retail Xstore Point-of-Service returns to the Main Menu.

Till Audit

Till Audit provides the capability to select a tender type, record its total current value, and see if that value balances with the amount that the system shows for the same tender. The system calculates and displays any difference (over/short) between the two amounts.

A Till Audit may be performed any time after the Beginning Count and before the Ending Count. The till does not need to be removed after the audit is completed.

1. From the Till menu, select the **Till Maintenance** option.
2. From the Till Maintenance menu ([Figure 11-4](#)), select the **Till Audit** option.

 Note:

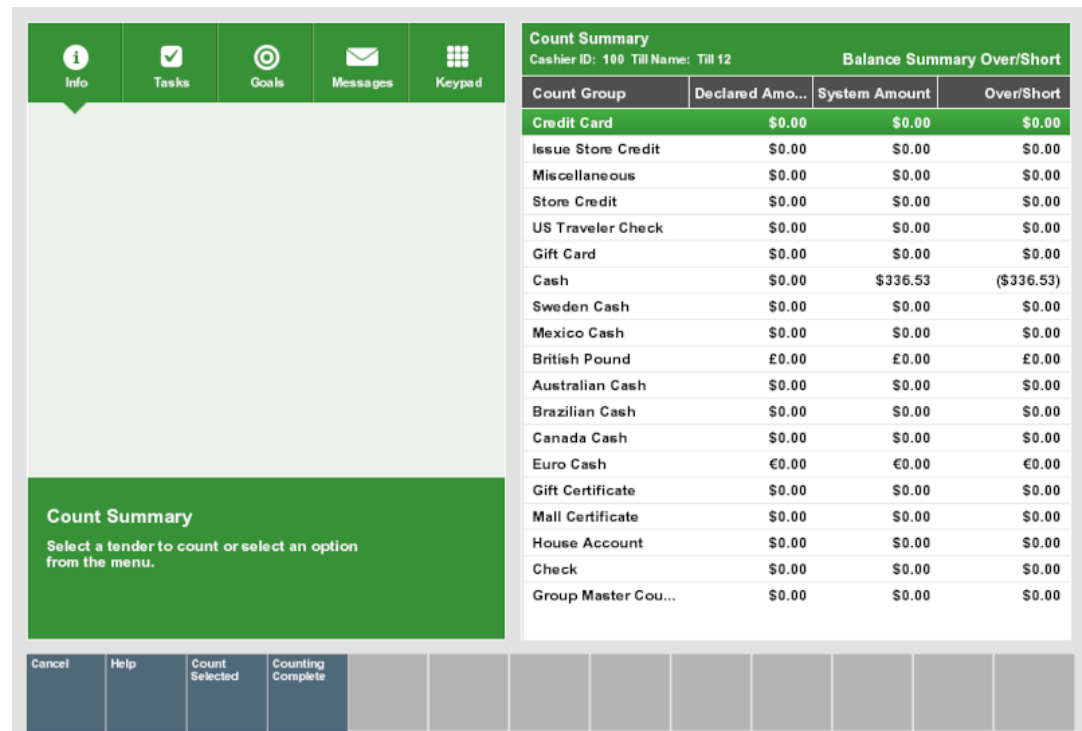
If the register has more than one cash drawer, you may be prompted to select the till to be used for this process.

In an only networked cash drawer environment, you are required to scan the cash drawer barcode to link it to the transaction before the drawer pops.

In a mixed network/local cash drawer environment, select whether to use a network cash drawer.

- At the Count Summary screen, select the tender type you want to count and select the **Count Selected** option. Use the up and down arrow keys to scroll through the list if necessary.

Figure 11-33 Audit Count - Count Summary Screen



Count Summary		Balance Summary Over/Short	
Cashier ID: 100 Till Name: Till 12			
Count Group	Declared Amo...	System Amount	Over/Short
Credit Card	\$0.00	\$0.00	\$0.00
Issue Store Credit	\$0.00	\$0.00	\$0.00
Miscellaneous	\$0.00	\$0.00	\$0.00
Store Credit	\$0.00	\$0.00	\$0.00
US Traveler Check	\$0.00	\$0.00	\$0.00
Gift Card	\$0.00	\$0.00	\$0.00
Cash	\$0.00	\$336.53	(\$336.53)
Sweden Cash	\$0.00	\$0.00	\$0.00
Mexico Cash	\$0.00	\$0.00	\$0.00
British Pound	£0.00	£0.00	£0.00
Australian Cash	\$0.00	\$0.00	\$0.00
Brazilian Cash	\$0.00	\$0.00	\$0.00
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
House Account	\$0.00	\$0.00	\$0.00
Check	\$0.00	\$0.00	\$0.00
Group Master Cou...	\$0.00	\$0.00	\$0.00

- 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 [Table 8-1](#).
- After you complete the count for the selected group, select the **Next Group** option, and repeat this step for additional groups that you want to count.
- After you count all groups that you want to audit, select the **Summary** option to return to the Count Summary screen. Check the Over/Short column to see if your till is now balanced with the system values for each tender type.

Figure 11-34 Count Summary Screen - Audit Complete

Info

Tasks

Goals

Messages

Keypad

7

8

9

-

4

5

6

←

1

2

3

↵

0

.

↵

Count Summary

Select a tender to count or select an option from the menu.

Count Summary

Cashier ID: 100 Till Name: Till 12

Balance Summary Over/Short

Count Group	Declared Amo...	System Amount	Over/Short
Credit Card	\$0.00	\$0.00	\$0.00
Issue Store Credit	\$0.00	\$0.00	\$0.00
Miscellaneous	\$0.00	\$0.00	\$0.00
Store Credit	\$0.00	\$0.00	\$0.00
US Traveler Check	\$0.00	\$0.00	\$0.00
Gift Card	\$0.00	\$0.00	\$0.00
Cash	\$336.53	\$336.53	\$0.00
Sweden Cash	\$0.00	\$0.00	\$0.00
Mexico Cash	\$0.00	\$0.00	\$0.00
British Pound	£0.00	£0.00	£0.00
Australian Cash	\$0.00	\$0.00	\$0.00
Brazilian Cash	\$0.00	\$0.00	\$0.00
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
House Account	\$0.00	\$0.00	\$0.00
Check	\$0.00	\$0.00	\$0.00
Group Master Cou...	\$0.00	\$0.00	\$0.00

Cancel

Help

Count Selected

Counting 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.

Figure 11-35 Till Audit Receipt (selection only)

Cashier: 1	
Session ID:	
Count Type: TILL AUDIT	
Till ID: T111	
Tender	
Check	
Declared Amount	0.00
System Total	0.00
Difference	0.00
Cash	
Declared Amount	603.00
System Total	613.63
Difference	(10.63)
US Traveler's Check	
Declared Amount	0.00
System Total	0.00
Difference	0.00
Total Declared Amount	
	603.00
Local Currency	
Till Opening Amount	
Total Cash Amount	603.00
Total Cash Deposit	0.00
Cash Remained In Till	603.00
Total Cash Pickup	
	550.00
Aruban Guilder	
Exchange Rate	
	1.77
Foreign Amount	0.00
Converted Amount	0.00

9. Close the cash drawer. The system returns to the Till Options menu.

Mid-day Deposit

Mid-day Deposit allows you to place funds from a register into the store safe during a working session. This activity is not necessarily restricted to a specific time and may be used as often as necessary.

1. From the Main Menu, select **Till** to display the Tills menu.
2. Select **Till Maintenance** from the Till menu.
3. At the Till Maintenance menu ([Figure 11-4](#)), select the **Mid-day Deposit** option. The system opens the cash drawer when you select this option.

 Note:

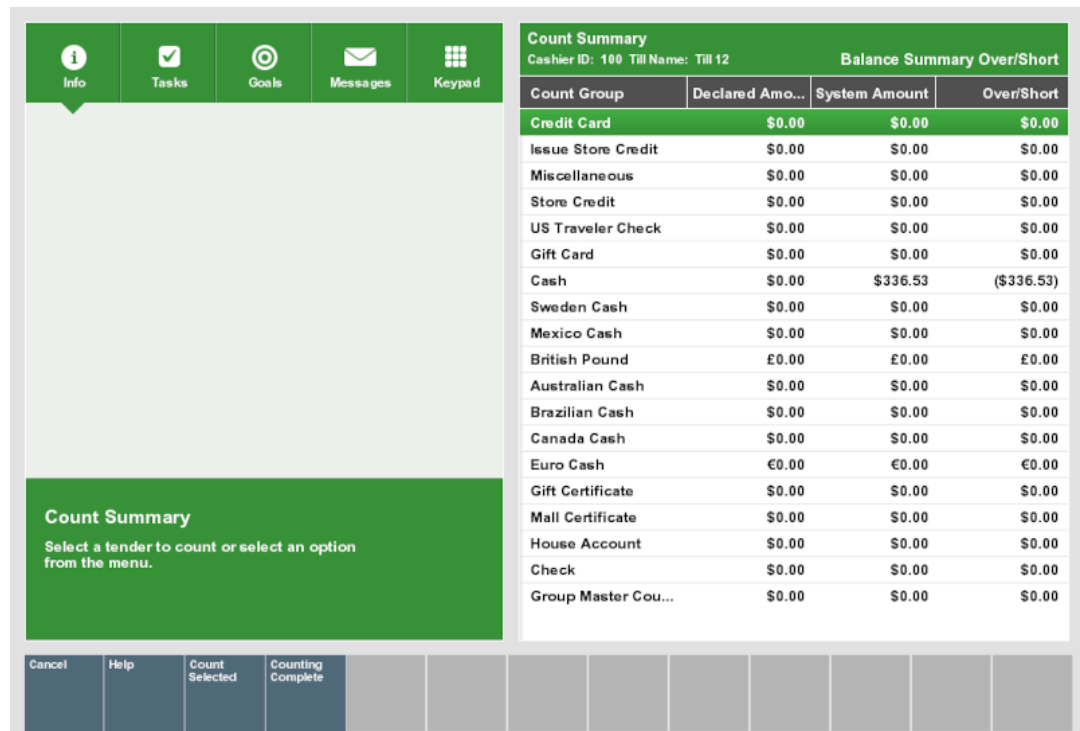
If the register has more than one cash drawer, you may be prompted to select the till to be used for this process.

In an only networked cash drawer environment, you are required to scan the cash drawer barcode to link it to the transaction before the drawer pops.

In a mixed network/local cash drawer environment, select whether to use a network cash drawer.

4. The Count Summary screen displays a list of tender groups that may be removed from the till and deposited in the store safe. Select the tender type you want to count and select the **Count Selected** option.

Figure 11-36 Count Summary Screen - Mid-day Count



The screenshot shows the 'Count Summary' screen. At the top, there is a navigation bar with icons for Info, Tasks, Goals, Messages, and Keypad. Below this, the screen is divided into two main sections. The left section is a green box with the text 'Count Summary' and 'Select a tender to count or select an option from the menu.' The right section is a table with the following data:

Count Summary		Balance Summary Over/Short	
Cashier ID: 100 Till Name: Till 12			
Count Group	Declared Amo...	System Amount	Over/Short
Credit Card	\$0.00	\$0.00	\$0.00
Issue Store Credit	\$0.00	\$0.00	\$0.00
Miscellaneous	\$0.00	\$0.00	\$0.00
Store Credit	\$0.00	\$0.00	\$0.00
US Traveler Check	\$0.00	\$0.00	\$0.00
Gift Card	\$0.00	\$0.00	\$0.00
Cash	\$0.00	\$336.53	(\$336.53)
Sweden Cash	\$0.00	\$0.00	\$0.00
Mexico Cash	\$0.00	\$0.00	\$0.00
British Pound	£0.00	£0.00	£0.00
Australian Cash	\$0.00	\$0.00	\$0.00
Brazilian Cash	\$0.00	\$0.00	\$0.00
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
House Account	\$0.00	\$0.00	\$0.00
Check	\$0.00	\$0.00	\$0.00
Group Master Cou...	\$0.00	\$0.00	\$0.00

At the bottom of the screen, there is a row of buttons: Cancel, Help, Count Selected, Counting Complete, and several empty buttons.

5. Enter each value as required in the focus bar and press **Enter**. The tender type you select, and your system's configuration determine the type of count you must perform. For examples of count screens, see [Table 8-1](#).
6. If additional funds are to be placed into the store safe, 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.

 Note:

You may select **Prior Group** to return to the previous tender group in the list.

- b. Select the **Summary** option to return to the list of all tender groups.
7. At the Count Summary screen, select the **Done Counting** option.

Figure 11-37 Mid-day Count Summary Screen - Done Counting

Count Summary
Cashier ID: 100 Till Name: Till 12

Count Group	Declared Amo...	System Amount	Over/Short
Credit Card	\$0.00	\$0.00	\$0.00
Issue Store Credit	\$0.00	\$0.00	\$0.00
Miscellaneous	\$0.00	\$0.00	\$0.00
Store Credit	\$0.00	\$0.00	\$0.00
US Traveler Check	\$0.00	\$0.00	\$0.00
Gift Card	\$0.00	\$0.00	\$0.00
Cash	\$0.00	\$336.53	(\$336.53)
Sweden Cash	\$0.00	\$0.00	\$0.00
Mexico Cash	\$0.00	\$0.00	\$0.00
British Pound	£0.00	£0.00	£0.00
Australian Cash	\$0.00	\$0.00	\$0.00
Brazilian Cash	\$0.00	\$0.00	\$0.00
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
House Account	\$0.00	\$0.00	\$0.00
Check	\$0.00	\$0.00	\$0.00
Group Master Cou...	\$0.00	\$0.00	\$0.00

Count Summary
Select a tender to count or select an option from the menu.

Cancel Help Count Selected Counting Complete

Note:

The difference between the Declared Amount (your count) and the System Amount is the amount remaining in the till.

8. The system prints a receipt for the Mid-day deposit.

Figure 11-38 Mid-Day Deposit Receipt

Count Type: MID COUNT	
Till ID: T111	
Tender	
Check	
Declared Amount	0.00
System Total	0.00
Difference	0.00
Cash	
Declared Amount	1500.00
System Total	2128.63
Difference	(628.63)
US Traveler's Check	
Declared Amount	0.00
System Total	0.00
Difference	0.00
Total Declared Amount	1500.00
Local Currency	
Till Opening Amount	
Total Cash Amount	1500.00
Total Cash Deposit	0.00
Cash Remained In Till	1500.00
Total Cash Pickup	550.00
Aruban Guilder	
Exchange Rate	1.77
Foreign Amount	0.00
Converted Amount	0.00
Canadian Cash	
Exchange Rate	1.19
Foreign Amount	0.00

9. Close the cash drawer. The system returns to the Main Menu.

Cash Drawers

This section describes the Cash Drawer options:

- [Attaching a Cash Drawer Till](#)
- [Removing a Cash Drawer Till](#)
- [Reconciling a Networked Cash Drawer Till](#)

Attaching a Cash Drawer Till

Use this procedure to attach a till into the networked cash drawers in order to track money in the cash drawer.

1. From the Till menu, select the **Till Maintenance** option and press **Enter** for OK.
2. From the Till Maintenance menu, select the **Attach Cash Drawer Till** option and press **Enter** for OK.
3. The system displays a list of tills available to be attached.

Figure 11-39 Select Cash Drawer Till to Attach

Cash Drawer Accountability
Select cash drawer till to attach.

Till ID	Cash Drawer Id	Description
TILL12	8S7MV	Rack11

Back OK

Select a till from the list and press **Enter** for OK.

4. Scan the cash drawer. The cash drawer ID is verified to determine it is in the correct state.
If the scanned drawer is not in the correct state, an error message is displayed. "Cash drawer is currently unavailable." Press **Enter** for OK.
If the scanned cash drawer barcode does not match to the selected cash drawer, an error message is displayed "The scanned cash drawer does not match the selected cash drawer." Press **Enter** for OK.
5. Confirm you want to attach the till to the cash drawer: "Are you sure you want to attach till to cash drawer <cash drawer id and name>?" Select **Yes** on this prompt, to continue.
The cash drawer is opened, and the till is attached to the cash drawer.
A confirmation message is displayed: "Till <insert till name> has been attached to cash drawer <Cash Drawer ID and name>."
Press **Enter** for OK and close the drawer. You are returned to the Xstore Home screen.
6. Repeat this procedure for further cash drawers.

Removing a Cash Drawer Till

Oracle Retail Xstore Point of Service gives managers and associates the option to remove their own till from a register or remove a till assigned to someone else, depending on the option chosen in the Manage Tills menu. The ability to combine the cash drawer close and reconcile processes together is configurable.

To remove a till from a networked enabled cash drawer, do the following:

1. From the Till menu, select the **Till Maintenance** option.
2. From the Till Maintenance menu, select **Remove Cash Drawer Till**.
3. Oracle Retail Xstore Point of Service displays a list of tills attached to the cash drawer.

Figure 11-40 Select Cash Drawer Till to Remove

The screenshot shows a screen titled "Cash Drawer Accountability" with the instruction "Select cash drawer till to remove." Below this is a table with three columns: "Till ID", "Cash Drawer Id", and "Description". The table contains one row with the values "TILL12", "8S7MV", and "Rack11". At the bottom of the screen are two buttons labeled "Back" and "OK".

Till ID	Cash Drawer Id	Description
TILL12	8S7MV	Rack11

Select the till you are removing, then press **Enter** for OK.

4. Scan the cash drawer. The cash drawer ID is verified to determine it is in the correct state. If the scanned drawer is not in the correct state, an error message is displayed. "Cash drawer is currently unavailable." Press **Enter** for OK.

If the scanned cash drawer barcode doesn't match to the selected cash drawer, an error message is displayed "The scanned cash drawer does not match the selected cash drawer." Press **Enter** for OK.

5. Confirm you want to remove the till from the cash drawer: "Are you sure you want to remove till from cash drawer <cash drawer id and name>?" Select **Yes** on this prompt, to continue.

The cash drawer is opened, and the till is removed from the cash drawer.

A confirmation message is displayed: "Till <insert till name> has been removed from cash drawer <Cash Drawer ID and name>."

Press **Enter** for OK and close the drawer. You are returned to the Xstore Home screen.

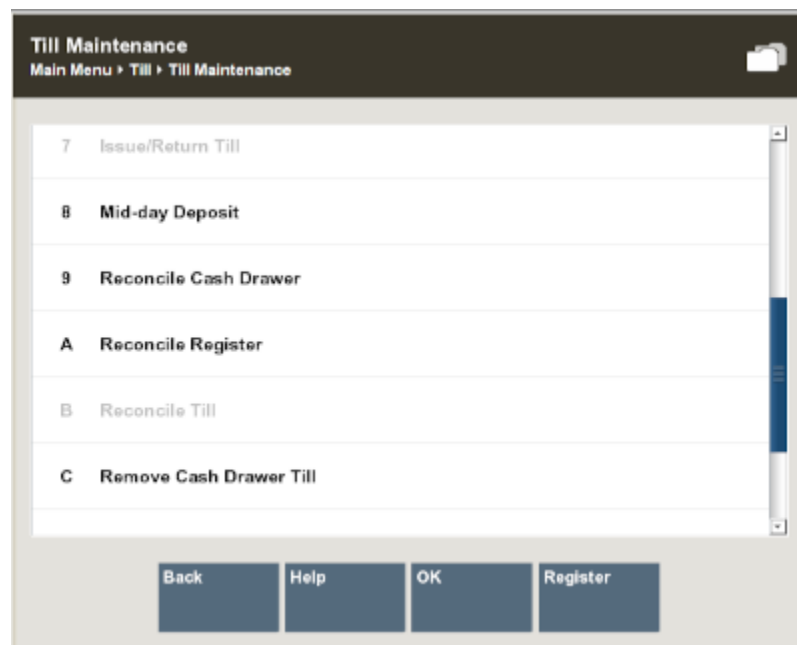
6. Repeat this procedure for further cash drawers.

Reconciling a Networked Cash Drawer Till

This procedure allows you to reconcile the transactions associated to a cash drawer. It does not reconcile the register. You need to close the cash drawer first (at any time) and then reconcile the cash drawer (at any time). The cash drawer does not have to be closed before the End of Day Process. This is particularly applicable for 24/7 trading to minimize downtime.

1. From the Till menu, select the **Till Maintenance** option.
2. From the Till Maintenance menu, select the **Reconcile Cash Drawer** option.

Figure 11-41 Till Maintenance - Reconcile Cash Drawer



The ability to combine the Cash Drawer Close and Reconciliation Processes is configurable (for register accountability in a normal store environment). Therefore, if configured, the reconciliation process would begin directly after the Cash Drawer Close flow. In 24/7 trading the cash drawer and reconciliation processes is separate.

3. Any register's back office can be used to reconcile networked cash drawers.

The **Networked Cash Drawer Reconciliation** button is always available. If you attempt to access it and no cash drawers are available to reconcile, an error message "All closed cash drawers have been reconciled." is displayed.

4. Select the cash drawer to reconcile from a list of cash drawers available to reconcile.

Figure 11-42 Cash Drawer Selection

Cash Drawer	Session
8C8WE IP drawer1	0032 12/5/17 1:09 PM-1:52 PM
9N8KA IP Drawer2	0033 12/5/17 1:09 PM-1:58 PM

Back OK

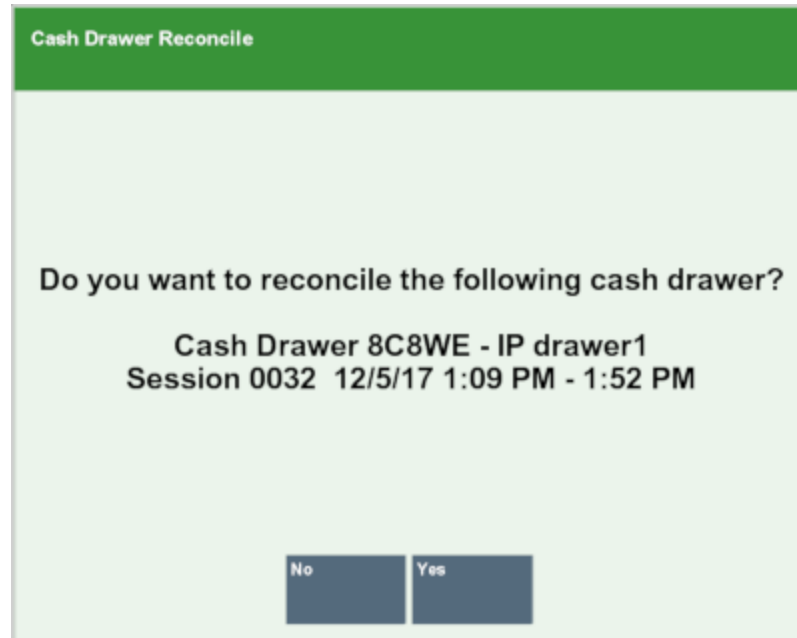
Once a cash drawer has been reconciled, it is no longer displayed on the list of available cash drawers to reconcile.

The cash drawers do not have to be reconciled in a specific order. The cash drawers' name, description and Session ID are listed.

5. Select the Cash Drawer and press the **OK** button.

The system prompts you with the question: "Do you want to reconcile the following cash drawer? <Insert Cash Drawer Device Name>".

Figure 11-43 Confirm Cash Drawer Reconciliation



Cash Drawer Reconcile

Do you want to reconcile the following cash drawer?

Cash Drawer 8C8WE - IP drawer1
Session 0032 12/5/17 1:09 PM - 1:52 PM

No Yes

Select **Yes** on this prompt, to continue.

6. The existing Xstore reconcile flow is followed for the limited tenders accepted on the networked cash drawer. Any transaction from any register completed on the cash drawer and has the selected networked cash drawer's ID saved with the transaction should be reconciled at this time.

The cash drawer has been reconciled and the user is returned to the Xstore Home screen.

Till Accountability Mode Only Functions

This section describes the till accountability functions:

- [Issuing a Till \(Till Accountability Mode Only\)](#)
- [Attaching Other Till \(Till Accountability Mode Only\)](#)
- [Removing a Till \(Till Accountability Mode Only\)](#)
- [End Count Other Till \(Till Accountability Mode Only\)](#)
- [Returning a Till \(Till Accountability Mode Only\)](#)
- [Reconciling a Till \(Till Accountability Mode Only\)](#)

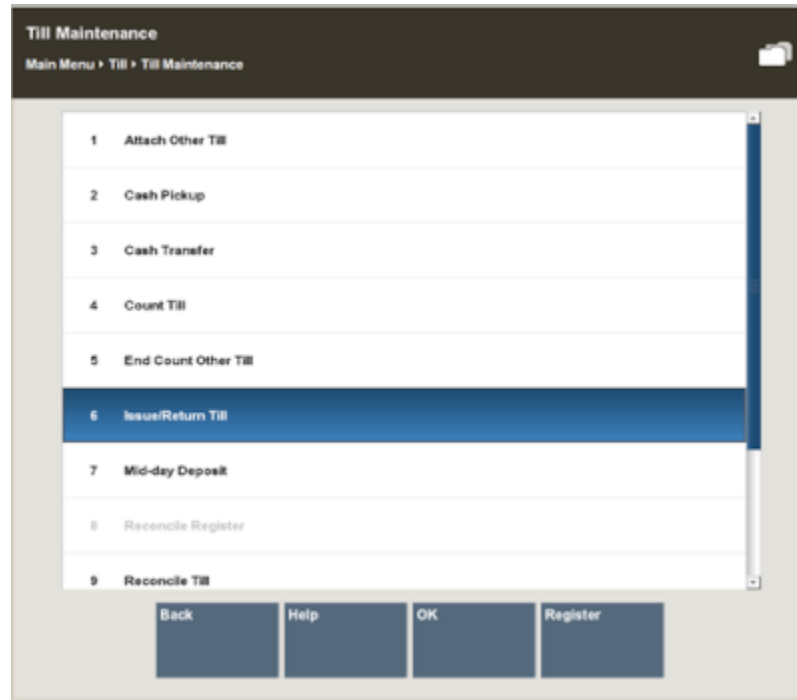
Issuing a Till (Till Accountability Mode Only)

 Note:

Prerequisites: No tills can be issued until the store bank is open. See [Store Safe Maintenance](#) for more information.

1. From the Till Menu, select the **Till Maintenance** option and press **Enter** for OK.
2. From the Till Maintenance menu, select the **Issue/Return Till** option and press **Enter** for OK.

Figure 11-44 Till Maintenance Menu - Issue/Return Till Option



3. The system displays the Till Details screen, showing the current status of the tills.

Figure 11-45 Till Details Screen

Till Details							
The details of each till are shown. Select an option from the menu below.							
Till ID	Issued	Employee ID	Employee Name	Attached	Cash Drawer	Register	Count Status
TILL2	✓	191	Shree Sakthi	✓		2	BEGINCOUNT
TILL1	✗			✗			
TILL3	✗			✗			
TILL4	✗			✗			
TILL5	✗			✗			
TILL6	✗			✗			
TILL7	✗			✗			

At the bottom of the screen, there are buttons: Back, Help, Issue Till, Return Till, and Register.

About this screen:

A red X (✗) in the Issued column indicates that the till has been returned to the cash office and is available for assignment.

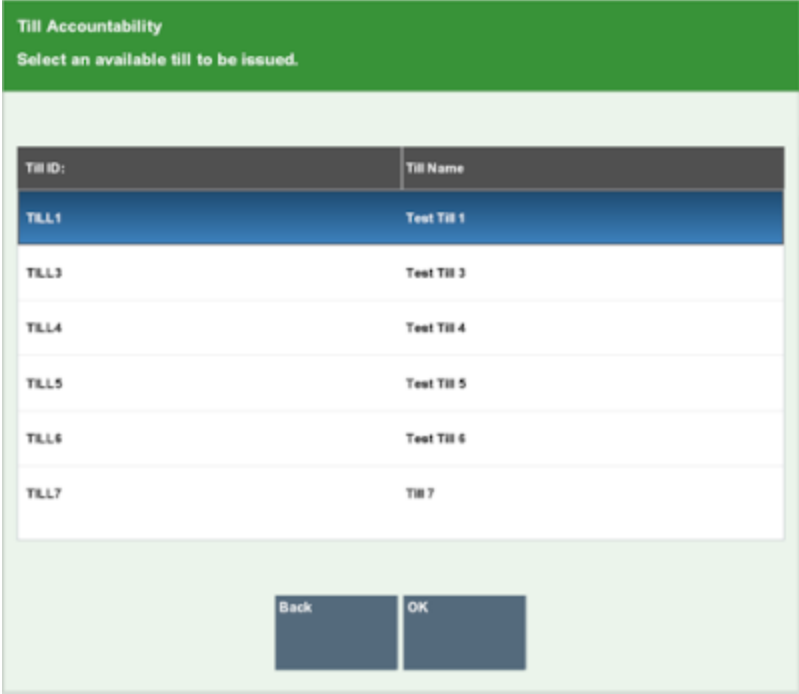
A green check mark (✓) in the Issued column indicates that the till has already been issued to an associate and is not available.

 Note:

All the tills listed in this example are available for assignment.

4. Select the **Issue Till** button. The system displays a list of available tills. Select a till from the list and press **Enter** for OK.

Figure 11-46 Available Till List

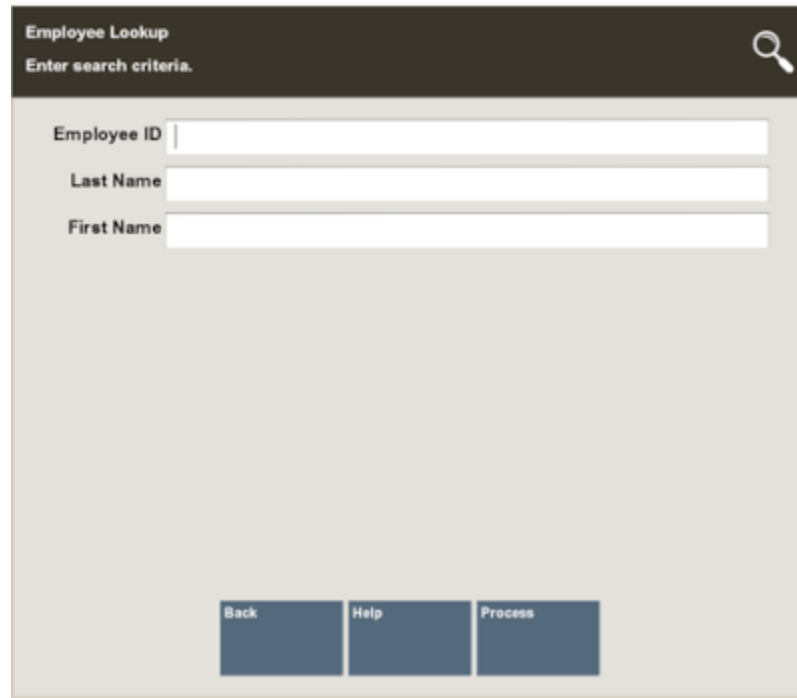


Till ID:	Till Name
TILL1	Test Till 1
TILL3	Test Till 3
TILL4	Test Till 4
TILL5	Test Till 5
TILL6	Test Till 6
TILL7	Till 7

Back OK

5. An Employee Lookup prompt opens. Enter the search criteria (Employee ID, First Name and/or Last Name) for the employee to be assigned to the till and select Process.

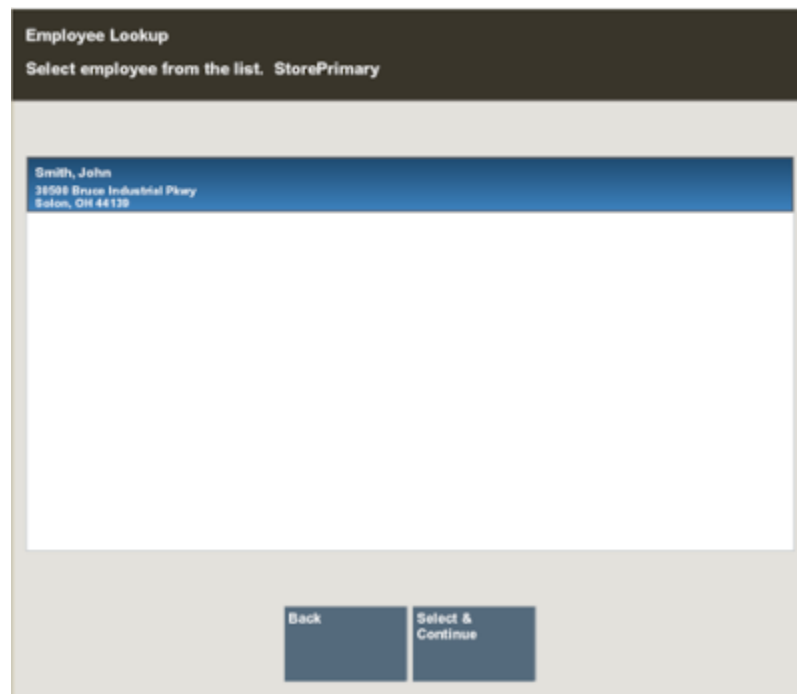
Figure 11-47 Employee Lookup Prompt



The screenshot shows the 'Employee Lookup' screen. At the top, there is a dark header bar with the text 'Employee Lookup' and 'Enter search criteria.' on the left, and a magnifying glass icon on the right. Below the header, there are three input fields: 'Employee ID', 'Last Name', and 'First Name'. At the bottom of the screen, there are three buttons: 'Back', 'Help', and 'Process'.

6. The system displays a list of employees matching the entered search criteria. Select the employee's name that is being issued the till and press **Enter** to continue.

Figure 11-48 Employee Selection List



The screenshot shows the 'Employee Selection List' screen. At the top, there is a dark header bar with the text 'Employee Lookup' and 'Select employee from the list. StorePrimary' on the left. Below the header, there is a list of employees. The first employee listed is 'Smith, John' with address '35598 Bruce Industrial Pkwy' and 'Solon, OH 44138'. Below the list, there are two buttons: 'Back' and 'Select & Continue'.

7. Oracle Retail Xstore Point of Service prompts for the amount of starting cash in the till and may show the default starting cash amount set up for this till. Accept the default cash amount or enter the starting cash amount and press **Enter**.

Figure 11-49 Starting Cash Prompt

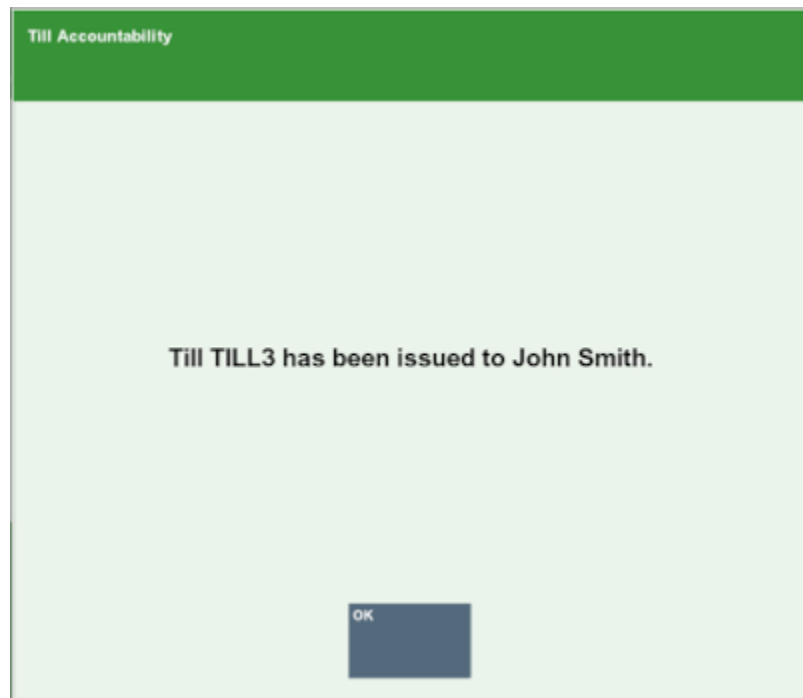
The screen has a green header bar with the text "Till Accountability" in white. Below the header is a white input field with a blue border, containing the text "100.00". Below the input field is the text "Enter total starting Australian Cash amount." in green. To the right of the input field is a green circular icon with a white dollar sign inside.

 Note:

If your store allows foreign cash to be given as change, additional prompts may display in the focus bar for each denomination. Continue to enter the amount and press **Enter** for each prompt until the confirmation prompt displays.

The system displays a message confirming that the till is now issued to a specific employee.

Figure 11-50 Issued Till Confirmation

The screen has a green header bar with the text "Till Accountability" in white. The main area is light green and contains the text "Till TILL3 has been issued to John Smith." in black. At the bottom center is a dark blue rectangular button with the text "OK" in white.

8. Press **Enter** for OK to close the confirmation prompt. A receipt is also printed for your records.

Figure 11-51 Till Assigned Receipt

9. Oracle Retail Xstore Point of Service assigns the till to the cashier and returns to the Till Details screen. The till is now listed as Issued.

Figure 11-52 Till Details - Issued Till

Till Details								
The details of each till are shown. Select an option from the menu below.								
Till ID	Issued	Employee ID	Employee Name	Attached	Cash Drawer	Register	Count Status	
TILL2	✓	191	Shree Sakthi	✓		2	BEGINCOUNT	
TILL1	✗			✗				
TILL3	✗			✗				
TILL4	✗			✗				
TILL5	✗			✗				
TILL6	✗			✗				
TILL7	✗			✗				

About this screen:

- A green check mark (✓) in the Issued column indicates that the till has been issued to the employee.
- A red X (✗) in the Attached column indicates that the till has not yet been attached to a cash drawer and register.

Oracle Retail Xstore Point of Service generates a new session ID to identify the session that was started by assigning a till to a cashier.

 Note:

A cashiering session begins when the till is withdrawn from the cash management office and assigned to a cashier. The session ends when the till is reconciled.

The till is now assigned to a specific cashier. When the cashier logs in to the register, Oracle Retail Xstore Point of Service prompts the cashier to verify the starting amount in the till and to attach the till to the register before ringing sales.

 Note:

Refer to the *Oracle Retail Xstore Point of Service User Guide* for more information about using till accountability at the cash register.

Attaching Other Till (Till Accountability Mode Only)

After a till has been issued to a cashier, the till must be attached to a register for it to be used for transactions.

Normally, an associate can attach a till assigned to them after logging in to the system where the till is located. However, if a manager is attaching another employee's till to a register, this must be done through the **Attach Other Till** option.

1. From the Till menu, select the **Till Maintenance** option and press **Enter** for OK.
2. From the Till Maintenance menu, select the **Attach Other Till** option and press **Enter** for OK.
3. The system displays a list of tills available to be attached. Select a till from the list and press **Enter** for OK.
4. If your system is configured to allow two (2) tills on the register and both cash drawers are still available, the system prompts for the cash drawer to use for the till. Select the cash drawer to be used, then press **Enter** for OK.
5. Perform the Begin Count on the till.

See [To Perform a Begin Count](#) for the Begin Count procedure.

At the confirmation prompt, select **OK**.

Removing a Till (Till Accountability Mode Only)

Oracle Retail Xstore Point of Service gives managers and associates the option to remove their own till from a register or remove a till assigned to someone else, depending on the option chosen in the Manage Tills menu.

To remove a till, do the following:

1. From the Manage Till menu, select the **Till Maintenance** option, then press **Enter** for OK.
2. From the Till Maintenance menu, select **Remove Till** or **Remove Other Till** option, then press **Enter** for OK.
 - If you selected **Remove Other Till**, continue with step 3.

- If you selected **Remove Other Till**, Oracle Retail Xstore Point of Service displays a list of tills attached to the register. Select the till you are removing, then press **Enter** for OK. Skip to step 5.
- 3. The system prompts whether to remove the till from the register.
 - Press **Y** or select Yes to remove the till.
 - Press **N** or select No to keep the till attached to the register and return to the Manage Tills menu.
- 4. Oracle Retail Xstore Point of Service displays a message confirming that the till has been removed from the register. Press **Enter** for OK to close the prompt.
- 5. A receipt prints for the till removal and Oracle Retail Xstore Point of Service returns to the Till Maintenance menu.

End Count Other Till (Till Accountability Mode Only)

To end count a till assigned to any employee, do the following:

1. From the Till menu, select the **Till Maintenance** option, then press **Enter**.
2. From the **Till Maintenance** menu, select the **End Count Other Till** option, then press **Enter** for OK.
3. The system prompts you to select the till that is being end counted. Select the till, then press **Enter** for OK.
4. Continue the end count process as with a normal closing count.
5. See [Closing the Register](#) for a description of the closing count procedure.

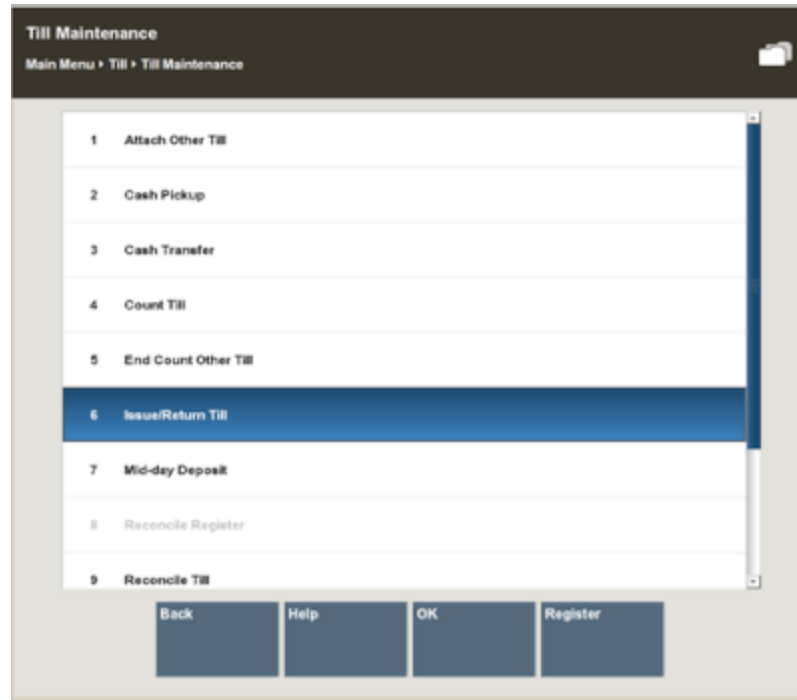
Returning a Till (Till Accountability Mode Only)

Before a till can be reconciled, the till must be marked as Returned. This indicates that the till has been transferred from the control of the associate/cashier to the manager.

Prerequisites: The following steps must be completed before you can return a till.

1. The till must be end counted
<AND>
2. The till must be removed
See [End Count Other Till \(Till Accountability Mode Only\)](#) and [Removing a Till \(Till Accountability Mode Only\)](#).
1. From the Till Menu, select the **Till Maintenance** option and press **Enter** for OK.
2. From the Till Maintenance menu, select the **Issue/Return Till** option and press **Enter** for OK.

Figure 11-53 Till Maintenance - Issue/Return Till



3. The system displays the Till Details screen, showing the current status of the tills. Select the Return Till menu option.

About this screen:

- Count Status: A Count Status of ENDCOUNT indicates that the till has been end counted by the associate.
 - Attached : A red x (✗) in the Attached column indicates that the till has been removed from the register.
 - Issued : A green check mark (✓) in the Issued column indicates that the till has not yet been returned to the manager.
4. The system displays a list of tills that can be returned. Select the till from the list and press **Enter** for OK.
 5. Oracle Retail Xstore Point of Service displays a message confirming that the till has been returned. Press **Enter** for OK to acknowledge the message.
 6. The system returns to the Till Details screen, with a red x next to the Till showing it as Returned. Select the **Back** option to return to the Back Office.

About this screen

A red x in the Issued column indicates that the till is Returned. The till can now be reconciled.

Reconciling a Till (Till Accountability Mode Only)

The final check of a till is performed at till reconciliation, when the till is counted and checked against the amount the cashier counted for the till. Following till reconciliation, the till is closed.

 Note:

Prerequisites: The following steps must be completed before you can reconcile a till:

1. The till must have an ENDCOUNT status. Activity: The associate has performed a close count on the till.
2. The till has been removed from the register. Activity: The associate has performed the Remove Till function at the register.
3. The till has been returned, indicating the till has been transferred from the control of the associate to the cash manager. Activity: The cash manager has marked the till as returned using the Issue/Return function.

See also: [End Count Other Till \(Till Accountability Mode Only\)](#), [Removing a Till \(Till Accountability Mode Only\)](#), and [Returning a Till \(Till Accountability Mode Only\)](#).

1. From the Till menu, select the **Till Maintenance** option and press **Enter** for OK.
2. From the Till Maintenance menu, select the **Reconcile Till** option and press **Enter** for OK.
3. Select a till to reconcile from the list of tills and press **Enter** for OK.
4. At the Count Summary screen, select the tender type you want to count and then select the **Count Selected** option.

 Note:

Depending upon the configuration of your system, the over/short amounts as shown above may not be displayed.

Select the **View Over/Short Reasons** button to review comments regarding the end count.

5. Enter each value as required in the focus bar and press **Enter**. The tender type you select, and your system's configuration determine the type of count you must perform. For examples of count screens, see [Table 8-1](#).
6. 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.
7. After you count all groups that you want to audit, select the **Summary** option to return to the Count Summary screen.
8. The system records the information, prints a reconcile receipt for your records, and returns to the Till Management menu.

Figure 11-54 Reconcile Receipt

Xstor

6573 Cochran Rd
Suite A
Solon, Oh 44139
330-555-1212

Ticket: 255 Date: 9/24/
Store: 301 Register: 1
Cashier: 1
Session ID:

Count Type: RECONCILE
Till ID: StoreBank

Tender

Store Credit	
Declared Amount	0.00
System Total	0.00
Difference	0.00
Private Label Credit Card	
Declared Amount	0.00
System Total	0.00
Difference	0.00
Merchandise Credit Card	
Declared Amount	0.00
System Total	0.00
Difference	0.00
US Traveler Check	
Declared Amount	0.00
System Total	0.00
Difference	0.00
Credit Card	
Declared Amount	183.37
System Total	183.37
Difference	0.00

 Note:

Deposits from the reconciled till are made to the store safe.

Store Safe Maintenance

Safe bags are used by retailers that deal with a large volume of cash. Using safe bags allows retailers to move money quickly and safely from safe bags into cash drawers or from cash drawers into safe bags. Safe bags can come in many styles - they can be a plastic tube that is used or a large, zippered pouch.

Every safe bag has a unique number and can be used in the Pickup, Add Float and Store Safe process. When configured to use safe bags, all cash processes will prompt you to scan (or manually enter), the safe bag first before processing.

In the Cash Pick Up process the safe bag will be filled with money and closed.

In the store safe processes, a list of safe bags ID's with amount should be displayed.

Every safe bag in the store safe can be used in the Add Float process or in the Safe Deposit process.

Configurations

There are two configurations in Xadmin for retailers.

The first one determines if a store will use safe bags. When configured this means that during till functions (safe deposits, opening the store safe, safe audits, reconciling safes, cash transfer and cash pickups - anything that involves cash) the system prompts you to scan the safe bag or enter the safe bag id.

The second configuration set depends on whether the retailer will count the money during a cash pick up or not. Most retailers want the process to be fast, so the default is NO/false. If they set the value to true, then the retailer is prompted for the amount of cash that is being picked up and this will require the manager to count the cash before putting it into the safe bag.

Retailers should not mix these settings up in a store because that will cause confusion - all registers should either be configured to count money at cash pickup, or all registers should be configured not to count money during a cash pickup.

- Safe Bags Used in Store - default false
- Safe Bag Money is Counted During Cash Pick Up - default false

It is recommended not to mix register settings within a store.

Safe Bag Management

The safe bag management screen (available only on tablet/thin and desktop) is where safe bags are created and managed. A store first needs to create/add safe bags for use in their store. They will select **Create safe bag** and scan the safe bag - they can do this for all the safe bags they want to use. They will do this any time they also need to add more safe bags for use in their store. If they scan a safe bag that is already in use in their store, they will be prompted the bag is already in use. Once a safe bag is created the user can add money into the safe bag to be used in a bank deposit that will be created later or for cash transfers. They would select the function for Add Funds. By putting money in safe bags using the Add Funds function these bags can be used during the bank deposit or cash transfer process. During a cash transfer the

process remains as it does today but at the start of the function the user is asked to scan the safe bag that the money is coming from. All the money that is in a safe bag is used in the function - for example if the safe bag has \$200 in it (determined during the Add Funds process) all of the funds will be used during the process, for example cash transfer. If a cash transfer is done all \$200 will be transferred. There is no option to use only half the money. That applies any time money is used in a safe bag. Also, safe bags do not allow users to mix currency types. One currency per bag. For example, if US Cash is selected as the currency type during the **Add Funds** process that is the only currency type that is allowed in that bag. Other currency types can be used in other safe bags - but one currency type per bag. When a safe bag is used in a cash transfer the safe bag is now empty and in "available" status that allows it to be used again.

There are 4 statuses a safe bag can be in:

- **Available** - the status for a newly created bag ready to be used in a function. Example - In a Cash pick up or to add funds into it using **Add Funds** function. Bags in available status can be used for Cash Pickups. These bags could not be used in a cash transfer as there is no money in them yet - Xstore would display an error.
- **Counted** - the status for a safe bag that was used during the Add Funds process and can now be used for cash transfer or bank deposit whenever the retailer is ready. Bags in **Counted** status cannot be used for a cash pickup process as this bag is not empty - Xstore would display an error.
- **Deposited** - the status for a bag that was used during the bank deposit process. This safe bag is sitting in the safe until someone takes it to the bank for deposit. This bag could not be used in a cash transfer, a cash pickup or any other process - the user would get an error if they tried. Bags in **Deposited** status cannot be used for cash transfers as the money has been assigned for a bank deposit - Xstore would display an error. Also, these bags could not be used in a cash pick up process as the bag is not in **Available** status - Xstore would display an error.
- **Undeclared** - the status for a safe bag that was used during a cash pick up. The money in the bag must be declared by using the **Declare into Safe** process from the management screen. All safe bags used during a cash pick up (whether it was counted at the cash drawer or not counted) must be declared and counted because until it is declared the cash drawer doesn't know how much money was taken - that cash is still a part of the drawer until it is declared. If the store was configured to count the money at the cash pickup and the money counted during the declaration process did not match, the standard Xstore discrepancy process would be done. Also, during the register close process any safe bags that are **Undeclared** must be counted first - Xstore would display an error that there are safe bags that need declared first. For example, if a store was in till accountability mode and the user was going to count the till, any safe bags that had been used in cash pickups must be counted because that money is still, technically, in the drawer until it is declared into the safe from the safe bag. Also, during a till audit - all safe bags must be declared that had been used for cash pickups from that till. The cash drawer does not know how much money was pulled during cash pickups until the safe bags are declared.

Remove Safe Bag is used when a safe bag is no longer going to be used in the store. For example, the plastic tube cracked or the zipper on a safe bag broke - the store can remove these bags from use using this function. Any safe bag that is removed can be created again if desired. For example, a safe bag with a broken zipper has been fixed - the store can use the **Create Safe Bag** function and put the safe bag back into use in the store.

The function **Return Safe Bag** is used when a safe bag that was used in a bank deposit physically comes back to the store. A good example is that during a bank deposit the safe bag was dropped into the store's bank (the brick and mortar bank down the street) and since the bag was dropped into the overnight drop box it may not come back to the store until a manager goes to the physical bank and picks it up. Until they come back with the safe bag it will remain

in **Deposited** status. By using Return Safe Bag function the bag will now be put into Available status and can be used again in the store.

The safe bag management screen lists all safe bags in use and their status.

- Create a safe bag - add safe bags to be used in the store.
- Remove safe bag - bag doesn't come back from bank or has hole in it.
- Declare into Safe - for counted and uncounted cash pickups. During this process the money in the safe bag is counted. Xstore will handle discrepancies in the standard way.
- Add Funds from safe - normal till count - no partial moving of money.
- Return Safe Bag - it's back from bank and ready for use.

**Note:**

Assumption - A safe bag can only contain one currency.

Safe Bag Management Screen

Table 12-1 Safe Bag Status

Safe Bag ID	Status	Source of Funds	Amount	Currency	Comments
1A	Undeclared	Register 1	\$250.00	Canadian	Money was counted at the floor during cash pickup.
2B	Undeclared	John Smith		US	Money collected at the till was not counted during cash pickup.
3C	Available				This is what a newly created safe bag would look like. The currency type is selected during cash pick up.
4D	Deposited	Store Safe			Amount and currency are blank because this money is not in the store any longer.
5E	Counted	Store Safe	\$50.00	US	When Add Funds From Safe has been done. Only safe bags that are in Counted status can be used in the bank deposit or cash transfer.

Below are the next steps for the above bags and what their status would look like after a particular action has been performed.

Table 12-2 Safe Bag Status After Action Performed

Safe Bag ID	Status	Source of Funds	Amount	Currency	Comments
1A	Available				After Cash Pickup - money is Declared into Safe . The safe bag is now empty and available for use.
2B	Available				After Cash Pickup - money is Declared into Safe . The safe bag is now empty and available for use.
3C	Counted	Store Safe	\$200	US	When Add Funds From Safe has been done on available bag.
4D	Available				Status info after user selects Return Safe Bag .
5E	Available				The bag had \$50 from store safe in it and was used in a Cash Transfer.

Safe Bag Use

Safe bags should work whether in till accountability mode or register accountability mode, on desktop and tablet, thin client and for fixed and networked cash drawers.

Safe Bag Processes

- [Store Safe Opening with Safe Bag \(Till Accountability Mode Only\)](#)
- [Store Safe Auditing with a Safe Bag](#)
- [Reconciling the Store Safe with a Safe Bag \(Till Accountability Mode Only\)](#)
- [Preparing the Bank Deposit using a Safe Bag](#)
- [Store Safe Cash Deposit using a Safe Bag](#)
- [Cash Pickup using a Safe Bag](#)

Store Safe Opening with Safe Bag (Till Accountability Mode Only)

**Note:**

This function may be part of the store open process.

To open the store safe, do the following:

1. From the **Till** menu, select the **Store Safe Maintenance** option.
2. From the Store Safe Maintenance menu, select the **Open Store Safe** option.

3. At the Count Summary screen, select the tender type you want to count and then select the **Count Selected** option.
4. If Safe Bag functionality is activated, the system displays a list of safe bags that are in the store safe at the prior store safe close. This list of safe bags cannot be changed, added or adjusted here.
5. Enter each value as required.
6. 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.
7. After you count all groups that you want to audit, select **Back** to return to the Count Summary screen.
8. When all denomination quantities have been entered, select **Counting Complete**.
 - If the opening amount in the store safe does not equal the amount that was in the store safe at the prior store safe close, the system prompts whether to accept or reject the discrepancy.
 - Select **Yes** to accept the discrepancy. You may be prompted to enter a comment and then press **OK**.
 - Select **No** to reject the discrepancy and return to the denomination counts.
 - If the opening amount in the store safe equals the amount that was in the store safe at the prior store safe close, the system displays a message confirming that the store safe is in balance. Acknowledge the message to continue.
9. Oracle Retail Xstore Point of Service opens the store safe, prints a receipt for the opening of the store safe with the denomination count, and returns to the Main Menu.

Store Safe Auditing with a Safe Bag

The store safe audit function is used to count the tenders in your store safe. This audit function provides the capability to select a tender type, record its total current value, and compare that value with the system-recorded amount for the same tender.

The system calculates and displays any difference (over/short) between the expected amount and the actual amount.



Note:

An audit does not change the expected amount in the store safe.

1. From the **Till** menu, select the **Store Safe Maintenance** option.
2. From the Store Safe Maintenance menu, select the **StoreSafe Audit** option.
3. At the Count Summary screen, select the tender type you want to count and then select the **Count Selected** option to start the store bank audit process.



Note:

Depending upon the configuration of your system, the over/short amounts as shown above may not be displayed.

4. If Safe Bag functionality is activated the system displays a list of Safe Bags that are in the store safe at the prior store bank close.
5. Enter each value as required. The tender type you select, and your system's configuration determine the type of count you must perform.
6. 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.
7. After you count all groups that you want to audit, select the **Back** option to return to the Count Summary screen.
8. When you have counted all the tenders in the store bank, select **Counting Complete** to complete the audit and return to the Main Menu.

Reconciling the Store Safe with a Safe Bag (Till Accountability Mode Only)



Note:

Before you can close the store safe, all tills must be reconciled.

To close the store safe, the store safe must also be reconciled. In Oracle Retail Xstore Point of Service, the store safe is automatically closed once it is reconciled. To reconcile and close the store safe, do the following:

1. From the **Till** menu, select the **Store Safe Maintenance** option.
2. From the **Store Safe Maintenance** menu, select the **Reconcile Store Safe** option.
3. The Reconcile Store Safe screen opens. Select each count group and count the tenders in the store safe.



Note:

Depending upon the configuration of your system, the over/short amounts may not be displayed.

4. If Safe Bag functionality is activated the system displays a list of safe bags that are in the store safe at the prior store safe close.
5. When you have counted all the tenders in the store bank, select **Counting Complete** to complete the reconciliation and return to the **Till** menu.
6. Oracle Retail Xstore Point of Service prints a receipt for the store bank reconciliation and closes the store bank. The system returns to the Main Menu.

Preparing the Bank Deposit using a Safe Bag

1. From the Till Menu, select the **Store Bank Maintenance** option.
2. From the Store Bank Maintenance menu select, the **Bank Deposit** option.
3. Depending upon your store policy, you may be prompted to select the bank where the money should be deposited. If prompted, select a bank from the list and press **OK**.

4. At the Count Summary screen, select the tender type you want to count and then select the **Count Selected** button.

 Note:

Depending upon the configuration of your system, the over/short amounts as shown above may not be displayed.

5. If Safe Bag functionality is activated the system displays a list of Safe Bags that are in the store bank at the prior store bank close.
6. Enter each value as required.
7. 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.
8. After you count all groups that you want to audit, select **Back** to return to the Count Summary screen.
9. Select **Counting Complete** when you have finished counting.
10. The system displays a confirmation prompt showing the bank deposit tenders and amounts you counted. Select **Yes** to accept the bank deposit amounts as shown or select **No** to return to the Count Summary screen to make any adjustments as needed.

When the bank deposit count is complete, the system prints a deposit slip showing all tenders to be deposited and returns to the Store Bank Maintenance menu.

Store Safe Cash Deposit using a Safe Bag

 Note:

Once the Store Safe has been reconciled, you cannot make cash deposits into it.

During the day, there may be times when you must deposit cash into the store bank. Use this procedure when a cash deposit is to be made into the store bank.

1. From the **Till** menu, select the **Store Safe Maintenance** option.
2. From the **Store Safe Maintenance** menu, select the **Store Safe Cash Deposit** option.
3. If your store is configured for foreign cash currency tenders to be given as change, select the type of currency you are depositing.
4. At the Count Summary screen, select the tender type you want to count and then select the **Counting Complete** button.
5. Scan or manually enter the Safe Bag ID.
6. Enter the amount and select **OK** to confirm the amount.
7. Oracle Retail Xstore Point of Service prints a receipt for the deposit and returns to the Store Bank Maintenance menu.

Cash Pickup using a Safe Bag

You can scan or manually enter a unique identification number for a safe bag during the Cash Pickup process, if configured. This function allows you to monitor the safe bag ID and the amount transferred from the till to the safe.

To pick up cash from the till and enter a safe bag ID, follow the steps below:

1. You are prompted to select the corresponding currency. Select for example, USD and press **OK**.
2. Select **Cash Pickup**. You are prompted to scan or manually enter the safe bag ID.
3. Scan, or enter the safe bag ID and press **OK**.

 Note:

The Safe Bag ID process is disabled by default.

4. If you are prompted for the cash pickup amount. Enter the cash pickup amount and select **OK** to confirm the amount.
5. The cash drawer opens, remove the money for the cash pickup. The system prints a receipt for the cash pickup.

 Note:

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

Networked Cash Drawers

This chapter describes the process of integrating networked cash drawers into the store.

1. Manage Networked Cash Drawer (only for new networked cash drawers that have not been configured yet).
 - a. Configure cash drawer
 - b. Activate cash drawer
2. Open Cash Drawer
 - a. Assign and count till
3. Attach Cash Drawer Till
 - a. Scan cash drawer
 - b. Put physical till in cash drawer
4. Networked Cash Drawer is ready for use in Xstore Sales
5. Remove Cash Drawer Till
 - a. Scan cash drawer
 - b. Remove physical till from cash drawer
6. Close Cash Drawer
 - a. Count till

Discover and Activate a New Networked Cash Drawer

Discover new networked cash drawers using the **Manage Networked Cash Drawer** menu option. These steps are only required for new networked cash drawers.

1. From the Main menu, select **Till** then **Manage Networked Cash Drawers**. The list of networked cash drawers displays. If this is the first time drawers are being discovered the list may be empty.

 Note:

If a networked cash drawer has a status of **Reset** extra steps are required. This is the status that is shown when Xstore does not recognize the configurations found upon discovery of the cash drawer. A hard reset is required. Refer to your IP Cash drawer device documentation for instructions on resetting the networked cash drawer.

Figure 13-1 Manage Networked Cash Drawers

Manage Networked Cash Drawers			
Device Name	Device Description	Barcode	Status
APG Atwood	Drawer40	4035H	Active
APG Atwood	Bs7mv cash drawer	857MV	Active

Back
Help
Discover Devices
Activate Device
Deactivate Device
Configure Device
Delete Device
Release Device
Get Log
Get New Log

- If your cash drawer is not listed and you need to find/discover your networked cash drawer, select **Discover Devices**.
Your drawer will be listed now with a status of **New**.
- Select your networked cash drawer. An option menu opens.
- Select **Configure Device**. The Configuration Information window displays:

Figure 13-2 Manage Networked Cash Drawers - Configure

CONFIGURE

Enter Configuration Information

IP Address: 10.145.55.97

Netmask: 255.255.255.0

Gateway: 10.145.55.1

TCP Port: 50998

Description: Drawer40

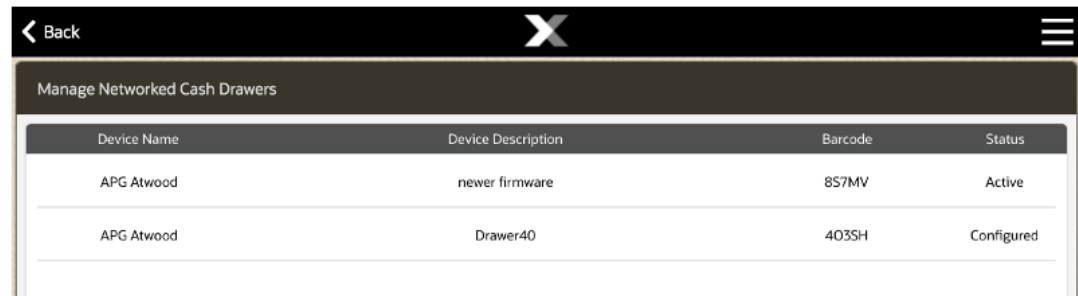
Beep On Open ☐

Beep On Extended Open ☐

Cancel Help Clear Configs Save Configs

- Enter the required fields: **IP Address**, **Netmask**, **Gateway**, **TCP Port** and a description.
- Select **Save Configs**. The system will take a couple minutes to save your configurations. Your drawer will be listed in **Configured** status.

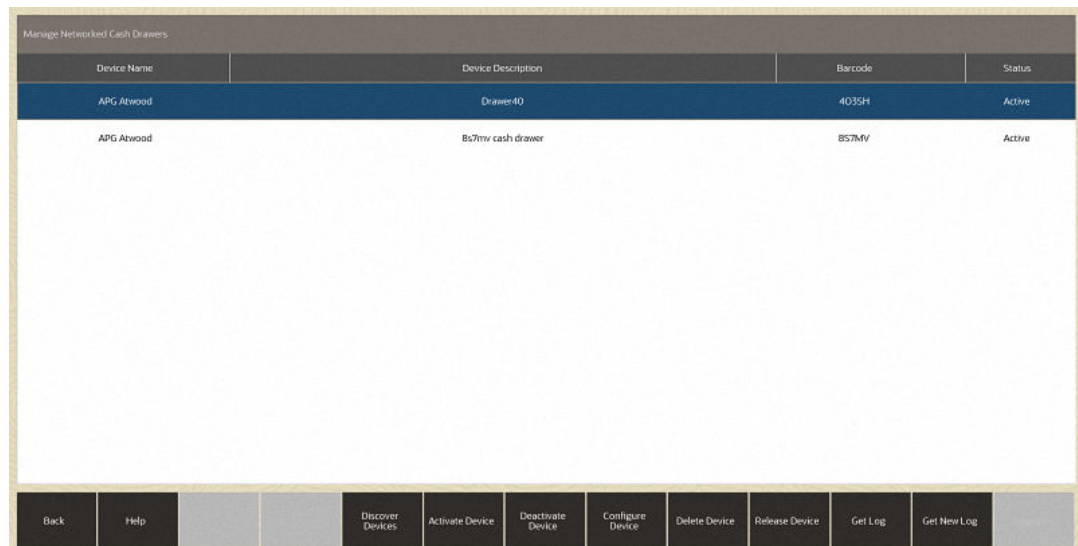
Figure 13-3 Manage Networked Cash Drawers - Configured Status



Device Name	Device Description	Barcode	Status
APG Atwood	newer firmware	857MV	Active
APG Atwood	Drawer40	403SH	Configured

7. Select your drawer and select **Activate Device**. The status of your networked cash drawer updates to **Active**.

Figure 13-4 Manage Networked Cash Drawers - Active Status



Device Name	Device Description	Barcode	Status
APG Atwood	Drawer40	403SH	Active
APG Atwood	857mv cash drawer	857MV	Active

Back Help Discover Devices Activate Device Deactivate Device Configure Device Delete Device Release Device Get Log Get New Log

Your networked cash drawer is now available to be set up for use in your store. Prior to moving on to the next steps you need to open the store and open the register. See [Opening the Store](#) and [Opening the Register](#) for more information.

Open Cash Drawer

To use the networked cash drawer that has been activated, you need to open the cash drawer. This must be done prior to **Attach Cash Drawer**.



Note:

: If you try to attach the cash drawer till first, you get an error message that there are no cash drawers available to attach till.

To open the networked cash drawer

1. Select **Till** from the **Main Menu**.
2. Select **Open/Close Options** from the **Till** menu.
3. Select **Cash Drawer Open** from the **Open/Close Options** menu. The system displays a list of networked cash drawers that are available.

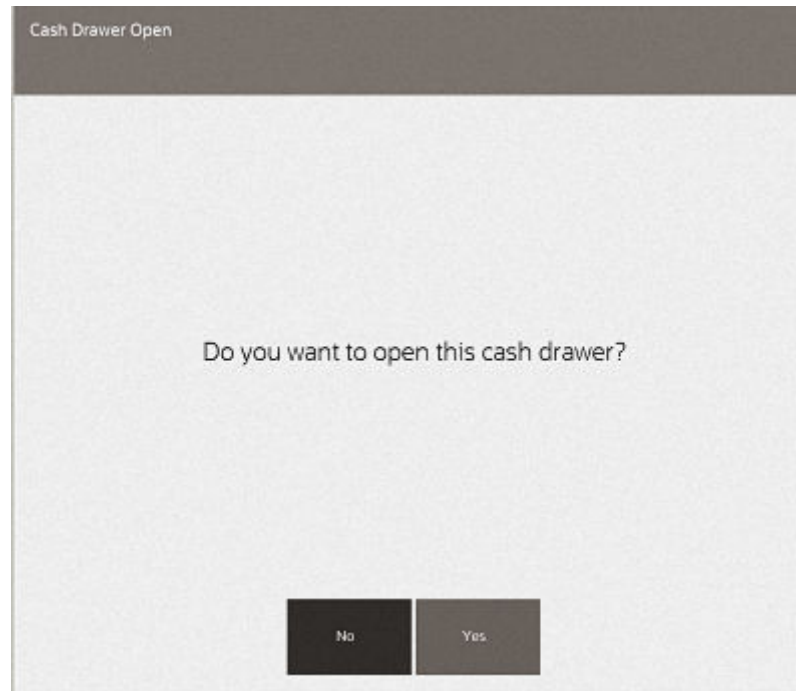
Figure 13-5 Cash Drawer Open

The screenshot shows a screen titled "Cash Drawer Open" with the instruction "Select the cash drawer that you want to open". Below this is a table with two columns: "Cash Drawer Id" and "Description". The table contains two rows: one with "4035H" and "Drawer40", and another with "857MV" and "857mv cash drawer". The first row is highlighted in blue. At the bottom of the screen are two buttons: "Back" and "OK".

Cash Drawer Id	Description
4035H	Drawer40
857MV	857mv cash drawer

4. Select the networked cash drawer to open from the list. The system prompts 'Do you want to open this cash drawer?'

Figure 13-6 Cash Drawer Open Prompt



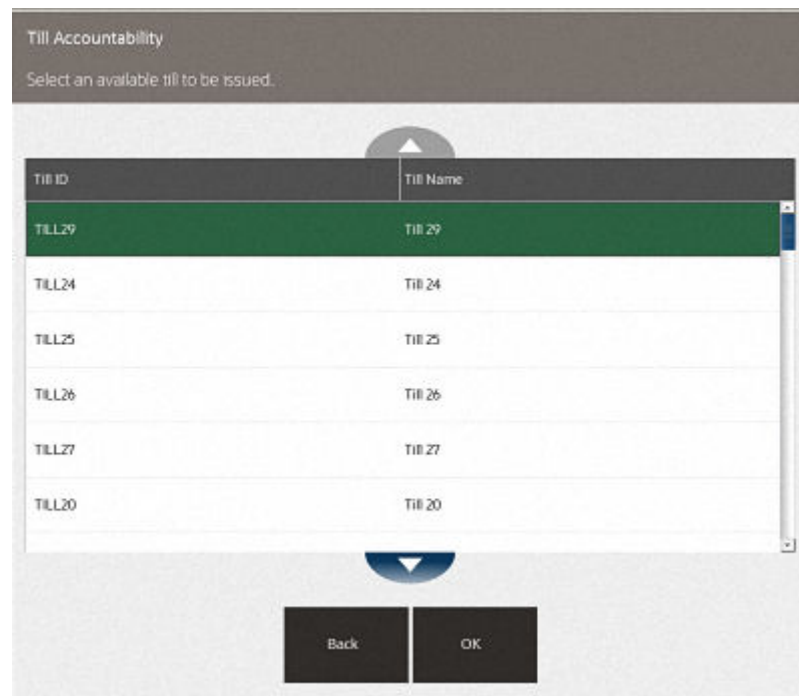
Cash Drawer Open

Do you want to open this cash drawer?

No Yes

5. Select **Yes**.
6. A cash drawer needs a till (insert that holds the money inside the cash drawer) so the system prompts for the till that will be issued for this cash drawer and go through the process of counting the till.
 - a. Select the till ID/Name that is located inside their cash drawer or associated to the cash drawer.

Figure 13-7 Select Available Till



Till Accountability

Select an available till to be issued.

Till ID	Till Name
TILL29	Till 29
TILL24	Till 24
TILL25	Till 25
TILL26	Till 26
TILL27	Till 27
TILL20	Till 20

Back OK

- b. Count the till contents.

Figure 13-8 Till Accountability Begin Count

Count Summary
Cashier ID 100 Till Name TILL 25

Count Group	Declared	System	Over/Short
Australian Cash	\$0.00	\$100.00	(\$100.00)
Canada Cash	\$0.00	\$100.00	(\$100.00)
Cash	\$0.00	\$100.00	(\$100.00)

Detailed Count Summary
Count Type **Begin Count**
Till Name TILL 25
Till Owner 4035H - Drawer40

Count Summary
Select a tender to count or select an option from the menu.

Cancel Help Count Selected Counting Complete

Begin Count John Smith Online Corner Market LTD Register 1 12/04/2019 2:59 PM

Select the **Count Group** to count first such as Australian Cash, Canada Cash, or Cash. The following example shows a denomination count for Australian cash first.

Figure 13-9 Till Accountability Denomination Count

Denomination Count
Cashier ID 100 Till Name TILL 25

Denomination	Qty	@	Amount
Five Cent	0	0.05	\$0.00
Ten Cent	0	0.1	\$0.00
Twenty Cent	0	0.2	\$0.00
Fifty Cent	0	0.5	\$0.00
Dollar	0	1	\$0.00
Two Dollar	0	2	\$0.00
Five Dollar	0	5	\$0.00
Ten Dollar	0	10	\$0.00
Twenty Dollar	0	20	\$0.00
Fifty Dollar	0	50	\$0.00
Hundred Dollar	0	100	\$0.00

Enter Counts
Select a denomination and enter the quantity for Australian Cash.

Back Help Next Group

Begin Count John Smith Online Corner Market LTD Register 1 12/04/2019 2:59 PM

- c. Select **Next Group** to perform the denomination count for the next currency, in this example, Canada Cash.
- d. Select **Next Group** to complete the last denomination count, Cash.
- e. Now the counting is done, select **Back** to exit the counting function and to select **Counting Complete**.

Figure 13-10 Till Accountability Counting Complete

Count Summary		Balance Summary Over/Short	
Count Group	Declared	System	Over/Short
Australian Cash	\$100.00	\$100.00	\$0.00
Canada Cash	\$100.00	\$100.00	\$0.00
Cash	\$100.00	\$100.00	\$0.00

- f. The prompt displays to verify the counts.

Figure 13-11 Till Accountability Verify Begin Count

Verify Begin Count

You have entered the following starting cash amounts. Is this correct?

Australian Cash \$100.00
Canada Cash \$100.00
Cash \$100.00

No Yes

- Select **Yes** if the amounts are correct.
Continue with attaching the cash drawer till.

Attach Cash Drawer

To attach a cash drawer till:

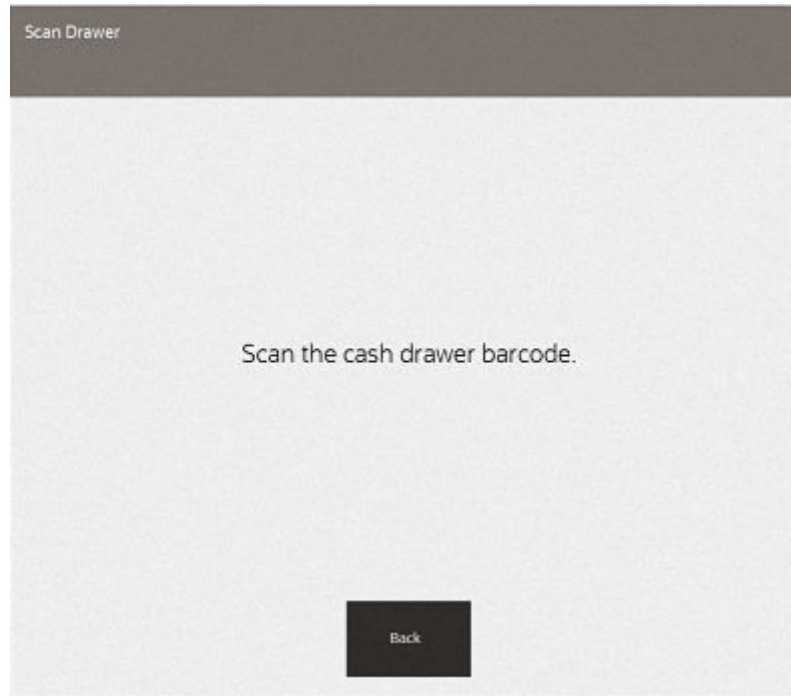
1. Select **Till** from the **Main Menu**.
2. Select **Till Maintenance** from the **Till** menu.
3. Select **Attach Cash Drawer Till** from the **Till Maintenance** menu. A list of cash drawer tills is shown.

Figure 13-12 Cash Drawer Accountability

Till ID	Cash Drawer Id	Description
TILL25	4035H	Drawer40

4. Select the till you had selected during the open cash drawer process. The system prompts you to scan the cash drawer barcode. This is the cash drawer the till will be placed inside.

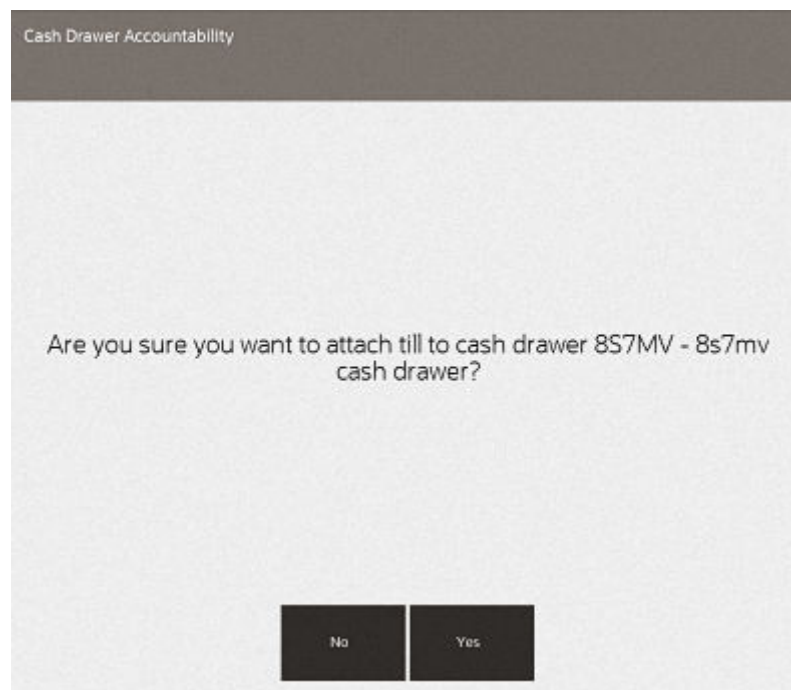
Figure 13-13 Scan Cash Drawer Barcode



Using the scanner, scan the barcode on the cash drawer.

After you scan the barcode the system prompts, "Are you sure you want to attach till to cash drawer ### (listing the specific cash drawer)."

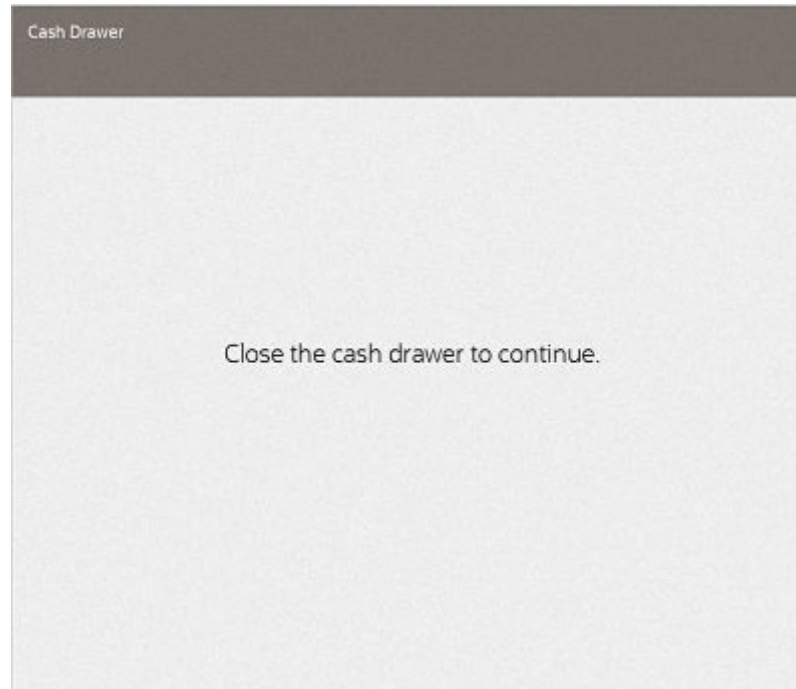
Figure 13-14 Attach Till Prompt



5. Select **Yes** to attach the till to that networked cash drawer.

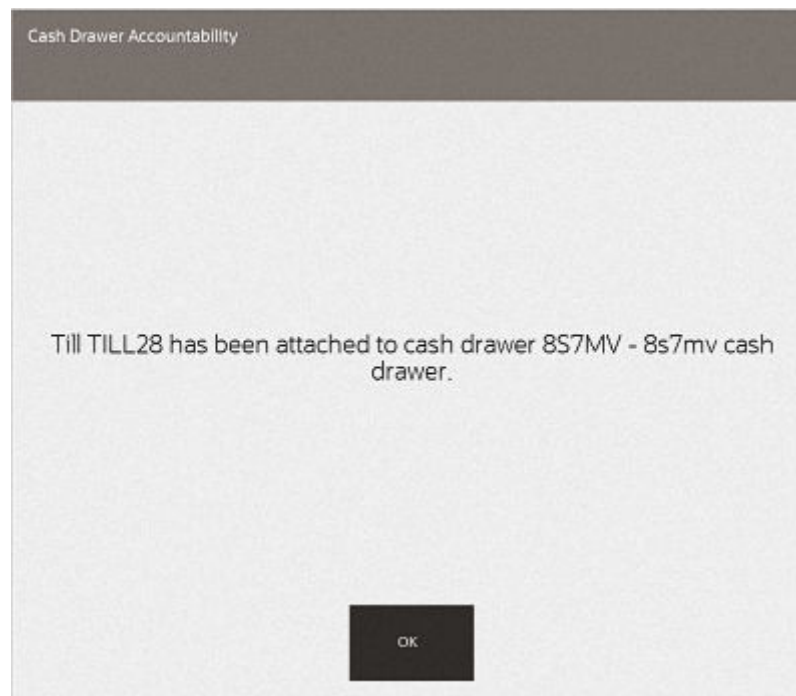
The networked cash drawer will open. Insert the till into the networked cash drawer. The system prompts to close the cash drawer.

Figure 13-15 Close Cash Drawer Prompt



6. Close the cash drawer. A final prompt displays stating which till has been attached to which networked cash drawer.

Figure 13-16 Till Attached Message



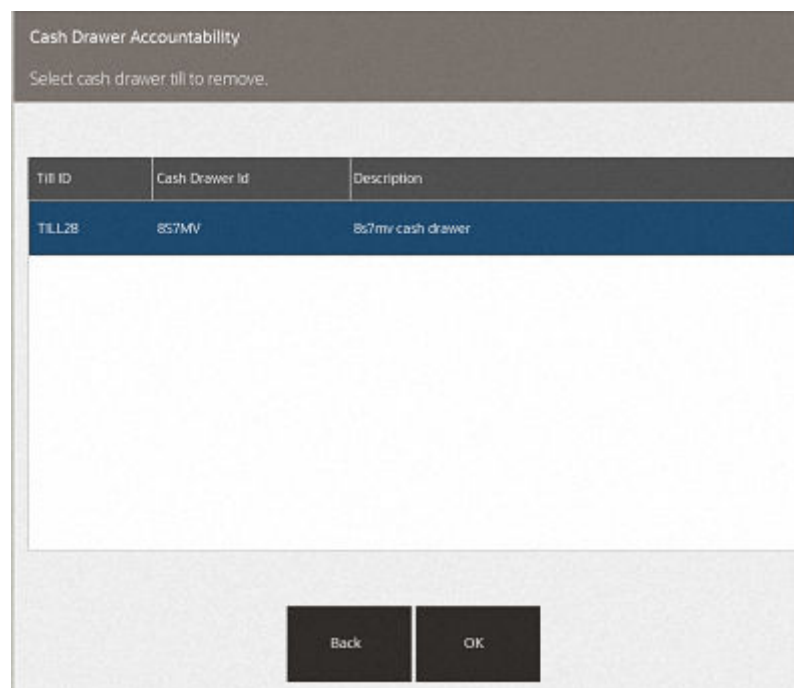
You can now perform sales. At the end of the day/shift remove the cash drawer till, followed by closing the cash drawer (which includes the counting of the till contents).

Remove Cash Drawer

To remove a cash drawer till:

1. Select **Till** from the **Main Menu**.
2. Select **Open/Close Options** from the **Till** menu.
3. Select **Remove Cash Drawer Till** from the **Open/Close Options** menu. The system displays a list of networked cash drawers that are available to remove.

Figure 13-17 Cash Drawer Remove List

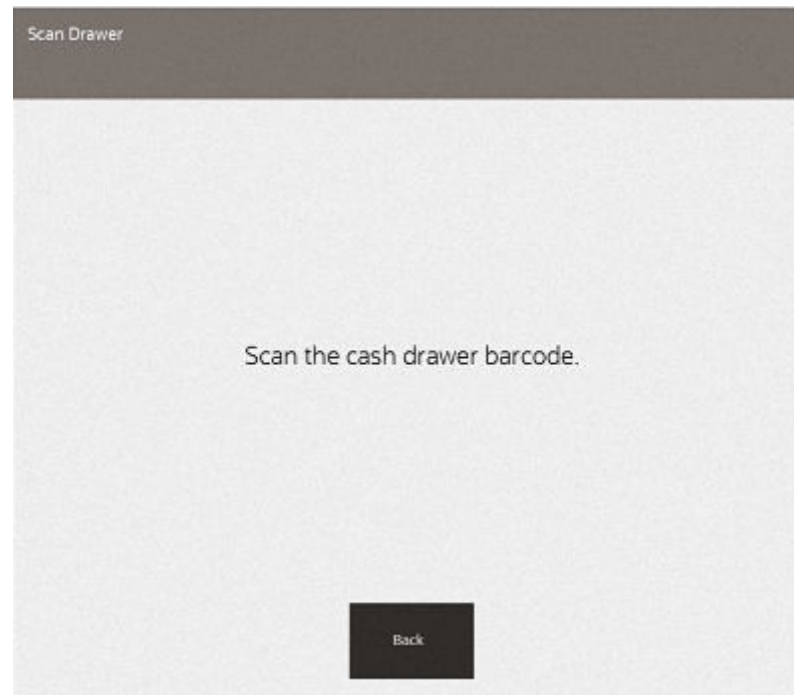


The screenshot shows a software interface titled "Cash Drawer Accountability" with the instruction "Select cash drawer till to remove." Below this is a table with three columns: "Till ID", "Cash Drawer Id", and "Description". One row is visible, showing "TILL28", "857MV", and "857mv cash drawer". At the bottom of the screen are two buttons: "Back" and "OK".

Till ID	Cash Drawer Id	Description
TILL28	857MV	857mv cash drawer

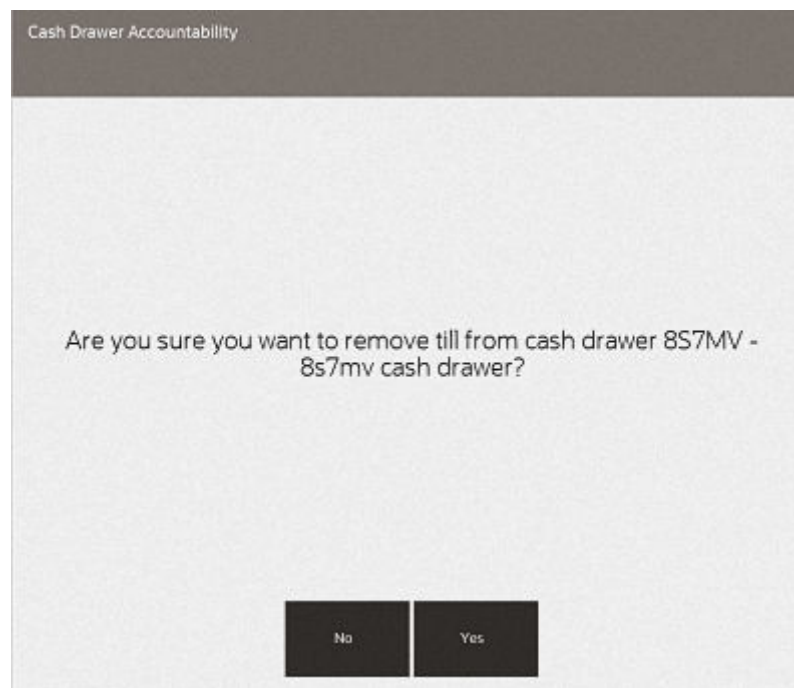
4. Scan the cash drawer barcode.

Figure 13-18 Scan Cash Drawer Barcode



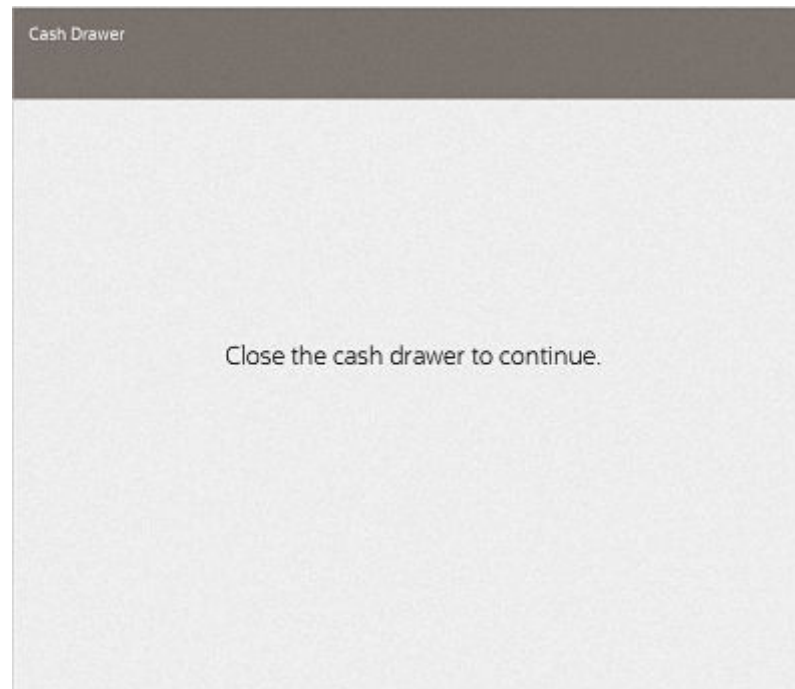
The system prompts to confirm you want to remove the till from this specific cash drawer (listing the name/description of the cash drawer).

Figure 13-19 Remove Till Prompt



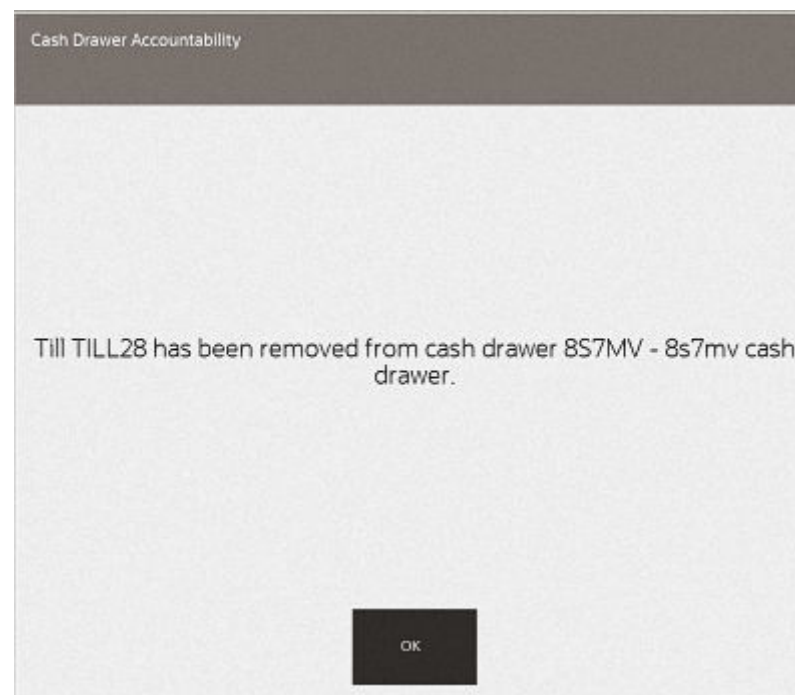
The cash drawer will pop open to take out the cash drawer till. The system will prompt to close the drawer once the till is removed.

Figure 13-20 Close Cash Drawer Prompt



5. Close the cash drawer. A final prompt displays stating which till has been attached to which networked cash drawer.

Figure 13-21 Till Removed Message



6. The last step will be to close the cash drawer.

Close Cash Drawer

To close the cash drawer:

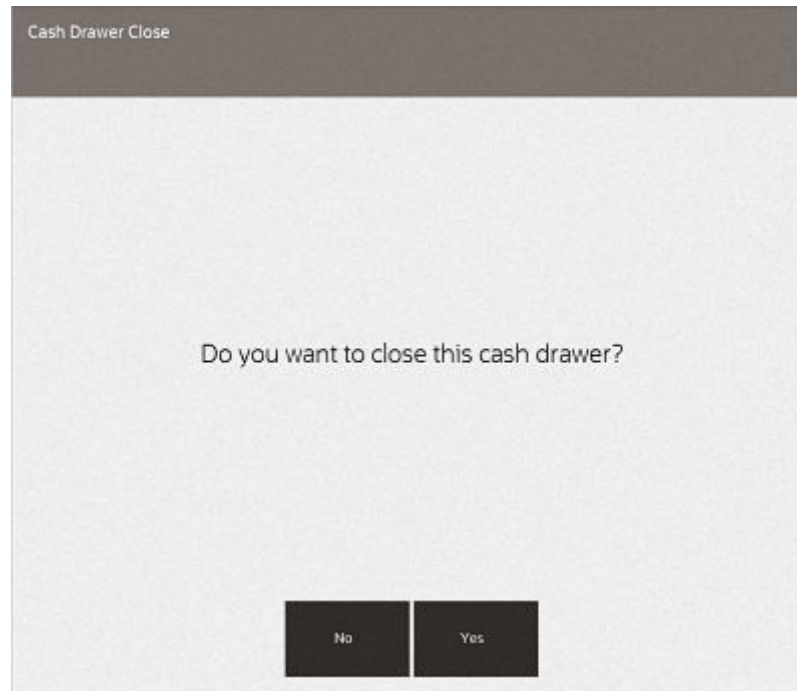
1. Select **Till** from the **Main Menu**.
2. Select **Open/Close Options** from the **Till** menu.
3. Select **Cash Drawer Close** from the **Open/Close Options** menu. The system displays a list of networked cash drawers to select from.

Figure 13-22 Cash Drawer Close List

Cash Drawer Id	Description
4035H	Drawer40
857MV	857mv cash drawer

4. Select the cash drawer to close. The system prompts to confirm that you want to close the cash drawer.

Figure 13-23 Cash Drawer Close Prompt



5. Select **Yes** and the process for counting the till will begin.

Figure 13-24 End Count

Count Group	Declared	System	Over/Short
Credit Card	\$0.00	\$0.00	\$0.00
Issue Store Credit	\$0.00	\$0.00	\$0.00
Miscellaneous	\$0.00	\$0.00	\$0.00
Store Credit	\$0.00	\$0.00	\$0.00
US Traveler Check	\$0.00	\$0.00	\$0.00
Gift Card	\$0.00	\$0.00	\$0.00
Australian Cash	\$0.00	\$100.00	(\$100.00)
Brazilian Cash	R\$0.00	R\$0.00	R\$0.00
Canada Cash	\$0.00	\$0.00	\$0.00
Swiss Cash	CHF0.00	CHF0.00	CHF0.00
Chinese Cash	¥0.00	¥0.00	¥0.00
British Pound	£0.00	£0.00	£0.00
Japanese Cash	¥0	¥0	¥0
Mexico Cash	\$0.00	\$0.00	\$0.00
Polish Cash	zł0.00	zł0.00	zł0.00
Swedish Cash	kr0.00	kr0.00	kr0.00
Cash	\$0.00	\$76.00	(\$76.00)
South African Cash	R\$0.00	R\$0.00	R\$0.00
Euro Cash	€0.00	€0.00	€0.00
Electronic Wallet	\$0.00	\$0.00	\$0.00
Gift Certificate	\$0.00	\$0.00	\$0.00
Issued Gift Certificate	\$0.00	\$0.00	\$0.00
Mail Certificate	\$0.00	\$0.00	\$0.00
House Account	\$0.00	\$0.00	\$0.00
Check	\$0.00	\$0.00	\$0.00
Coupons	\$0.00	\$0.00	\$0.00

6. Count each of the count groups that are in the drawer. Select **Next Group** or **Prior Group** to count each group.

Figure 13-25 Denomination Count

Denomination Count
Cashier ID 100 Till Name Till 28 Australian Cash

Denomination	Qty	@	Amount
Five Cent	0	0.05	\$0.00
Ten Cent	0	0.1	\$0.00
Twenty Cent	0	0.2	\$0.00
Fifty Cent	0	0.5	\$0.00
Dollar	0	1	\$0.00
Two Dollar	0	2	\$0.00
Five Dollar	0	5	\$0.00
Ten Dollar	0	10	\$0.00
Twenty Dollar	0	20	\$0.00
Fifty Dollar	0	50	\$0.00
Hundred Dollar	0	100	\$0.00
Total			\$0.00

Enter Counts
Select a denomination and enter the quantity for Australian Cash.

Back Help Prior Group Next Group

Close Count John Smith Online Corner Market 110 Register 1 12/04/2019 9:35 AM

- When done counting, select **Back**, then select **Counting Complete**.

Figure 13-26 End Count Counting Complete

Count Summary
Cashier ID 100 Till Name Till 28 Balance Summary Over/Short

Count Group	Declared	System	Over/Short
Credit Card	\$0.00	\$0.00	\$0.00
Issue Store Credit	\$0.00	\$0.00	\$0.00
Miscellaneous	\$0.00	\$0.00	\$0.00
State Credit	\$0.00	\$0.00	\$0.00
US Traveler Check	\$0.00	\$0.00	\$0.00
Gift Card	\$0.00	\$0.00	\$0.00
Australian Cash	\$100.00	\$100.00	\$0.00
Brazilian Cash	\$50.00	\$50.00	\$0.00
Canada Cash	\$5.00	\$5.00	\$0.00
Swiss Cash	CHF0.00	CHF0.00	CHF0.00
Chinese Cash	¥0.00	¥0.00	¥0.00
British Pound	£0.00	£0.00	£0.00
Japanese Cash	¥0.00	¥0.00	¥0.00
Mexico Cash	\$0.00	\$0.00	\$0.00
Polish Cash	zł0.00	zł0.00	zł0.00
Swedish Cash	kr0.00	kr0.00	kr0.00
Cash	\$176.00	\$176.00	\$0.00
South African Cash	R50.00	R50.00	R50.00
Euro Cash	€0.00	€0.00	€0.00
Electronic Wallet	\$0.00	\$0.00	\$0.00
Gift Certificate	\$0.00	\$0.00	\$0.00
Issue Gift Certificate	\$0.00	\$0.00	\$0.00
Mail Certificate	\$0.00	\$0.00	\$0.00
House Account	\$0.00	\$0.00	\$0.00
Check	\$0.00	\$0.00	\$0.00
Coupon	\$0.00	\$0.00	\$0.00

Count Summary
Select a tender to count or select an option from the menu.

Cancel Help Count Selected Counting Complete

Close Count John Smith Online Corner Market 110 Register 1 12/04/2019 9:37 AM

- If there are any discrepancies in the count, the system will prompt you to confirm the count.

Figure 13-27 Till Discrepancy

Deposit

The following tenders or tender types are out of balance:

Canada Cash, Cash

Do you want to accept the difference?

No Yes

Select **Yes** to accept the count.

9. Enter a reason code for the discrepancy and select **OK**.

Figure 13-28 Discrepancy Reason

Reason Code

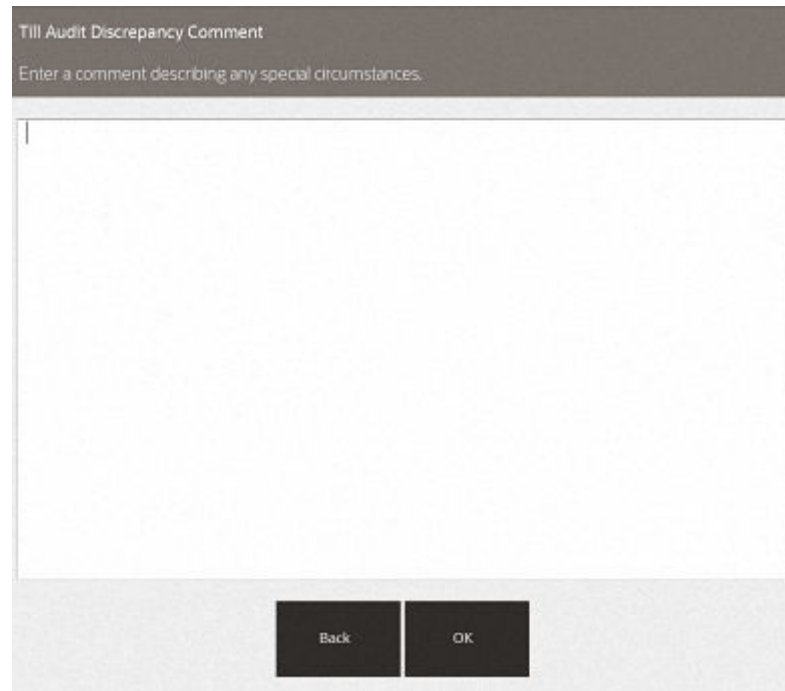
Select a reason code from the list.

Reasons
Till Audit Discrepancy Reason 1
Till Audit Discrepancy Reason 2
Till Audit Discrepancy Reason 3
Till Audit Discrepancy Reason 4

Back OK

10. Enter a comment for the discrepancy and select **OK**.

Figure 13-29 Discrepancy Comment



The screenshot shows a dialog box titled "Till Audit Discrepancy Comment". Below the title bar, there is a text prompt: "Enter a comment describing any special circumstances." This is followed by a large, empty rectangular text input area. At the bottom of the dialog, there are two buttons: "Back" on the left and "OK" on the right.

A receipt will print for the end count.

This concludes the process for closing the cash drawer.

Flash Sales Reports

The Flash Sales Reports include four different reports, each of which may be displayed on the screen or printed:

- [Flash Sales Summary Report](#)
- [Flash Sales By Department Report](#)
- [Flash Sales By Hour Report](#)
- [Flash Sales By Employee Report](#)

The Flash Sales reports provide an instant snapshot of sales at the moment that you select one of the reports. Three of the four reports display data in a column format and in graphic format as bar charts and pie charts. The exception is the Flash Sales By Employee Report, which does not include graphs.

Each of the reports provides a criteria selection screen where you may set the parameters that are used to select the data included in the report.

All of the reports may be viewed online and printed immediately or saved so that they may be viewed later. Saved reports may be preserved with the original selection parameters or with the original data.

All of the Flash Sales reports are also accessible from the Back Office Reporting Menu.

**Note:**

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

Flash Sales Summary Report

The Flash Sales Summary Report provides current sales results for the entire store. It includes looks at sales results from two perspectives:

Sales - The count of transactions and the dollar amount of the transactions in the following categories: gross sales, net sales, returns, discounts and total tax.

Tenders - The count of transactions and the dollar amount for each tender type that was used, such as cash, various credit cards, store credit, gift certificates, and so on.

The last page of the Flash Sales Summary report includes a pie chart of the tenders used and a bar chart of the sales results.

Flash Sales By Department Report

The Flash Sales By Department Report provides current sales results for the entire store for each department. It includes the department name and number, count of transactions in each department and the dollar amount of the sales per department.

The last page of the Flash Sales By Department Report includes a vertical bar graph showing dollar values per department.

Flash Sales By Hour Report

The Flash Sales By Hour Report provides current sales results for the entire store in hourly increments. It includes an hour by hour breakdown of sales and shows the transaction count per hour, item count per hour and net sales per hour.

The last page of the Flash Sales By Hour Report includes a horizontal bar graph showing sales dollars, item count, and transaction count per hour.

Flash Sales By Employee Report

The Flash Sales By Employee Report provides up-to-the-moment sales results on a specified date for every employee. It includes the employee's name and ID, number of transactions and the total dollar value of those transactions.

Electronic Journal

The electronic journal is an electronically captured record of all transactions. The search capabilities allow you to quickly locate any transaction and to view the detailed information on the receipt associated with a specific transaction. You may also print gift receipts, reprint receipts, tax free invoices and post void transactions from the Electronic Journal if you have the proper security permissions. A Journal Report showing detailed transaction information is also available.

The following topics are described in this chapter:

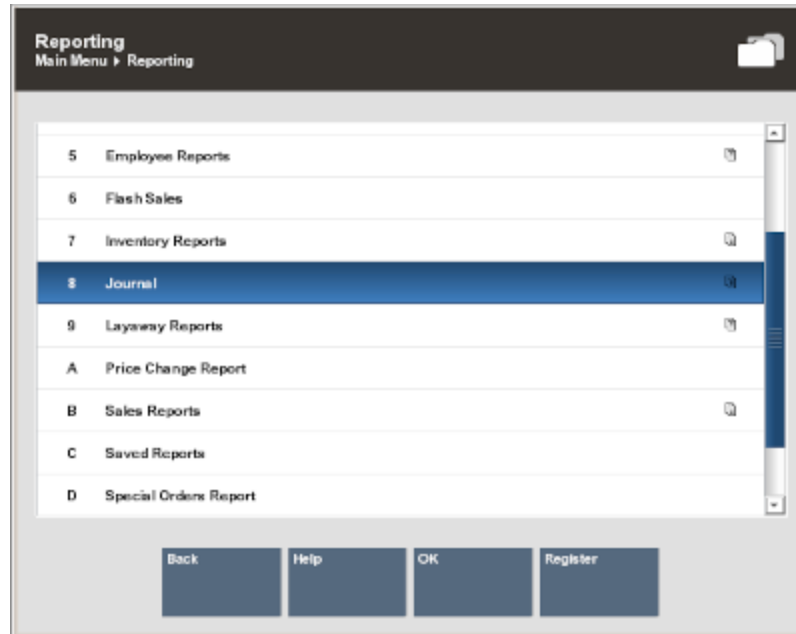
- [Accessing Back Office Journal Functions](#)
- [Viewing the Electronic Journal](#)
- [Viewing Transaction Detail](#)
- [Reprinting a Receipt](#)
- [Printing a Gift Receipt](#)
- [Printing a Rebate Receipt](#)
- [Post Voiding a Transaction](#)
- [Journal Report](#)

Accessing Back Office Journal Functions

Employees with the proper security permissions may access the Electronic Journal from the Back Office Menu. The Journal menu provides options to view the Electronic Journal and to run the Journal Report.

1. After logging in to the Back Office (see [Accessing the Back Office](#)), select the **Journal** option from the Reporting menu and press **Enter**.

Figure 15-1 Back Office Main Menu - Journal Option

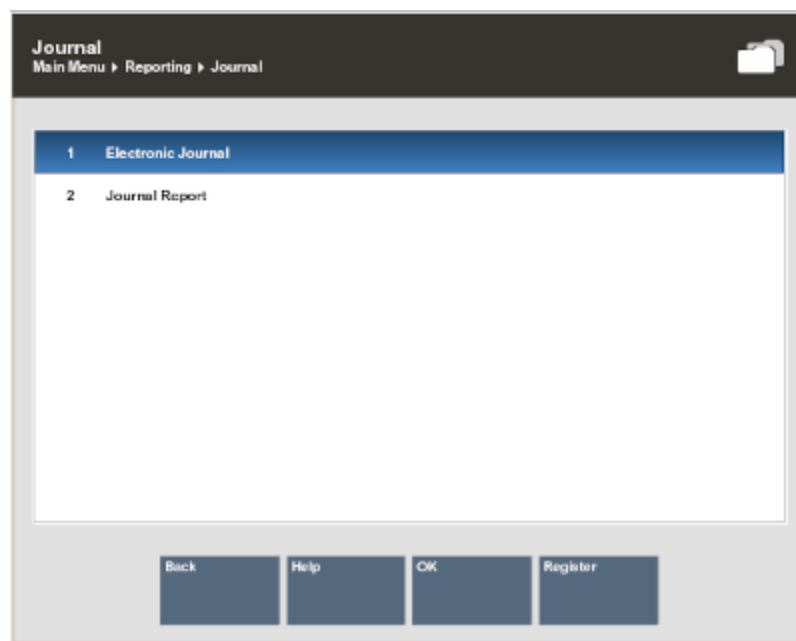


 Note:

You can also press the number or letter on the keyboard associated with a menu option to access the Journal functions. Touch-screen users can tap to select from the list.

2. At the Journal menu, select one of the options and press **Enter**.

Figure 15-2 Journal Menu



The Journal menu has the following options:

- Electronic Journal - Select this option to view the Electronic Journal records.
- Journal Report - Select this option to run the Journal report. Refer to [Journal Report](#) for more information.

Viewing the Electronic Journal

1. At the Journal menu, select the **Electronic Journal** option and press **Enter**.
2. The system displays the Transaction Search form. Enter your search criteria and select **Process**.

Note:

Depending on your store's configuration, a Check Account Number search field displays as well as a Read Check from MICR button.

Figure 15-3 Transaction Search Form

Transaction Search Enter search criteria or scan the receipt barcode				
Register #	Start	1	End	1
Ticket #	Start		End	
Date/Time	Start Date	10/24/2017	End Date	10/25/2017
	Start Time	12:00:00 AM	End Time	11:59:59 PM
Cashier ID	Start Range		End Range	
Customer # or Last Name				
Trans. Type	<All>			
Tender	<All>			
Credit Card #				
Back Help Process				

The following search parameters are available:

- Register Number - Enter the identifier for a specific register, a range of registers, or leave these fields blank to view information for all registers.
- Ticket Number - Enter a transaction identifier for a specific transaction, a range of transactions, or leave these fields blank to view information for all transactions.
- Date/Time - Enter a start date and time, an end date and time, or accept the default for today.
- Cashier ID - Enter the identifier for a specific associate, a range of associates, or leave these fields blank to view information for all associates.

- Customer - Enter a customer name or number to view information about a specific customer.
 - Transaction Type - Select a transaction type from the list or select ALL to view all transaction types. Transaction types include options such as TIME CLOCK, NO SALE, RETAIL SALE, POST VOID, and so on.
 - Tender - Select a tender type from the list or select ALL to view all tender types. Tender types include options such as Store Credit, Cash, Check, and so on.
 - Credit Card # - Enter the credit card number used for a transaction.
- Oracle Retail Xstore Point of Service displays the Electronic Journal screen.

Figure 15-4 Electronic Journal Screen

Electronic Journal					
Start #: 1 End #: 1	Start Date: 10/24/2017 End Date: 10/25/2017	Start Time: 12:00:00 AM End Time: 11:59:59 PM	Cashier ID:	Trans. Type: <All> Tender: <All>	Customer:
Retail Sale Register: 1 Customer: Vanessa Clark Total Sale:	Date: 10/25/2017 Cashier: 100	Time: 11:59:47 AM Ticket: 119	Status: Cancel		
Retail Sale Register: 1 Customer: Vanessa Clark Total Sale: \$8.34	Date: 10/25/2017 Cashier: 100	Time: 11:53:58 AM Ticket: 118	Status: Complete		
Retail Sale Register: 1 Customer: Vanessa Clark Total Sale: \$8.95	Date: 10/25/2017 Cashier: 100	Time: 11:56:08 AM Ticket: 117	Status: Complete		
Retail Sale Register: 1 Customer: Greyly Campbell Total Sale: \$263.53	Date: 10/25/2017 Cashier: 100	Time: 11:52:35 AM Ticket: 116	Status: Complete		
Retail Sale Register: 1 Customer:	Date: 10/25/2017 Cashier: 100	Time: 10:56:56 AM Ticket: 115	Status: Complete		
Retail Sale Register: 1 Customer:	Date: 10/25/2017 Cashier: 100	Time: 10:53:46 AM Ticket: 113	Status: Complete		
Inventory Control Register: 1 Customer:	Date: 10/25/2017 Cashier: 100	Time: 04:16:27 PM Ticket: 111	Status: Complete		
Back	Help		View Detail	Reprint Receipt	Gift Receipt
			Rebate Receipt		Post Void
					Register

The following options are available at this screen:

- **Invoice Functions** - Select this option to issue or reprint a tax-free invoice.
- **View Detail** - Select this option to view additional information about the selected transaction. Refer to [Viewing Transaction Detail](#) for more information.
- **Reprint Receipt** - Select this option to reprint a receipt for the selected transaction. The receipt is clearly labeled as a reprint. Refer to [Reprinting a Receipt](#) for more information.
- **Gift Receipt** - Select this option to print a gift receipt for the selected transaction. Refer to [Printing a Gift Receipt](#) for more information.
- **Rebate Receipt** - Select this option to print a Rebate Authorization receipt. Refer to [Printing a Rebate Receipt](#) for more information.
- **Post Void** - Select this option to post void the selected transaction. Refer to [Post Voiding a Transaction](#) for more information.

Viewing Transaction Detail

Note:

The detail information shown is specific to each transaction type. For example, a Time Clock journal includes the Employee number and name, Clock In or Clock Out, and the time. A Post Void Journal includes the Original Transaction Location ID, Register ID, and Business Date.

With the transaction record selected, select the **View Detail** option.

Oracle Retail Xstore Point of Service displays the Electronic Journal transaction detail screen for the selected record.

Figure 15-5 Electronic Journal Transaction Detail Screen - Sale Transaction Type

The screenshot displays the 'Electronic Journal Transaction Detail Screen' for a 'RETAIL SALE' transaction. At the top, it shows transaction metadata: Ticket # 117, Date 10/25/2017, Register ID 1, and Cashier ID 100. Below this, a 'Detail' tab is active, showing customer information (Vanessa Clark, ID 100), transaction dates (10/31/2017 11:06:08 AM to 11:08:21 AM), and totals (Total: \$8.95). The main area lists items and their details:

Item ID	Description	Quantity	Price	Extended Price
1007	ANIMAL PRINT CAP SLEEVE DRESS	1	\$8.95	\$8.95
564	Special Order Service Fee	1	\$2.98	\$2.98
565	Special Order Deposit	1	\$5.97	\$5.97
Employee/Family 15% Discount				(\$9.75)
Tender: Cash				\$8.95
Subtotal				\$5.97
Fees				\$2.98
Tax				\$0.00
Total				\$8.95
Change Due				\$0.00

At the bottom, there are navigation buttons: Back, Help, Rebate Receipt, Reprint Receipt, Gift Receipt, Post Void, Previous Tab, Next Tab, and Register.

The detail information for a RETAIL SALE transaction, (sale, return, send sale, special order, layaway, order, and so on) includes the following data:

- **Item Detail:** Quantity, item ID, description, discounts, price, and the extended price for each item
- **Tender Detail:** Tender types and amount of each type
- **Totals:** Subtotal, fees, tax, and totals as shown on the original receipt

Note:

Some transaction types, such as Assign Till transaction type and Workstation Open transaction type, do not show any detailed information.

Reprinting a Receipt

This function may also be available from the Register Login screen.

1. With the transaction record selected, select the **Reprint Receipt** option.
2. Oracle Retail Xstore Point of Service prompts to confirm: Do you want to reprint the receipts associated with the transaction? Select **Yes** to reprint the receipts.

The printed receipts are clearly identified as reprints.

Figure 15-6 Reprint Receipt

Ticket: 48 Date: 3/22/06
Store: 301 Register: 1

Salesperson:
1 (System USER)

Cashier: 1
Customer: Penny Pauly

*****REPRINT - REPRINT - REPRINT - REPRINT*****

Item	Qty	Price	Amount
BLK DRESS W/SCALLOP NECK 1002	1	\$9.98	\$9.98
		Subtotal	\$9.98
		Tax 5.00%	3.00
		Total	62.98
Cash			63.00
Change			
Cash			(0.02)
SOLD ITEM COUNT = 1			
*****REPRINT - REPRINT - REPRINT - REPRINT*****			

 Note:

If reprints of the receipts are not permitted for the transaction type you selected, Oracle Retail Xstore Point of Service displays a message indicating that reprints are not allowed. You must acknowledge the message to return to the Electronic Journal screen.

Printing a Gift Receipt

This function may also be available at the Register Login screen.

1. With the transaction record selected, select the Gift Receipt option.

Oracle Retail Xstore Point of Service displays a list of items in the transaction that are eligible for a gift receipt. Use the up and down arrow keys to select an item and then press the **Spacebar** to mark it for a gift receipt. You may use the **Select All** option to print gift receipts for all the listed items.

Note:

If there are multiple items that have been labeled as requiring a gift receipt, you may be prompted whether the items should be grouped on separate gift receipts. For example, 2 items on one receipt, and 3 items on another receipt.

See [Multiple Gift Items - Grouping Items for Gift Receipts](#).

2. Press **Enter** to continue. Oracle Retail Xstore Point of Service prints the gift receipt(s) for the selected item(s).

Figure 15-7 Gift Receipt

Ticket: 2769 Date: 8/4/11
Store: 110 Register: 1
Salesperson:
100
Cashier: 100

A Gift For You

Item	Qty	Price
WINE TEXT DUSTER DRESS		
1006	1	


10061006100610061006

Gift Receipt

The items that you issued a gift receipt for are now labeled with the Gift icon.

 Note:

If gift receipts are not permitted for the transaction type you selected, Oracle Retail Xstore Point of Service prompts with a message indicating that gift receipts are not allowed. You must press **Enter** to acknowledge the message to return to the Electronic Journal screen.

Multiple Gift Items - Grouping Items for Gift Receipts

If prompted whether you want to group the gift receipt items, you have the following options:

- To group the items, select **Yes**, and continue with [To Group Gift Items](#) below.
- If you do not want to group the items, select **No** and continue with [To Continue without Grouping Gift Items](#).

To Group Gift Items

After selecting **Yes** at the Multiple Gift Receipts prompt, the system displays the list of items requiring gift receipts. Press the **Spacebar** to highlight and select the gift items for the first gift receipt, then select one of the following options:

Finish and Print Option

- Select **Finish and Print** to print a gift receipt with the grouped items you selected.
- If there are at least two or more gift items still available after setting up the grouping, you are prompted whether you want to print a separate gift receipt for each remaining gift item:
 - When prompted, select **Yes** to print a separate gift receipt for each remaining gift item.
- **<OR>**
- Select **No** to print the remaining gift items on a single gift receipt.
- If only one gift item is still available after setting up the grouping, the system automatically prints that gift item on a separate gift receipt.

Add Grouping Option

- Select **Add Grouping** to create multiple grouped gift receipts, beginning with the first group of gift items you selected.
- The system then displays the gift item list again showing only the items that are still available for grouping. Select the next gift receipt items.
- You can continue grouping the items using the **Add Grouping** option as long as there are at least 2 remaining items in the list.
- When only 1 item remains in the list, the **Add Grouping** option no longer is available. Select **Finish and Print** to create a gift receipt for the remaining gift item.

To Continue without Grouping Gift Items

- After selecting **No** at the Multiple Gift Receipts prompt, the system prompts whether you want to print a separate gift receipt for each gift item. Select one the following options:
 - Select **Yes** to print one gift receipt per gift item.

- Select **No** to print a single gift receipt with all gift items.

Printing a Rebate Receipt

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

With the transaction record selected, select the Rebate Receipt option. Oracle Retail Xstore Point of Service prints the rebate authorization receipt if an item is eligible for a rebate.

Figure 15-8 Rebate Authorization Receipt

30800 Bruce Industrial Hwy
Solon, OH 44139
440-488-4414

Ticket: 442 Date: 7/31/09
Store: 101 Register: 1
Salesperson:
100 (John Nashbrown)
Cashier: 100
Customer: Woody Allen

**** Rebate Authorization **

Item	Qty	Price	Amount
BLK DRESS W/SCALLOP NECK 1002	1	49.98	49.98
Subtotal			49.98
Tax 8%			5.40
Total			55.38

Cash 55.38

Change 0.00

You have saved 0 dollars.

SOLD ITEM COUNT = 1

**** Rebate Authorization **


10000000000000

Not valid for merchandise return.
Customer Copy

Post Voiding a Transaction



Note:

Only transactions for the current date can be post voided. If you try to post void a transaction from a previous day, the system displays a message and you are not permitted to post void the transaction.

This function may also be available at the Register Login screen.

1. With the transaction record selected, select the **Post Void** option.
2. Oracle Retail Xstore Point of Service prompts to confirm that you want to post void this transaction. Select **Yes** to post void the transaction.

Figure 15-9 Confirm Post Void Prompt

The screenshot shows a dark header bar with the text "Post Void". Below the header, the main area is light gray and contains the question "Are you sure you want to post void the selected transaction?" in bold black text. At the bottom, there are two blue rectangular buttons labeled "No" and "Yes".

3. Oracle Retail Xstore Point of Service prompts for the reason you are post voiding this transaction, if required by your store policy. Select a reason from the list and press **Enter**.

Figure 15-10 Post Void Reasons

The screenshot shows a dark header bar with the text "Reason Code" and "Select a reason code from the list." below it. The main area is light gray and contains a list of reasons. The list has a dark header bar labeled "Reasons". The list items are "Cashier Error" (highlighted in blue), "Supervisors Discretion", and "Customer Satisfaction". At the bottom, there are two blue rectangular buttons labeled "Back" and "OK".

- Oracle Retail Xstore Point of Service may prompt for a comment for this post void transaction. If prompted, type a comment and press **Enter**.

Oracle Retail Xstore Point of Service post voids the transaction and prints a post void receipt. The printed receipts are clearly identified as voided.

Figure 15-11 Post Void Receipt

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

Ticket: 49      Date: 3/22/06
Store: 301      Register: 1

Cashier: 1

Penny Pauly
VOID TRANSACTION
Code:DISCOUNT_NOT_GIVEN
Discount Not Given

Item      Qty      Price      Amount
BLK DRESS W/SCALLOP NECK
1002
1 59.98 59.98

Subtotal 59.98
Tax 5.00% 3.00

Total 62.98

Cash 63.00

Change
Cash (0.02)

Original Tran ID:49
Original Cashier ID:1
Original Register ID:1
**VOID**VOID**VOID**
```

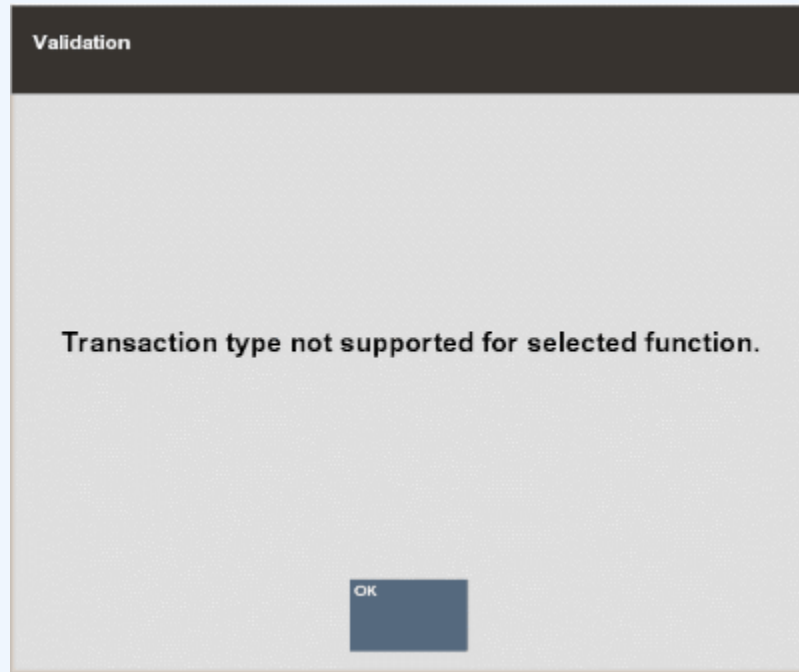
The journal record status is updated to Void.

Figure 15-12 Updated Record Status after Post Void

Electronic Journal									
Start #: 1 End #: 1		Start Date: 10/25/2017 End Date: 10/25/2017		Start Time: 12:00:00 AM End Time: 11:59:59 PM		Cashier ID:		Trans. Type: <All> Tender: <All>	
Customer: Vanessa Clark						Status Cancel			
Total Sale:									
Retail Sale		Date: 10/25/2017		Time: 03:40:25 PM		Ticket: 120			
Register: 1		Cashier: 100							
Customer: Vanessa Clark						Status Cancel			
Total Sale:									
Retail Sale		Date: 10/25/2017		Time: 11:50:47 AM		Ticket: 119			
Register: 1		Cashier: 100							
Customer: Vanessa Clark						Status Cancel			
Total Sale:									
Retail Sale		Date: 10/25/2017		Time: 11:43:59 AM		Ticket: 118			
Register: 1		Cashier: 100							
Customer: Vanessa Clark						Status Void			
Total Sale: \$0.34									
Retail Sale		Date: 10/25/2017		Time: 11:06:08 AM		Ticket: 117			
Register: 1		Cashier: 100							
Customer: Vanessa Clark						Status Void			
Total Sale: \$8.95									
Retail Sale		Date: 10/25/2017		Time: 11:02:30 AM		Ticket: 116			
Register: 1		Cashier: 100							
Customer: Greyly Campbell						Status Complete			
Total Sale: \$263.63									
Retail Sale		Date: 10/25/2017		Time: 10:56:56 AM		Ticket: 115			
Register: 1		Cashier: 100							
Customer:						Status Complete			
Total Sale:									
Back	Help			View Detail	Reprint Receipt	Gift Receipt	Rebate Receipt	Post Void	Register

 Note:

If post voids are not supported for the transaction type you selected, Oracle Retail Xstore Point of Service prompts with a message indicating that it is not allowed. You must press **Enter** to acknowledge the message to return to the Electronic Journal screen.



If the transaction is an extended transaction type such as a layaway or a work order, Oracle Retail Xstore Point of Service displays a message and prompts you to respond.

An extended transaction includes other activities after the initial transaction is completed. Post voiding an extended transaction impacts the other activities that follow the initial transaction.

If you want to continue with the post void, select **Yes** to void the transaction, otherwise, select **No**.

Journal Report

The Journal Report shows detailed transaction information exactly as it was rung. Data can be displayed for an individual employee or for all employees, or for transaction codes, transaction line codes, and tender codes. Transactions are sorted by date, register number, and transaction number.

This report includes the following information:

- Transaction Type
- Register ID

- Business Date
- Total
- Cashier
- Transaction ID
- Customer Name
- Status

Item section: Commissioned Emp ID, Item ID, Description, Quantity, Unit Price, and Ext Price

Tender section: Taxable Amount, Non Taxable Amount, Sales Tax, Total, and Tender Type



Note:

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

Figure 15-13 Journal Report

Store 34 - Corner Market

ORACLE®			Journal			
Date: 09/07/2018			Employee: All Employees		Transaction: All Transactions	
Prior Days Included: 0 Days			Customer: All Customers		Transaction Type: All Transaction Types	
			Register: All Registers		Tender Type: All Tenders	
Transaction: 363						
Date	Register	Cashier	Transaction Type	Transaction Status		
8/7/18	1	100	Retail Sale	Complete		
Transaction Total						
Description				Amount		
Non-Taxable				\$0.00		
Taxable				\$106.20		
Sales Tax				\$8.50		
Total				\$114.70		
Item						
Type	Comm Assoc	Item	Description	Qty	Selling Price	Extend Price
Sale		1002	COTTON JERSEY TIERED DRESS	1.0000	\$106.20	\$106.20
Tender						
Type				Amount		
Change				(\$35.30)		
Tender				\$150.00		
Transaction: 362						
Date	Register	Cashier	Transaction Type	Transaction Status	Customer	
8/7/18	1	100	Retail Sale	Cancel	Raj, Mithula	
Transaction Total						
Description				Amount		
Non-Taxable				\$110.73		

Run Date: 9/8/18 9:42 AM

Page: 1 of 2

Run Date: 9/9/18 9:42 AM

Page 1 of 40

Balance Inquiry

The system creates accounts to track the activities that are related to various customer- related transactions. The status of an account may change from time to time as different events occur that affect the account. An individual customer may have several different kinds of accounts open at the same time. The Balance Inquiry process is associated with customer accounts and is used to check the amount remaining on a customer's store credit voucher, gift card, or gift certificate.

**Note:**

Other customer account types such as Work Orders, Special Orders, Layaways, and Orders are documented in separate chapters in this book.

House Account information can be found in [Customer Maintenance](#).

About Store Credit and Gift Certificate Balance Inquiry

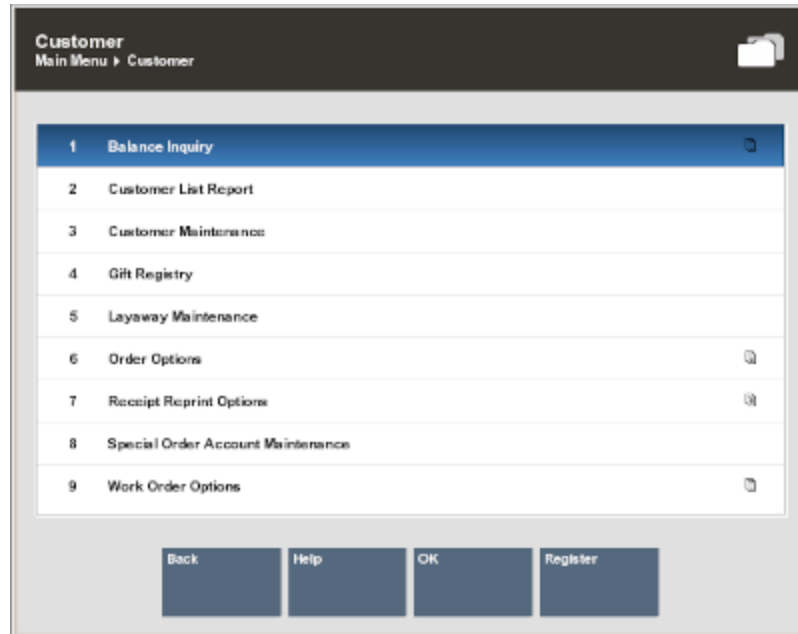
When a balance inquiry for a store credit or gift certificate is performed, Oracle Retail Xstore Point of Service first determines which currency the store credit or gift certificate is in. If this currency is different than your store's local currency, then the foreign tender amount of the store credit or gift certificate is automatically converted to the local tender and amount using the current exchange rate on file. This localization is shown on the screen and on the receipt, if printed.

Balance Information

The Balance Inquiry function allows you to see the current balance on various types of accounts that a customer may have. The types of inquiries available depend upon the types of accounts that are offered by a store. For example, balance inquiries may be performed for:

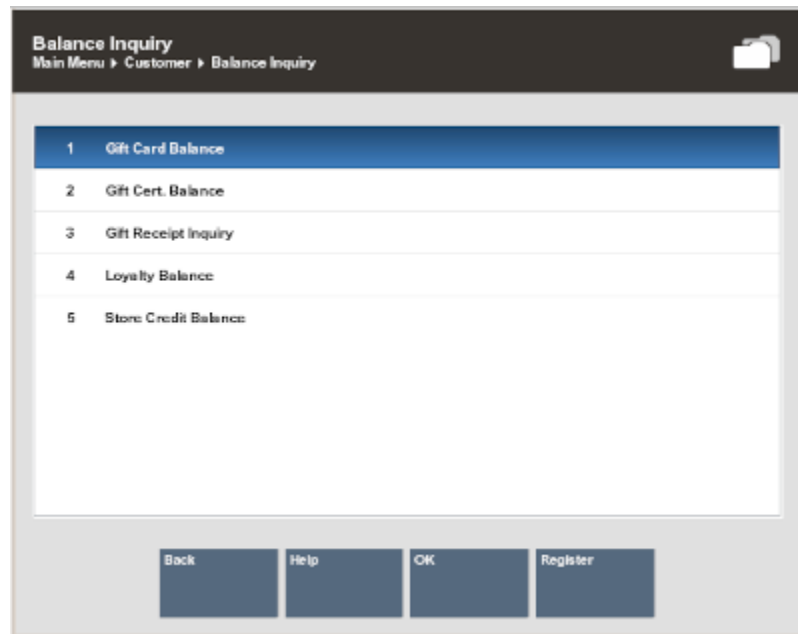
- Gift Cards
 - Gift Certificates
 - Store Credit accounts
 - Loyalty accounts
 - Gift Receipts
1. After logging in to the Back Office (see [Accessing the Back Office](#)), select the **Balance Inquiry** option from the Customer menu to view the inquiry functions available in your store.

Figure 16-1 Back Office Customer Menu - Balance Inquiry



2. Select the type of inquiry you want to perform by selecting the appropriate option from the Balance Inquiry menu.

Figure 16-2 Balance Inquiry Menu



3. Oracle Retail Xstore Point of Service prompts for a card or account number. The information required here varies with the type of balance inquiry you are performing. Enter the information or scan it from a card and press **Enter** to continue.

Figure 16-3 Store Credit Account Number Prompt

Balance Inquiry

Enter the Store Credit number.

#

4. Please wait while the system queries the centralized database for the balance information.

 Note:

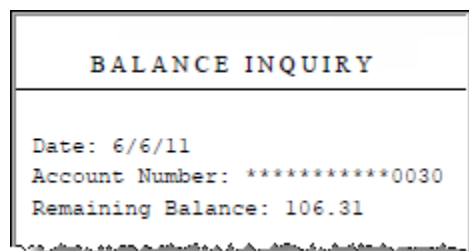
The system displays a message if the account is closed or cannot be located.

If a deal or discount was applied to the gift item at the time of purchase, you cannot use Balance Inquiry to look up the price. No item price barcode is printed on the receipt.

5. Oracle Retail Xstore Point of Service retrieves the account balance information and displays the information on the screen.

- Press **Y** to print a receipt for this balance information.
- Press **N** if you do not need a printed receipt for this balance information.
- If the option to print a receipt is not available, press **Enter** to close the prompt.

If you chose to print a receipt, the information shown on the receipt includes the date of this inquiry, the card or account information (masked), and the available balance on the card or account.

Figure 16-4 Sample Balance Inquiry Receipts

BALANCE INQUIRY
Date: 6/6/11
Account Number: *****0030
Remaining Balance: 106.31

BALANCE INQUIRY

Date: 6/12/11
Card # *****1678
Program Name: XST Loyalty
Program Level: XST Loyalty 1
Loyalty Pts.: 2328
Awards: 79.02

Layaway Maintenance

Layaways are like special orders and work orders because they are persistent sales. Generally, this indicates that the sale transaction in which the layaway is created is not the end of the transaction's life cycle. Persistent sales can have an arbitrary number of transactions in their life cycles, but non-persistent sales consist of a single transaction (and a possible void of that transaction).

The operational rules for layaways may also differ from those for non-persistent sales or even other types of persistent sales. For example, a layaway does not require the customer to pay for the items in full when purchased. Also, layaway items may not be reflected in the store's sales figures until the customer takes the item into possession (at pickup).

After a layaway account has been created, the account information is available from the Back Office. Use the Back Office Layaway Maintenance functions to track, update, and maintain layaway accounts.

**Note:**

Refer to the *Oracle Retail Xstore Point of Service Classic User Guide* for information about setting up layaway accounts.

The following sections are contained in this chapter:

- [Layaway Reports](#)
- [Accessing Back Office Layaway Maintenance](#)
- [To Cancel a Layaway Account](#)
- [Cancel Layaway - When the Customer Is Present](#)

Layaway Reports

The following reports are available from the Reports menu to help maintain layaway accounts:

- Layaway Aging Summary Report
- Layaway Aging Detail Report
- Layaway Account Activity Summary Report
- Layaway Account Activity Detail Report

The Layaway Aging reports show layaway accounts based on a specified aging period. Select the Summary report option to print a condensed version of the Layaway Aging Report and select the Detail report option to print an itemized version of the Layaway Aging Report.

The Layaway Account Activity reports show layaway accounts based on status such as Inactive, Overdue, Delinquent, and so on. Select the Summary report option to print a condensed version of the Layaway Account Activity Report and select the Detail report option to print an itemized version of the Layaway Account Activity Report.



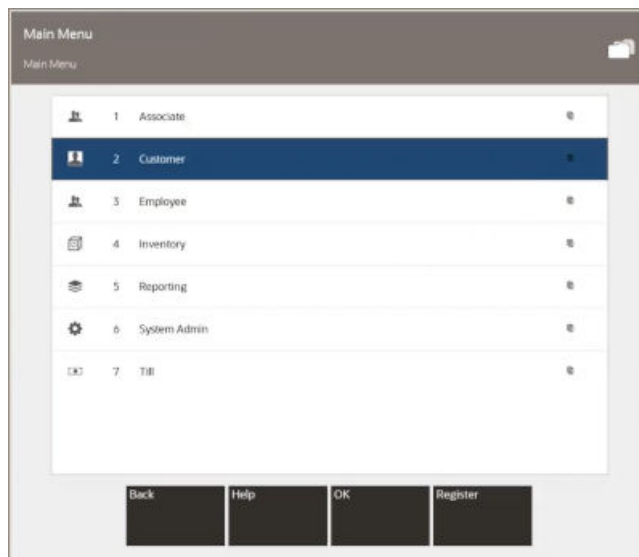
Note:

Refer to the Oracle Retail Xstore Point of Service Reports Guide for more information about setting up and running these reports.

Accessing Back Office Layaway Maintenance

1. Select the Back Office option.
2. After logging in to the Back Office, select the **Customer** option from the Back Office Main Menu.

Figure 17-1 Back Office Main Menu - Customer Option

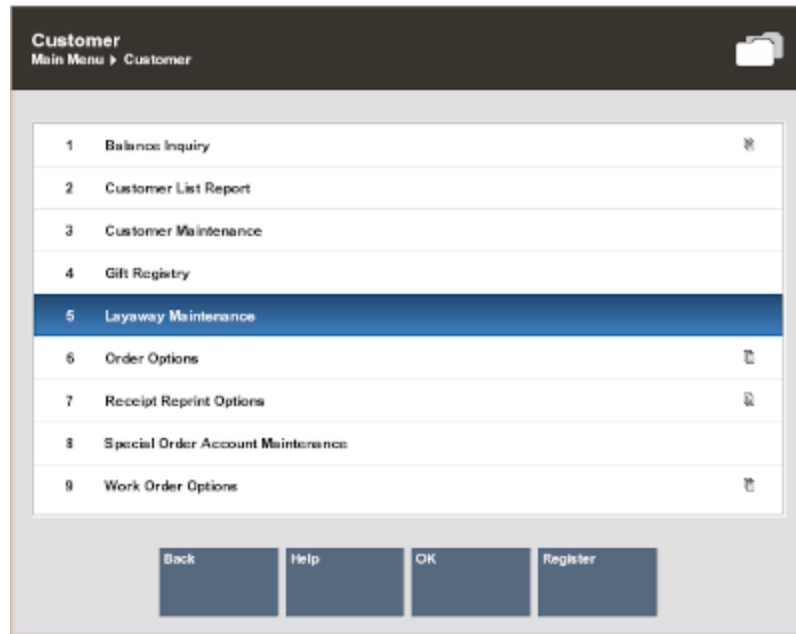


Note:

You can also press the number or letter associated with the menu option on the keyboard to access the function.

3. Select the **Layaway Maintenance** option and **OK**.

Figure 17-2 Customer Menu - Layaway Maintenance

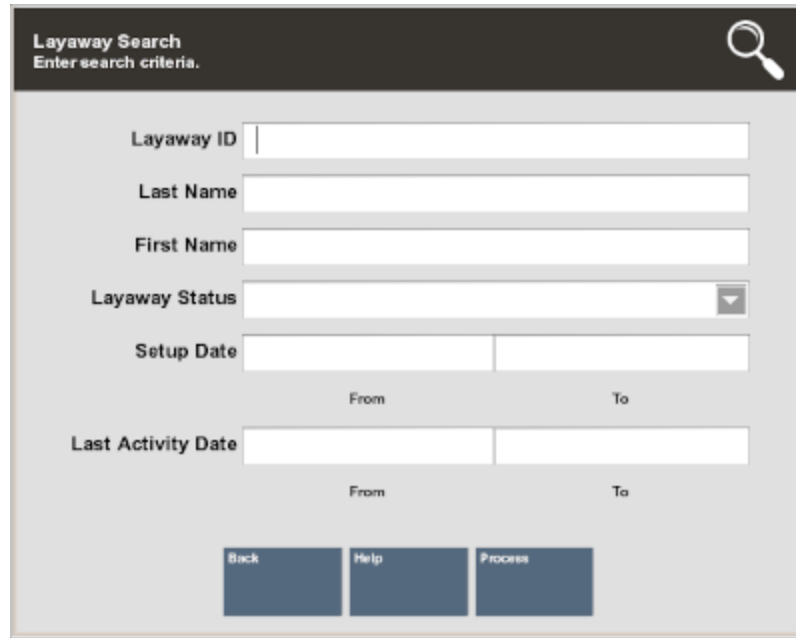


 Note:

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

4. Oracle Retail Xstore Point of Service displays the Layaway Search form, prompting for search criteria. Enter the criteria you want to use for finding a layaway record and select **Process**:

Figure 17-3 Layaway Search Form



The Layaway Search form is a web-based interface for searching layaway records. It features a dark header bar with the title "Layaway Search" and the instruction "Enter search criteria." on the left, and a magnifying glass icon on the right. The main form area is light gray and contains several input fields: "Layaway ID" (a single text box), "Last Name" (a single text box), "First Name" (a single text box), "Layaway Status" (a dropdown menu), "Setup Date" (two text boxes labeled "From" and "To"), and "Last Activity Date" (two text boxes labeled "From" and "To"). At the bottom of the form are three buttons: "Back", "Help", and "Process".

- If you enter a specific layaway ID and Oracle Retail Xstore Point of Service finds it, Oracle Retail Xstore Point of Service displays the layaway record in a list. Press **Enter** to continue and the record is displayed.
- If you enter search criteria that results in more than one record being found, or your system is set up to display the accounts list, you must select the record you want from the list and then press **Enter**.

Figure 17-4 Layaway Search Results List

Layaway Search
Select one of the following layaway accounts.

Name Account ID	Setup Date Status	Balance
Clark, Vanessa L0401001000003	10/25/2017 Open	\$250.40

BackSelect & Continue

Oracle Retail Xstore Point of Service displays the Layaway screen for the selected record.

Figure 17-5 Layaway Screen

LayawayVanessa Clark | L0401001000003 | Setup Date: 10/25/2017
Last Activity Date: 10/25/2017Open

Items	Activity	Comments

Customer Info

Sold To: Vanessa Clark
12345 Chatham Circle
Twinsburg, OH 44087

Company:
Email: clark@email.com
Phone: 216-333-3333 x.333

Layaway Totals

Subtotal: \$234.19
Fees: \$25.29
Tax: \$18.74
Total: \$278.22
Balance Due: \$250.40

Status	Item ID	Description	Qty	Ext Price
Open	9999999	Pine Table	1	\$234.19

BackHelpCancel LayawayPrevious TabNext TabRegister

The Layaway screen provides the following information:

- [Static Information Area](#)
- [Customer Information](#)
- [Order Totals](#)

- [Layaway Tab Information](#)

Static Information Area

The upper panel on the screen shows the summary information for the Layaway account, including its status and customer contact information. This panel is always displayed when viewing any of the tabs on this screen.

Customer Information

The customer information area displays:

- **Sold To:** The purchasing customer's name and address information.
- **Company:** The purchasing customer's company, if applicable.
- **Email:** The purchasing customer's email address.
- **Phone:** The purchasing customer's telephone number(s).

Order Totals

The order totals information displays:

- **Subtotal:** The Layaway subtotal (the shipping fee amount is not included in the subtotal).
- **Fees:** Additional cost associated with the Layaway.
- **Tax:** The tax on the Layaway.
- **Total:** The total for the Layaway (the shipping fee amount is included in the total).
- **Balance Due:** The amount due for the Layaway.

Layaway Tab Information

Detailed Layaway information is presented on three tabs, Items, Activity, and Comments. You can navigate between the tab sections by using the Previous Tab and Next Tab menu options. Each tab contains specific information about the customer's Layaway account.

- [Items Tab](#): Shows the item information for the Layaway account.
- [Activity Tab](#): Shows the activity information for the Layaway account.
- [Comments Tab](#): Shows any comments associated with the Layaway account.

Items Tab

The Items tab contains the following information:

Figure 17-6 Items Tab

Layaway

Vanessa Clark | L0401001000003 | Setup Date: 10/25/2017
Last Activity Date: 10/25/2017

Open

Items

Activity

Comments

Customer Info

Sold To: Vanessa Clark
12345 Chatham Circle
Twinsburg, OH 44087

Company:
Email: clerk@email.com
Phone: 216-333-3333 x.333

Layaway Totals

Subtotal: \$234.19
Fees: \$25.29
Tax: \$18.74
Total: \$278.22
Balance Due: \$259.40

Status	Item ID	Description	Qty	Ext Price
Open	9999999	Pine Table	1	\$234.19

Back

Help

Cancel Layaway

Previous Tab

Next Tab

Register

- Status: The status of the item (Open, Picked Up, Cancelled).
- Item ID: The item identifier.
- Item Description: The item description.
- Quantity: The item quantity.
- Ext. Price: The extended price for the item (price x quantity).

Activity Tab

The Activity tab contains the following information:

Figure 17-7 Activity Tab

Layaway

Vanessa Clark | L0401001000003 | Setup Date: 10/25/2017
Last Activity Date: 10/25/2017

Open

Items

Activity

Comments

Date	Type	Activity	Item ID	Amount	Store	Reg	Tran ID
10/25/2017	Item	Added	9999999	\$234.19	401	1	98
10/25/2017	Setup Fee	Added		\$25.29	401	1	98
10/25/2017	Deposit	Added		(\$27.82)	401	1	98

Back

Help

Cancel Layaway

Previous Tab

Next Tab

Register

- **Date:** The date the layaway activity took place.
- **Type:** The layaway activity type associated with the amount of the activity.
- **Activity:** The action performed.
- **Item ID:** The item identifier.
- **Amount:** The amount for the associated type of activity on the account.
- **Store:** The identifier of the store where the layaway activity took place.
- **Reg:** The identifier of the register where the layaway activity took place.
- **Tran ID:** The transaction identifier for the layaway activity.

Comments Tab

The Comments tab contains the following information:

Figure 17-8 Comments Tab

The screenshot shows the Oracle Layaway interface with the 'Comments' tab selected. The top header bar is purple and contains the following information: 'Layaway' (with a dropdown arrow), 'Vanessa Clark', 'L8481001000003', 'Setup Date: 10/25/2017', 'Last Activity Date: 10/25/2017', and an 'Open' button. Below the header, there are three tabs: 'Items', 'Activity', and 'Comments'. The 'Comments' tab is active, showing a table with the following data:

Created Date	Created By	Comment
October 30, 2017	100	Customer has requested price list.

Below the table, there is a large empty white area for adding new comments. At the bottom of the interface, there is a navigation bar with buttons: 'Back', 'Help', 'Add Comment', 'Cancel Layaway', 'Previous Tab', 'Next Tab', and 'Register'.

- **Created Time:** The date this comment was added to this layaway account record.
- **Comment Created By:** The identifier for the employee who created the comment.
- **Comment:** The text that was entered.



Note:

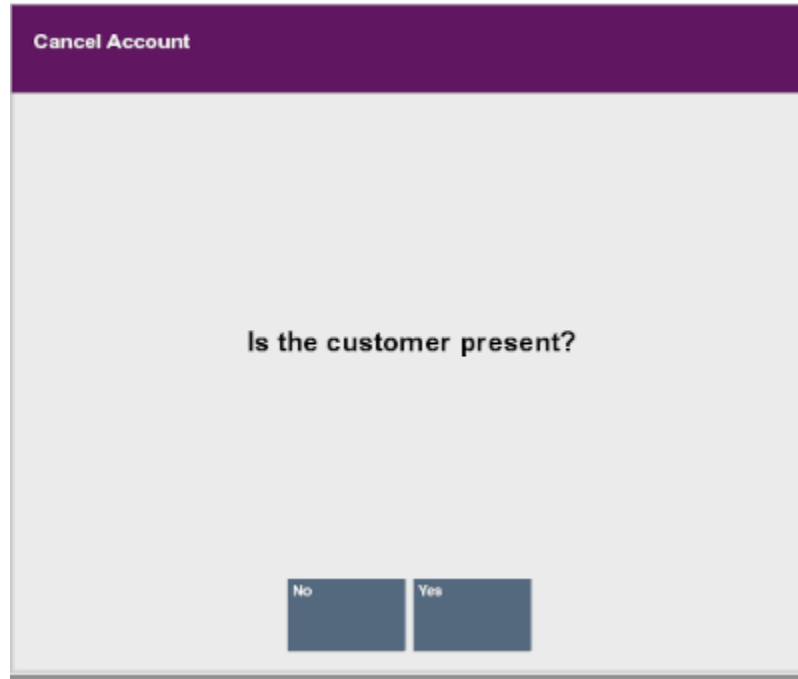
Use the Add Comment option to add a comment to the layaway account record.

To Cancel a Layaway Account

The option to cancel a layaway account is available on all three tabs (Item, Activity, and Comments) while you are viewing the account you want to cancel.

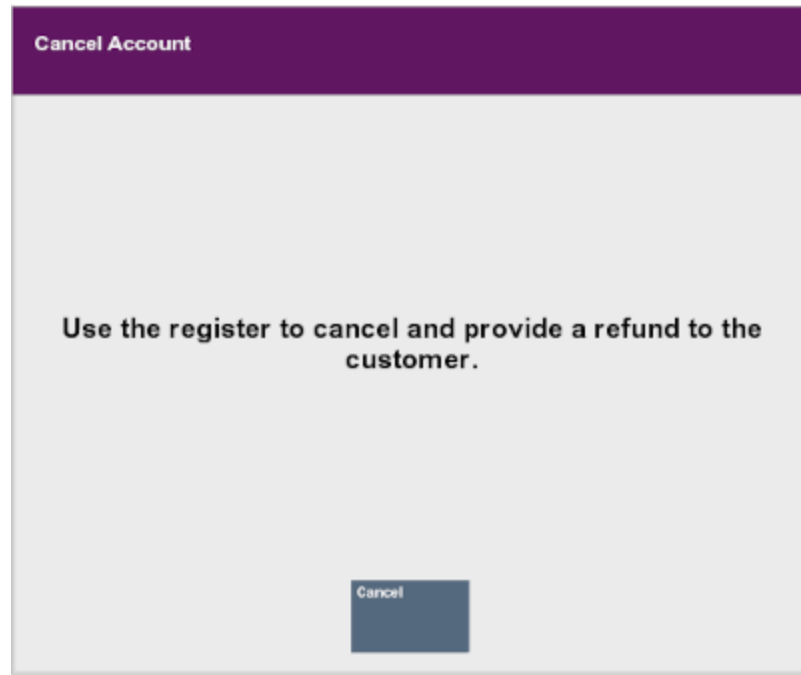
1. Search for the layaway account that you want to cancel. Refer to step 4.
2. When Oracle Retail Xstore Point of Service displays the account, select the Cancel Layaway option.
3. Oracle Retail Xstore Point of Service displays a message asking if the customer is present during the cancellation of the layaway account. Select **Yes** or **No**.

Figure 17-9 Prompt to Check for Presence of Customer During Cancellation



- Customer not present
If you select No, indicating the customer is not present:
 - a. The system displays a prompt asking if you are sure you want to cancel the layaway account. Select **Yes** (responding No returns to the Layaway screen).
 - b. The system displays a prompt indicating that the balance amount due to the customer will be transferred to an escrow account. Press **Enter** to respond to the prompt and continue.
 - c. The system returns to the Layaway Search form. You may select Back to return to the Customer Maintenance and Accounts Menu and perform other functions (see [Figure 17-3](#)).
- Customer present
If you select Yes, indicating the customer is present, Oracle Retail Xstore Point of Service displays the following prompt. Press **Enter** and continue with the procedure [Cancel Layaway - When the Customer Is Present](#) below.

Figure 17-10 Prompt if Customer is Present



Cancel Layaway - When the Customer Is Present

1. Select the **Register** option from the menu.

Figure 17-11 Register Option

Status	Item ID	Description	Qty	Ext Price
Open	9999999	Pine Table	1	\$234.19

2. At the Register Pre-Sale screen, assign an associate to the transaction, if your system's configuration requires an associate, and press **Enter**.
3. The Customer Lookup form displays. Enter search criteria in the form for the customer whose layaway account must be canceled and select **Process**.
4. Select the correct customer from the list and choose **Select & Continue**.

5. The Register Sale screen displays and the customer who owns the layaway account is associated with it. Select the **Extended Transaction** option from the menu.
6. Select **Layaway** from the Extended Transaction menu.
7. Xstore displays a list of Layaway accounts for the selected customer. Select the Layaway account to be canceled and press **Enter** to continue.

Figure 17-12 List of Customer's Layaway Accounts

Layaway Search
Select one of the following layaway accounts.

Name Account ID	Setup Date Status	Balance
Clark, Vanessa L0401001000003	10/25/2017 Open	\$250.40

Back Set Up New Make Payment Select & Continue

8. Select the **Cancel Layaway** option.

Figure 17-13 Layaway Screen - Cancel Layaway Option

Vanessa Clark

Trans # 99

Item	Unit Price	Qty	Ext Price
Pine Table Open 9999999		1	\$234.19
Spend >= \$500 Get \$50 Off			(\$24.48)
Employee/Family 15% Discount			(\$41.33)
Layaway Setup Fee Open 560		1	\$25.29
Layaway Deposit Open 561		1	\$27.82

Items: 0 Tax \$0.00 Fees \$0.00 Subtotal \$0.00

Associate: Amount Due \$0.00 >

Cancel Help Exit Layaway Make Payment Layaway Details More...

Cancel Layaway

 Note:

See the *Oracle Retail Xstore Point of Service Classic User Guide* for further instructions on cancelling the layaway.

18

Special Order Maintenance

After a Special Order account has been created, the account information is available from the Back Office. Use the Back Office Special Order Account Maintenance functions to track, update, and maintain Special Order accounts.



Note:

Refer to the *Oracle Retail Xstore Point of Service Classic User Guide* for information about setting up Special Order accounts.

Special Orders Report:

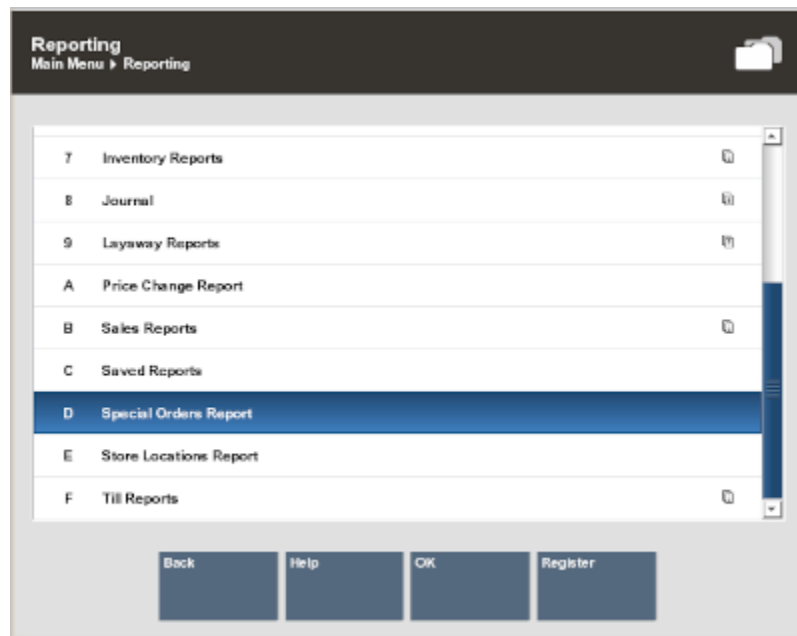
A Special Orders Report is available from the Back Office Reports Menu. This report shows when the account was created, the owner's name, the account's status, and the item amount.



Note:

Refer to the *Oracle Retail Xstore Point of Service Classic User Guide* for information about this report.

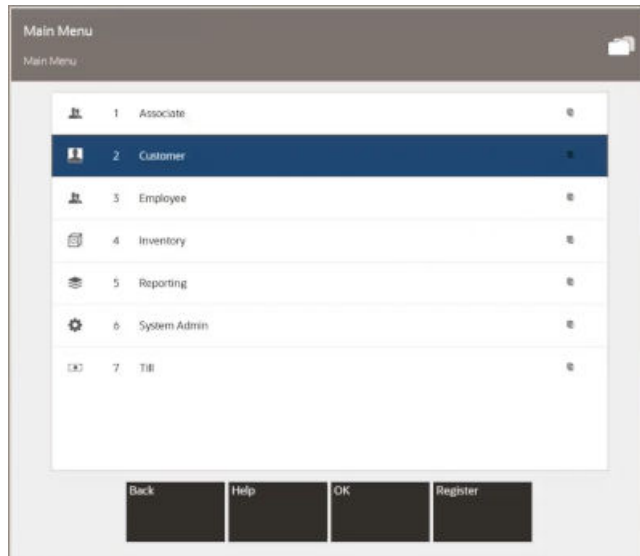
Figure 18-1 Reporting Menu - Special Orders Report



Accessing Back Office Special Order Maintenance

1. Select the **Back Office** option.
2. After logging in to the Back Office, select the **Customer** option from the Back Office Main Menu and press **Enter**.

Figure 18-2 Back Office Main Menu - Customer Option



 Note:

You can also press the number or letter associated with the menu option on the keyboard to access the function.

3. Select the **Special Order Account Maintenance** option and press **Enter**.

Figure 18-3 Customer Menu - Special Order Account Maintenance

The screenshot shows a software interface titled "Customer" with a breadcrumb "Main Menu > Customer". It contains a list of nine menu items, each with a number and a description. Item 8, "Special Order Account Maintenance", is highlighted with a blue background. At the bottom, there are four buttons: "Back", "Help", "OK", and "Register".

Number	Description	Icon
1	Balance Inquiry	
2	Customer List Report	
3	Customer Maintenance	
4	Gift Registry	
5	Layaway Maintenance	
6	Order Options	
7	Receipt Reprint Options	
8	Special Order Account Maintenance	
9	Work Order Options	

4. Oracle Retail Xstore Point of Service displays the Special Order Search form, prompting for search criteria. Enter the criteria you want to use for finding a Special Order record and select **Process**.

Figure 18-4 Special Order Search Form

The screenshot shows a "Special Order Search" form with the instruction "Enter search criteria." and a magnifying glass icon. It includes several input fields: "Special Order ID", "Last Name", "First Name", "Special Order Status" (a dropdown menu), and two date ranges labeled "Setup Date" and "Last Activity Date", each with "From" and "To" sub-fields. At the bottom are three buttons: "Back", "Help", and "Process".

- If you enter a Special Order ID, Oracle Retail Xstore Point of Service displays that Special Order record if the ID exists and if it is unique.
- Your search criteria may result in multiple records being found. Your system may also be set up to display the accounts list even when only one record is found. You must select the record you want from the list and then press **Enter**.

Oracle Retail Xstore Point of Service displays the Special Order screen for the selected record.

Figure 18-5 Special Order Screen

Special Order Greyly Campbell S0401001000002 Setup Date: 10/25/2017 Last Activity Date: 10/25/2017 Closed

Items Activity Comments

Customer Info

Sold To: Greyly Campbell
4422 Stony Parkway Bldg F
Solon, OH 44139

Ship To: Greyly Campbell
4422 Stony Parkway Bldg F
Solon, OH 44139

Company: ASAP Tailoring
Email: gc@email.com
Phone: 123-456-7890
123-123-1231 x.2312

Order Totals

Subtotal: \$149.40
Fees: \$27.82
Tax: \$11.95
Total: \$189.29
Balance Due: \$0.00

Status	Item ID	Description	Qty	Ext Price
Ship	1004	BLK WHITE CAP SLEEVE DRESS	1	\$69.50
Ship	1005	PEASANT TOP JERSEY DRESS	1	\$79.90

Back Help Previous Tab Next Tab Register

The Special Orders screen contains the following information:

- [Static Information Area](#)
- [Customer Information](#)
- [Order Totals](#)
- [Special Order Tab Information](#)

Static Information Area

The upper portion of the screen shows the summary information for the Special Order account, including its status and customer contact information. This panel is always displayed when viewing any of the tabs on this screen.

Customer Information

The customer information area displays:

- **Sold To:** The purchasing customer's name and address information.
- **Company:** The purchasing customer's company, if applicable.
- **Email:** The purchasing customer's email address.
- **Phone:** The purchasing customer's telephone number(s).
- **Ship To:** The name and address information to ship to.

Order Totals

The order totals information displays:

- **Subtotal:** The order subtotal (the shipping fee amount is not included in the subtotal).

- **Fees:** Additional cost associated with the order.
- **Tax:** The tax on the order.
- **Total:** The total for the order (the shipping fee amount is included in the total).
- **Balance Due:** The amount due for the order.

Special Order Tab Information

Detailed Special Order information is presented on three tabs, Items, Activity, and Comments. You can navigate between the tab sections by using the **Previous Tab** and **Next Tab** menu options. Each tab contains specific information about the customer's Special Order account.

- **Items Tab:** Shows the item information for the Special Order account.
- **Activity Tab:** Shows the activity information for the Special Order account.
- **Comments Tab:** Shows any comments associated with the Special Order account.

Items Tab

The Items tab contains the following information:

Figure 18-6 Items Tab Information

The screenshot displays the 'Special Order' interface for a customer named Greyly Campbell. The top header bar includes the order ID 'S0401001000002', setup date '10/25/2017', last activity date '10/26/2017', and a 'Closed' status. Below the header, there are three tabs: 'Items' (selected), 'Activity', and 'Comments'. The main content area is divided into two sections. On the left, 'Customer Info' shows 'Sold To' and 'Ship To' addresses for Greyly Campbell at 4422 Stony Parkway Bldg F, Solon, OH 44139, along with company details for ASAP Tailoring. On the right, 'Order Totals' lists Subtotal (\$149.49), Fees (\$27.82), Tax (\$11.95), Total (\$189.39), and Balance Due (\$0.00). Below these sections is a table with columns: Status, Item ID, Description, Qty, and Ext Price. The table contains two rows: 'Ship' for Item ID 1004 (BLK WHITE CAP SLEEVE DRESS, Qty 1, Ext Price \$69.50) and 'Ship' for Item ID 1005 (PEASANT TOP JERSEY DRESS, Qty 1, Ext Price \$79.99). At the bottom, a navigation bar includes 'Back', 'Help', and buttons for 'Previous Tab', 'Next Tab', and 'Register'.

- **Status:** The status of the item (Open, Received, Ship, Picked Up, Cancelled, Cancelled to Escrow).
- **Item ID:** The item identifier.
- **Item Description:** The item description.
- **Quantity:** The item quantity.
- **Ext. Price:** The extended price for the item (price x quantity).

Activity Tab

The Activity tab contains the following information:

Figure 18-7 Activity Tab Information

Special Order										Greyly Campbell		S0401001000002		Setup Date: 10/25/2017		Last Activity Date: 10/25/2017		Closed	
Items				Activity				Comments											
Date	Type	Activity		Item ID		Amount		Store		Reg		Tran ID							
10/25/2017	Item	Added		1004		\$69.50		401		1		116							
10/25/2017	Item	Added		1005		\$79.99		401		1		116							
10/25/2017	Setup Fee	Added				\$8.07		401		1		116							
10/25/2017	Shipping Fee	Added				\$10.95		401		1		116							

- **Date:** The date the Special Order activity took place.
- **Type:** The Special Order activity type associated with the amount of the activity.
- **Activity:** The action performed.
- **Item ID:** The item identifier.
- **Amount:** The amount for the associated type of activity on the account.
- **Store:** The store identifier where the Special Order activity took place.
- **Reg:** The register identifier where the Special Order activity took place.
- **Tran ID:** The transaction identifier for the Special Order activity.

Comments Tab

The Comments tab contains the following information:

Figure 18-8 Comments Tab Information

Special Order										Greyly Campbell		S0401001000002		Setup Date: 10/25/2017		Last Activity Date: 10/25/2017		Closed	
Items						Activity						Comments							
Created Date				Created By				Comment											
October 31, 2017				100				Customer called to check on order status.											

- Created Date: The date this comment was added to this Special Order account record.
- Created By: The identifier for the employee who created the comment.
- Comment: The text that was entered.



Note:

You can also add a new comment for this Special Order account record when viewing this tab. Select the **Add Comment** option, type a comment, then press **Enter**. Xstore adds the new comment to the Special Order account record.

To Cancel a Special Order Account

The option to cancel a special order account is available on all three tabs: Items, Activity, and Comments while you are viewing the account you want to cancel. Closed accounts cannot be canceled.

1. Search for the special order account that you want to cancel.
2. When Oracle Retail Xstore Point of Service displays the account, select the **Cancel Special Order** option.
3. Oracle Retail Xstore Point of Service displays a message asking if the customer is present during the cancellation of the special order account. Select **Yes** or **No**.

Figure 18-9 Checking for Presence of Customer

Cancel Account

Is the customer present?

No Yes

- If you select **No**, continue with Customer Not Present.
- If you select **Yes**, continue with Customer Present.

Customer Not Present:

If you select **No**, indicating the customer is not present:

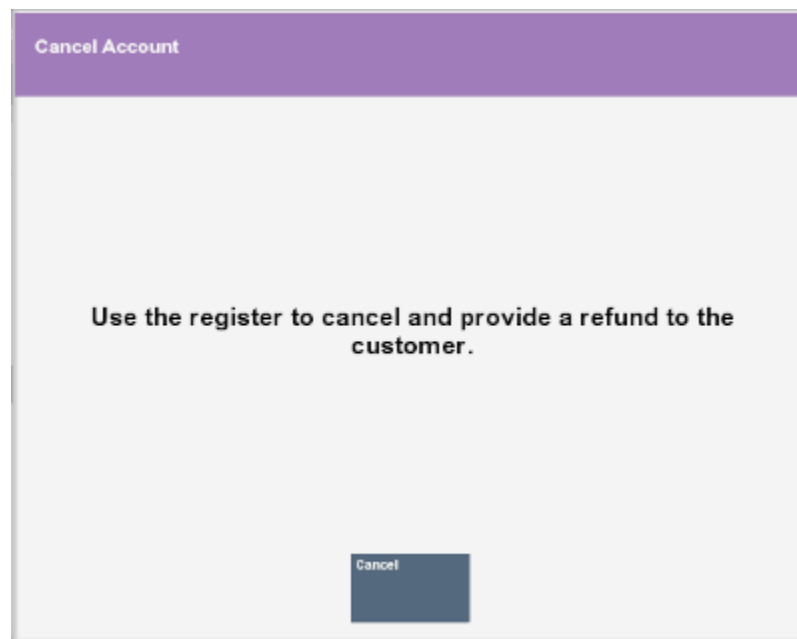
- a. The system displays a prompt asking if you are sure you want to cancel the special order account. Select **Yes**.
- b. The system displays a prompt indicating that the balance amount due to the customer has been transferred to an escrow account. Press **Enter** to respond to the prompt and continue.
- c. The system returns to the Special Order Search form. You may select **Back** to return to the Customer Maintenance and Accounts Menu and perform other options. See [Figure 18-4](#).

The order status and item status are updated to Cancelled to Escrow.

Customer Present:

If you select **Yes**, indicating the customer is present, Oracle Retail Xstore Point of Service displays the following prompt. Press **Enter** to continue.

Figure 18-10 Prompt if Customer is Present



 Note:

Refer to the *Oracle Retail Xstore Point of Service Classic User Guide* for more information about Special Order accounts at the POS.

- a. Select the **Register** option from the menu.

Figure 18-11 Register Menu Option

Status	Item ID	Description	Qty	Ext Price
Open	1007	ANIMAL PRINT CAP SLEEVE DRESS	1	\$55.24

Back Help Cancel Special Order Previous Tab Next Tab Register

- b. At the Register Pre-Sale screen, assign an associate to the transaction if your system's configuration requires an associate and press **Enter**.
- c. The Customer Lookup form displays. Enter search criteria in the form for the customer whose special order account must be canceled and select Process.
- d. If more than one customer name matches your criteria, select the correct customer from the list and choose **Select & Continue**.
- e. The Register Sale screen displays and the customer who owns the special order account is associated with it. Select **Extended Transaction** from the menu.
- f. Select **Special Order** from the Extended Transaction menu.
- g. Oracle Retail Xstore Point of Service displays a list of special order accounts for the selected customer. Select the special order account to be canceled and press **Enter** to continue.

Figure 18-12 Special Order Results - Cancellation

Special Order Search
Select one of the following special order accounts.

Name	Account ID	Setup Date	Status	Balance
Clark, Vanessa	S6461001000003	10/25/2017	Open	\$53.69

Back Set Up New Select & Continue

- h. The system displays the details of the special order account you selected in the Special Order Mode. Select the **Cancel Special Order** options on the menu.

Figure 18-13 Special Order Screen

The screenshot displays the 'Special Order Screen' for a customer named Vanessa Clark. The interface is divided into several sections:

- Top Navigation Bar:** Includes icons for Info, Offers, Messages, Keypad, and Customer.
- Account Information (Left Panel):**
 - Account ID: S8461001000003
 - Special Order Status: Open
 - Setup Date: 10/25/17
 - Customer #: Vanessa Clark
 - Address: (blank)
 - Phone: 216-333-3333 x.333
 - Sale Amount: \$59.66
 - Balance Due: \$53.69
 - Open Items: 1
- Special Order Section (Left Panel):** A purple box with the text 'Special Order' and 'Select an option from the menu.'
- Item List (Right Panel):**

Item	Unit Price	Qty	Ext Price
ANIMAL PRINT CAP SLEEVE DRESS		1	\$55.24
Open 1907			
Employee/Family 15% Discount			(\$9.75)
Special Order Service Fee		1	\$2.98
Open 564			
Special Order Deposit		1	\$5.97
Open 565			
- Summary (Bottom Right):**
 - Items: 0
 - Tax: \$0.00
 - Fees: \$0.00
 - Subtotal: \$0.00
 - Associate: Amount Due \$0.00 >
- Bottom Action Bar:** Contains buttons for Cancel, Help, Exit Special Order, and Cancel Special Order (highlighted with a red box). Other buttons include View History, View Customer, and others.

Note:

For more information on cancelling special orders, see the *Oracle Retail Xstore Point of Service Classic User Guide*.

Work Order Maintenance

A Work Order is a request to take some action (perform a task) on an item. The item may be on the current sale transaction at the register, or it may be a previously- purchased item.

Work Order tasks may be organized into logically related categories. For example, some tasks may be related to jewelry, while others are related to automotive parts. Vendors who perform the work must be defined and associated with a store location because it's possible that a vendor may offer service only within a restricted geographic area.

After a Work Order has been created, the information in the Work Order account is accessible from the Back Office. Use the Back Office Work Order Maintenance functions to track, update, and maintain Work Order accounts.

**Note:**

Refer to the *Oracle Retail Xstore Point of Service Classic User Guide* for information about setting up Work Orders.

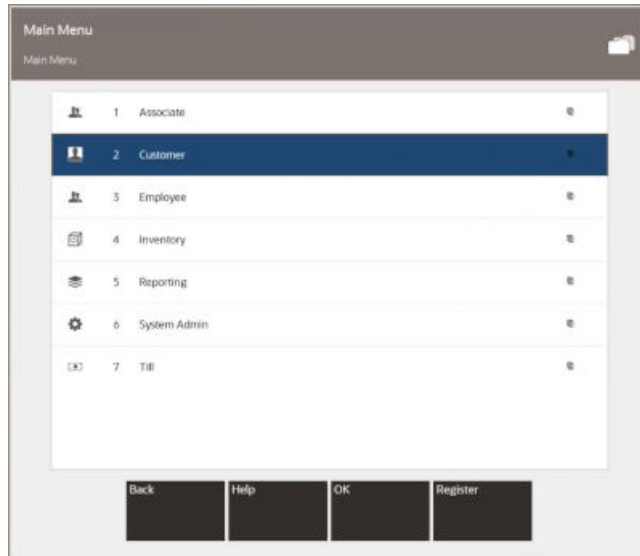
This chapter contains the following sections:

- [Accessing Work Order Maintenance Functions](#)
- [Maintaining Work Orders](#)
- [To View and Add a Work Order Comment](#)
- [To View Work Order History](#)
- [To View and Edit a Work Order Item Record](#)
- [Shipping Work Orders](#)
- [Receiving Work Orders](#)
- [Work Order Invoices](#)

Accessing Work Order Maintenance Functions

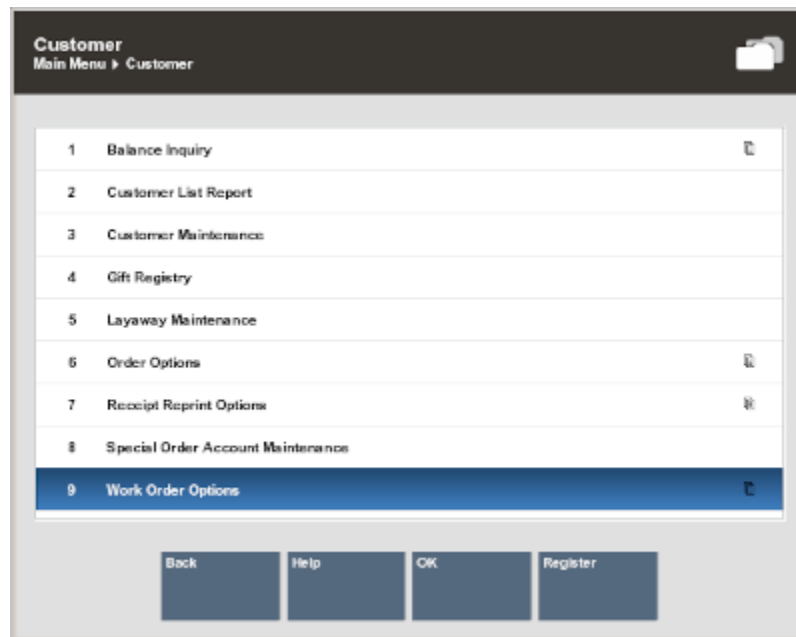
1. Select the **Back Office** option.
2. After logging in to the Back Office, select the **Customer** option from the Main Menu and press **Enter**.

Figure 19-1 Back Office Main Menu - Customer Option



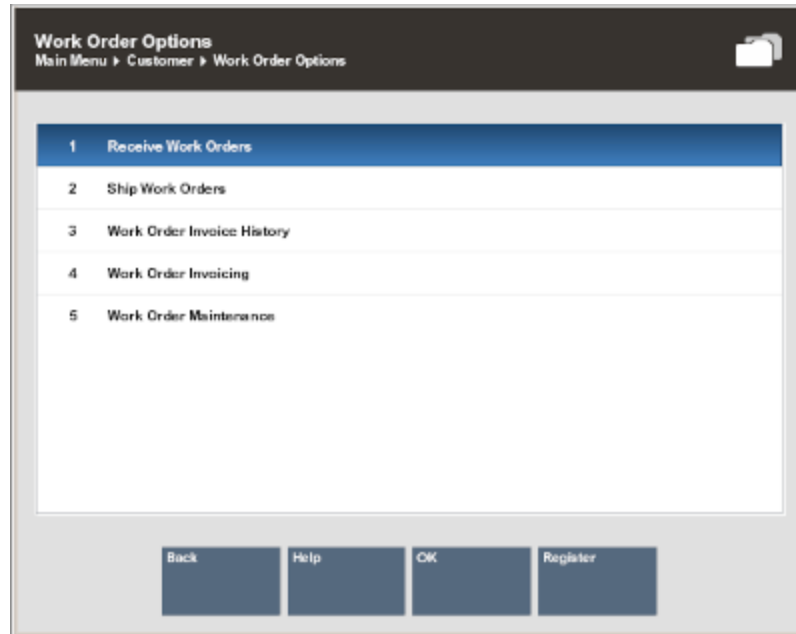
3. Select the **Work Order Options** option from the Customer menu and press **Enter**.

Figure 19-2 Customer Menu - Work Order Options



4. Oracle Retail Xstore Point of Service displays the Work Order Options menu. The following work order options are available:

Figure 19-3 Work Order Options Menu

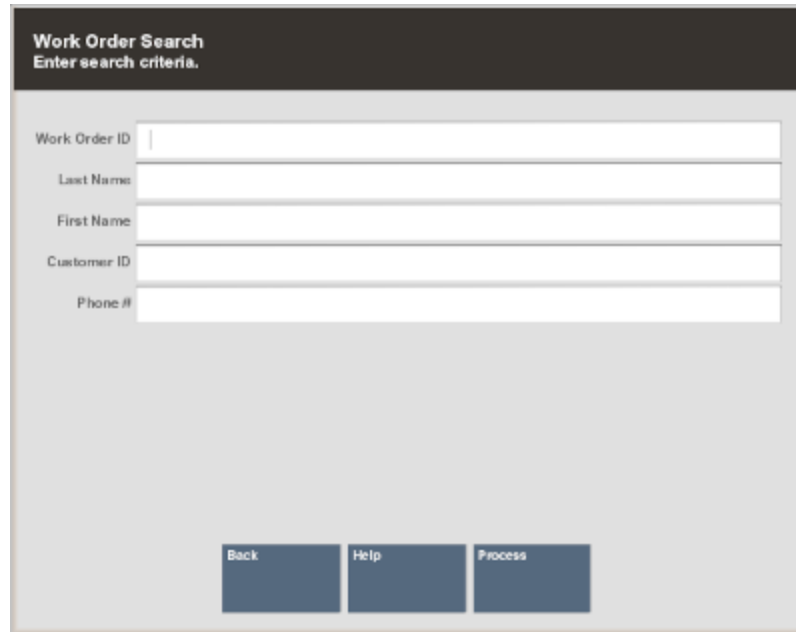


- Work Order Maintenance - Select this option to maintain Work Order information. Refer to [Maintaining Work Orders](#).
- Ship Work Orders - Select this option to ship Work Order items to the repair vendor. Refer to [Shipping Work Orders](#).
- Receive Work Orders - Select this option to receive completed Work Order items from the repair vendor. Refer to [Receiving Work Orders](#).
- Work Order Invoicing - Select this option to perform invoicing functions for Work Orders. Refer to [Work Order Invoices](#).
- Work Order Invoice History - Select this option to view existing Work Order invoice information. Refer to [Viewing Work Order Invoice History](#).

Maintaining Work Orders

1. After selecting the **Work Order Maintenance** option at the Work Order Options menu, the system prompts for Work Order search information. Enter the criteria you want to use for finding a Work Order record and select **Process**.

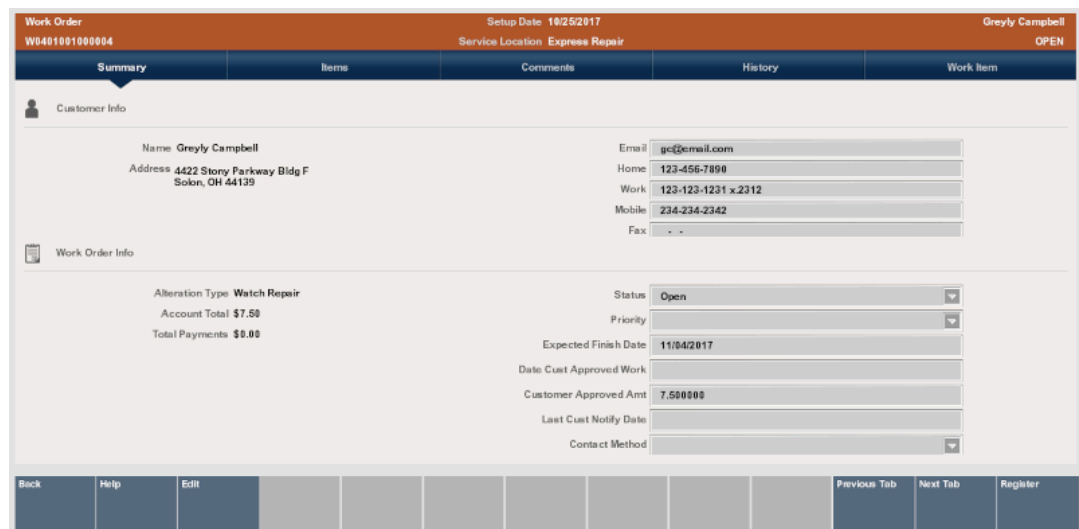
Figure 19-4 Work Order Search Form



The screenshot shows a 'Work Order Search' form with a dark header bar containing the title and the instruction 'Enter search criteria.' Below the header, there are five input fields stacked vertically: 'Work Order ID', 'Last Name', 'First Name', 'Customer ID', and 'Phone #'. At the bottom of the form, there are three buttons: 'Back', 'Help', and 'Process'.

- If Oracle Retail Xstore Point of Service finds the Work Order, it is displayed in a list. Press **Enter** to continue.
 - The search criteria you entered may result in more than one record being found. Select the record you want from the list and press **Enter**.
2. Select a Work Order record and Oracle Retail Xstore Point of Service displays the Work Order screen as shown here.

Figure 19-5 Work Order Screen - View Only Mode



The screenshot displays the 'Work Order' screen in 'View Only Mode'. The top header bar is orange and contains the work order number 'W0401001000004', the setup date '10/25/2017', the service location 'Express Repair', and the customer name 'Greyly Campbell' with an 'OPEN' status. Below the header, there are five tabs: 'Summary' (selected), 'Items', 'Comments', 'History', and 'Work Item'. The 'Summary' tab shows customer information for 'Greyly Campbell' at '4422 Stony Parkway Bldg F, Solon, OH 44139'. It also displays work order details: 'Alteration Type: Watch Repair', 'Account Total: \$7.50', 'Total Payments: \$0.00', 'Status: Open', 'Priority: 7.500000', 'Expected Finish Date: 11/04/2017', 'Date Cust Approved Work', 'Customer Approved Amt: 7.500000', 'Last Cust Notify Date', and 'Contact Method'. At the bottom, there is a navigation bar with buttons for 'Back', 'Help', 'Edit', and several other buttons, along with 'Previous Tab', 'Next Tab', and 'Register'.

 Note:

When a screen or field is grayed out, the record can be seen, but not changed until you choose the **Edit** option.

Maintaining Work Order Records

A Work Order record always opens in a read-only mode and cannot be edited unless you change to the editing mode. You can navigate between the five tab sections by selecting the **Previous Tab** and **Next Tab** menu options. Each tab contains information that is related to a particular aspect of the Work Order.

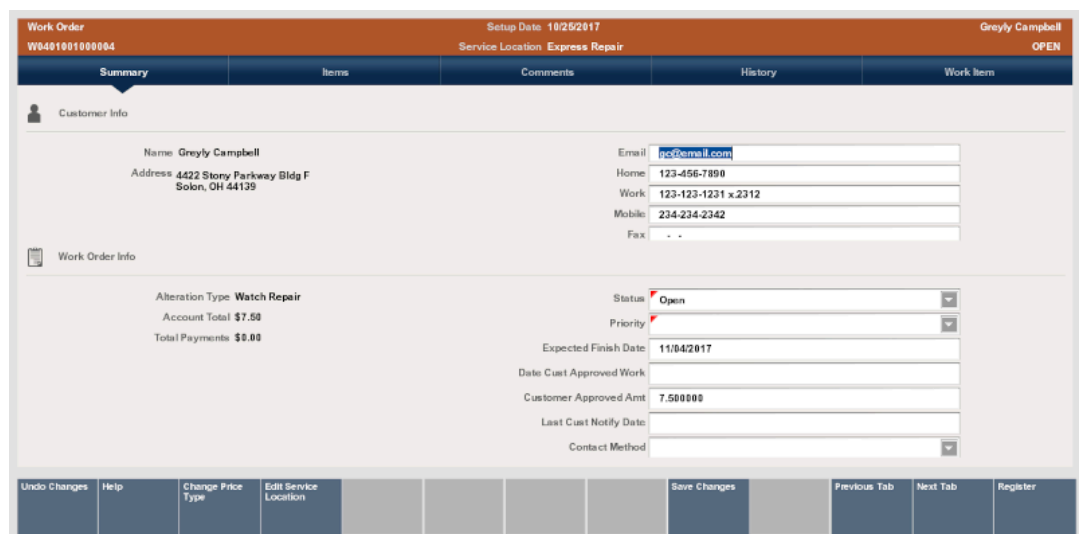
After viewing a Work Order record, you may decide that some of the information must be changed, or you may want to enter additional information in some fields. You must transition to an editing mode to make any changes to the record.

- **Work Order Summary Tab:** Shows the summary information for the Work Order, including its status, and customer contact information.
- **Work Order Items Tab:** Shows the item task-related information for the Work Order, including any instructions and comments for performing the task.
- **Work Order Comments Tab:** Shows any comments that have been entered for the Work Order.
- **Work Order History Tab:** Shows any status changes for the Work Order (view-only).
- **Work Order Work Item Tab:** Shows the item ID and description for the item being repaired/alterd, and the dollar value of the item.

To View and Edit a Work Order Record

1. With the Work Order record displayed, select the **Edit** option to go into an editing mode. The fields are no longer grayed out.

Figure 19-6 Work Order Summary Tab in Edit Mode



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

The Work Order screen provides the following information:

- [Static Information Area](#)
- [Summary Tab Information](#)

Static Information Area

See [Figure 19-6](#)

- **Work Order Id:** A unique identifying number assigned to the Work Order. This number cannot be changed.
- **Service Location:** The actual location where Work Order services are performed. To edit the service location:
 1. Select the **Edit Service Location** option.
 2. Enter a new Work Order location or select a Service Location from the list and press **OK** to change the Service Location for this Work Order.

Summary Tab Information

See [Figure 19-6](#)

- **Customer Information:** The customer's name, street address, Email address and phone number information is shown here.
- **Contact Information:** The customer's name, street address, Email address and phone number information is shown here.
- **Alteration Type:** These categories are defined by the home office and assigned to the Work Order when it is created. The Alteration Type cannot be changed for this account.
- **Account Total:** The total for the Work Order account. This amount cannot be changed.
- **Total Payments:** The total amount the customer has paid on this account. This amount cannot be changed.
- **Status:** The status for the Work Order account:
 - The Status may be changed as the Work Order moves through the Alteration/Repair process. For example, each new Work Order has a status of Open when it is created. If work is performed at the store, the in-store service provider may change the status to In Progress when work is begun on the item.

Figure 19-7 Status for the Work Order Account

A screenshot of a software interface showing a dropdown menu for the 'Status' field. The menu is open, displaying a list of status options: Open, Pending, In Progress, Ready To Pickup, Closed, Refundable, Overdue, and Delinquent. The 'Open' option is currently selected and highlighted in blue. To the left of the dropdown, the labels for other fields are visible: Priority, Expected Finish Date, Date Cust Approved Work, Customer Approved Amt, and Last Cust Notify Date.

- **Priority:** The priority of the Work Order account. The default is set to Normal but may be changed to Urgent or Priority if the customer needs the item immediately.

Figure 19-8 Priority of the Work Order Account

A screenshot of a software interface showing two dropdown menus. The top dropdown is for 'Status' and is set to 'Open'. The bottom dropdown is for 'Priority' and is set to 'Normal'. Below the 'Priority' dropdown, there is a list of options: Normal, Priority, and Urgent, with 'Normal' currently selected and highlighted in blue. Above the dropdowns, the text 'Total Payments: \$0.00' is displayed. To the left of the dropdowns, the labels for other fields are visible: Status, Priority, and Contact Method.

- **Expected Finish Date:** This is the date the item should be ready for customer pickup. Depending upon your store policy, this date may be calculated automatically based on certain Work Order parameters entered during setup.
- **Date Customer Approved Work:** The date that the customer reviewed and approved the work to be performed on the item(s) and the amount that will be charged.
- **Customer Approved Amount:** This is the maximum dollar amount the customer has agreed to pay for the work to be performed on the item, without requiring additional notification.
- **Last Customer Notify Date:** The date the customer was last contacted about the Work Order account. For example, if the service provider notifies you that the repair is running behind schedule, you may need to inform the customer about the delay. You would update this field to track the date the customer was contacted.
- **Contact Method:** The customer's preferred mode of contact.

Menu Options

- **Change Price Type:** Select this menu option to edit the price type of this Work Order account:
 1. Select the **Change Price Type** option. Oracle Retail Xstore Point of Service displays a list of price codes.
 2. Select a price code from the list and **OK** to change the price type for this Work Order.

For example, if the customer did not have proof that this item was covered by a warranty when the Work Order was originally set up, you may need to change a Chargeable price type to a Warranty price type if the customer returns to the store with proof that the item is covered under a warranty.

- **Edit Service Loc:** Select this menu option to edit the service location. See Service Location.

Select the **Save Changes** option to save any changes you made to the Work Order summary record.

To View and Edit Work Order Items

The Items tab shows the item task information for the Work Order, including instructions and comments for the task. In addition, you can add a new task, edit an existing task, and add parts. You must transition to an editing mode to make any changes to the record.

1. With the Work Order record displayed, select the Item tab.
2. Select the **Edit** option.

Figure 19-9 Work Order Items Tab - Edit Mode

Qty	Task	Price Type	Status	Charge
1	Repair Clasp	ACTUAL	OPEN	\$7.50

Information on the Items tab includes these columns:

- **Quantity:** If a part is needed to perform a task, this entry indicates how many parts are needed.
- **Task:** A brief description of the work that will be performed on the item.
- **Price Type:** Prices may be categorized; for example, an Actual price or Estimated price.
- **Status:** The current state of the task.
- **Charge:** The dollar amount that will be charged to the customer for performing the task.

The following menu options are available:

- **Add Task:** Select this option to add a new task to this Work Order. Refer to [Adding a Task](#) for procedural information.
- **Delete Task:** Select this option to delete a task from the Work Order. Refer to [Deleting a Task](#) for procedural information.
- **Convert Estimate:** Select this option to convert an estimated task amount to the actual cost of the task. This option is only available when there are estimated tasks on

this Work Order account. You must convert all estimated tasks to actual task amounts before the account can be set to Ready For Pickup status. Refer to [Converting an Estimate](#) for procedural information.

- **Add Instruction:** Select this option to add, view, and edit task instructions. Refer to [Viewing/Adding Task Instructions](#) for procedural information.
- **Add Parts:** Select this option to add parts to the Work Order. Refer to [Adding Parts](#) for procedural information.
- **Delete Parts:** Select this option to remove parts from the Work Order. This option is only available when there are parts on this Work Order. Refer to [Deleting Parts](#) for procedural information.
- **Change Quantity:** Select this option to change the task quantity. Refer to [Changing the Quantity](#) for procedural information.
- **Change Price:** Select this option to change the task price. Refer to [Changing the Price](#) for procedural information.
- **Change Tax Location:** Select this option to change the tax location. Refer to [Changing the Tax Location](#) for procedural information.
- **Tax Exempt:** Select this option to change the tax to tax exempt. Refer to [Changing the Tax to Tax Exempt](#) for procedural information.
- **Change Tax Amount:** Select this option to change the tax amount. Refer to [Changing the Tax Amount](#) for procedural information.
- **Change Tax Percent:** Select this option to change the tax percentage. Refer to [Changing the Tax Percentage](#) for procedural information.

 Note:

Select the **More...** option as needed to access the menu options available at the **Items** tab.

3. Select the **Save Changes** option to save any changes you made to the Work Order items record.

Adding a Task

1. With the Work Order record displayed in edit mode, select the **Add Task** option.
2. Oracle Retail Xstore Point of Service displays a list of tasks available for this Work Order category. Use the up and down arrow keys to go to a task(s) and press **Spacebar** to select it. After marking all required tasks, press **Enter** to add them to the Work Order.

Figure 19-10 Work Order Task List

Task	Price Type	Charge
Repair Clasp	ACTUAL	\$7.50
Replace Clasp	ESTIMATE	\$11.00

3. Oracle Retail Xstore Point of Service adds the new task and its associated price type and charge to the Work Order. Select the **Save Changes** option to save any changes you made to the Work Order detail record.

 Note:

Oracle Retail Xstore Point of Service adjusts any charges as required. If a change to the Work Order causes the charge to exceed the customer authorization limit, you may be prompted to confirm the changes with the customer. This information can be edited at the Summary tab.

Deleting a Task

 Note:

Select the **More...** option as needed to access the menu options available at the Items tab.

1. With the Work Order record displayed in edit mode, select the **Delete Task** option.
2. Oracle Retail Xstore Point of Service displays the tasks currently on this Work Order. Select the task from the list and press **Enter** to remove this task from this Work Order.

Figure 19-11 Current Work Order Task List

Work Order
Select a task.

Task Status	Charge Price Type	Qty
Repair Clasp OPEN	\$7.50 ACTUAL	1
Repair Clasp CREATED	\$7.50 ACTUAL	1

Back

OK

3. Oracle Retail Xstore Point of Service removes the task from the Work Order. Select the **Save Changes** option to save any changes you made to the Work Order detail record. Oracle Retail Xstore Point of Service adjusts any charges as required.

Converting an Estimate

You must convert all of the estimated task amounts to actual task amounts before the Work Order account can be changed to Ready For Pickup status.

1. With the Work Order record displayed in edit mode, select the **Convert Estimate** option.
2. Oracle Retail Xstore Point of Service displays the estimated tasks currently on this Work Order. Select the task from the list and press **Enter** to convert this task from an estimated task amount to an actual task amount.
3. Oracle Retail Xstore Point of Service displays a list of tasks with actual charges associated with the task. Use the up and down arrow keys to go to a task in the list and press **Spacebar**.
4. Press **Enter** to update the Estimated task to an Actual amount task. Oracle Retail Xstore Point of Service updates the task on the Work Order.
5. Select the **Save Changes** option to save any changes you made to the Work Order detail record.

Oracle Retail Xstore Point of Service adjusts any charges as required.

Note:

If a change to the Work Order causes the charge to exceed the customer authorization limit, you are prompted to confirm the changes with the customer. This information can be edited at the Summary Tab.

Viewing/Adding Task Instructions

1. With the Work Order record displayed in edit mode, select the **Add Instruction** option.
2. Oracle Retail Xstore Point of Service displays the tasks currently on this Work Order. Select a task from the list and press **Enter** to view, edit, or add instructions.

Figure 19-12 Current Work Order Task List

Task Status	Charge Price Type	Qty
Repair Clasp OPEN	\$7.50 ACTUAL	1
Repair Clasp CREATED	\$7.50 ACTUAL	1

3. Oracle Retail Xstore Point of Service displays the Work Order Task Instruction form. You can add, delete, or modify instructions on this form and then press **Enter** to add (or remove) these instructions to (from) the task.

Figure 19-13 Work Order Task Instruction Form

4. Select the **Save Changes** option to save any changes you made to the Work Order record. The instruction is now associated with this task and is shown on the screen.

Figure 19-14 Work Order Instructions

Work Order W0401001000004		Setup Date 10/25/2017 Service Location Express Repair
Summary	Items	Comments
Qty	Task	Price Type
1	Repair Clasp Old parts to be returned to customer.	ACTUAL

Adding Parts

You can add an item ID for a part that is needed to complete the Work Order task.

1. With the Work Order record displayed in edit mode, select the **Add Parts** option.
2. Oracle Retail Xstore Point of Service prompts for an item ID for the part to be added to this Work Order. Scan or key the item ID and press **Enter**.

Figure 19-15 Part Item ID Prompt

3. Oracle Retail Xstore Point of Service adds the part and the associated price to the Work Order. Select the **Save Changes** option to save any changes you made to the Work Order detail record.
4. If you need to adjust the quantity required for any part that you added, use the **Change Qty** option to enter the number of parts needed. If you change any item's quantity, be sure to Save Changes.

Oracle Retail Xstore Point of Service adjusts any charges as required.

 Note:

If a change to the Work Order causes the charge to exceed the customer authorization limit, you may be prompted to confirm the changes with the customer. This information can be edited at the Summary Tab.

Deleting Parts

You can remove a part that was added to a Work Order but was not used to complete the Work Order task.

1. With the Work Order record displayed in edit mode, select the **Delete Parts** option.
2. Oracle Retail Xstore Point of Service displays a list of parts currently on this Work Order. Select a part from the list and press **Enter** to remove the part and its associated price from the Work Order.
3. Select the **Save Changes** option to save any changes you made to the Work Order detail record.

Oracle Retail Xstore Point of Service adjusts any charges as required.

Changing the Quantity

 Note:

Select the **More...** option as needed to access the menu options available at the Items tab.

1. With the Work Order record displayed in edit mode, select the **Change Quantity** option.
2. Oracle Retail Xstore Point of Service displays a list of line items currently on this Work Order. Select an item from the list and press **Enter**.

 Note:

If the item you selected is not eligible for a quantity change, Oracle Retail Xstore Point of Service displays a message informing you that the item quantity cannot be changed.

3. Oracle Retail Xstore Point of Service prompts for the item quantity to be added to this Work Order. Enter the quantity and press **Enter**. Oracle Retail Xstore Point of Service adds the new quantity and the associated price to the Work Order.

Figure 19-16 Item Quantity Prompt

4. Select the **Save Changes** option to save any changes you made to the Work Order record.

Oracle Retail Xstore Point of Service adjusts any charges as required.

 Note:

If a change to the Work Order causes the charge to exceed the customer authorization limit, you may be prompted to confirm the changes with the customer. This information can be edited at the Summary Tab.

Changing the Price

 Note:

Select the **More...** option as needed to access the menu options available at the Items tab.

1. With the Work Order record displayed in edit mode, select the **Change Price** option.
2. Oracle Retail Xstore Point of Service displays a list of line items currently on this Work Order. Select an item from the list and press **Enter**.

 Note:

If the item you selected is not eligible for a price change, Oracle Retail Xstore Point of Service displays a message informing you that the item price cannot be changed.

3. Oracle Retail Xstore Point of Service prompts for the item price to be added to this Work Order. The item you selected is displayed in the price change prompt. Enter the new price and press **Enter**.

Figure 19-17 Item Price Prompt

4. Oracle Retail Xstore Point of Service updates the new price for the Work Order line item. Select the **Save Changes** option to save any changes you made to the Work Order detail record.

Oracle Retail Xstore Point of Service adjusts any charges as required.

Changing the Tax Location

Note:

Select the **More...** option as needed to access the menu options available at the Items tab.

1. With the Work Order record displayed in edit mode, select the **Change Tax Loc** option.
2. Oracle Retail Xstore Point of Service displays a list of line items currently on this Work Order. Select an item from the list and press **Enter**.

Note:

If the item you selected is not eligible for a tax location change, Oracle Retail Xstore Point of Service displays a message informing you that the item tax location cannot be changed.

3. Oracle Retail Xstore Point of Service prompts for the postal code for the new tax location. Enter the postal code and press **Enter**.

Figure 19-18 Postal Code Prompt

Oracle Retail Xstore Point of Service changes the tax on the item based on the new postal code.

 Note:

If the postal code you entered is not recognized as a valid tax location, the current store's tax rate is used.

4. If you are prompted for a tax change reason, select a reason from the list and press **Enter**.
5. Select the **Save Changes** option to save any changes you made to the Work Order detail record.

Oracle Retail Xstore Point of Service adjusts any charges as required.

 Note:

If a change to the Work Order causes the charge to exceed the customer authorization limit, you may be prompted to confirm the changes with the customer. This information can be edited at the Summary tab.

Changing the Tax to Tax Exempt

 Note:

Select the **More...** option as needed to access the menu options available at the Items tab.

1. With the Work Order record displayed in edit mode, select the **Tax Exempt** option.
2. Oracle Retail Xstore Point of Service displays a list of line items currently on this Work Order. Select an item from the list and press **Enter**.

 Note:

If the item you selected is not eligible for a tax exemption, Oracle Retail Xstore Point of Service displays a message informing you that the item tax cannot be changed.

3. If prompted with a list of the current taxes on the item, select the tax to change. Use the up and down arrow keys to select a tax to change and then press **Enter**.
4. Depending upon the customer's tax status, you have the following options:
 - If the customer associated with the Work Order has a current tax exemption on file, you are prompted to select the tax-exempt identifier from the list of exemptions on file for this customer. Select the tax exemption to apply to the item.

<OR>
 - If the customer associated with the Work Order does not have a current tax exemption on file, you are prompted to enter the tax-exempt information. Enter the tax-exempt information and save your entries.

Figure 19-19 Customer Tax Exempt Information Screen

Oracle Retail Xstore Point of Service applies the tax exemption to the Work Order item.

5. Select the **Save Changes** option to save any changes you made to the Work Order detail record.

Oracle Retail Xstore Point of Service adjusts any charges as required.

 Note:

To add tax exempt information, see the *Oracle Retail Xstore Point of Service Classic User Guide*.

Changing the Tax Amount

 Note:

Select the **More...** option as needed to access the menu options available at the Items tab.

1. With the Work Order record displayed in edit mode, select the **Change Tax Amt** option.
2. Oracle Retail Xstore Point of Service displays a list of line items currently on this Work Order. Select an item from the list and press **Enter**.

 Note:

If the item you selected is not eligible for a tax change, Oracle Retail Xstore Point of Service displays a message informing you that the item tax cannot be changed.

3. Oracle Retail Xstore Point of Service may display a list of the current taxes on the item and prompt you to select the tax to change. If prompted, use the up and down arrow keys to select a tax to change and then press **Enter**.

Oracle Retail Xstore Point of Service prompts for the new tax amount. Enter the new tax amount and press **Enter**.

4. If you are prompted for a tax change reason, select a reason from the list and press **Enter**.
5. Select the **Save Changes** option to save any changes you made to the Work Order detail record.

Oracle Retail Xstore Point of Service adjusts any charges as required.

 Note:

If a change to the Work Order causes the charge to exceed the customer's authorization limit, you may be prompted to confirm the changes with the customer. This information can be edited at the Summary tab.

Changing the Tax Percentage

 Note:

Select the **More...** option as needed to access the menu options available at the Items tab.

1. With the Work Order record displayed in edit mode, select the **Change Tax Percent** option.
2. Oracle Retail Xstore Point of Service displays a list of line items currently on this Work Order. Select an item from the list and press **Enter**.

 Note:

If the item you selected is not eligible for a tax change, Oracle Retail Xstore Point of Service displays a message informing you that the item tax cannot be changed.

3. Oracle Retail Xstore Point of Service may display a list of the current taxes on the item and prompt you to select the tax to change. If prompted, use the up and down arrow keys to select a tax to change and press **Enter**.

4. Oracle Retail Xstore Point of Service prompts for the new tax percentage. Enter the new tax percentage and press **Enter**.

Figure 19-20 New Tax Amount Prompt

Oracle Retail Xstore Point of Service changes the tax percentage on the item.

5. If you are prompted for a tax change reason, select a reason from the list and press **Enter**.
6. Select the **Save Changes** option to save any changes to the Work Order detail record.

Oracle Retail Xstore Point of Service adjusts any charges as required.

 Note:

If a change to the Work Order causes the charge to exceed the customer authorization limit, you may be prompted to confirm the changes with the customer. This information can be edited at the Summary tab.

To View and Add a Work Order Comment

Any comments associated with the Work Order are shown on the Comments tab. You can also add a new comment for a Work Order record.

Figure 19-21 Work Order Comment Tab

Comments Tab Information

- Created Date: The date the comment was added to the Work Order record.
- Created By: An identifier for the associate who created the comment.
- Comment: The text of the comment.

Adding a Comment to the Work Order Record

1. Select the Add Comment option. Oracle Retail Xstore Point of Service displays the comment form.
2. Type a comment and press **Enter**.

Oracle Retail Xstore Point of Service adds the new comment to the Work Order record.

To View Work Order History

The information shown on the History tab provides a look at the actions taken on this Work Order as it moved through the repair/alteration process. The information here is read-only and cannot be edited.

Figure 19-22 History Tab

Work Order		Setup Date: 10/25/2017		Greyly Campbell	
W0401001000004		Service Location: Express Repair		READY TO PICKUP	
Summary		Items		History	
Date	Work Order ID	Status		Balance	
10/30/17	W0401001000004	Open		\$7.50	

Back	Help								Previous Tab	Next Tab	Register

History Tab Information

- Date: The date of each Work Order activity.
- Work Order ID: The Work Order Identifier, and the status and price for the activity.

To View and Edit a Work Order Item Record

After viewing a Work Order item record you may decide that some of the information must be changed. You can change the item description and the item valuation. You must transition to an editing mode to make any changes to the record.

Work Item Tab Information

- **Item ID:** The item identifier.
- **Item Description:** A brief description of the item.
- **Value:** The dollar value of the item. This value is typically used for shipping insurance and store liability purposes.

Editing Item Information

With the Work Order item record displayed in edit mode, the following options are available:

Figure 19-23 Work Order Item Record - Edit Mode

- **Edit Item Value:** Select this option to change the valuation of the Work Order item. This is the value placed on the merchandise being serviced. This value is typically used for shipping insurance and store liability purposes.
 1. When you select this option, Oracle Retail Xstore Point of Service prompts you to choose the item from a list of items on this Work Order account. Select the item and press **Enter**.
 2. At the Work Order item value prompt, type a new value for this item and press **Enter**.

Figure 19-24 Work Order Item Value Prompt

Oracle Retail Xstore Point of Service updates the Work Order item valuation with this information.

3. Select the **Save Changes** option to save any changes you made to the Work Order item record.
- **Edit Item Description:** Select this option to change the description of the Work Order item.
 1. When you select this option, Oracle Retail Xstore Point of Service prompts you to choose the item from a list of items on this Work Order account. Select the item and press **Enter**.
 2. At the Work Order item description prompt, type a new description for this item and press **Enter**. Oracle Retail Xstore Point of Service updates the Work Order item description with this information

Figure 19-25 Work Order Item Description Prompt

3. Select the **Save Changes** option to save any changes you made to the Work Order item record.

Shipping Work Orders

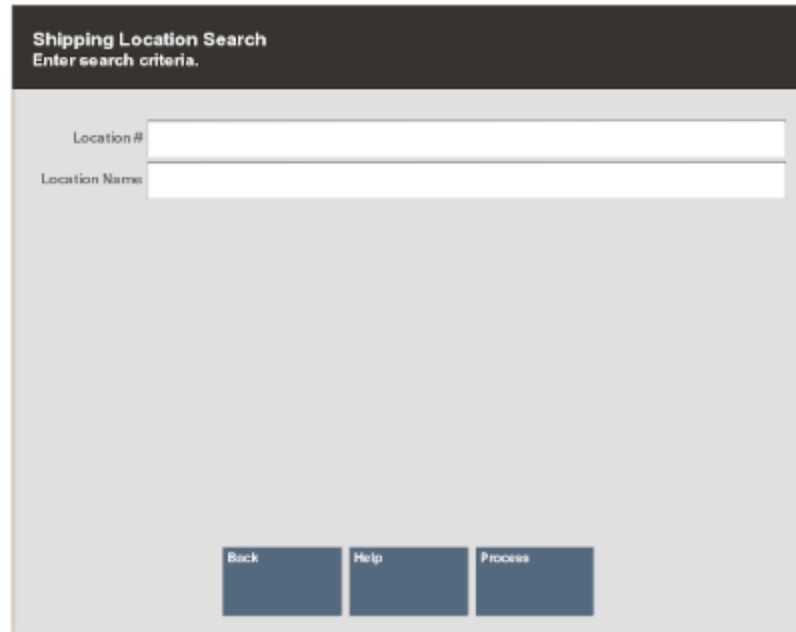
Use the shipping function to ship Work Order items to the repair vendor.

1. To ship a Work Order item to a repair vendor, select the **Ship Work Orders** option from the Work Order Options menu.

Figure 19-26 Work Order Options - Ship Work Order

2. The system prompts for the shipping location (repair vendor) search information. Enter the information as required to find the service location for the Work Order and select **Process** to continue.

Figure 19-27 Shipping Location Search Form

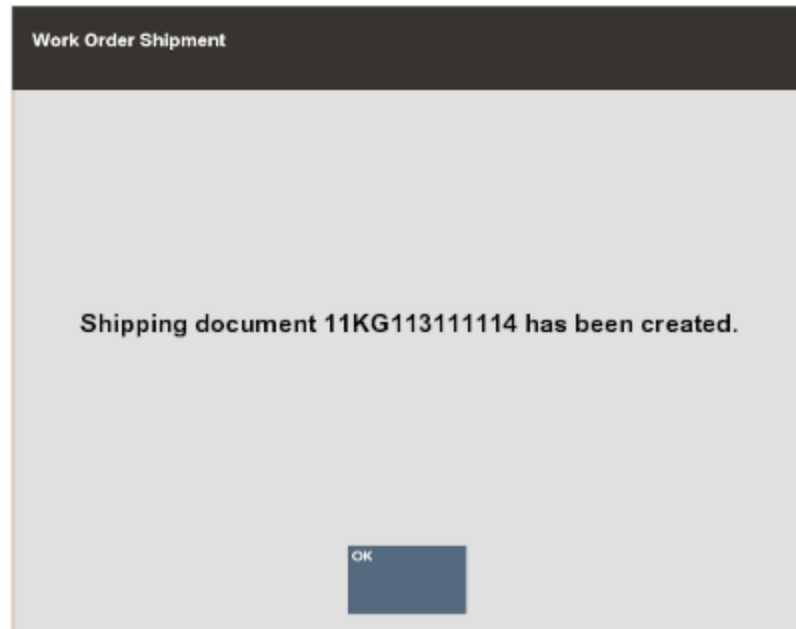
The image shows a web form titled "Shipping Location Search" with the instruction "Enter search criteria." Below the title, there are two input fields: "Location #" and "Location Name". At the bottom of the form, there are three buttons: "Back", "Help", and "Process".

 Note:

To see a list of all service locations, leave the fields blank and press **Enter**.

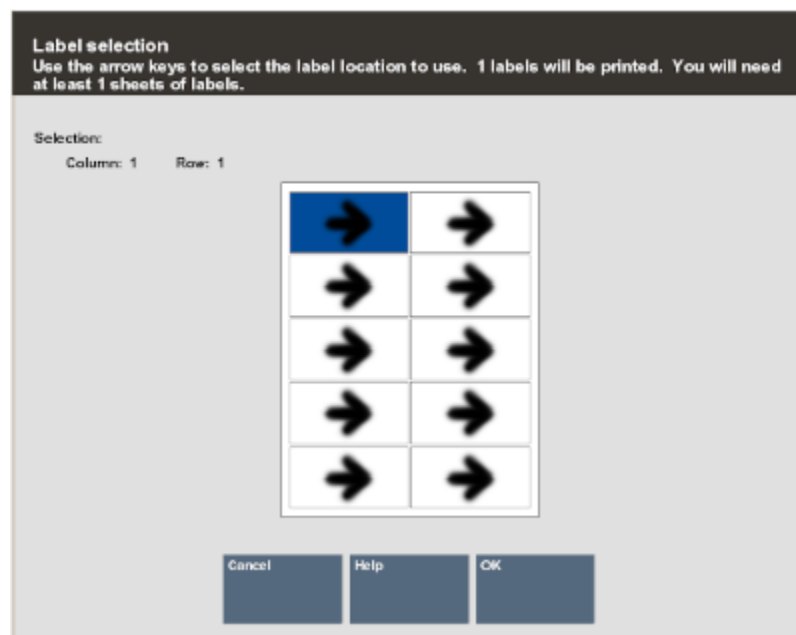
- If more than one service location matches the search criteria you entered, the system displays a list of service locations. Select a service location from the list and select **Process** to continue.
 - If only one location matches the search criteria, the system displays the Work Order accounts that are pending shipment to that service location.
3. Select a Work Order account from the list of Work Order accounts to be sent to this service location. Use the up and down arrow keys to go to an account in the list and press **Spacebar** to select it. Press **Enter** to continue.
 4. The system creates a shipping document for the Work Order and displays the shipping document information. Press **Enter** to continue with the shipping process.

Figure 19-28 Shipping Document Created Prompt



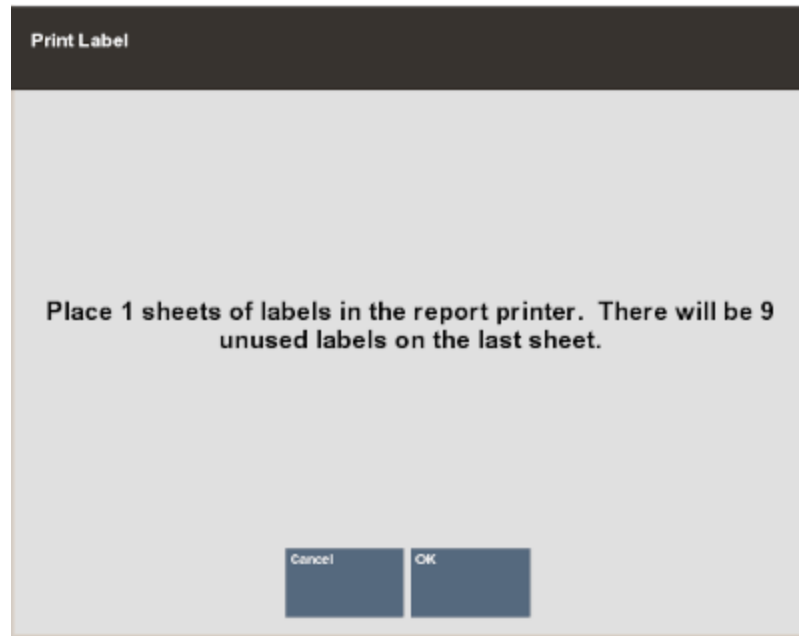
5. The system prompts: Do you want to print a shipping label? Select **Yes** to print a shipping label.
6. The system prompts for the label location on the label sheet. Use the arrow keys to select where the first label should be printed on the label sheet and press **Enter**. This allows you to use partial sheets to avoid wasting labels.

Figure 19-29 Shipping Label Selection Prompt



The system calculates the number of label sheets you need, the number of unused labels that will remain on the label sheet and prompts you to load the label stock in the printer.

Figure 19-30 Print Label Prompt



7. Press **Enter** when you are ready to print the shipping label.

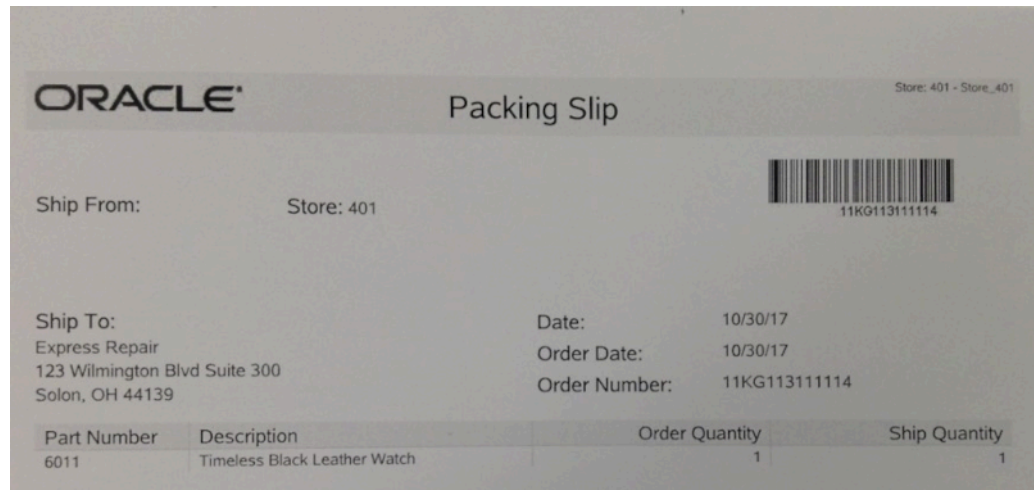
The system prints the labels and returns to the Shipping Location Search form where you can continue shipping Work Orders to service locations.

Figure 19-31 Shipping Label Sample



8. The system prompts: Do you want to print a packing slip?
 - Select **No** if you do not want to print a packing slip. The system skips printing a packing slip.
<OR>
 - Select **Yes** to print a packing slip on the report printer. Xstore returns to the Shipping Location Search Form ([Figure 19-27](#)).

Figure 19-32 Packing Slip Sample



ORACLE® Packing Slip Store: 401 - Store_401

Ship From: Store: 401

Ship To: Express Repair
123 Wilmington Blvd Suite 300
Solon, OH 44139

Date: 10/30/17
Order Date: 10/30/17
Order Number: 11KG113111114

Barcode: 11KG113111114

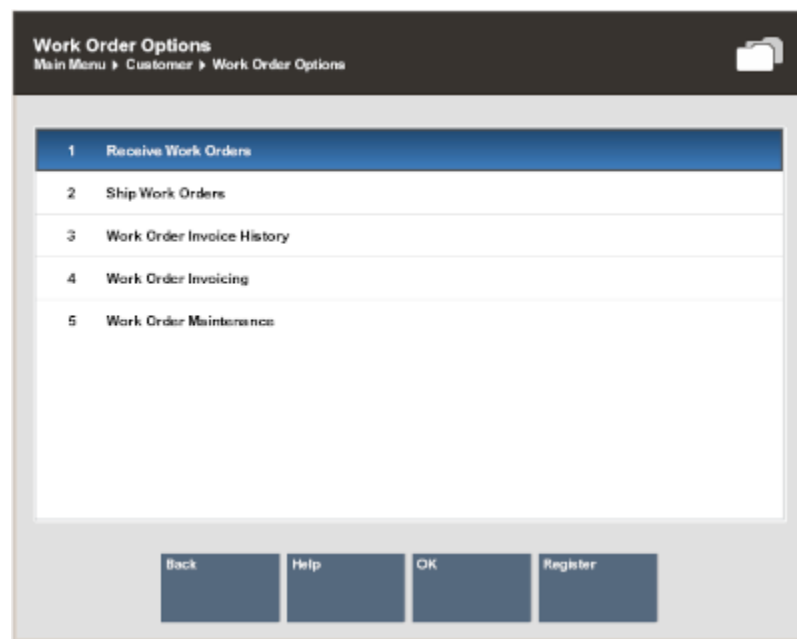
Part Number	Description	Order Quantity	Ship Quantity
6011	Timeless Black Leather Watch	1	1

Receiving Work Orders

Use the receiving function to receive completed Work Order items from the repair vendor.

1. To receive a Work Order item from a repair vendor, select the **Receive Work Orders** option from the Work Order Options menu.

Figure 19-33 Work Order Options Menu - Receive Work Orders



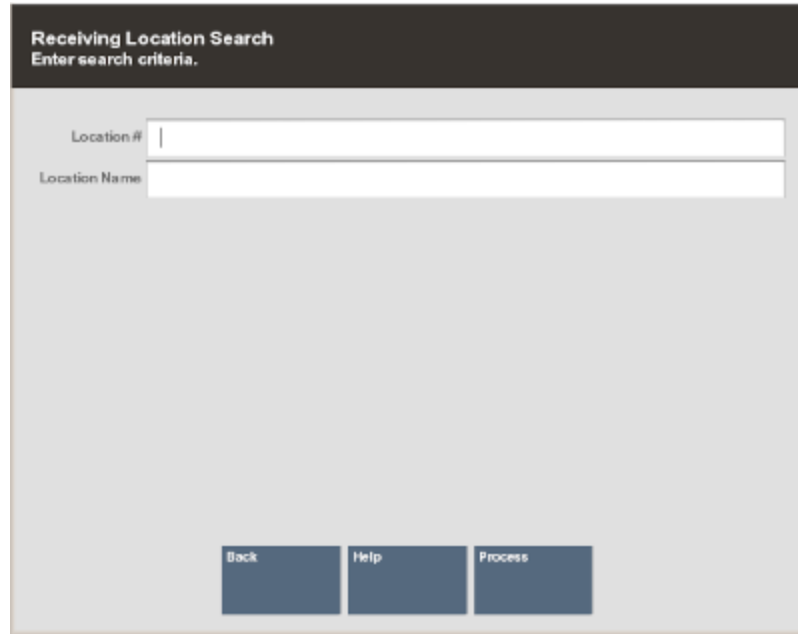
Work Order Options
Main Menu > Customer > Work Order Options

- 1 Receive Work Orders
- 2 Ship Work Orders
- 3 Work Order Invoice History
- 4 Work Order Invoicing
- 5 Work Order Maintenance

Back Help OK Register

2. The system prompts for the receiving location (repair vendor) search information. Enter the information as required to find the service location for the Work Order and select **Process** to continue.

Figure 19-34 Receiving Location Search From



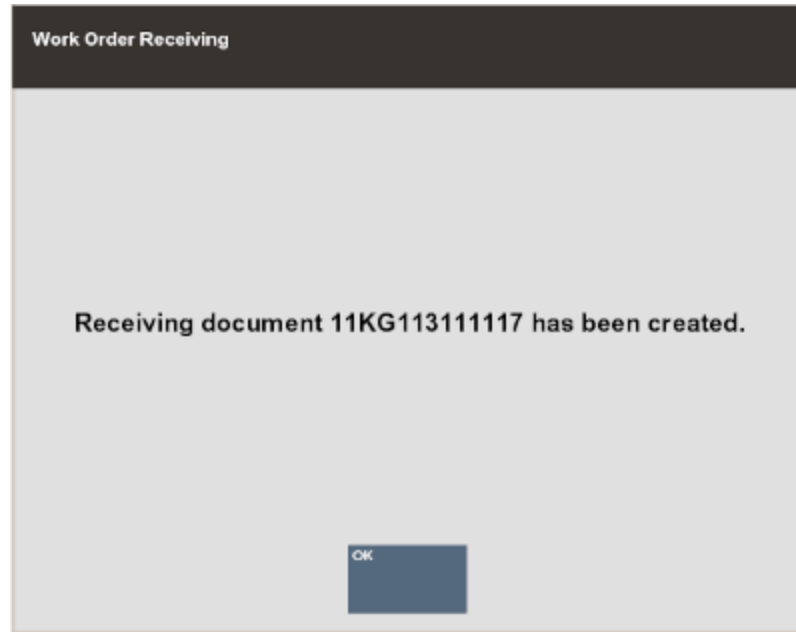
The screenshot shows a web interface titled "Receiving Location Search" with the instruction "Enter search criteria." Below the title are two input fields: "Location #" and "Location Name". At the bottom of the screen are three buttons: "Back", "Help", and "Process".

 Note:

To see a list of all service locations, leave the fields blank and press **Enter**.

- If more than one service location matches the search criteria you entered, the system displays a list of service locations. Select a service location from the list and select **Process** to continue.
 - If only one location matches the search criteria, the system displays the Work Order accounts pending receipt from this service location.
3. Select a Work Order account from the list of Work Order accounts to be received from this service location. Use the up and down arrow keys to go to an account and press **Spacebar** to select it. Press **Enter** to continue.
 4. The system creates a receiving document for the Work Order and displays the receiving document information. Press **Enter** to continue with the receiving process.

Figure 19-35 Receiving Document Created Prompt



The system prints a packing list for this receiving document, any receipts as configured for your store, and returns to the Receiving Location prompt where you can continue receiving Work Orders from service locations.

Once the work order is received, the system marks the Work Order item as Ready To Pick Up.

Work Order Invoices

Use this function to maintain your Work Order invoice information from the repair vendors.

1. To maintain a Work Order invoice from a repair vendor, select the **Work Order Invoicing** option from the Work Order Options menu.

Figure 19-36 Work Order Options Menu - Work Order Receiving

The screenshot shows a software window titled "Work Order Options" with a breadcrumb trail "Main Menu > Customer > Work Order Options". Inside the window is a list of five menu items: "1 Receive Work Orders", "2 Ship Work Orders", "3 Work Order Invoice History", "4 Work Order Invoicing", and "5 Work Order Maintenance". The item "4 Work Order Invoicing" is highlighted with a blue background. At the bottom of the window are four buttons: "Back", "Help", "OK", and "Register".

2. The system prompts for the invoicing location. Enter the search criteria to find the location and select **Process** to continue.

Figure 19-37 Invoicing Location Search Form

The screenshot shows a software window titled "Invoicing Location Search" with the instruction "Enter search criteria." below the title. The form contains two input fields: "Location #" and "Location Name". At the bottom of the window are three buttons: "Back", "Help", and "Process".

 Note:

To see a list of all service locations, leave the fields blank and press **Enter**.

3. If more than one service location matches the search criteria you entered, the system displays a list of service locations. Use the up and down arrow keys to select a service location from the list and select **Process** to continue.
4. Enter the required information as found on the invoice from the service vendor and select **Process** to continue.

Figure 19-38 Invoice Information Entry Form

Invoice Entry
Enter Invoice Details

Vendor: Westfield Jewelry Repair

Invoice #:

Invoice Date:

Invoice Amount Due:

Comments:

Back Help Process

5. The system prompts you to select Work Order accounts for this invoice. Select the account(s) from the list and press **Enter** to continue.

Figure 19-39 Work Order Accounts

Work Order Search
Select one or more of the following accounts.

Name	Setup Date	Account ID
Campbell, Greyly	10/25/2017	W0401001000002
Campbell, Greyly	10/25/2017	W0401001000004

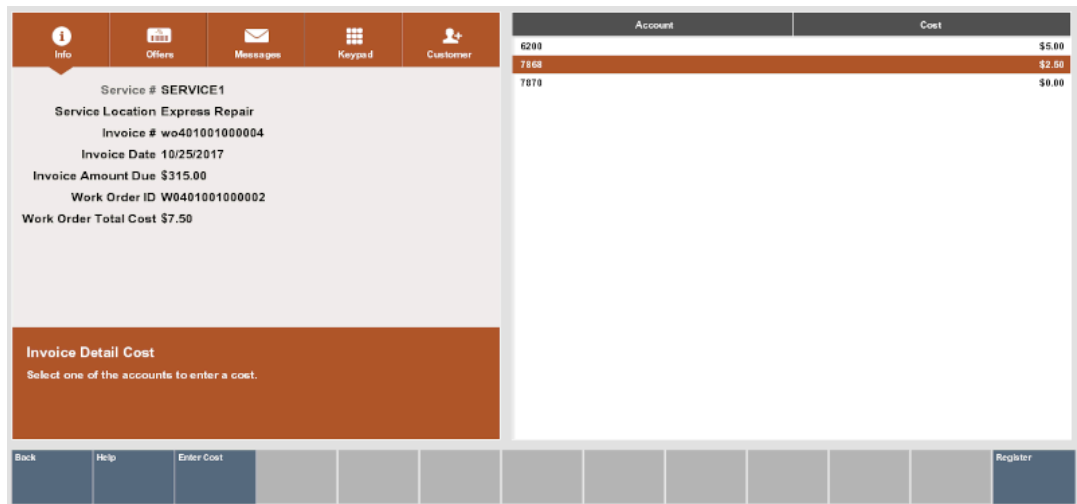
Back Select & Continue

 Note:

You may select multiple accounts. Use the up and down arrow keys to navigate through the list and press the spacebar on each account you want to select.

- The system prompts for the cost of each Work Order on this invoice. Enter the information for each General Ledger # (or other information determined by your store's policy) and select Save Invoice to save the data.

Figure 19-40 Work Order Cost Screen

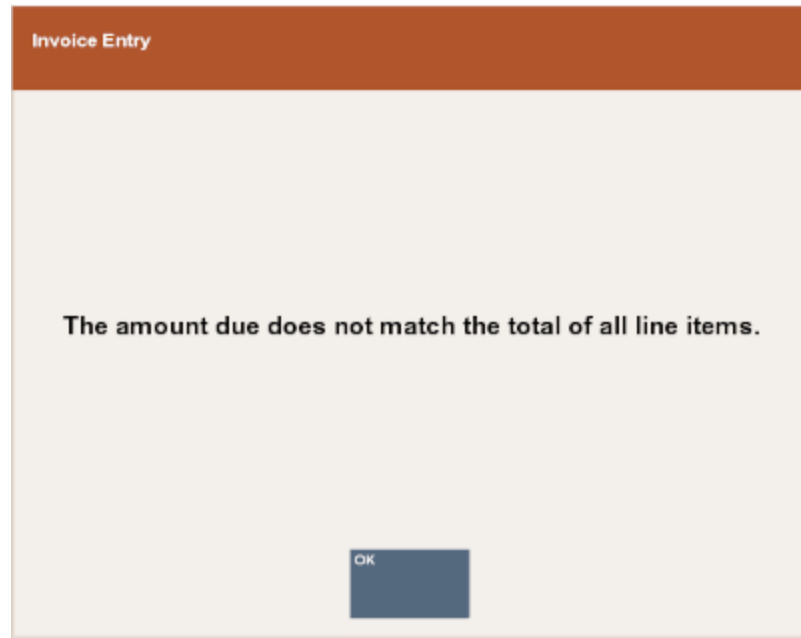


Account	Cost
6289	\$5.00
7868	\$2.50
7879	\$0.00

The system displays a running total at the bottom of the screen as you enter the costs for each Work Order.

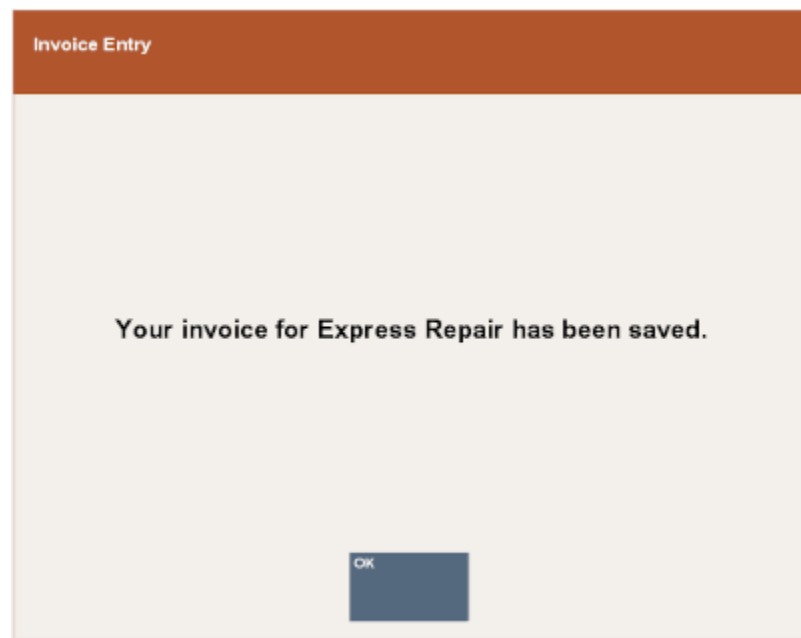
- To add a fee, select **Add Misc Fee**.
- The system verifies that the amounts you entered match the amount due for this invoice:
 - If the amounts do not match, the system displays a message indicating the amounts do not balance and you must re-enter the invoice Work Order costs. Press **Enter** to acknowledge the prompt.

Figure 19-41 Amount Due Out of Balance Message



- When the Work Order account amounts you entered match the invoice amount, the system displays a prompt indicating the invoice data has been saved. Press **Enter** to acknowledge the prompt.

Figure 19-42 Invoice Information Saved Prompt



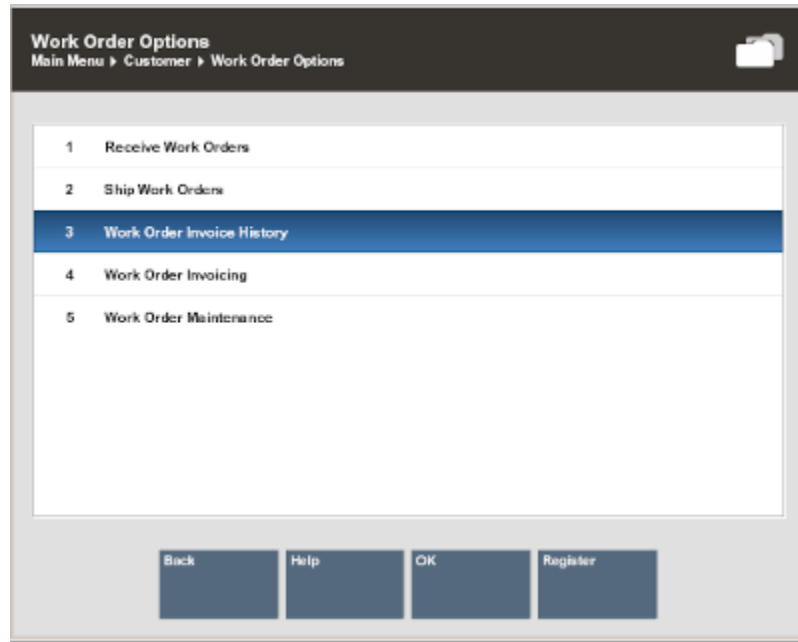
The system prints an invoice report for your records.

Viewing Work Order Invoice History

Use this function to view information about completed Work Order invoices.

1. To view Work Order invoice history, select the **Work Order Invoice History** option from the Work Order Options menu.

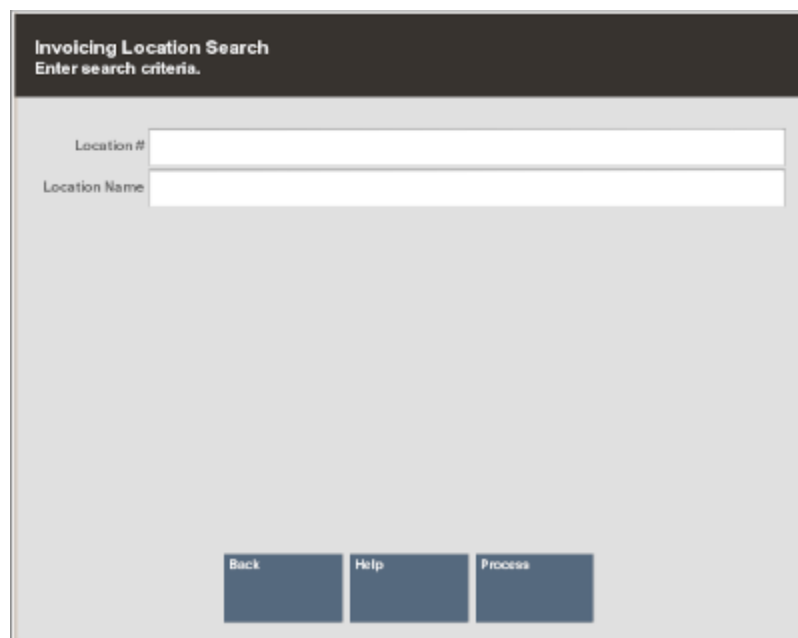
Figure 19-43 Work Order Options Menu - Work Order Invoice History Option



The screenshot shows a software interface titled "Work Order Options" with a breadcrumb trail "Main Menu > Customer > Work Order Options". A list of five options is displayed: "1 Receive Work Orders", "2 Ship Work Orders", "3 Work Order Invoice History" (highlighted in blue), "4 Work Order Invoicing", and "5 Work Order Maintenance". At the bottom, there are four buttons: "Back", "Help", "OK", and "Register".

2. The system prompts for the invoicing location. Enter the search criteria to find the location and select **Process** to continue.

Figure 19-44 Invoicing Location Search Form



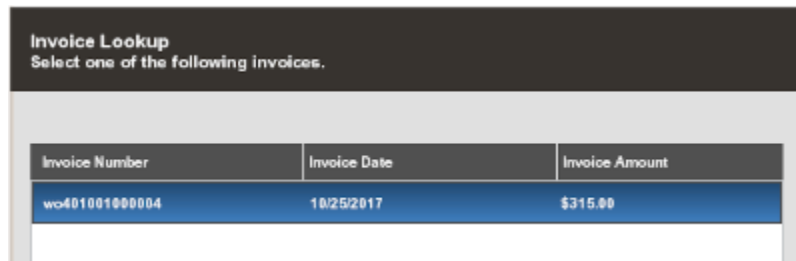
The screenshot shows a software interface titled "Invoicing Location Search" with the instruction "Enter search criteria." Below this, there are two input fields: "Location #" and "Location Name". At the bottom, there are three buttons: "Back", "Help", and "Process".

 Note:

To see a list of all service locations, leave the fields blank and press **Enter**.

3. If more than one service location matches the search criteria you entered, the system displays a list of service locations. Use the up and down arrow keys to select a service location from the list and select **Process** to continue.
4. Select the invoice you want to view for the selected service location and press **Enter** to continue.

Figure 19-45 Service Location Invoices

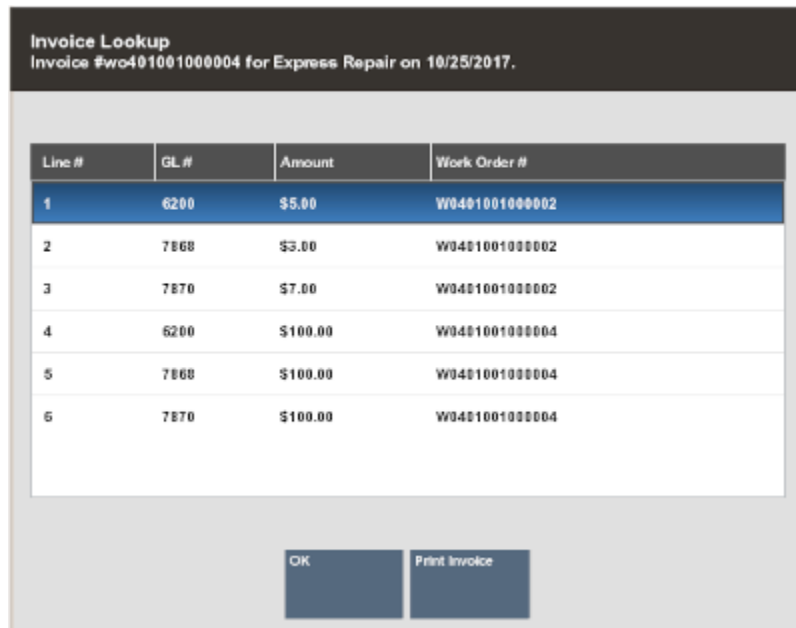


Invoice Lookup
Select one of the following invoices.

Invoice Number	Invoice Date	Invoice Amount
wo401001000004	10/25/2017	\$315.00

5. The system displays the invoice detail:

Figure 19-46 Invoice Line Detail



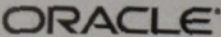
Invoice Lookup
Invoice #wo401001000004 for Express Repair on 10/25/2017.

Line #	GL #	Amount	Work Order #
1	6200	\$5.00	W0401001000002
2	7860	\$3.00	W0401001000002
3	7870	\$7.00	W0401001000002
4	6200	\$100.00	W0401001000004
5	7860	\$100.00	W0401001000004
6	7870	\$100.00	W0401001000004

OK Print Invoice

- Press **Enter** to close the invoice detail form and return to the Work Order Options Menu.
- Select Print Invoice to print the invoice on the report printer.

Figure 19-47 Printed Invoice Example



Invoice Summary

Store: 401 - Store_401

Invoice Number: wo401001000004

Vendor ID: Express Repair

Address: 123 Wilmington Blvd
Solon OH, 44139

Date: 10/25/2017

Tax ID:

Work Order	Description	Account Number	Code	Charged Amt	Retail Price
W0401001000002	2 Initial	6200		\$5.00	\$2.00
W0401001000004	Repair Clasp	6200		\$100.00	\$7.50
W0401001000002	2 Initial	7868		\$3.00	\$2.00
W0401001000004	Repair Clasp	7868		\$100.00	\$7.50
W0401001000002	2 Initial	7870		\$7.00	\$2.00
W0401001000004	Repair Clasp	7870		\$100.00	\$7.50

Account Let	Account Number	Description	Quantity	Total Cost	Retail Price
6200	6200	6200	2	\$105.00	
	7868		2	\$103.00	
	7870		2	\$107.00	
			Total	\$315.00	\$9.50

Order Broker Maintenance

An Oracle Retail Order Broker Cloud Service transaction allows a store to sell an item that is not in stock and to direct another location to fulfil and ship the customer's order to a specified location. The menu options described here allow you to manage these orders. After Order Broker is configured for your store, use the Order options to maintain the order. A store can only see orders initiated in the store and orders downloaded to the store for sourcing or pick up.

**Note:**

Refer to the chapter Order Broker Transactions in the *Oracle Retail Xstore Point of Service Classic User Guide* for more information about Order setup.

If your store has been assigned as the source to fulfil an Order Broker order, you need, to ship the items to the customer. If the Order Broker order was created in your store, you can use these options to track the progress of the order as it is processed.

Use the Order Status Report to view detailed information about orders based on user- selected criteria. This report includes details about the Order Broker order themselves (ORDER section), the purchasing customer information (CUSTOMER section), as well as details about the items that are on the order (ITEMS section).

Use the Unfulfillable Items Report and Order Status Report to track orders and follow up with customers.

**Note:**

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

This chapter contains the following sections:

- [Order Status](#)
- [Order Status Values](#)
- [Order Item Status](#)
- [Fulfilling an Order](#)
- [View Selected Order](#)
- [Maintaining/Viewing an Order](#)
- [Allocating an Item](#)

Order Status

**Note:**

To view status information about new orders you must have a touchscreen or a mouse. The additional information, as shown below, is view-only.

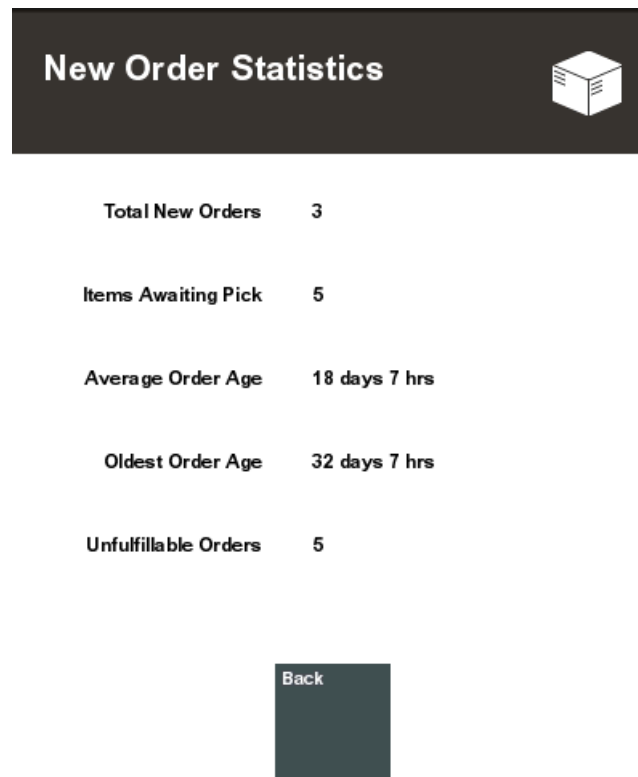
Oracle Retail Xstore Point of Service periodically checks for orders to be fulfilled. If there are orders to be fulfilled by this location, you will see a message in the message bar indicating the number of new orders pending fulfilment by this store.

Figure 20-1 Message Bar Showing Three New Orders



Click/select the message bar to view the New Order Statistics window:

Figure 20-2 New Order Statistics



- **Unfulfillable Orders:** The total number of new orders based on the order line statuses of Accepted, Polled, or Reserved. See [Order Status Values](#). The following statistics are subsets of Total New Orders:

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

Order Status Values

Orders can have the following status values:

- **Open:** At least one item in the order has a status of: New, Polled, Accepted, or In Transit.
- **Ready for Pick Up:** All items are in reserved or received status (can also include canceled item).
- **Ready to Ship:** This is applicable only for customer delivery, transfer pickup, or delayed pickup (pickup from this store). All items must be reserved, or some items are reserved and some canceled.
- **Complete:** The order has been completed and the customer is in possession of their items.
- **Canceled:** All items are canceled.
- **Unfulfillable:** All items are unfulfillable or a mix of unfulfillable and canceled. Unfulfillable items are those that have been rejected by the store assigned as the source for the item and Order Broker cannot find another source store.

Order Item Status

Order items can have the following statuses:

- **New:** Indicates the item has been added to the order.
- **Polled:** Indicates the source/fulfilling location got the item request.
- **Accepted:** Indicates the source location has confirmed it can satisfy the order request.
- **Reserved:** Indicates the item has been put aside for the customer at the source/fulfilling location.
- **Pending Reservation:** Only shown if **Enable Pick Slip Scanning** configuration is enabled. After an Order is Accepted, the item is moved to Pending Reservation where it will remain until the item is scanned in the Virtual Pick Slip.

 Note:

When a store sets up all registers to **Enable Pick Slip Scanning**, the **Automatically Pick Order Inventory** setting should be set to Yes. When an order is accepted, the order is automatically marked as Pending Reservation.

The Automatically Pick Order Inventory setting should be set to No for stores that include both registers that enable and registers that do not enable the **Enable Pick Slip Scanning** setting.

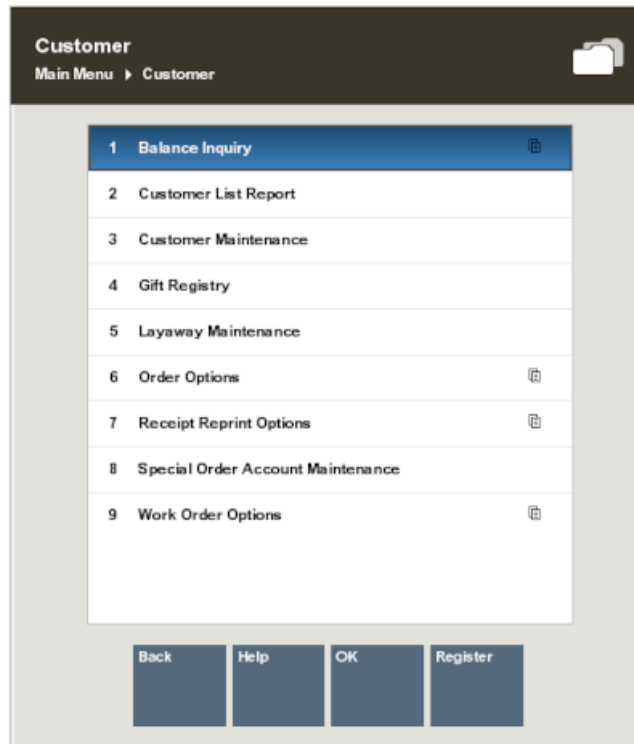
- **In Transit:** Indicates the item has been shipped.
- **In Transit Polled:** Indicates the store in which the customer is to pick up the product has acknowledged that the items are in transit and is expecting the order.
- **Received:** Indicates the item has been received in the store.
- **Fulfilled:** Indicates the item has been picked up/delivered.
- **Canceled:** Indicates the item has been canceled.
- **Rejected:** Indicates the source location has rejected the order and the item is sourced from another location. The status of the order becomes unfulfillable.
- **Unfulfillable:** Indicates the item has been rejected and an alternative location could not be determined.

Fulfilling an Order

Store fulfilment can:

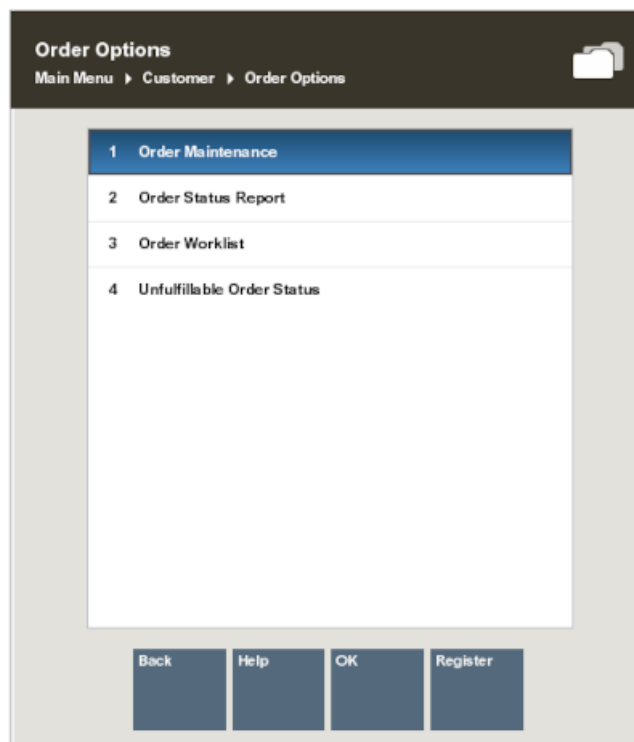
- be done at the order level whereby the store accepts or rejects the whole order
 - be done at the item level whereby a store can accept or reject specific items from an Order Broker order to fulfil
 - accept a quantity of an item from an Order Broker order to fulfil so the order is partially fulfilled.
1. To fulfil an order or specific items of an order, select **Customer** from the Back Office Main Menu.
 2. Select **Order Options** from the Customer menu.

Figure 20-3 Customer Menu



3. At the Order Options menu, select **Order Worklist**, then press **Enter** to display a list of orders to be fulfilled by this store.

Figure 20-4 Order Options Menu - Order Worklist Option



 Note:

The orders shown in the Order Worklist are the orders that require action: either fulfillment, or rejection if you cannot fulfil the request.

Depending on your store configuration (set in SystemConfig.xml), delivery orders may be listed before customer pickup orders.

4. Select an order from the Order Worklist and then select one of the following:

Table 20-1 Order Worklist Options

Option	Description
Accept Order	Accept the order and go to the Accept Order step. See Accept Order
Accept All Orders	Accept all orders.
Print Pick List	Prints a single pick list for all accepted orders.
Scan Pick List Items	Only shown if Enable Pick Slip Scanning configuration is enabled. This option displays a scannable pick list rather than printing a paper pick slip. Items to pick/reserve can be scanned or entered manually.
View Selected Order	View additional information (see View Selected Order).

 Note:

The Action column may indicate "Under Review." When the order is under review, you cannot accept or reject items. The customer can, however, cancel the order.

If you select **Accept All Orders** a prompt displays indicating orders under review will not be changed. If you select **Accept Order** a prompt displays indicating the order is under review.

Figure 20-5 Order Worklist

Order Worklist
Select an order.

Order	Customer	Date	Action
01000010000004 Delivery	Van-Tan-E Sun 912-410-4887	08/18/2017 110 days 17 hrs	Accept/Reject
0201001002124 Delivery	Sandy Gu 303-540-8542 x.32254	08/20/2017 90 days 21 hrs	Accept/Reject
0201001002147 Delivery	Sandy Gu 303-540-8542 x.32254	08/21/2017 90 days 11 hrs	Accept/Reject
0100001001014 Delivery	Sandy Gu 303-540-8542 x.32254	08/11/2017 90 days 20 hrs	Accept/Reject
0100001000010 Delivery	Laurie Beland 313-471-0332	08/17/2017 90 days 21 hrs	Accept/Reject
0100001000010 Delivery	Laurie Beland 313-471-0332	08/17/2017 90 days 20 hrs	Accept/Reject
0100040000002 Delivery	Laurie Beland 313-471-0332	08/08/2017 90 days 11 hrs	Pick/Reserve
0100001000021 Delivery	Laurie Beland 313-471-0332	08/11/2017 90 days 11 hrs	Accept/Reject
0100001000022 Delivery	Laurie Beland 313-471-0332	08/11/2017 90 days 20 hrs	Accept/Reject
0100001000027 Delivery	Ya Su 313-555-4444	08/13/2017 90 days 18 hrs	Accept/Reject
0100040000012 Delivery	Laurie Beland 313-471-0332	08/18/2017 90 days 21 hrs	Accept/Reject
01210010175276 Delivery	Steve Smith 303-540-8542 x.30000	08/28/2017 90 days 16 hrs	Accept/Reject
0201001002236 Delivery	Sandy Gu 313-555-4444	08/17/2017	Accept/Reject

Back Accept Order Accept All Print Pick List View

Figure 20-6 Order Worklist with Scan Pick List Items Enabled

Order Worklist
Select an order.

Order	Customer	Date	Action
2324001000005 Transfer Pickup	Melanie Solon 407-319-2603	08/29/2017 419 days 21 ...	Accept/Reject
0570002000142 Transfer Pickup	Barbara James 903-350-8542	09/20/2018 32 days 19 hrs	Ship
1516001000023 Transfer Pickup	Noreen Braun 440-256-3971	09/24/2018 28 days 19 hrs	Pick/Reserve
2324001000006 Pickup	Melanie Solon 407-319-2603	08/29/2017 419 days 20 ...	Accept/Reject
0570054000005 Pickup	Adrianna Ward 448-723-5724	09/13/2018 39 days 20 hrs	Pick/Reserve
0570054000006 Pickup	Megan Sanders 632-552-1111	09/13/2018 39 days 20 hrs	Pick/Reserve
0570054000007 Pickup	Margaret Dolan 985-680-0516	09/13/2018 39 days 19 hrs	Pick/Reserve
2324001000022 Pickup	Bob Rushmore 222-222-2222	09/19/2018 34 days 1 hrs	Pick/Reserve
0570001000217 Pickup	Megan Sanders	09/24/2018	Pick/Reserve

Back Accept Order Accept All Orders Print Pick List Scan Pick List Items View Selected Order

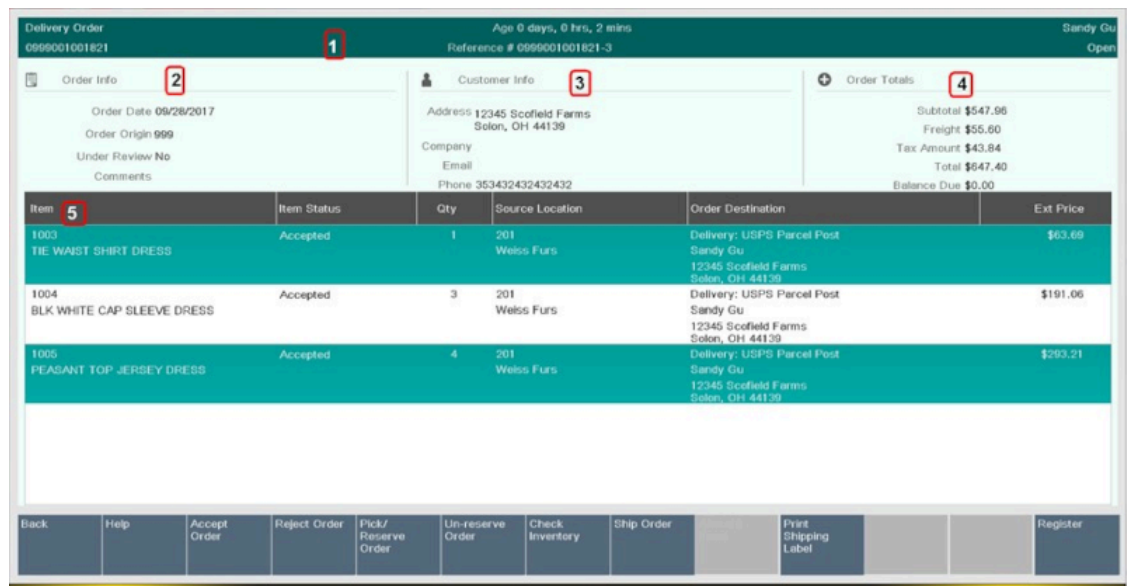
 Note:

Orders that are still pending beyond a specified age threshold are shown in red text in the list. In the examples shown above, any orders that have been pending for 4 days or more are flagged.

View Selected Order

View Selected Order displays the Order maintenance screen.

Figure 20-7 Order Maintenance Screen



The following information is displayed on this screen:

Table 20-2 Order Maintenance Screen Components

Component	Description
1. Static Area	Contains the type of order, Customer Name, order number, age information, and reference number. The order number is the number provided by the system that requested/originated the order. The reference number is an optional value that identifies the order. It is the order ID appended with last order line sequence number. The status displays on the far right. See Order Status Values for status definitions. Order Type values include the following: • Transfer Pickup Order (Pickup This Store) • Pickup Order (Pickup Other Store) • Delivery Order (Customer Delivery)

Table 20-2 (Cont.) Order Maintenance Screen Components

Component	Description
2. Order Information	• Order Date - The date and time the order was created. • Order Origin - The location in which the order was created. • Under Review - Yes or No. • Failed to Pickup -Yes or No. • Comments - Any notes associated with the order.
3. Customer Information	• Sold To - The purchasing customer's name and address information. • Company - The purchasing customer's company, if applicable. • Email - The purchasing customer's email address. • Phone - The purchasing customer's telephone number(s).
4. Order Totals	• Subtotal - The order subtotal (the shipping fee amount is not included in the subtotal). • Deposit - The amount of deposit, if any. • Freight - The freight cost associated with the order. • Tax Amount- The tax on the order. • Total - The total for the order (the shipping fee amount is included in the total). • Balance Due - The amount due for the order.
5. Item Information	• Status - The item status. See Order Status Values. • Source Location - The location name and ID that sourced the order request. • Order Destination - The delivery method and delivery address, or pickup location for the order. • Item - The item identifier and description. • Qty - The item quantity. • Ext Price - The item's extended price (the item quantity x the item unit price - discounts).

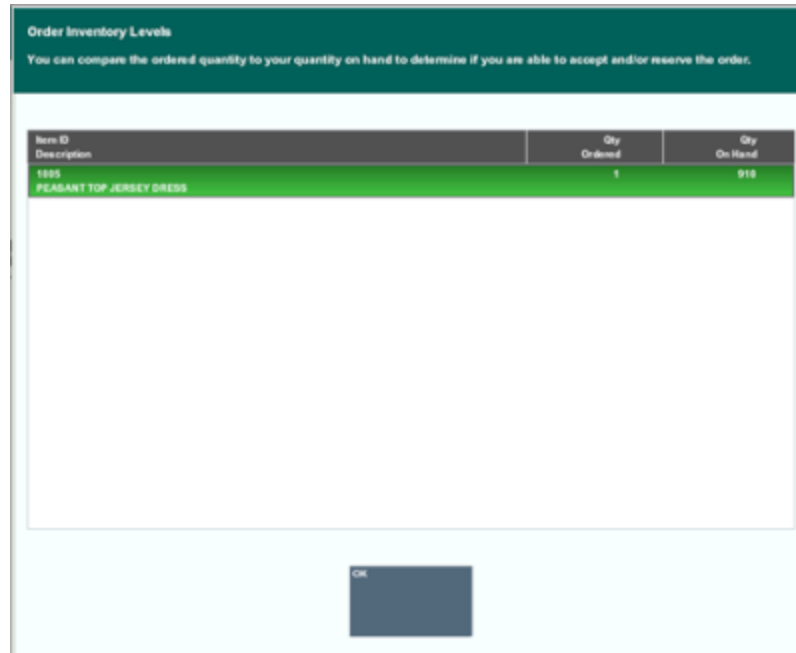
Select an option from the menu to process the order: [Check Inventory](#), [Accept Order](#), [Pick/Reserve Order](#), [Un-reserve Order](#), [Cancel Order](#) or [Reject Order](#).

Check Inventory

To verify you have enough stock on hand to fulfil an order:

1. Select **Check Inventory** menu option. The Order Inventory Levels form shows the item quantity ordered and the current quantity on hand.
2. Press **Enter** to close the form.

Figure 20-8 Order Inventory Levels Form



Order Inventory Levels
You can compare the ordered quantity to your quantity on hand to determine if you are able to accept and/or reserve the order.

Item ID Description	Qty Ordered	Qty On Hand
1895 PLEASANT TOP JERSEY DRESS	1	916

OK

Accept Order

To Accept an order or specific items on an order:

1. At the Order Maintenance screen, select the specific items or for the entire order, select **Accept Order**.
2. At the confirmation prompt, select **Yes** to accept the order.
3. At the Order Accepted prompt, press **Enter** to continue.

Figure 20-9 Order Accept Prompt



Order Accepted

Please retrieve and put aside items with the order pick slip prior to setting the order to picked/reserved.

If items are unavailable, the order may be rejected.

OK

Pick/Reserve Order

After accepting an order, the items need to be retrieved and put aside. When picking items for an order, the screens shown are dependent on your store's configuration.

To display a scannable pick list rather than printing a paper pick slip, **Enable Pick Slip Scanning** must be enabled, and the Scan Pick List Items option is shown at the bottom of the Order Worklist screen. Continue with [Scan Pick Slip Items](#).

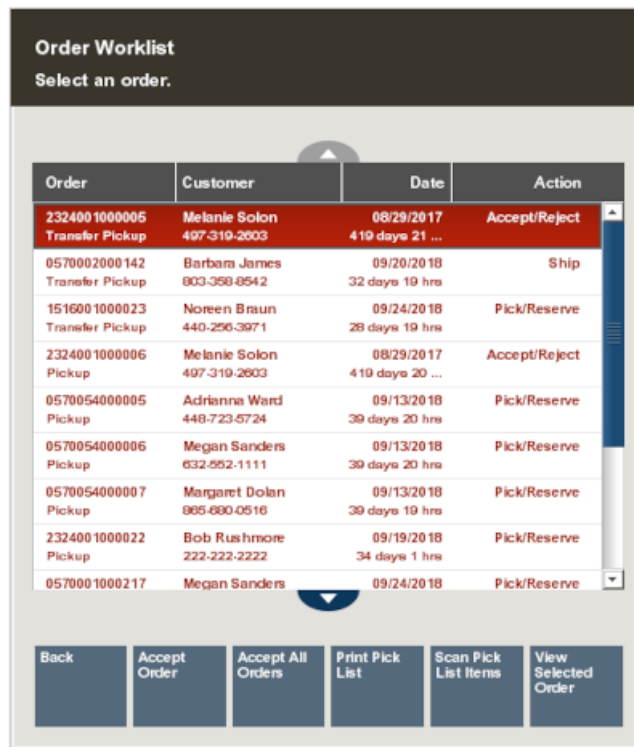
If the **Enable Pick Slip Scanning** setting is not enabled, the pick slip is printable from the Order Worklist screen or automatically printed when the order is accepted. Continue with [Picking/Reserving an Order](#).

Scan Pick Slip Items

Using the virtual pick list, items to pick are scanned from a list on a mobile device. If needed, the items can be entered manually if the barcode is unreadable. Scanning items ensures the items being set aside, for order fulfilment, are the exact items required. This functionality replaces the printed pick list from automatically printing upon Order Acceptance. The option to print a pick list is still available if desired by selecting the **Print Pick List** option from the Order Worklist.

1. At the Order Worklist, select the order and select **Scan Pick List Items**.

Figure 20-10 Order Worklist - Scan Item



The screenshot shows the 'Order Worklist' screen with the instruction 'Select an order.' at the top. Below is a table with columns: Order, Customer, Date, and Action. The table lists several orders, including one for Melanie Solon (Order 2324001000005) and another for Bob Rushmore (Order 2324001000022). At the bottom, there is a navigation bar with buttons: Back, Accept Order, Accept All Orders, Print Pick List, Scan Pick List Items (highlighted), and View Selected Order.

Order	Customer	Date	Action
2324001000005 Transfer Pickup	Melanie Solon 497-319-2603	08/29/2017 419 days 21 ...	Accept/Reject
0570002000142 Transfer Pickup	Barbara James 803-358-8542	09/20/2018 32 days 19 hrs	Ship
1516001000023 Transfer Pickup	Noreen Braun 440-296-3971	09/24/2018 28 days 19 hrs	Pick/Reserve
2324001000006 Pickup	Melanie Solon 497-319-2603	08/29/2017 419 days 20 ...	Accept/Reject
0570054000005 Pickup	Adrianna Ward 448-723-5724	09/13/2018 39 days 20 hrs	Pick/Reserve
0570054000006 Pickup	Megan Sanders 632-552-1111	09/13/2018 39 days 20 hrs	Pick/Reserve
0570054000007 Pickup	Margaret Dolan 865-680-0516	09/13/2018 39 days 19 hrs	Pick/Reserve
2324001000022 Pickup	Bob Rushmore 222-222-2222	09/19/2018 34 days 1 hrs	Pick/Reserve
0570001000217	Megan Sanders	09/24/2018	Pick/Reserve

Navigation Bar: Back, Accept Order, Accept All Orders, Print Pick List, **Scan Pick List Items**, View Selected Order

2. If your store is configured to disallow the splitting of an order line where there are multiple quantities into multiple order lines, a warning message that their store does not allow fulfillment of partial line orders. Confirm you have the quantities required for line items before scanning.

Figure 20-11 Scan Items to Pick for Orders

Scan Items to Pick for Orders
As items are entered, they will be removed from the list.

Item ID	Description	Quantity
1002	COTTON JERSEY TIERED DRESS	98
1004	BLK WHITE CAP SLEEVE DRESS	5
1005	PEASANT TOP JERSEY DRESS	6
1006	ROLL SLEEVE SWEATER DRESS	3
1011	CHOCOLATE SCHNAPPS	1
1013	Carrier Bag	1
1234567890...	Signature Green Jersey	1

Manual Entry
Done

- On the mobile device scan each item as it is picked. As items are scanned, the Quantity of that item goes down.

Figure 20-12 Scan Items to Pick for Orders - After Scan

Scan Items to Pick for Orders
As items are entered, they will be removed from the list.

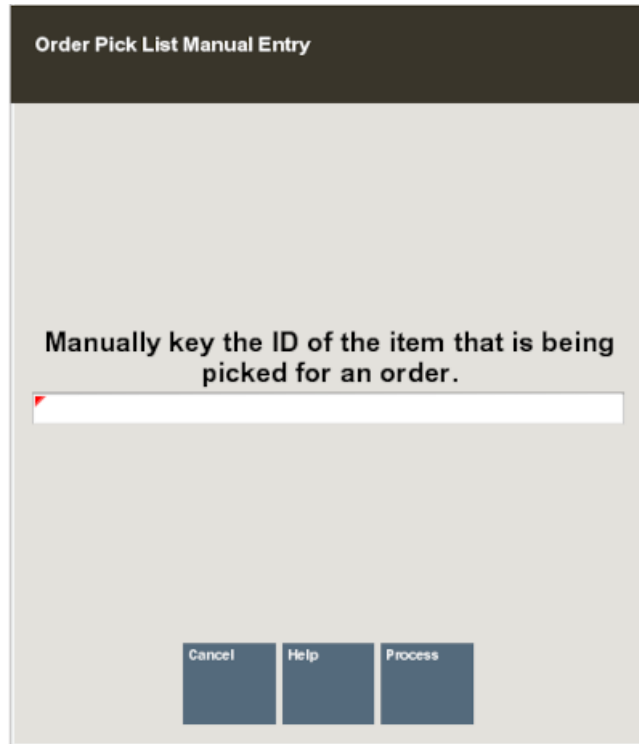
Item ID	Description	Quantity
1002	COTTON JERSEY TIERED DRESS	97
1004	BLK WHITE CAP SLEEVE DRESS	5
1005	PEASANT TOP JERSEY DRESS	6
1006	ROLL SLEEVE SWEATER DRESS	3
1011	CHOCOLATE SCHNAPPS	1
1013	Carrier Bag	1
1234567890...	Signature Green Jersey	1

Manual Entry
Done

Continue scanning each item until all items have been scanned. When the required quantity of the item has been scanned, the item is removed from the list.

If the item does not scan, select **Manual Entry** and enter the ID of the item.

Figure 20-13 Scan Pick List Manually



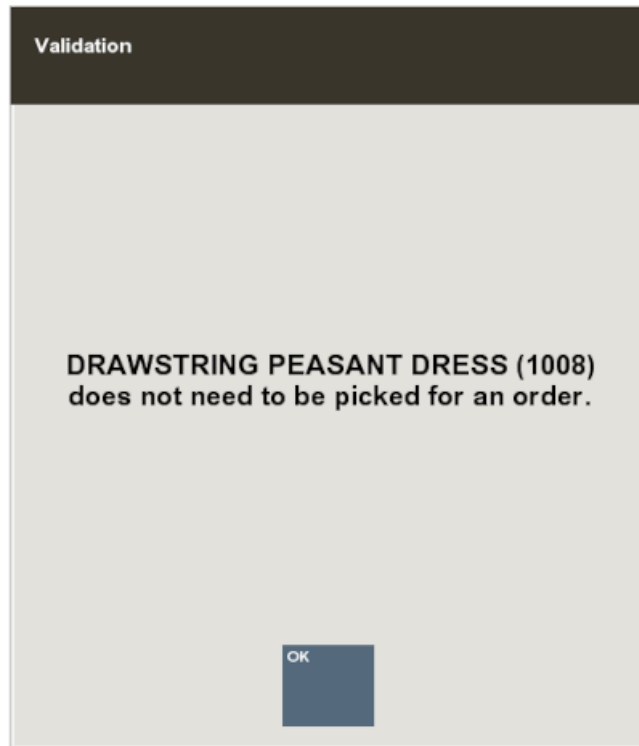
Order Pick List Manual Entry

Manually key the ID of the item that is being picked for an order.

Cancel Help Process

If an item is scanned or entered that does not belong to an order, a warning message is shown. Select **OK** to continue.

Figure 20-14 Wrong Item Scanned



Print Pick List

The pick slip is printable from the Order Worklist screen (see [Figure 20-5](#) and [Figure 20-6](#)) or automatically printed when the order is accepted.

Figure 20-15 Pick Slip

XSTORE™

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

Ticket: 30239 Date: 8/21/18
Store: 101 Register: 1
Cashier: 100

Customer:
Nancy D Smith

Pickup

Order #
0112001000128


0112001000128

Item	Qty	Price	Amount
Polarized Twenty Sunglasses			
3005	1		150.50

Balance Due: 137.14

Pick Slip

Picking/Reserving an Order

To Pick/Reserve items on an order

1. At the Order Worklist screen, select the order to pick/reserve.

Figure 20-16 Order Worklist - Pick/Reserve

Order Worklist			
Select an order.			
Order	Customer	Date	Action
1516001000023 Transfer Pickup	Noreen Braun 440-256-3071	09/24/2018 28 days 19 hrs	Pick/Reserve
2324001000006 Pickup	Melanie Solon 497-319-2003	08/29/2017 419 days 21 ...	Accept/Reject
0570054000005 Pickup	Adrianna Ward 448-723-5724	09/13/2018 39 days 20 hrs	Pick/Reserve
0570054000006 Pickup	Megan Sanders 632-552-1111	09/13/2018 39 days 20 hrs	Pick/Reserve
0570054000007 Pickup	Margaret Dolan 865-680-0516	09/13/2018 39 days 20 hrs	Pick/Reserve
2324001000022 Pickup	Bob Rushmore 222-222-2222	09/19/2018 34 days 1 hrs	Pick/Reserve
0570001000217 Pickup	Megan Sanders 632-552-1111	09/24/2018 28 days 17 hrs	Pick/Reserve
0570001000224 Pickup	Mary Poppins 216-555-5555	09/28/2018 24 days 23 hrs	Pick/Reserve
0570001000225 Pickup	Amy Rush	09/28/2018	Pick/Reserve
Back Accept Order Accept All Orders Print Pick List Scan Pick List Items View Selected Order			

- At the Order Maintenance screen, select the specific items or for the entire order, select **Pick/Reserve Order**. If you cannot fulfil the order for some reason, you can reject the order at this point. See [Reject Order](#) for more information about rejecting an order.

 Note:

The **Pick/Reserve Order** menu option is only available after you accept the order.

If the Under Review field indicates yes, the **Accept Order**, **Reject Order** and **Pick/Reserve Order** buttons are grayed out.

Figure 20-17 Order Maintenance Screen - Pick/Reserve Order

Pickup Order 0570054000006 Age 39 days, 20 hrs, 10 mins Megan Sanders Open

Reference # 0570054000006-1

Order Info: Order Date 09/13/2018, Order Origin 570 Corner Market, Under Review No, Comments

Customer Info: Address 807 OAKPARK CLEVELAND, OH 44125 United States, Company, Email adrienne.ward@oracle.com, Phone 6325521111

Order Totals: Subtotal \$96.20, Freight \$0.00, Tax Amount \$7.70, Total \$103.90, Balance Due \$93.51

Item	Item Status	Qty	Source Location	Order Destination	Ext Price
1002 COTTON JERSEY TIERED DRESS	Accepted	1	7 Corner Market	Pickup: 7 Corner Market 30500 Bruce Industrial Pkwy Solon, OH 44139 United States Phone: 440-498-4414	\$96.20

Buttons: Back, Help, Accept Order, Reject Order, Pick/Reserve Order, Un-reserve Order, Check Inventory, Ship Order, Register

If your system has the **Scan Items Prior to Adding to Transaction** setting configured, the items display in a list to scan from to confirm they are the correct items.

If your system does not have the **Scan Items Prior to Adding to Transaction** setting configured, collect the items and continue at step 5.

Figure 20-18 Scan Items to Reserve

Pickup Order 0570054000006 Megan Sanders Open

Order Info: Order Date 09/13/2018, Order Origin 570 Corner Market, Under Review No, Comments

Order Totals: Subtotal \$96.20, Freight \$0.00, Tax Amount \$7.70, Total \$103.90, Balance Due \$93.51

Scan Items to Reserve: As items are scanned the status will be updated to Reserved and they will be removed from this list

Item ID	Description	Quantity
1002	COTTON JERSEY TIERED DRESS	1

Buttons: Exit, Manual Entry

3. Scan the items from the list. The items will be marked Reserved and can be shipped or ready for customer pickup.

If the item does not scan, select **Manual Entry** and enter the ID of the item.

Figure 20-19 Manual Entry

The screenshot shows the 'Manual Entry' screen. On the left, the 'Pickup Order' header displays the order number 0570054000006. Below it, the 'Order Info' section lists: Order Date 09/13/2018, Order Origin 570 Corner Market, Under Review No, and a Comments field. The 'Item' list shows item 1002, COTTON JERSEY TIERED DRESS. The central area is titled 'Manual Entry' and contains the prompt 'Manually enter an item ID' above a text input field. At the bottom of this area are three buttons: 'Cancel', 'Help', and 'Process'. On the right, the 'Order Totals' section shows: Subtotal \$96.20, Freight \$0.00, Tax Amount \$7.70, Total \$103.90, and Balance Due \$93.51. The top right corner shows the user name 'Megan Sanders' and an 'Open' button.

If an item is scanned or entered that does not belong to an order, a warning message is shown. Select **OK** to continue.

Figure 20-20 Pickup Wrong Item Scanned

The screenshot shows the 'Error' screen. The left sidebar is identical to Figure 20-19, showing the same order and item information. The central area is titled 'Error' and contains the message: 'The item does not match any items selected from the order list and will not be picked/reserved at this time.' Below the message is an 'OK' button. The right sidebar, showing 'Order Totals' and user information, is also identical to Figure 20-19.

4. After all items for the order have been scanned or manually entered, select **OK** at the prompt.

Figure 20-21 Order Picked/Reserved

The screenshot shows a software interface with a central dialog box titled "Order Picked/Reserved". The dialog box has a light blue background and contains the following text:

Items for this order are now reserved. Place items with pick tickets in the customer pickup area.

The customer will be notified via email that the order is ready to be picked up.

At the bottom of the dialog box is a dark blue button labeled "OK".

The background interface is dimmed and shows the following sections:

- Top Left:** "Pickup Order 0570064000006"
- Top Right:** "Megan Sanders Open"
- Left Panel (Order Info):**
 - Order Date: 09/13/2018
 - Order Origin: S70 Corner Market
 - Under Review: No
 - Comments
- Right Panel (Order Totals):**
 - Subtotal: \$96.20
 - Freight: \$0.00
 - Tax Amount: \$7.70
 - Total: \$103.90
 - Balance Due: \$93.51
- Bottom Panel (Item List):**

Item	Ext Price
1002 COTTON JERSEY TIERED DRESS	\$96.20

5. The items will be marked Reserved and can be shipped or ready for customer pickup.
6.
 - For Delivery type orders, use the Ship Order function to complete the order delivery process. See [Shipping an Order](#).
 - For other Order types, the Order status is updated to Ready for Pickup.

Figure 20-22 Order Reserved

Pickup Order 0570054000006		Age 39 days, 20 hrs, 13 mins Reference # 0570054000006-1		Megan Sanders Ready for Pickup	
Order Info Order Date: 09/13/2018 Order Origin: 570 Corner Market Under Review: No Comments		Customer Info Address: 887 OAKPARK CLEVELAND, OH 44125 United States Company: Email: adrienne.ward@oracle.com Phone: 6325521111		Order Totals Subtotal: \$96.20 Freight: \$0.00 Tax Amount: \$7.70 Total: \$103.90 Balance Due: \$93.51	
Item	Item Status	Qty	Source Location	Order Destination	Ext Price
1002 COTTON JERSEY TIERED DRESS	Reserved	1	7 Corner Market	Pickup: 7 Corner Market 30500 Bruce Industrial Pkwy Solon, OH 44139 United States Phone: 440-498-4414	\$96.20

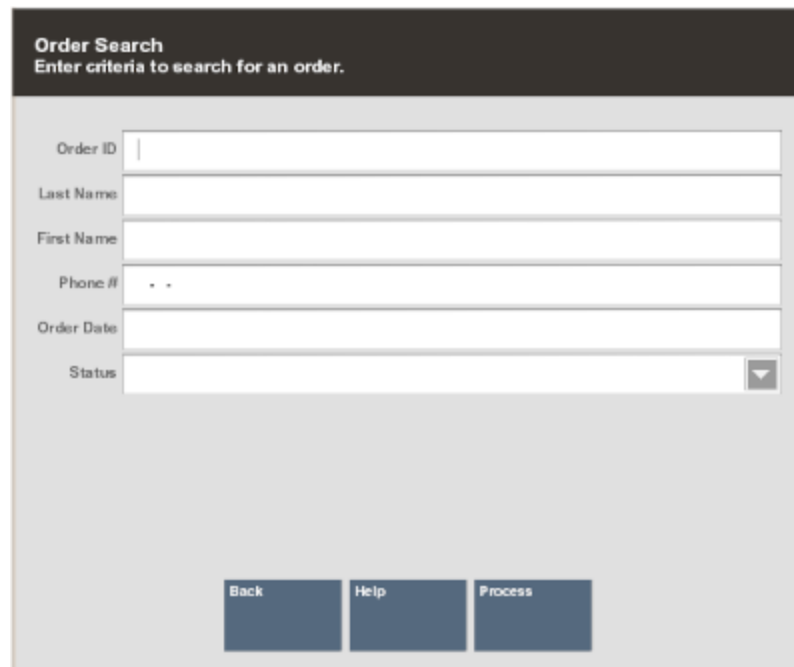
Back	Help	Accept Order	Reject Order	Pick/ Reserve Order	Un-reserve Order	Check Inventory	Ship Order	Allocate Stock	Print Shipping Label			Register

Un-reserve Order

To un-reserve an order:

1. Since the order has been accepted it will no longer appear in the Order Worklist. From the Back Office main menu, select **Customer \ Order Options \ Order Maintenance**.
2. Enter the search criteria and select **Process**.

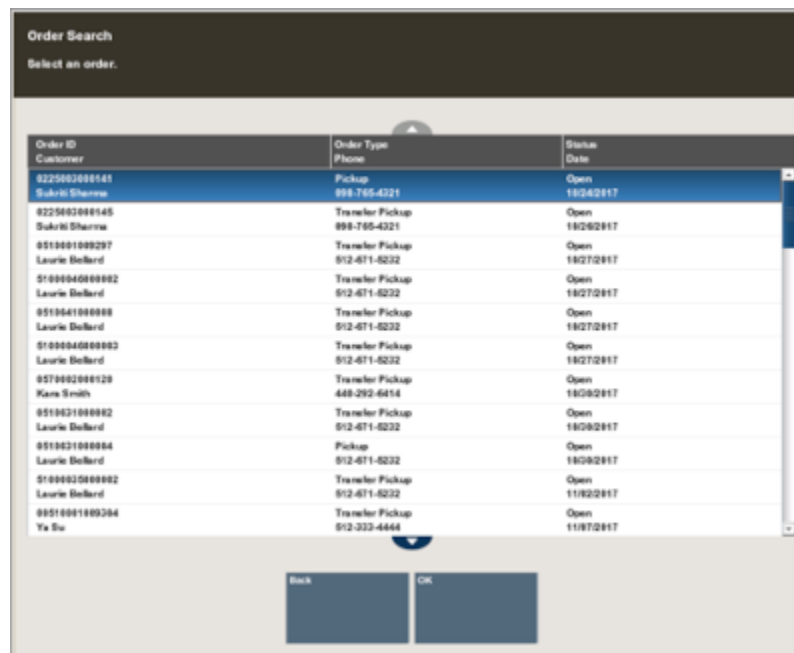
Figure 20-23 Order Search Screen



The Order Search screen features a dark header with the title "Order Search" and the instruction "Enter criteria to search for an order." Below the header is a form with the following fields: Order ID, Last Name, First Name, Phone # (with a mask "x x"), Order Date, and Status (a dropdown menu). At the bottom of the screen are three buttons: Back, Help, and Process.

3. If more than one order is returned, select the order you wish to modify, and press **Enter**.

Figure 20-24 Order Search Results



The Order Search Results screen displays a table of search results. The table has three columns: Order ID, Order Type, and Status. The first column also includes the Customer name. The table is scrollable, and the first row is highlighted in blue. Below the table are two buttons: Back and OK.

Order ID Customer	Order Type Phone	Status Date
0225002000141 Sukri/ Sharma	Pickup 998-765-4321	Open 18/02/2017
0225002000145 Sukri/ Sharma	Transfer Pickup 998-765-4321	Open 18/02/2017
0510001000297 Laurie Bellard	Transfer Pickup 912-471-5232	Open 18/02/2017
0100040000002 Laurie Bellard	Transfer Pickup 912-471-5232	Open 18/02/2017
0510041000008 Laurie Bellard	Transfer Pickup 912-471-5232	Open 18/02/2017
0100040000003 Laurie Bellard	Transfer Pickup 912-471-5232	Open 18/02/2017
0570002000129 Kara Smith	Transfer Pickup 448-292-4414	Open 18/02/2017
0510021000002 Laurie Bellard	Transfer Pickup 912-471-5232	Open 18/02/2017
0510021000004 Laurie Bellard	Pickup 912-471-5232	Open 18/02/2017
0100002000002 Laurie Bellard	Transfer Pickup 912-471-5232	Open 11/02/2017
00510001000204 Yi Su	Transfer Pickup 912-333-4444	Open 11/02/2017

4. Select **Un-reserve Order**.

Figure 20-25 Un-reserve Order Menu Option

Delivery Order		Age 0 days, 0 hrs, 15 mins		Sandy Gu	
0999001001821		Reference # 0999001001821-3		Open	
Order Info Order Date 09/26/2017 Order Origin 999 Under Review No Comments		Customer Info Address 12345 Scofield Farms Solon, OH 44139 Company Email Phone 353432432432432		Order Totals Subtotal \$547.96 Freight \$55.60 Tax Amount \$43.84 Total \$647.40 Balance Due \$0.00	
Item	Item Status	Qty	Source Location	Order Destination	Ext Price
1003 TIE WAIST SHIRT DRESS	Accepted	1	201 Weiss Furs	Delivery: USPS Parcel Post Sandy Gu 12345 Scofield Farms Solon, OH 44139	\$63.69
1004 BLK WHITE CAP SLEEVE DRESS	Accepted	3	201 Weiss Furs	Delivery: USPS Parcel Post Sandy Gu 12345 Scofield Farms Solon, OH 44139	\$191.06
1005 PEASANT TOP JERSEY DRESS	Accepted	1	201 Weiss Furs	Delivery: USPS Parcel Post Sandy Gu 12345 Scofield Farms Solon, OH 44139	\$73.30
	Reserved	3	201 Weiss Furs	Delivery: USPS Parcel Post Sandy Gu 12345 Scofield Farms Solon, OH 44139	\$219.01
Back Help Accept Order Reject Order Pick/ Reserve Order Un-reserve Order Check Inventory Ship Order Cancel Order Print Shipping Label Register					

The order status changes to Open, and the Item Status changes to Accepted.

Cancel Order

Orders that customers have failed to pickup can be cancelled at a store if no deposit or money has been taken and the items returned to on-hand inventory for that store.

Orders that have had a deposit taken, associates should contact the customer to remind them to collect the order or to refund/cancel it in the Register mode.

To cancel an omnichannel order that has not been collected:

1. Open an existing order, see [View Selected Order](#).
2. Click **Cancel Order**.

Figure 20-26 Cancel Order Confirmation Prompt

Cancel Order

Are you sure you want to cancel the items?

No

Yes

3. Confirm you want to cancel the order:
Click **No** to return to the order without canceling it. Click **Yes** to cancel the order.
4. Select a reason code to cancel the order.

Figure 20-27 Cancel Order Reason Code

The screenshot shows a mobile application interface for selecting a reason code. At the top, a teal header bar contains the text 'Reason Code' and 'Select a reason code from the list.' Below this is a dark grey bar with the word 'Reasons'. The main area is a white list box containing the text 'Customer no show' with a small cursor icon next to it. At the bottom of the screen is a dark grey button labeled 'Back'.

The [Order Status](#) is updated to Cancelled and the on-hand inventory automatically adjusted.

Reject Order

When you reject an order or specific item in the order, it changes the order status to open sends it back to the Order Broker where another source/fulfilment location is determined.

1. At the Order Maintenance screen, select specific items or for the entire order, select the **Reject Order** menu option.
2. At the Reject Order confirmation prompt, select **Yes** to reject the order.

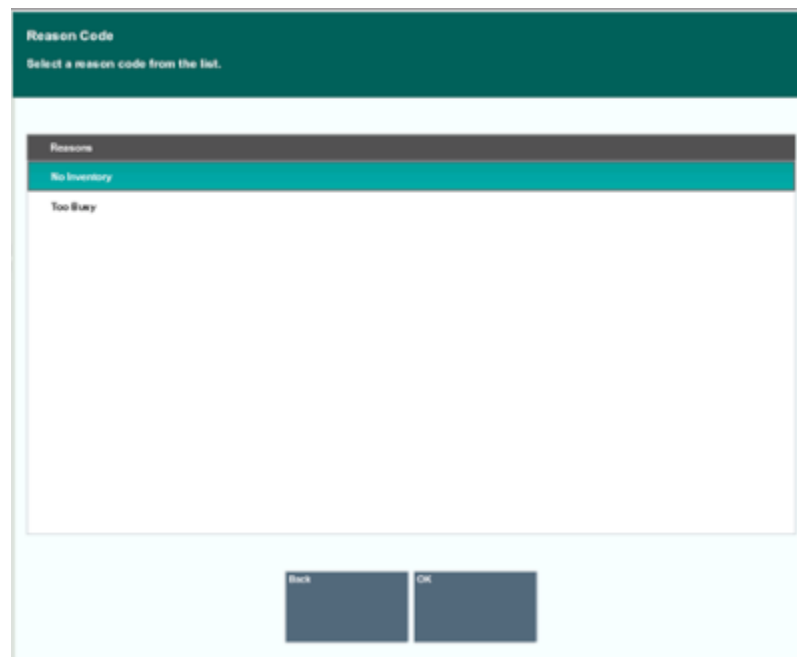
Figure 20-28 Reject Order Confirmation Prompt



A screenshot of a mobile application interface for rejecting an order. The screen has a dark teal header with the text "Reject Order". The main area is light blue and contains the question "Are you sure you want to reject this order?". At the bottom, there are two dark blue buttons labeled "No" and "Yes".

3. If prompted, select a reject reason code.

Figure 20-29 Reject Order - Reason Code Prompt



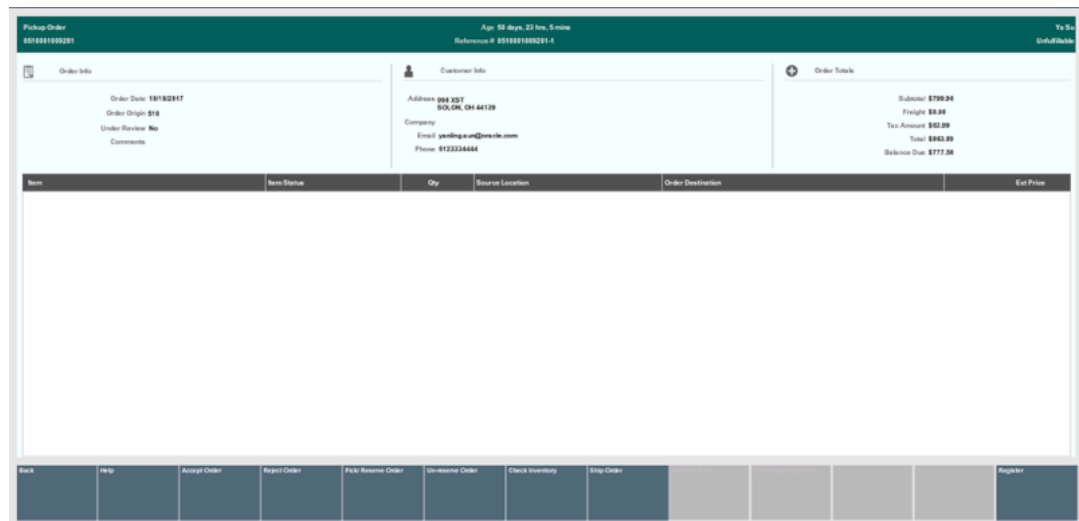
A screenshot of a mobile application interface for selecting a reason code. The screen has a dark teal header with the text "Reason Code" and "Select a reason code from the list.". Below the header is a list of reasons. The first reason, "No Inventory", is highlighted with a teal background. The second reason, "Too Busy", is visible below it. At the bottom, there are two dark blue buttons labeled "Back" and "OK".

 Note:

This order is sent back to the Order Broker where another source/fulfilment location is determined. If a source location is not found, the order status becomes unfulfillable. It may take a few minutes for the status to change from Open to Unfulfillable.

If the order is unfulfillable, you will want to cancel it and refund the customer. Orders are cancelled through the Register, see the *Oracle Retail Xstore Point of Service Classic User Guide*.

Figure 20-30 Rejected Order - Unfulfillable



Shipping an Order

For Delivery type orders, select the Ship Order menu option to ship the items. Oracle Retail Xstore Point of Service creates the Shipping Document for this order. This option is only available at the order sourcing location when the status of the items on the order is Reserved.

1. At the Order Maintenance screen, select the **Ship Order** menu option.

Figure 20-31 Order Maintenance Screen - Ship Order Menu Option

The screenshot displays the 'Transfer Pickup Order' screen. At the top, it shows 'Run: 42 Secs, 32 Ins, 49 mins' and 'Reference # 001001000204-1'. The screen is divided into three main sections: Order Info, Customer Info, and Order Totals. The Order Info section includes Order Date (18/02/17), Order Origin (018), Order Review (No), and Comments. The Customer Info section includes Address (6381 Shaw Park, Bates, OR 97108), Company, Email, and Phone (503/6715222). The Order Totals section includes Subtotal (\$67.99), Freight (\$5.99), Tax Amount (\$5.44), Total (\$79.42), and Balance Due (\$66.99). Below these sections is a table with columns: Item, Item Status, Qty, Source Location, Order Description, and Est Price. The table contains one row for item 1005, 'PULANAT TOP JERSEY DRESS', with a status of 'Reserved', quantity of 1, source location of '01000 Corner Market', order description of 'Pickup: 010 Corner Market, 30000 Shaw Industrial/Phony, Bates, OR 97109', and an estimated price of \$67.99. At the bottom of the screen is a navigation bar with buttons: Back, Help, Accept Order, Reject Order, Pick Reserve Order, Un-assign Order, Check Inventory, Ship Order (highlighted with a red box), and Register.

2. When prompted, select **Yes** to confirm you want to ship the order.
3. When prompted, select **Yes** to print a shipping label.
4. If prompted, enter the total weight for the shipment and select **Process**.
5. When prompted whether to accept the shipping method chosen when the order was set up, perform one of the following steps:

Figure 20-32 Shipping Label - Original Shipping Method Prompt

The screenshot shows the 'Shipping Label' screen. It has a dark green header with the text 'Shipping Label'. The main area is light blue and contains the text 'Continue with originally selected shipping method of 'USPS Parcel Post''. At the bottom, there are two buttons: 'Override Shipping Method' and 'OK'.

- To accept the shipping method selected during order setup, press **Enter** and go to step 6.
- To change the shipping method selected during order setup, select **Override Shipping Method**, select a shipping method from the list and press **Enter**.

 Note:

The **Override Shipping Method** option is controlled by security. You are prompted for Manager override if you do not have the required level of security to perform this function as indicated by the Security Override icon shown here.

6. Print the shipping label. If the shipping carrier's label cannot be printed for any reason, you can print a label manually by following the prompts for label location selection and printing.
7. If prompted, enter the tracking number for the shipment and select **Process**.
8. If prompted, to print a packing slip for the shipment, select **Yes** to print the packing slip.

Oracle Retail Xstore Point of Service returns to the Order maintenance screen. The status for each item is updated to either In Transit if the order is being shipped to another store or Fulfilled if the order is being shipped directly to the customer.

Figure 20-33 Updated Item and Order Status - In Transit

Transfer Order					
Apr 29, 2016 10:10 AM					
Reference # 010001000002-3					
Order Info		Customer Info		Order Totals	
Order Date: 11/09/2017		Address: 999 XST		Subtotal: \$1,964.95	
Order Origin: 0100		SOL, OH, 44129		Freight: \$0.00	
Under Review: No		Company: yandling@oreacle.com		Tax Amount: \$97.00	
Comments:		Email: yandling@oreacle.com		Total: \$1,162.95	
		Phone: 9122344664		Balance Due: \$1,964.95	
Item	Item Status	Qty	Source Location	Order Description	Est Price
1985	PELAKT TOP JERSEY DRESS	0	01000	Pickup: 0100 Corner Market	\$209.95
	USPS Parcel Post			35000 Shreve Industrial/Phary	
	Tracking #: 123123123123123			Shreve, OH 44129	
1984	BULK WHITE CAP SLEEVE DRESS	0	01000	Pickup: 0100 Corner Market	\$247.50
	USPS Parcel Post			35000 Shreve Industrial/Phary	
	Tracking #: 123123123123123			Shreve, OH 44129	
1983	THE WABT SHIRT DRESS	0	01000	Pickup: 0100 Corner Market	\$247.50
	USPS Parcel Post			35000 Shreve Industrial/Phary	
	Tracking #: 123123123123123			Shreve, OH 44129	

Maintaining/Viewing an Order

If an Order Broker order was created in your store, you can use the following steps to track the progress of the order as it is processed.

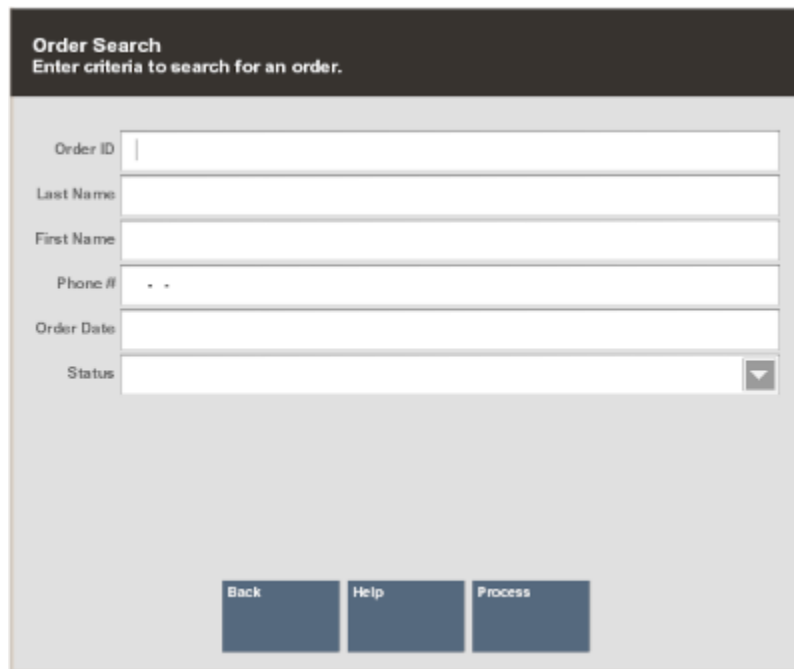
1. To maintain/view an order, select the **Customer** option from the Back Office Main Menu.
2. Select the **Order Options** option from the Customer menu, then select the **Order Maintenance** option from the Order Options menu. See [Figure 20-4](#).
3. At the Order Search form, enter the search criteria needed to find an order:

 Note:

To find all pending orders for fulfillment, select the Open Order Status value as the search criterion.

- **Order ID** - The order identifier number.
- **Last Name** - The customer's last name.
- **First Name** - The customer's first name.
- **Phone** - The customer's phone number.
- **Order Date** - The date the order was set up.
- **Order Status** - See [Order Status Values](#).
- **Failed to Pickup**: Select **Yes** to search for orders that have not been collected within a certain time from when the order was ready for pick up.

Figure 20-34 Order Search Form

The image shows a web form titled "Order Search" with the instruction "Enter criteria to search for an order." The form contains several input fields: "Order ID", "Last Name", "First Name", "Phone #" (with a placeholder " - -"), "Order Date", and "Status" (a dropdown menu). At the bottom of the form are three buttons: "Back", "Help", and "Process".

Order Search	
Enter criteria to search for an order.	
Order ID	
Last Name	
First Name	
Phone #	- -
Order Date	
Status	
Back Help Process	

4. At the Order Search results list, select an order and press **Enter**.

Figure 20-35 Order Search Results List

Order ID	Customer	Order Type	Phone	Status Date
8225862889145	Sukro Sharma	Pickup	899-765-4321	Open 18/04/2017
8225862889145	Sukro Sharma	Transfer Pickup	899-765-4321	Open 18/04/2017
8519861889297	Laurie Bellard	Transfer Pickup	912-471-6232	Open 18/07/2017
5100864080002	Laurie Bellard	Transfer Pickup	912-471-6232	Open 18/07/2017
8519861880008	Laurie Bellard	Transfer Pickup	912-471-6232	Open 18/07/2017
5100864080003	Laurie Bellard	Transfer Pickup	912-471-6232	Open 18/07/2017
8519862889128	Kara Smith	Transfer Pickup	448-292-6414	Open 18/08/2017
8519831880002	Laurie Bellard	Transfer Pickup	912-471-6232	Open 18/08/2017
8519831880004	Laurie Bellard	Pickup	912-471-6232	Open 18/08/2017
5100862880002	Laurie Bellard	Transfer Pickup	912-471-6232	Open 11/02/2017
00510001880264	Yu Su	Transfer Pickup	912-333-4444	Open 11/07/2017

The system displays the Order maintenance screen. See [Figure 20-7](#) for details.

Allocating an Item

If you do not use the Oracle Retail Xstore Point of Service Back Office receiving module to receive items, select the **Allocate Items** menu option at the Order maintenance screen to automatically mark the item as received and ready for pickup. This allocation process performs all the Order Broker updates, local status updates, and customer e-mailing rules typically performed by the Oracle Retail Xstore Point of Service receiving module and moves ON_HAND inventory to the ORDER bucket for allocation purposes.

The Allocate Items menu option is only available when the following conditions are true:

- Your system is not set up to auto-generate receiving documents
 - The order type is either Transfer Pickup or Web Pickup
 - This is the store where the order is to be picked up
 - The items on the order have a status of In Transit
1. To allocate items, select the **Allocate Items** menu option at the Order maintenance screen.
 2. When prompted, select **Yes** to confirm you want to receive the item(s). The system updates the item status to Received and the order status is updated to Ready for Pick Up.

Same Day Orders

Xstore POS now supports the ability for orders to be delivered via a courier the same day the order is placed. This new feature is an integration with the new Collect and Receive platform which works directly with the courier. When the 'Same Day' functionality is configured in Xstore, the order maintenance functionality has been modified to handle the ability to prepare orders to be picked up by a courier, and delivered to the customer.

If an Omnichannel order arrives in the store to pick/pack status with the Same Day Delivery attribute from Order Broker via the web service then a store message automatically generates. The message will state, "There are XX orders that require same day delivery. Please review them in Order Maintenance". The message will include the number (XX) of Same Day orders.

The message will stay active until all Same Day Delivery orders have been Accepted or Rejected using Order Maintenance.



Note:

In order to accept a same day order, you must be able to fulfill the **entire** order. If any item is **not available** the order must be **rejected**. See [Reject Orders](#).

Same Day Order Maintenance

Xstore POS can be configured to support Same Day Orders. Once an order is assigned to the store to be fulfilled as a Same Day Order, use Order Options to maintain those orders. A store can only see Same Day orders assigned to them.

If your store has been assigned as the source to fulfil an Order Broker Same Day order, you need to use this process to ship the items to the customer on the same day.

To maintain/view an order:

1. Select **Customer** from the Main Menu.
2. Select **Order Options** from the Customer menu.
3. Select the **Order Maintenance** option from the Order Options menu.
4. At the Order Search form, enter the search criteria needed to find an order:
 - **Order ID:** The order identifier number.
 - **Last Name:** The customer's last name.
 - **First Name:** The customer's first name.
 - **Phone:** The customer's phone number.
 - **Order Date:** The date the order was set up.
 - **Order Status:** See [Order Status](#).

- **Failed to Pickup:** Select **Yes** to search for orders that have not been collected within a certain time from when the order was ready for pick up.
 - **Same Day:** Select **Yes** to see only Same Day Delivery orders in the search results. Select **No** to remove all Same Day Delivery order in the search results.
5. At the Order Search results list, select an order.
- The system displays the Order maintenance screen.

Same Day: View Order

Selecting a same day order from the Search List displays the Order Maintenance screen.

The following information is displayed on this screen:

Table 21-1 Order Maintenance Screen

Component	Description
1. Static Area	Contains the type of order, Customer Name, order number, age information, and reference number. The order number is the number provided by the system that requested/originated the order. The reference number is an optional value that identifies the order. It is the order ID appended with last order line sequence number. The status displays on the far right. See Order Status for status definitions. Order Type values include the following: • Transfer Pickup Order (Pickup This Store) • Pickup Order (Pickup Other Store) • Delivery Order (Customer Delivery)
2. Order Information	• Order Date - The date and time the order was created. • Order Origin - The location in which the order was created. • Under Review - Yes or No. • Failed to Pickup -Yes or No. • Comments - Any notes associated with the order. • Same Day - Yes or No.
3. Customer Information	• Sold To - The purchasing customer's name and address information. • Company - The purchasing customer's company, if applicable. • Email - The purchasing customer's email address. • Phone - The purchasing customer's telephone number(s).
4. Order Totals	• Subtotal - The order subtotal (the shipping fee amount is not included in the subtotal). • Deposit - The amount of deposit, if any. • Tax Amount - The tax on the order. • Freight - The freight cost associated with the order. • Total - The total for the order (the shipping fee amount is included in the total). • Balance Due - The amount due for the order.

Table 21-1 (Cont.) Order Maintenance Screen

Component	Description
5. Item Information	• Item - The item identifier and description. • Status - The item status. See Item Status. • Qty - The item quantity. • Source Location - The location name and ID that sourced the order request. • Order Destination - The delivery method and delivery address, or pickup location for the order. • Ext Price - The item's extended price (the item quantity x the item unit price - discounts).

Select an option from the Context Menu to process the Same Day order: [Accept Order](#), or [Reject Order](#). While the other options are available, you can only Accept or Reject a Same Day order at this point in the process.

Same Day: Accept Order

To Accept a same day order:

1. At the Order Maintenance screen, select the **Accept Order** menu option.
2. At the confirmation prompt, select **Yes** to accept the order, or select **No** to close the prompt and return to the order.

Result: If **Yes** is selected, the order is accepted and you proceed to the next step: [Pick/Reserve Order](#).

Same Day: Pick/Reserve Order

After accepting an order, **all** the items must be retrieved and put aside. When picking/reserving items for an order, the screens shown are dependent on your store's configuration.

To Pick/Reserve a same day order:

1. At the Order Maintenance screen, select the **Pick/Reserve Order** menu option.
2. At the confirmation prompt, select **Yes** to pick/reserve the order, or select **No** to close the prompt and return to the order.

Result: If **Yes** is selected, all the items in the order are picked/reserved.

3. Click **OK** to close the confirmation.

Same Day: Ship Order

For Same Day Delivery type orders, select the Ship Order menu option to ship the items. Xstore POS creates the Shipping Document for this order. This option is only available at the order sourcing location when the status of the items on the order is Reserved.

A key difference for Same Day orders is after the order has been Shipped, Xstore will not send a fulfillment updated to Order Broker. The fulfillment update to Order Broker will happen when the courier picks up the package(s) and is part of the Package Collection process below.

1. At the Order Maintenance screen, select **Ship Order** from the Order Maintenance menu.
2. When prompted, select **Yes** to confirm you want to ship the order or select **No** to return to the order.
3. Click the Package Count dialog box to display the Package Count.
4. Use the on screen number pad to **enter the number of packages** in the order. Reset the number entered at any time by clicking the red x.
5. Select the curved left facing arrow to accept the package count.

 Note:

If the package count exceeds the number of items on the order, a prompt will appear instructing the associate to select packages that are less than or equal to the number of items on the order. If at any point the items cannot be shipped, then the order must be Unreserved and Rejected. See [Reject Order](#) for those details.

6. Select **Process** to continue, or select **Cancel** to return to the order.
7. For same day shipping you are **required** to select **Yes** to print a shipping label.

 Note:

The next steps may vary based on the type of printing system used by your retailer.

8. Confirm the label selection and click **Process**, or click **Back** to return to the order.
9. Follow the instructions in the Print Label window and click **OK** to print, or **Cancel** to return to the order.
10. Select the **Printer Name**.

 Note:

The selections displayed are based on the printers available in your location.

11. Click **OK** to submit the print job.
12. If prompted, to print a packing slip for the shipment, select **Yes** to print the packing slip.
13. Select the **Printer Name**.

 Note:

The selections displayed are based on the printers available in your location.

Result: The packing slip print job is submitted. Click **OK** to proceed to the next step.

14. If the courier fails to arrive then see [Same Day: Unpack Order](#) otherwise proceed to the next step.

15. When the courier arrives to pick up the order for delivery, a document is needed to confirm to the courier the items in the order. The document is a Courier Delivery Handover.

Select **Yes** to print the courier delivery handover document.

16. Select the **Printer Name**.

Result: The courier delivery handover print job is submitted. Click **OK** to proceed to the next step.

17. The system books the courier, the Courier Booked displays the provider and pickup deadline. Click **OK** to proceed to the next step.

18. The order can now be viewed in Order Maintenance and has an internal Xstore status of 'Awaiting Collection'. This status is not shared with any other systems. At this point the associate should put the packages aside with the hand off document until the courier comes to the store to pickup the ordered packages.

When the courier arrives at the store, proceed to [Same Day: Package Collection](#).

 Note:

Once an order is awaiting collection you can also use the criteria Status > Awaiting Collection in the Order Search Form.

Same Day: Package Collection

Package Collection occurs when the courier arrives at the store to pick up and deliver the same day order. To complete the Same Day Order process do the following:

1. When the delivery driver collects the order click Package Collection.

Result: The Package Collection window displays.

2. Click **Yes** to confirm all packages in the order have been confirmed and collected by the delivery driver, or click **No** to return to the order.

If **Yes** is selected, the order is marked **Complete** and Xstore sends an order fulfillment update to Order Broker.

Same Day: Unpack Order

There are two scenarios where Unpack Order is used.

- **Courier Fails to Arrive at Store for Pickup**

If the courier fails to arrive at the store by the designated deadline do the following.

1. Navigate to the Order Maintenance Menu.
2. Search for the order using the criteria Status > Awaiting Collection.
3. Select the desired order from the search results.
4. Click **Unpack Order**.

The Unpack Order prompt displays.

5. Click **Yes** to cancel the order and return the items to inventory, or click **No** to return to the order.

- **Courier Returns to Store with Items**

In some cases the courier is unable to complete the delivery and returns to the store with items. In this scenario do the following:

1. Navigate to the Order Maintenance Menu.
2. Search for the order using the criteria Order ID and enter the Order Number.
3. Select the order from the search results.
4. Click **Unpack Order**.

The Unpack Order prompt displays.

5. Click **Yes** to cancel the order and return the items to inventory, or click **No** to return to the order.

Local Inventory Order Maintenance

A Local Inventory Order uses inventory from the local store inventory only, that is from stock in the store/on hand.

A Local Inventory Order account is created at the register via **Extended Transactions** and payment requested for the Customer Not Present transaction. After full payment is received, an associate can search for the paid Local Inventory Order to pick/reserve the items. The items are moved in preparation for collection by the customer at the store.

**Note:**

Refer to Creating a New Local Inventory Order in the *Oracle Retail Xstore Point of Service Classic User Guide* for information about setting up these orders at the POS.

If the customer decides that they don't want to pick up the item(s), the cancelation of the order is processed. If full payment was made, the customer is provided a refund for the amount.

**Note:**

Refer to Canceling a Local Inventory Order in the *Oracle Retail Xstore Point of Service Classic User Guide*.

Local Inventory Orders as an account type, has been added to the current report, Customer Account Activity Report.

Run the **Customer Account Activity Report** and filter on Local Inventory Orders in the **Customer Account Type** drop-down to get a report on the store's Local Inventory Orders.

In the **Customer Account Status** field, you can further filter to see all Local Inventory Orders that have not been paid by the tender type, Pay By Link.

**Note:**

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

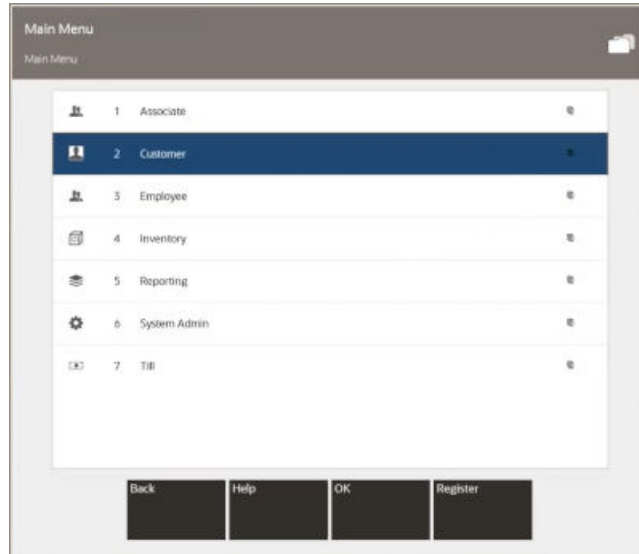
This chapter covers the following topics:

- [Accessing Local Inventory Order Maintenance](#)
- [Local Inventory Order Screen](#)
- [Pick/Reserve Local Inventory Order Items](#)

Accessing Local Inventory Order Maintenance

1. Select the Back Office option.

Figure 22-1 Back Office Main Menu - Customer Option

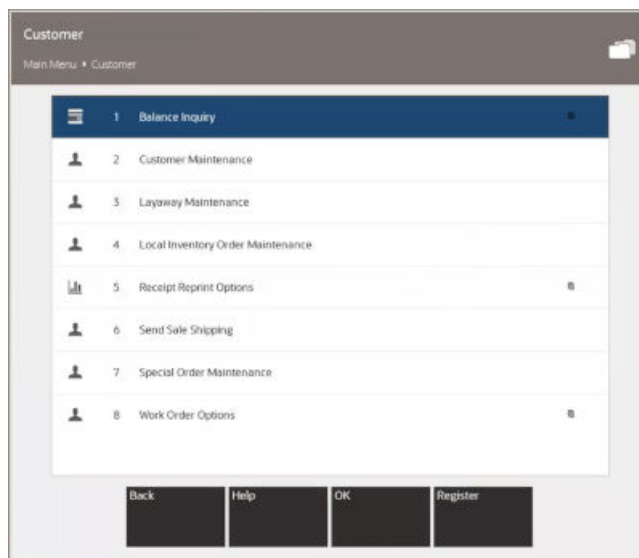


 Note:

You can also press the number or letter associated with the menu option on the keyboard to access the function.

2. After logging in to the Back Office, select the **Customer** option from the Back Office Main Menu.

Figure 22-2 Customer Menu



3. Select **Local Inventory Order Maintenance** from the Customer menu.
4. Xstore Classic displays the **Local Inventory Order Search** form, prompting for search criteria. Enter the criteria you want to use for finding an order record and select **Process**.

Figure 22-3 Local Inventory Order Search Form

The screenshot shows a web form titled "Local Inventory Order Search". Below the title is a header bar with the text "Enter search criteria:". The form contains several input fields: "Order ID", "Last Name", "First Name", "Phone #", "Order Date", and "Order Status" (which is a dropdown menu). At the bottom of the form are three buttons: "Back", "Help", and "Process".

- If you enter a Local Inventory Order ID, the system displays that Local Inventory Order record if the ID exists and if it is unique.
- Your search criteria may result in multiple records being found. Your system may also be set up to display the accounts list even when only one record is found. You must select the record you want from the list.

Select a record from the list and Xstore Classic displays the **Local Inventory Order** screen for the selected record.

Local Inventory Order Screen

Figure 22-4 Local Inventory Order - Completed Order

Local Inventory Order Account ID: L000000000002 Sales Date: 10/18/2021 Line Activity Date: 10/18/2021 Status: Closed

Detail Activity Comments

Customer Info

Sold To: Sandie Rimskaya
Address:
Email:
Phone: 973-450-0043

Order Totals

Subtotal	\$35.00
Fees	\$0.00
Tax	\$2.90
Total	\$37.90
Balance Due	\$0.00

Status	Item ID	Description	Qty	Ext Price
Picked Up	330104	Red XL Tee Shirt	1	\$11.25
Picked Up	330105	Red XXL Tee Shirt	1	\$11.25
Picked Up	330201	Green S Tee Shirt	1	\$12.50

Back Help Pick/Reserve Previous Tab Next Tab Register

The Local Inventory Order Maintenance screen is divided into three tabs: Detail, Activity, and Comments. You can navigate between the tab sections by selecting the Detail tab or swiping right to left.

At the top of each tab, is the [Static Information Area](#).

Each tab contains specific information about the customer's order account.

- [Detail Tab](#): Shows the customer and item information for the Local Inventory account.
- [Activity Tab](#): Shows the activity information for the Local Inventory account.
- [Comments Tab](#): Shows any comments associated with the Local Inventory account.

Static Information Area

The upper portion of the screen shows the summary information for the Local Inventory Order, including its status and customer contact information. This panel is always displayed when viewing any of the tabs on this screen.

Detail Tab

The Details tab, as shown above, contains the following information:

- [Customer Information](#)
- [Order Totals](#)
- [Item Details](#)

Customer Information

The customer information area displays:

- **Sold To:** The purchasing customer's name and address information.
- **Company:** The purchasing customer's company, if applicable.
- **Email:** The purchasing customer's email address.
- **Phone:** The purchasing customer's telephone number(s).

Order Totals

The order totals information displays:

- **Subtotal:** The order subtotal (the shipping fee amount is not included in the subtotal).
- **Tax:** The tax on the order.
- **Total:** The total for the order (the shipping fee amount is included in the total).
- **Balance Due:** The amount due for the order.

Item Details

- **Status:** The status of the item (Open, Received, Picked Up, Cancelled).
- **Item ID:** The item identifier.
- **Item Description:** The item description.
- **Quantity:** The item quantity.
- **Ext. Price:** The extended price for the item (price x quantity).

Activity Tab

Figure 22-5 Local Inventory Order Activity Tab

Local Inventory Order		Account ID LOG101001000002	Setup Date 10/18/2021	Last Activity Date 10/18/2021	Status Closed		
Detail		Activity		Comments			
Date	Type	Activity	Item ID	Amount	Store	Reg	Trans ID
10/18/2021	Item	Added	330104	\$11.25	101	1	117
10/18/2021	Item	Added	330105	\$11.25	101	1	117
10/18/2021	Item	Added	330201	\$12.50	101	1	117
10/18/2021	Deposit	Added		(\$37.80)	101	1	117
10/18/2021	Item	Modify Status	330104		101	1	117
10/18/2021	Item	Modify Status	330105		101	1	117
10/18/2021	Item	Modify Status	330201		101	1	117
10/18/2021	Item	Picked Up	330104	\$11.25	101	1	119
10/18/2021	Item	Picked Up	330105	\$11.25	101	1	119
10/18/2021	Item	Picked Up	330201	\$12.50	101	1	119
Back	Help	Pick/Reserve				Previous Tab	Next Tab
						Register	

The Activity tab shows the activity information for the account such as items added, and payment made and contains the following information:

- **Date:** The date the Local Inventory Order activity took place.
- **Type:** The order activity type associated with the amount of the activity.
- **Activity:** The action performed.
- **Item ID:** The item identifier.
- **Amount:** The amount for the associated type of activity on the account.
- **Store:** The store identifier where the order activity took place.
- **Reg:** The register identifier where the order activity took place.
- **Tran ID:** The transaction identifier for the order activity.

Comments Tab

Figure 22-6 Local Inventory Order Comments Tab

The screenshot shows the 'Comments' tab selected in the 'Local Inventory Order' screen. The top header bar includes the title 'Local Inventory Order', 'Account ID: L00101001000002', 'Setup Date: 10/18/2021', 'Last Activity Date: 10/18/2021', and a 'Status: Closed' indicator. Below the header, there are three tabs: 'Detail', 'Activity', and 'Comments', with 'Comments' being the active tab. The main content area displays a table with the following data:

Created Date	Created By	Comment
October 18, 2021	100	Will be in on Saturday morning

Below the table, there is a large empty white space for additional comments. At the bottom of the screen, there is a navigation bar with buttons for 'Back', 'Help', 'Add Comment', and several other unlabeled buttons, followed by 'Previous Tab', 'Next Tab', and 'Register'.

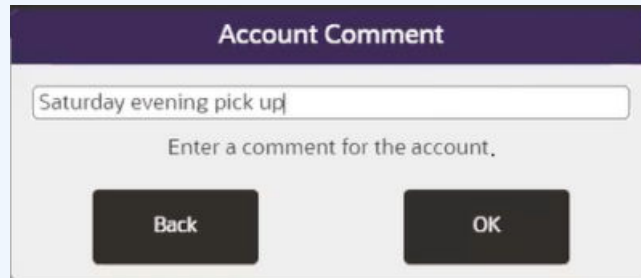
The Comments tab allows you to review any comments associated with the account and contains the following information:

- **Created Date:** The date this comment was added to this Local Inventory Order account record.
- **Created By:** The identifier for the employee who created the comment.
- **Comment:** The text that was entered.

 Note:

You can also add a new comment for this order account record when viewing this tab. Select the **Add Comment** option.

Type a comment.



Press **OK**. Xstore Classic adds the new comment to the order account record.

Pick/Reserve Local Inventory Order Items

1. Find the Local Inventory Order. See [Accessing Local Inventory Order Maintenance](#).
 - If prompted, enter search criteria to find the Local Inventory Order.
 - If a customer has been associated with the transaction, Xstore Classic returns a list of Local Inventory Orders for the customer.
2. Select a Local Inventory Order from the list. Only paid for open orders can be selected for picking.
3. At the Local Inventory Order screen, select **Pick /Reserve** to fulfil the order.
4. If prompted, select **Yes** to pick up all the items.

 Note:

This prompt only displays when there are multiple Local Inventory Order items.

5. If Xstore Classic is configured to scan items at this Pick/Reserve process, you will need to scan the items to ensure they match the order. As items are scanned/entered they will be removed from the pick list and the item/order is marked as Ready for Pickup.

If Xstore Classic is not configured to scan items at the Pick/Reserve process, a pick slip with the items on it will print from the receipt printer. The items/order is marked as Ready for Pickup.

6. Select **OK**.

23

Shelf Labels

You can print shelf labels for any item in the current item file. Shelf labels can be printed to a laser report printer if the report printer supports printing multiple labels per page, or to a label printer if using ZPL II communication. In addition to scanning/entering items in order to print labels, the system also provides an option to print shelf labels for all of the items on an entire receiving document at once, and from previously saved batches if using ZPL II communication.



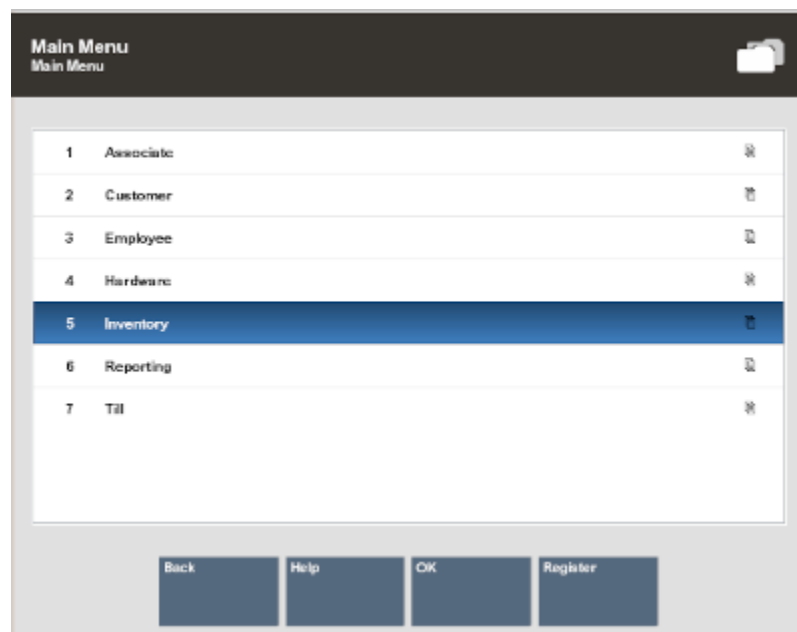
Note:

You must load the appropriate label stock into the printer for each label printing job. The system does not perform a check for the correct stock before printing.

Printing Shelf Labels

1. After logging in to the Back Office (see [Accessing the Back Office](#)), select the Inventory option from the Main Menu and press **Enter**.

Figure 23-1 Back Office Main Menu - Inventory Option

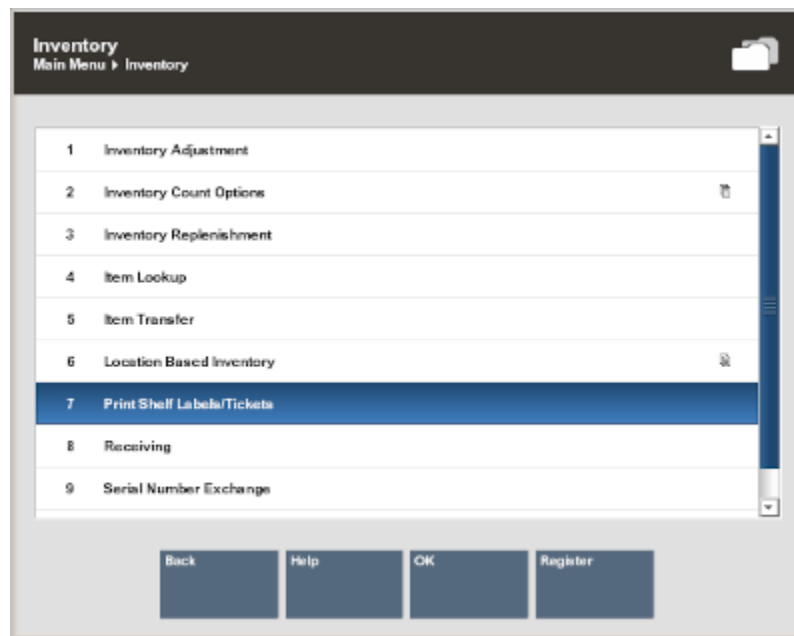


 Note:

Instead of scrolling up or down the menu list to select an option, you can immediately access any option on the menu by pressing the number or letter associated with it on the keyboard (3=Employee, 5=Inventory, C= Customer, and so on).

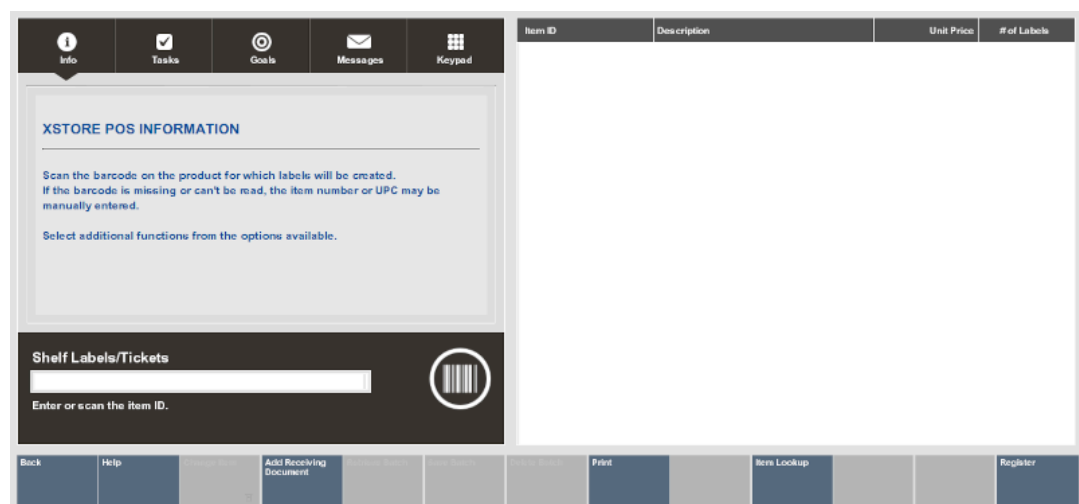
2. At the Inventory menu, select the Print Shelf Labels/Tickets option and press **Enter**.

Figure 23-2 Inventory Menu



3. When prompted scan the barcode or manually enter the item Id and press **Enter**.

Figure 23-3 Item ID Prompt



 Note:

If you are using ZPL II communication with a label printer, the Retrieve Batch option is available if you previously defined and saved a named print batch. See [To Retrieve a Batch - ZPL II Only](#).

When prompted for the number of labels you want to print for this item, type the quantity and press **Enter**.

Figure 23-4 Label Quantity Prompt

 **Note:**

By default, the system displays the number of items in your on hand inventory.

4. The next steps depend upon your label printer setup:
 - If you are not using ZPL II communication with a label printer, continue with step 5 below.
 - If you are using ZPL II communication with a label printer, skip to [ZPL II Label Printers](#).
5. Oracle Retail Xstore Point of Service adds each Item Id and number of labels to the View Port area of the screen. The item description and unit price are also shown.

Figure 23-5 View Port Displays Items Added for Labels



Additional Options:

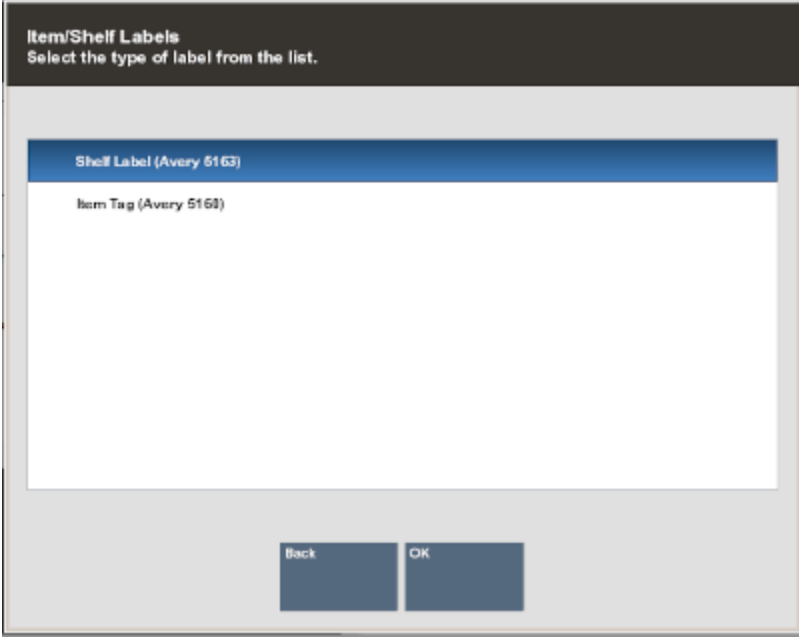
 Note:

- **Change Item** - To remove an item from the list, change the label quantity, or change the item label price, see [To Change an Item](#).
- **Item Lookup** - To search for an item to add to the list, see [To Look Up an Item](#).
- **Add Receiving Document** - To add items from a receiving document, see [To Add a Receiving Document](#).

6. When you have entered and/or edited all the items and label quantities, select the **Process** option to continue with label setup.

Oracle Retail Xstore Point of Service prompts you to select the type of label from the list. Select the label type and press **Enter** to continue.

Figure 23-6 Item/Shelf Labels - Select Type

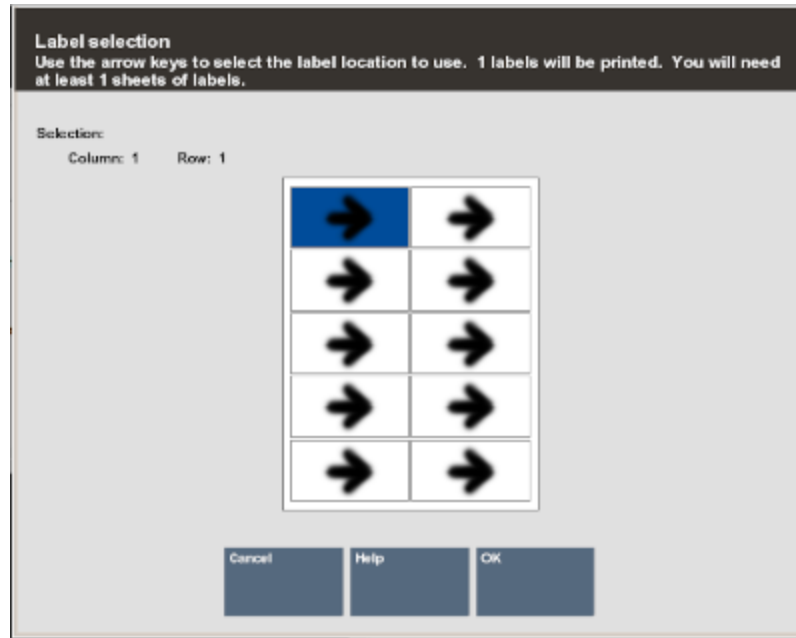


7. Oracle Retail Xstore Point of Service shows the number of label sheets you need and prompts you to select the location for the first printed label. Select the location for the first label and press **Enter**.

 Note:

The column/row you selected is shown in the Selection area on the form. In [Figure 23-7](#), Column: 1, Row: 1:

Figure 23-7 Label Location Prompt

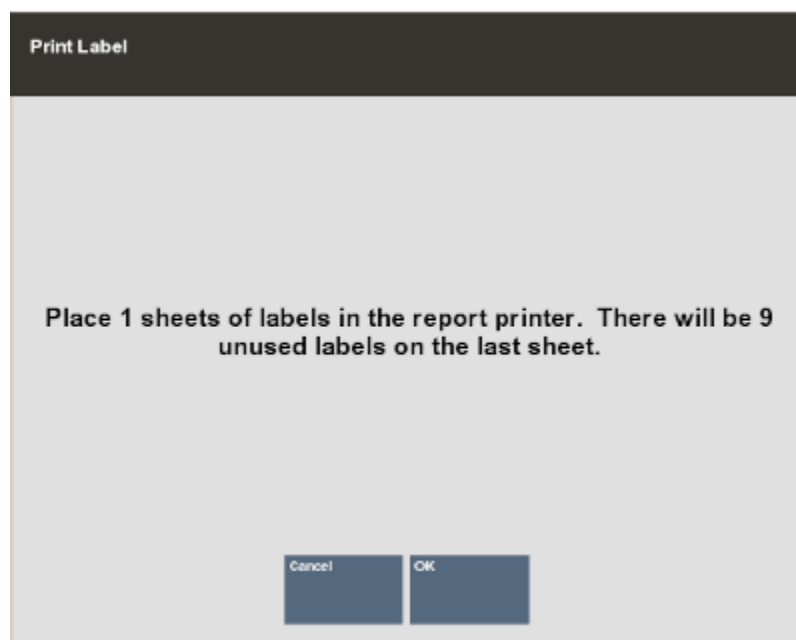


 Note:

Label location selection allows you to use partial sheets of labels to ensure that expensive labels are not wasted.

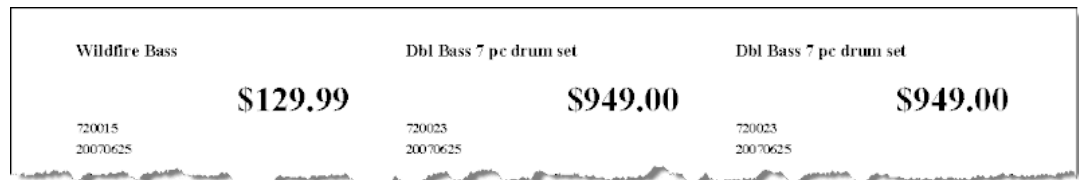
8. When prompted, press **Enter** to acknowledge the message informing you of the number of label sheets required.

Figure 23-8 Print Label Prompt



9. Oracle Retail Xstore Point of Service flashes a message Calculating label layout and prints the labels.

Figure 23-9 Sample Labels



 Note:

If you exit from the Item/Shelf Labels screen without printing the labels, Oracle Retail Xstore Point of Service displays a warning message that all current label settings will be lost. Select **Yes** to return to the Inventory Menu or select **No** to continue working with labels.

ZPL II Label Printers

...continued from step 4.

 Note:

If you previously defined and saved a Named Batch, you can retrieve the batch by selecting Retrieve Batch from the Item/Shelf Labels menu. See [To Retrieve a Batch - ZPL II Only](#).

1. After entering the item Id and label quantity:
 - If the item you entered is associated with a pre-defined stock label type, the item is automatically added to the view port with this icon Go to step 2.
 - If the item you entered is not associated with a pre-defined stock label type, you are prompted to select a label type from the list. This assigns the selected label type to the item for this instance only not for future label printing and does not affect future label printing.
 - Select the stock label type.
 - Select a processing option:
 - Select **Process** to associate the stock label type to the item.
<OR>
 - Select **Assign To All** to assign the selected Stock type to all items in the current list.

 Note:

All items in the list will print on the same label stock type. However, this selection will not update the pre-defined stock type of the items and will not apply to items that are added after the **Assign To All** option is selected.

- Xstore returns to the Enter/Scan Item Id prompt screen.
2. The following options are available before printing the labels:
 - **Change Item** - To remove an item from the list, change the label quantity, change the item label price, or change an item's stock label type, see [To Change an Item](#).
 - **Item lookup** - To search for an item to add to the list, see [To Look Up an Item](#).
 - **Add Receiving Document** - To add items from a receiving document, see [To Add a Receiving Document](#).
 - **Retrieve Batch** - To print a previously saved batch, see [To Retrieve a Batch - ZPL II Only](#).
 - **Save Batch** - To save this label printing instance as a batch, see [To Retrieve a Batch - ZPL II Only](#).
 3. When you have entered and/or edited all the items and label quantities, select the Process option to continue with label printing.

 Note:

Before printing, Oracle Retail Xstore Point of Service automatically groups the items by stock type and verifies all items are associated with a label stock type. If Oracle Retail Xstore Point of Service detects that any of the items do not have an assigned label stock, you are prompted to select a label stock.

4. Xstore displays the Load Label Type message.
 - Select **Print** to print the labels in this stock group. Continue printing all stock groups, making sure you have loaded the appropriate label stock for each. Go to step 5.<OR>
 - Select **Skip Group** if you do not want to print these labels at this time. If there is another stock group, the Load Label Type message displays for the next group. Make sure you have loaded the appropriate label stock for each group. Continue printing all stock groups.Go to step 5 below.

 Note:

You can select **Back** to return to the item entry screen.

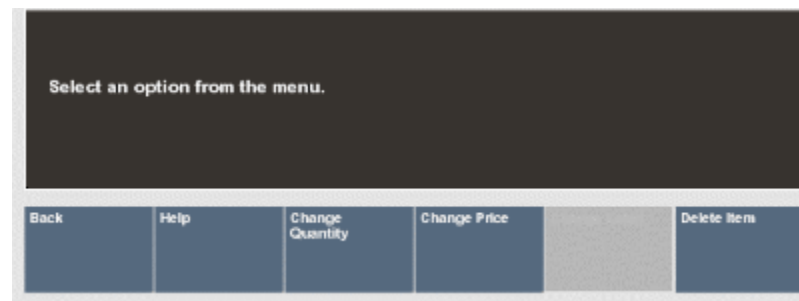
5. If prompted, select **Yes** to save and name this batch so it can be printed in the future, or select **No** if you do not want to print this batch again.

If you are not prompted, you can save the batch by selecting the **Save Batch** option. For more information see [To Save a Batch - ZPL II Only](#) and [To Retrieve a Batch - ZPL II Only](#).

To Change an Item

Select **Change Item** to edit an item. The following options are available from the Change Item menu before you print labels for the items.

Figure 23-10 Change Item Options



Change Quantity: Select **Change Quantity** to change the number of labels to be printed.

- Use the arrow keys to select the item and press **Enter**.
- At the Enter Quantity prompt (see [Figure 23-4](#)), enter the number of labels you want to print for the item and press **Enter**.

Oracle Retail Xstore Point of Service updates the label quantity on the View Port for the item.

Change Price: Select **Change Price** to change the price that is printed on the label.

- Use the arrow keys to select the item and press **Enter**.
- At the Enter Price prompt, enter the price of the item to be printed on the label and press **Enter**.

Figure 23-11 Enter Price Prompt



Oracle Retail Xstore Point of Service updates the label unit price on the View Port for the item.

Change Label - ZPL II ONLY Select Change Label to specify a different stock label type for the item.

- Use the arrow keys to select the item and press **Enter**.
- Select the stock label type.
- Select a processing option:
 - Select **Process** to associate the Stock Label type to the item.

<OR>

- Select **Assign To All** to assign the selected Stock Label type to all items in the current list.

 Note:

All items in the list print on the same label stock type. This selection does not update the pre-defined stock type of the items and does not apply to items that are added after the **Assign To All** option is selected.

Delete Item: Select **Delete Item** to remove an item from the list of item labels to be printed.

- Use the arrow keys to select the item and press **Enter**.

 Note:

There is no confirmation prompt before deleting the item. Be sure you are highlighting the correct item in the View Port display area.

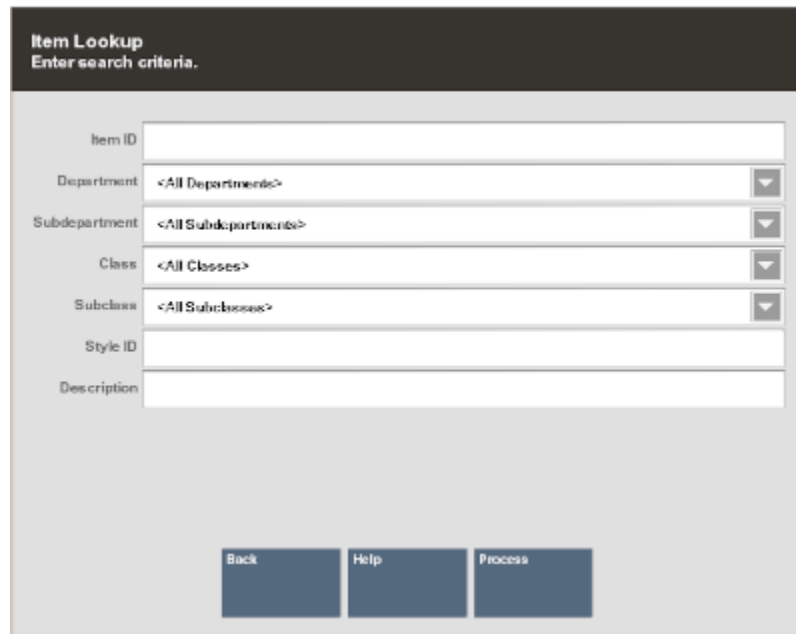
Oracle Retail Xstore Point of Service removes the item from the list of item labels to be printed.

To Look Up an Item

Item Lookup: Select Item Lookup to find an item using the item lookup search criteria form. The item can be added to the list of item labels to be printed.

At the Item Lookup form, enter the search criteria and select **Process**.

Figure 23-12 Item Lookup Form



Item Lookup
Enter search criteria.

Item ID

Department

Subdepartment

Class

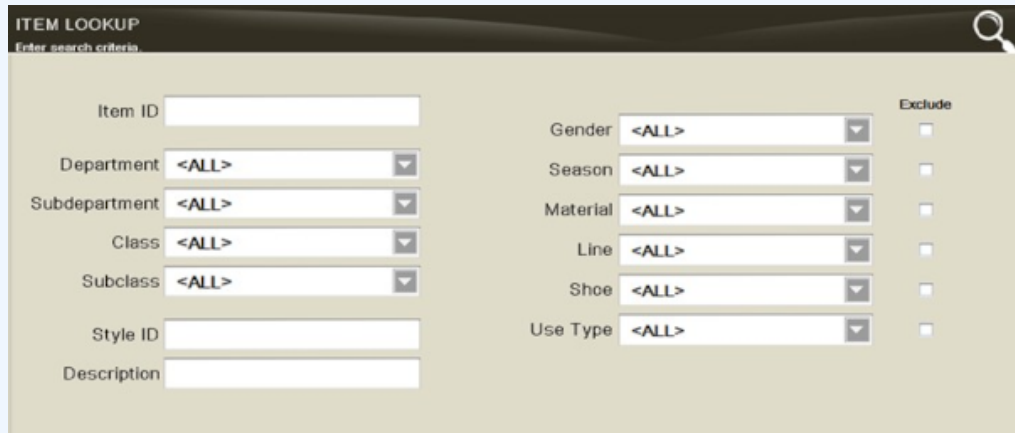
Subclass

Style ID

Description

 Note:

Your store may be configured with advanced lookup options, which provide the ability to add Custom Groups and Details to further define your search criteria. Select the exclude box to not include an item in your search.

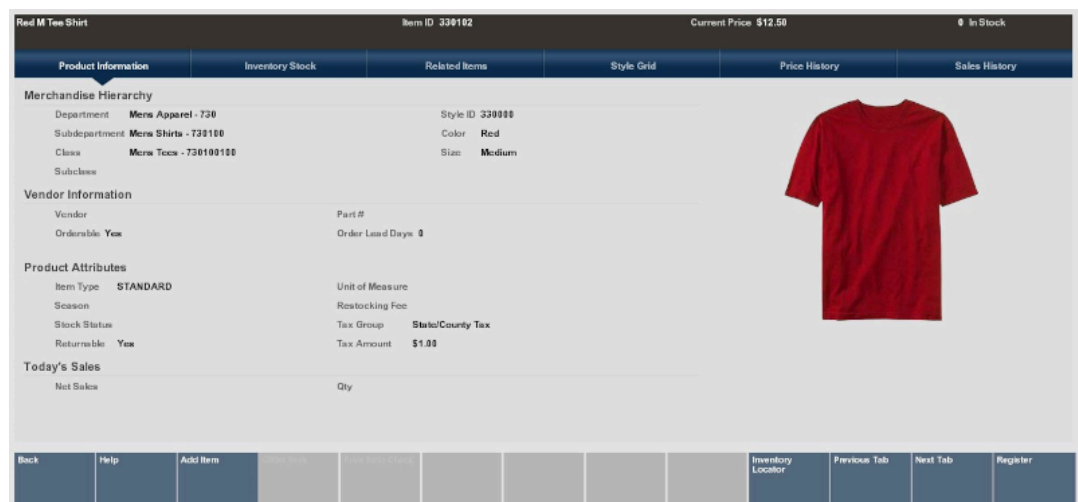


ITEM LOOKUP
Enter search criteria

Item ID	Gender <ALL>	Exclude ☐
Department <ALL>	Season <ALL>	☐
Subdepartment <ALL>	Material <ALL>	☐
Class <ALL>	Line <ALL>	☐
Subclass <ALL>	Shoe <ALL>	☐
Style ID	Use Type <ALL>	☐
Description		

- If more than one item matched the search criteria you entered, select the item from the list and **OK**. Oracle Retail Xstore Point of Service displays the item information.
- Select the **Add Item** option to include the item on the list of item labels to be printed.

Figure 23-13 Item Lookup Results - Add Item Option



Red M Tee Shirt Item ID: 339162 Current Price: \$12.50 0 In Stock

Product Information	Inventory Stock	Related Items	Style Grid	Price History	Sales History
Merchandise Hierarchy Department: Mens Apparel - 730 Style ID: 339888 Subdepartment: Mens Shirts - 730100 Color: Red Class: Mens Tees - 730100100 Size: Medium Subclass:					
Vendor Information Vendor: Orderable: Yes Part #: Order Lead Days: 0					
Product Attributes Item Type: STANDARD Unit of Measure: Season: Restocking Fee: Stock Status: Tax Group: State/County Tax Returnable: Yes Tax Amount: \$1.00					
Today's Sales Net Sales: Qty:					

Back Help Add Item Inventory Locator Previous Tab Next Tab Register

- Enter the number of labels to be printed for the item and press **Enter** to add the item to the list of item labels to be printed. By default, the on hand quantity for the item is shown in the Label Quantity focus bar prompt (Figure 23-4).

To Add a Receiving Document

Add Receiving Document: Select this option to print labels for all the items on a receiving document.

- At the Document Search form, scan the barcode for the Receiving Document or enter search criteria to locate the Receiving Document.

Figure 23-14 Document Search Form

The screenshot shows a web-based form titled "Receiving Document Search" with the instruction "Scan a document barcode or enter search criteria." The form contains four input fields: "Document ID", "Customer Acct. ID", "Document Type" (a dropdown menu), and "Document Status" (a list box). The "Document Status" list box is currently open, showing three options: "Closed", "In Process", and "Open". At the bottom of the form are three buttons: "Back", "Help", and "Process".

Oracle Retail Xstore Point of Service displays a list of receiving documents that match the criteria you entered. You may need to scroll through the list if multiple documents are displayed.

Figure 23-15 List of Receiving Documents

Receiving Documents
Select a receiving document to add to labels/tags selection.

Status	Document Number	Exp Rcpt Date	Store Created?
Special Order Open	ASN11KG113111119		Y
ASN In Process	ASN11KG113111114		Y
Store Transfer Closed	TF11KG113111114		Y

Back OK

- Select the receiving document that has the items that need labels and choose **OK**. Oracle Retail Xstore Point of Service adds all of the items on the Receiving Document to the list of item labels to be printed and displays them in the View Port area of the screen.

 Note:

By default, a label will be printed for each item/quantity in the shipment. Use the **Change Quantity** option to edit the number of labels to be printed.

To Save a Batch - ZPL II Only

Batch options are only available when using ZPL II. Use this option to assign a name to the current list of items so it can be used again in the future. See [To Retrieve a Batch - ZPL II Only](#) below for information about reusing the batch to print labels.

1. Select **Save Batch** from the Item/Shelf Labels screen.
2. When prompted, enter a name for the batch and press **Enter**.
3. Xstore saves the batch information, and it can be retrieved for printing later.

To Retrieve a Batch - ZPL II Only

Use this option to retrieve a list of previously save batches. See [To Save a Batch - ZPL II Only](#) above for more information about saving a batch for reuse.

1. Select **Retrieve Batch** from the Item/Shelf Labels screen.
2. When prompted, select a Batch from the list and press **Enter**.
3. The items in the batch are shown on the View Port.
4. Continue with step 2.

To Delete a Batch - ZPL II Only

Use this option to delete a previously saved batch.

1. Select **Retrieve Batch** from the Item/Shelf Labels screen.
2. When prompted, select a Batch from the saved Batch List and select **Delete Batch**.
3. At the confirmation prompt, select **Yes** to delete the batch. Selecting **No** returns to the saved Batch List and the selected batch is not deleted.
4. Xstore returns to the Saved Batch list and the selected batch is removed from the list.

Training Mode

Training Mode allows you to train new employees on the system-at both the POS Register and in the Back Office-without being concerned that any live data may be impacted.

In Training Mode, store employees can simulate most of the functions provided by Oracle Retail Xstore Point of Service in normal operating mode. Any transactions performed in Training Mode are distinguished from transactions conducted in operating mode in several ways. First, the data elements associated with live and training transactions are separated from each other. In addition, any artifacts related to them, such as receipts, reports, and so on, are also kept separately.

Your system's configuration applies to both the live and training modes. For example, if you are using Till Accountability in the live mode, the rules for Till Accountability also apply in training mode. Even though a till may be attached to the register in live mode, the first time that you log into the training mode you must assign a till to an employee and attach a till to the register from the Back Office.

You can exit training mode at any time and return to live operating mode.

Accessing Training Mode



Note:

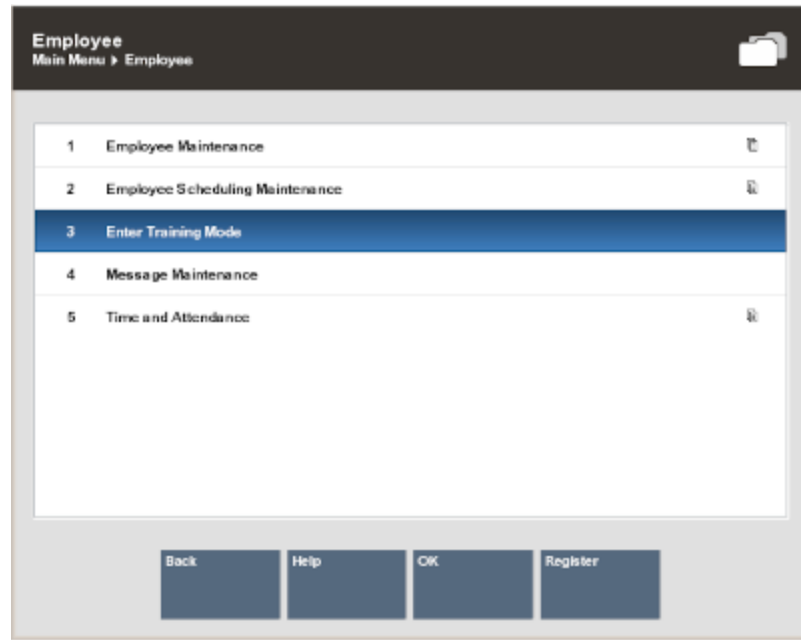
Training Mode can be accessed from both the Register Login screen and the Back Office Login screen.

You can log into the training mode using the same password that you use in the live, production mode. In Training Mode, Oracle Retail Xstore Point of Service shows only the functions and menu options that are permitted by your security level in production mode.

Starting Training Mode

1. To log in to Training Mode from the Back Office:
 - Log in to the Back Office using your employee ID and password.
 - Select the **Enter Training Mode** option at the Employee Menu.

Figure 24-1 Employee Menu - Enter Training Mode Option

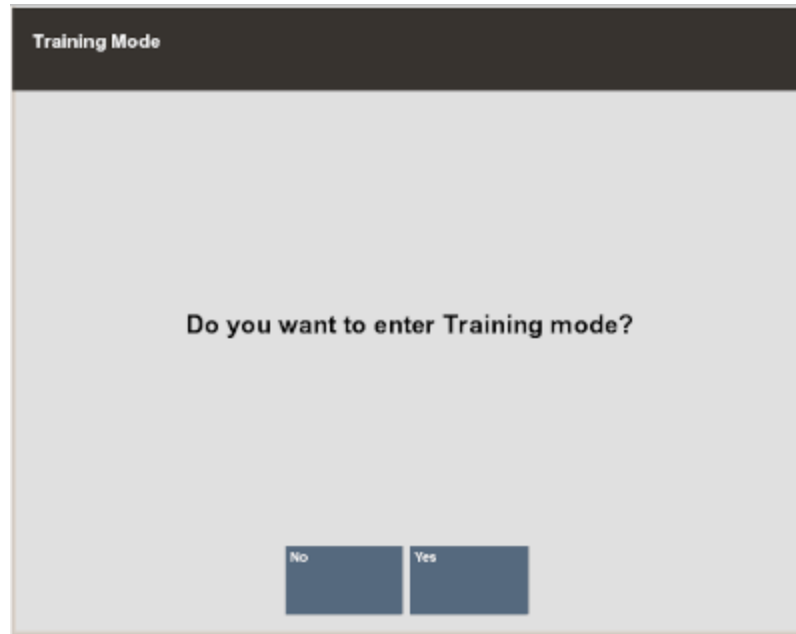


 Note:

If you select the **Enter Training Mode** menu option before logging in to the Back Office, Xstore displays the Register login screen in Training mode.

2. Oracle Retail Xstore Point of Service prompts to confirm that you want to enter Training Mode. Select **Yes** to enter Training Mode. If you select **No**, Oracle Retail Xstore Point of Service returns to the Back Office Main Menu or to the Register Login screen, depending upon the location from which you logged in.

Figure 24-2 Confirm Training Mode Prompt



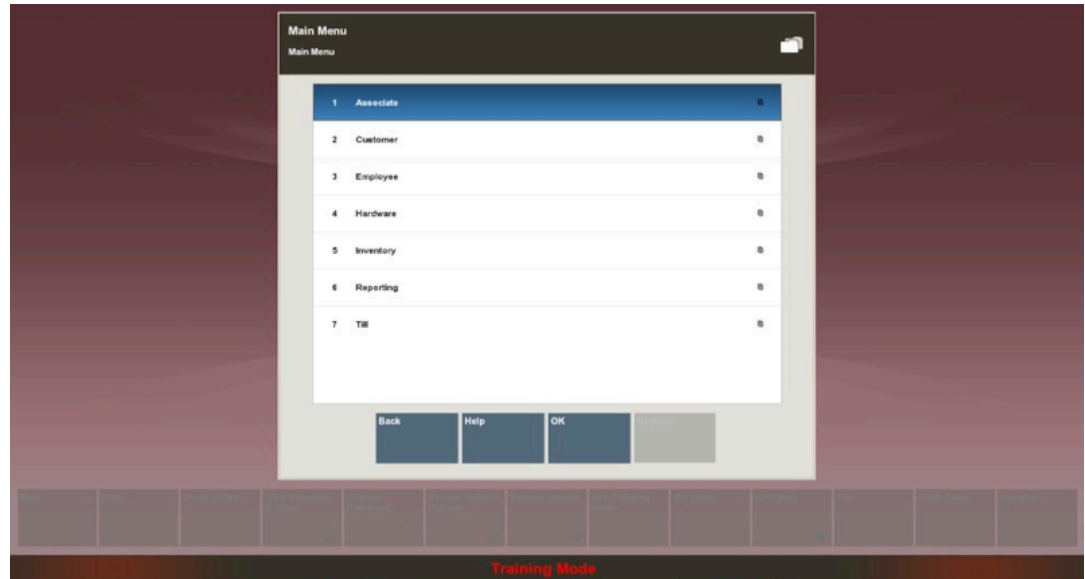
3. When prompted, enter your employee ID and password.

The system displays the same screen that it would in regular (non-training) mode. If the system is configured to prompt for a commissioned associate in regular mode, that screen also appears in training mode. If your system is configured to show the Customer Lookup form, that form displays.

 Note:

The background color of the menu options and the screen is red. The Title Bar name in the upper right corner of the screen toggles between the words "Register" or "Back Office" and "TRAINING".

Figure 24-3 Training Mode - Back Office Screen Example



You can perform most functions exactly the same way as when the register is in normal production mode. However, the following functions cannot be performed while the register is in Training Mode:

- The cash drawer does not open.
- No authorizations or settlements can be performed.
- Oracle Retail Xstore Point of Service does not communicate with the Environment (Xenvironment is an application that interacts with Oracle Retail Xstore Point of Service and the operating system to perform some critical functions, particularly during store opening and closing). For this reason, you can simulate a store close without impacting live operations in your store.

If your system is configured to print receipts while in training mode, the receipts clearly indicate that they were generated while the system was in Training Mode.

To Exit Training Mode

1. Select the **Exit Training Mode** option.
2. Oracle Retail Xstore Point of Service prompts you to confirm that you want to exit Training Mode. Select **Yes** to exit from Training Mode.

Oracle Retail Xstore Point of Service returns to normal production mode.

Figure 24-4 Back Office Login Screen - After Exiting Training Mode



System Admin

This chapter includes information about the functions that can be performed in the Back Office but are not closely associated with a specific functional task. Like other Back Office functions, these activities are logged by the system for accountability and reporting purposes.

The following functions are included in this section:

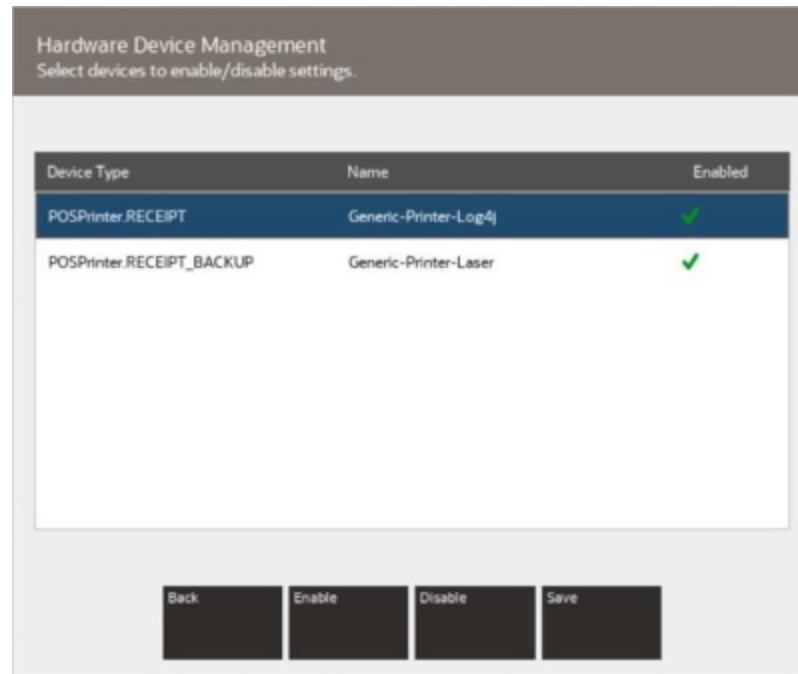
- Enabling/Disabling Hardware - See [Enabling and Disabling Hardware](#).
- Reinitializing Hardware - See [Reinitialize Hardware](#).
- Updating the PINpad key - See [Update PINpad Key \(TransArmor\)](#).
- Managing and Configuring Networked Cash Drawers - See [Networked Cash Drawers](#)
- Releasing Cash Drawers - See [Releasing a Cash Drawer](#).
- Mobile Client Device Access - See [Mobile Client Device Access](#).
- Mobile Device Quick Config- See [Mobile Device Quick Config](#).
- Temporary Store Request - See [Temporary Stores](#).

Enabling and Disabling Hardware

This option provides a way to temporarily disable and then enable hardware devices. This process writes out a hardwareconfig.xml file to a patch directory for the devices that have been disabled, reloads the hardware configurations, and then re-initializes the hardware.

To begin, select the **/Disable/Enable Hardware** option from the System Admin menu.

Figure 25-1 Hardware Device Management



The green check mark next to the device name indicates the device is currently enabled. The red cross next to the device name indicates the device is currently disabled.

- To disable a device or devices, select a hardware device or devices to be disabled, then select **Disable**

Select **Save**. The hardware devices are disabled.

- To enable a device or devices, select a hardware device or devices to be enabled, then select **Enable**.

Select **Save**. The hardware devices are enabled.

**Note:**

If there are any device errors detected when enabling a device, the system displays a warning message about the non-functional devices.

Reinitialize Hardware

Select the Reinitialize Hardware menu option to reset the peripheral hardware devices. The system performs the following process for the hardware devices:

close -->release-->claim-->open

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



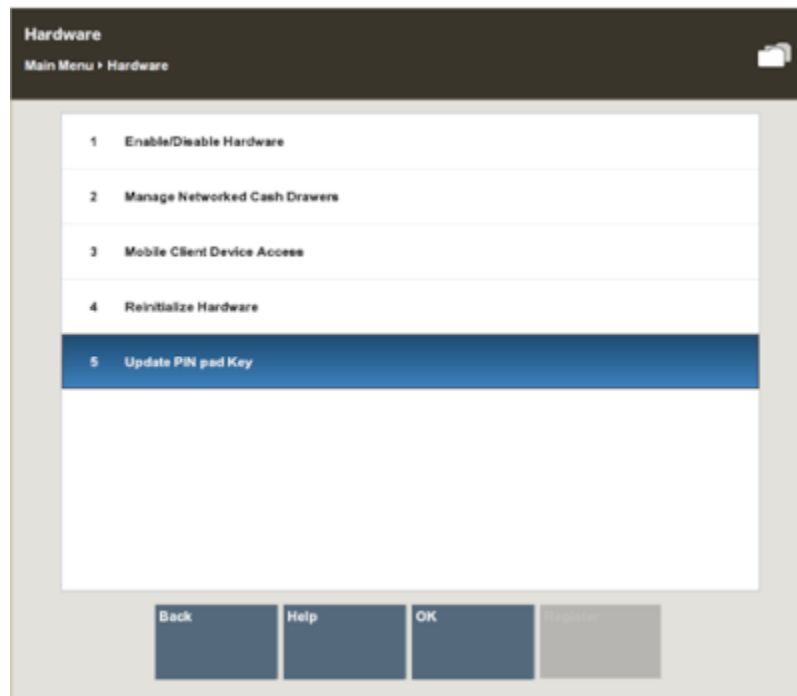
Note:

Reinitializing hardware is also used to register a VeriFone device with TransArmor.

Update PINpad Key (TransArmor)

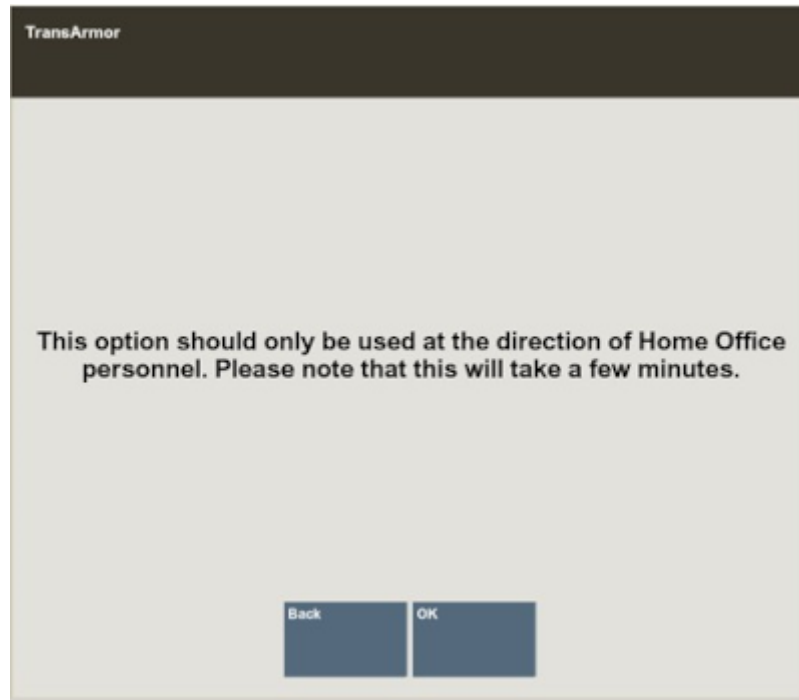
If your store is using TransArmor for credit card authorizations, use the Update PINpad Key option to advance the Device Derivation Key (DDK) when needed.

Figure 25-2 System Admin Menu



1. Select the **Update PINpad Key** option from the System Admin menu.

Figure 25-3 Warning Prompt



2. A warning prompt displays indicating that this option should only be used at the direction of the Home Office. Select **OK** to proceed or press **Enter** to return to the main menu.
 - If the update is successful, Xstore Classic prompts: PINpad device key is successfully updated.
 - If the update is not successful, Xstore Classic prompts: PINpad is no longer usable because the device key update was not successful. Call the Help Desk.

Networked Cash Drawers

This section describes the networked cash drawers:

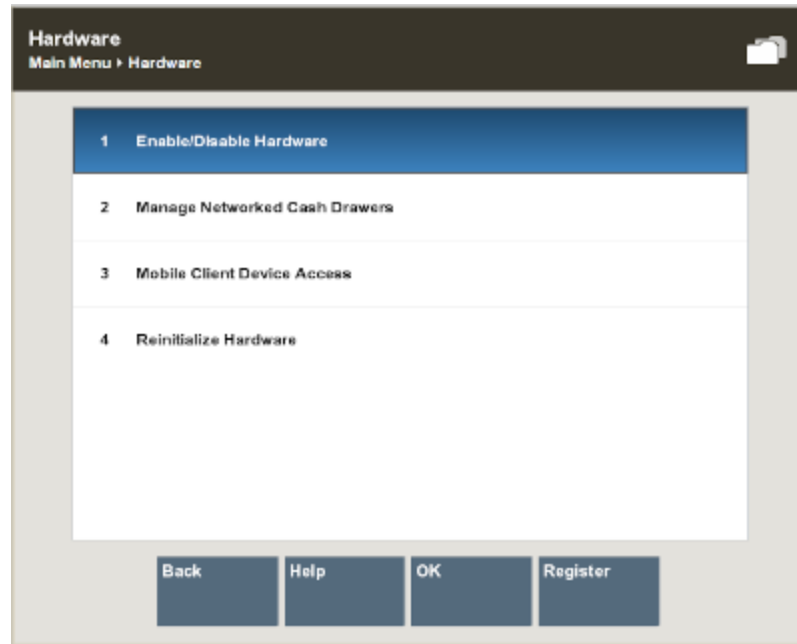
- [Managing Networked Cash Drawers](#)
- [Configuring Networked Cash Drawers](#)
- [Releasing a Cash Drawer](#)

Managing Networked Cash Drawers

When working with Xstore Mobile devices, networked cash drawers allow monies to be collected.

1. Select the **Manage Hardware** option from the Back Office Main Menu.
2. Select the **Managed Networked Cash Drawers** option from the list.

Figure 25-4 Manage Hardware Screen - Manage Networked Cash Drawers



Upon navigating to the screen, a discovery is performed to identify all networked cash drawers on the network.

3. A list of all discovered networked cash drawers is displayed.

Figure 25-5 Example List of Discovered Networked Cash Drawers

[illegible]

The status of the cash drawer may be:

- **New** - Configuration has not been entered.
- **Active** - The cash drawer is available to use.
- **Inactive** - The cash drawer is not available to use.

- **Reset** - Restored to factory settings and configuration needs to be entered.
4. Select a cash drawer from the list.
You can Activate and Deactivate cash drawers by selecting the correlating button. The Activate button changes the status to ACTIVE. The Deactivate changes the status to INACTIVE.
You can delete the cash drawer from the Database by selecting the **Delete Device** button. Use the Discover Devices button to find new networked cash drawers on the network.

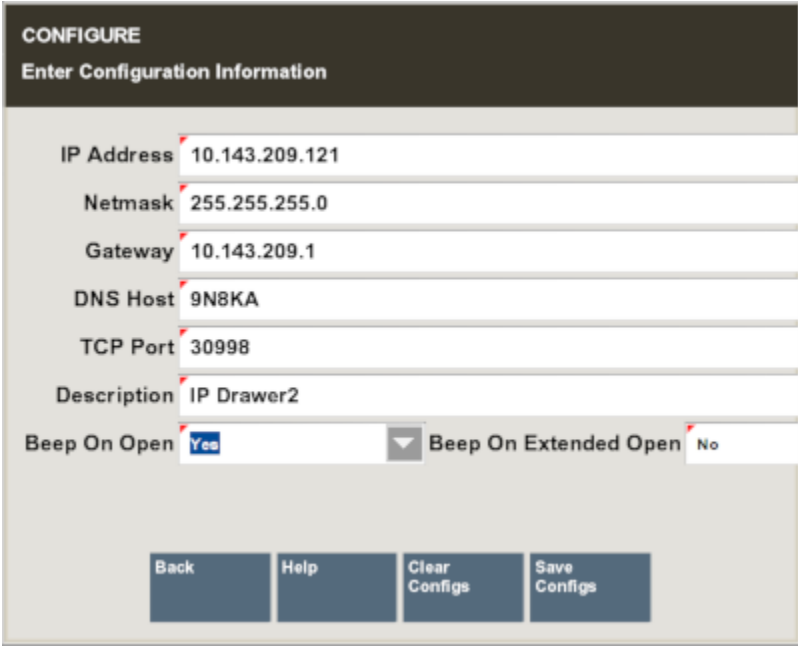
 Note:

The Activate, Deactivate, Delete and Configure activities are controlled by user security. An employee must have the proper security privileges to use these buttons.

Configuring Networked Cash Drawers

1. Select the **Configure** Button on the **Manage Networked Cash Drawers** screen.

Figure 25-6 Configure Screen



The screenshot shows a web-based configuration interface titled "CONFIGURE" with the subtitle "Enter Configuration Information". The form contains the following fields and controls:

- IP Address:** Text input field containing "10.143.209.121".
- Netmask:** Text input field containing "255.255.255.0".
- Gateway:** Text input field containing "10.143.209.1".
- DNS Host:** Text input field containing "9N8KA".
- TCP Port:** Text input field containing "30998".
- Description:** Text input field containing "IP Drawer2".
- Beep On Open:** A dropdown menu currently set to "Yes".
- Beep On Extended Open:** A dropdown menu currently set to "No".

At the bottom of the form are four buttons: "Back", "Help", "Clear Configs", and "Save Configs".

2. Enter the required data to configure the screen. If the drawer is an existing drawer, the configurable values will be shown with the option to change the values.
3. Select the **Save Configs** button to apply the changes to the Configure screen. You are returned to the **Manage Networked Cash Drawers** screen.

 Note:

You can clear all configurations by selecting the **Clear Configs** button.

Releasing a Cash Drawer

On occasions when the cash drawer cannot be opened (maybe due to a network loss), it is possible to manually release the cash drawer in-use and allow other users to use them.

**Note:**

Ensure there is no current transaction taking place prior to using this process.

1. Navigate to the **Manage Networked Cash Drawers** screen.

Figure 25-7 Manage Network Cash Drawers Screen

Device Name	Device Description	Barcode	Status
APG Atwood	Drawer 40	4035H	Active
APG Atwood	Bs7mv cash drawer	BS7MV	Active

Back Help Discover Devices Activate Device Deactivate Device Configure Device Delete Device Release Device Get Log Get New Log

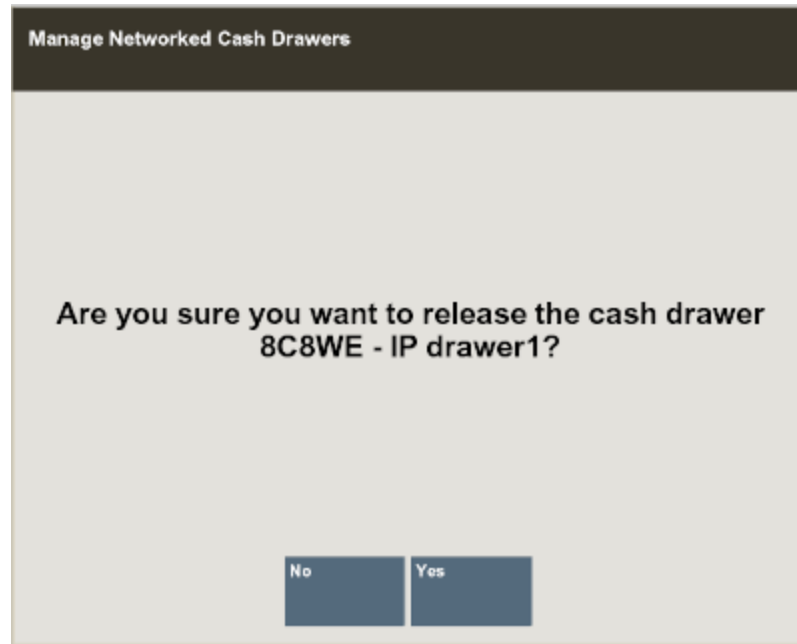
2. Select the in-use cash drawer from the list of cash drawers.
3. Select the **Release Device** button.

**Note:**

The **Release Device** button is controlled by user security. An employee must have the proper security privileges to release the cash drawer.

4. Confirm you want to release the cash drawer: "Are you sure you want to release the cash drawer <cash drawer id and name>?"

Figure 25-8 Release Device Confirmation



5. Select Yes on this prompt, to continue.

The cash drawer is manually released from being in-use and is available to use again.

Mobile Client Device Access

This option allows you to manage the mobile devices to function as a register in the store. When installing a new mobile device, the Xstore Mobile server will initially block that device from running Xstore until an administrator goes into this function to enable the newly configured device.

From the System Admin menu, select the **Mobile Client Device Access** option.

Figure 25-9 Mobile Client Device Access Screen



To enable the mobile device to function as a register in the store select the **Allow** button or select the **Disallow** button to disable access to any currently enabled mobile device.

Select the **Delete** button to remove the device configuration from the Xstore register.

See also the *Oracle Retail Xstore Point of Service Mobile User Guide* for more information about operating the mobile device.

Mobile Device Quick Config

Mobile Device Quick Config allows you to generate a QR code for a mobile device to connect to the Xstore Mobile server.

1. Select **System Admin** from the Main Menu.
2. Click **Mobile Device Quick Config** in the System Admin menu.
3. For the mobile device you want to configure, enter the register ID it should have.
4. Xstore generates a QR code containing the configuration information.
5. On the mobile device you want to configure, go into the Configuration screen. Swiping the screen from the left to the right on the mobile device gains access to the Configuration screen. Select **Scan to Configure** to scan the generated barcode.
6. Scan the QR code. The mobile device is added.

Temporary Stores

There are two types of temporary stores:

- **Extension Stores** - uses the same store number as the brick and mortar store (physical store). The store is extended to a remote location such as in a mall. Stock and sales are associated with the parent store. Only Extension Store requests can be created/maintained in Xstore POS.
- **Event Stores** - unique store number with no affiliation to an actual brick and mortar store. Also referred to as a standalone popup store. Store operates completely standalone, reporting its own sales and handles own inventory. Event Stores can only be created in Xadmin. See *Oracle Retail Xstore Office User Guide* for more information.

The following topics are covered in this section:

- [Requesting a Temporary Store](#)
- [View/Print QR Codes](#)
- [Cancel a Temporary Store Request](#)

Requesting a Temporary Store

To request a mobile server for specific dates or for an indefinite amount of time to host a temporary store.

1. Select **System Admin** from the Main Menu.
2. Click **Temporary Store** in the System Admin menu. A list of requests for that store within the last year is displayed. View-only information shows the status of the request, the assigned server and any notes added to the event.

The status can be:

- Submitted
- Approved
- Rejected (rejected by the Home Office)
- Cancelled (cancelled by Xstore user)

You can only cancel a request that is in Submitted or Approved status. See [Cancel a Temporary Store Request](#).

3. Select an event to open or select **New** to create a new request for an extension type temporary store.

To create a new request:

- a. Enter description, start date, and an end date.
 - b. If it is an indefinite request no end date is required. Select the check box for **Indefinite Use?**
 - c. Select **Use Store Tax Location?** if required. If left unchecked, you are prompted for the tax location each time a register is opened.
4. Select **Process**. After the request has been submitted there is no option to update the request. It has to be cancelled if not required.

A message is shown in the Message Tab to alert you when the status of a temporary store request for a mobile server for has changed.

Once approved, you can generate a report to show QR codes. The QR code can be scanned to quickly set up mobile devices that will be used at the temporary store.

View/Print QR Codes

When a temporary store request has been approved by the home office, you can access the QR codes for setting up mobile devices to be used at the temporary store.

To view/print QR codes:

1. Select **System Admin** from the Main Menu.
2. Click **Temporary Store** in the System Admin menu. A list of requests for that store within the last year is displayed.
3. Select an Approved request.
4. Select **View/Print QR Codes**.

Figure 25-10 Temporary Store QR Codes



QR CODE	REGISTER #	QR CODE DATA
	30	STORE NUMBER: 207 REGISTER ID: 30 SERVER: STORE207-OUTDOOR PORT: 8082
	31	STORE NUMBER: 207 REGISTER ID: 31 SERVER: STORE207-OUTDOOR PORT: 8082
	32	STORE NUMBER: 207 REGISTER ID: 32 SERVER: STORE207-OUTDOOR PORT: 8082
	33	STORE NUMBER: 207 REGISTER ID: 33

5. A Register Range screen appears. Enter the register range to print the QR Codes

Cancel a Temporary Store Request

You can only cancel a request that is in Submitted or Approved status.

To cancel a request for a temporary store:

1. Select **System Admin** from the Main Menu.
2. Click **Temporary Store** in the System Admin menu. A list of requests for that store within the last year is displayed. View-only information shows the status of the request.
3. Select an event to open.
4. Select **Cancel Request**.
5. Select **Yes** to confirm the cancellation.

The request is changed to Cancelled status.

Miscellaneous Functions

This chapter includes information about the functions that can be performed in the Back Office but are not closely associated with a specific functional task. Like other Back Office functions, these activities are logged by the system for accountability and reporting purposes.

The following functions are included in this section:

- Change your password - See [Changing Your Password](#).
- Dashboard View - See [Using the Dashboard](#).
- Oracle Retail XBRi Sales & Productivity Dashboard - See [Sales and Productivity Dashboard](#).
- Open a browser to access the World Wide Web - See [Opening a Browser](#).
- Exchange Serial Numbers - See [Exchanging Serial Numbers](#).

Changing Your Password

**Note:**

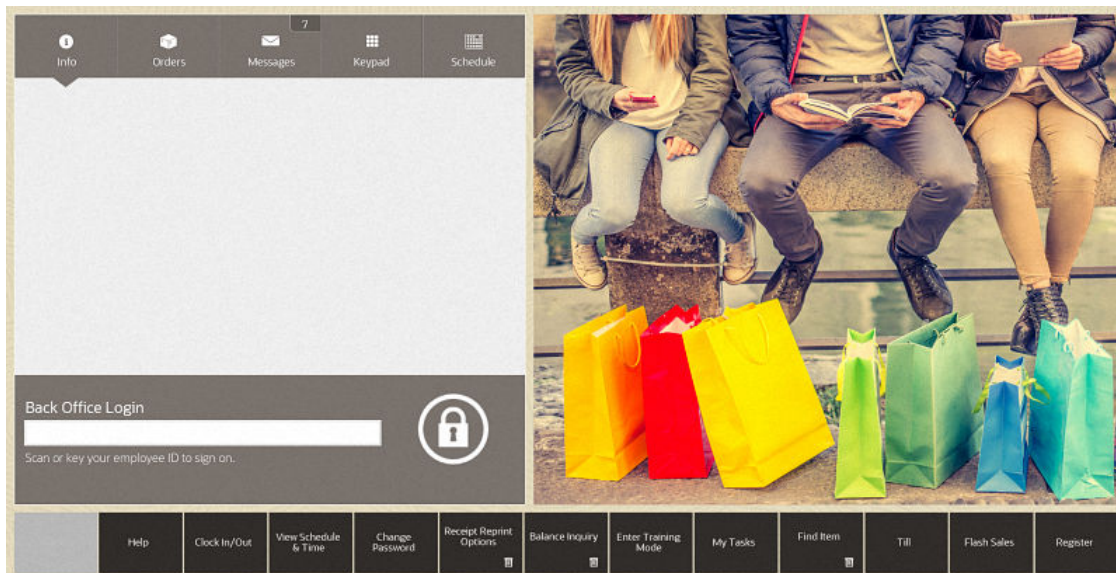
This function is also available from the POS register and the Employee Maintenance Menu in the Back Office. Refer to [Employee Maintenance](#).

If you need to change another employee's password, not your password, use the process described in [Changing an Employee's Password](#).

If your store is configured to use password challenge questions, you can re-set your password without knowing your current password by answering questions. See [Forgot Password Challenge Questions](#) for more information.

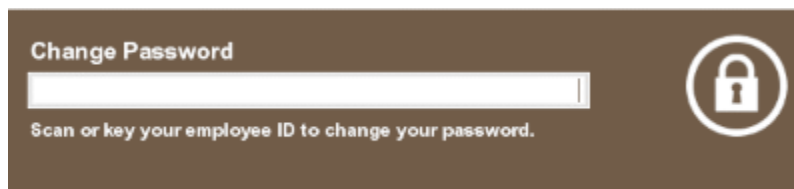
The **Change Password** option is available from the Back Office Login screen - before you log in to the system.

Figure 26-1 Back Office Login Screen



1. Select the **Change Password** option from the Back Office Login screen. Oracle Retail Xstore Point of Service prompts for your employee ID. If you are using the Fingerprint Scan, the prompt asks for your fingerprint.

Figure 26-2 Change Password Prompt: Scan or Key Entry Accepted

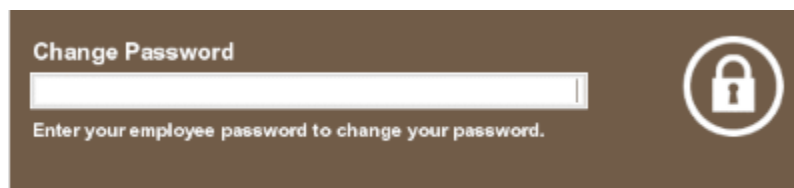


2. Type or scan your Employee ID at the Change Password prompt and press **Enter** or scan your finger if your system is set up to use a biometric device.
3. If prompted for your password, enter your current password and press **Enter**.

 Note:

If you forgot your current password and your store is configured with challenge questions, see [Forgot Password Challenge Questions](#).

Figure 26-3 Change Password Login Screen



4. Oracle Retail Xstore Point of Service prompts you to enter and confirm your new password. Type your new password in the first field and type the password again to confirm it in the field below.

Figure 26-4 New Password Prompt

 Note:

Passwords may be case sensitive, so be sure you note whether the keyboard Caps Lock key is on or off when you enter and confirm your new password.

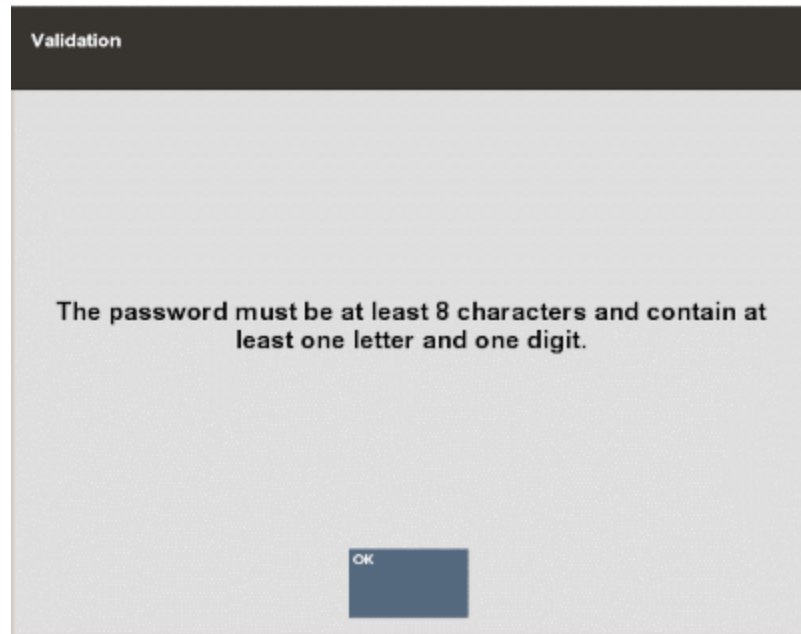
5. Select **Process** to store your new password:
 - If the system accepts the password, a confirmation message is shown indicating that your password was changed. Press **Enter** to acknowledge this prompt and return to the Login screen.

 Note:

The system may enforce certain rules regarding passwords. For example, a minimum number of characters may be required, and there may be a restriction on how frequently you can reuse an old password.

- If the new password you entered is invalid (according to your system's password requirements), the system displays a message. You must press **Enter** to acknowledge the prompt.

Figure 26-5 Password Validation Prompt



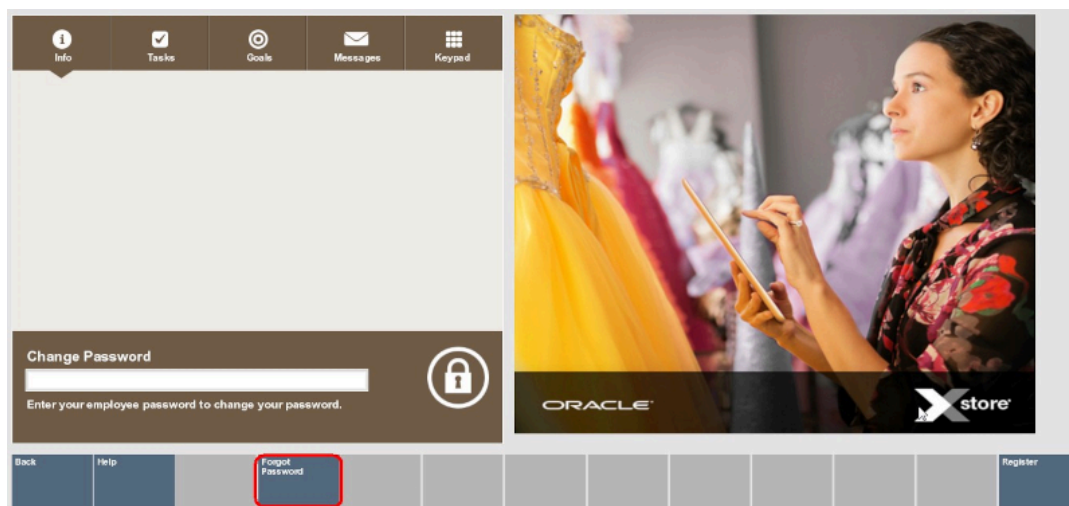
Oracle Retail Xstore Point of Service returns to the New Password prompt, and you can enter a different password.

Forgot Password Challenge Questions

If your store is configured to use password challenge questions, you can re-set your password without knowing your current password by answering the questions. The answers to the questions are set up in the Back Office see the Establish Password Challenge Questions.

1. Select the **Change Password** option from the Register Login screen or the Back Office Login screen. Oracle Retail Xstore Point of Service prompts for your employee ID.
2. Type or scan your employee ID at the Change Password prompt and press **Enter**. If fingerprint scans are supported, scan your finger at the prompt.
3. Select the **Forgot Password** menu option.

Figure 26-6 Forgot Password Menu Options



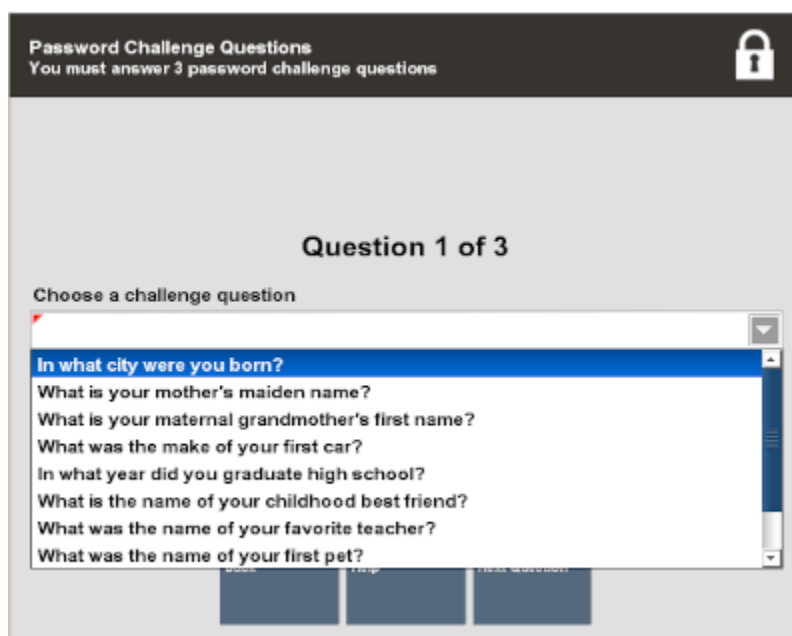
4. Enter your last name for verification.

Figure 26-7 Change Password Verification



5. For each challenge question, type the answer and then select **Next Question**. For the last question, select **Process**.

Figure 26-8 Password Challenge Questions



6. Once you've answered all the questions correctly, the New Password prompt displays. Type your new password in the first field and type the password again to confirm it in the field below.

Figure 26-9 New Password Prompt

7. Select **Process** to store your new password. If the system accepts the password, a confirmation message is shown indicating your password has been changed.
8. Press **Enter** to acknowledge this prompt and return to the Register Login screen.

 Note:

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

If your new password is not valid, press **Enter** to acknowledge the validation prompt and try again.

Using the Dashboard

The goal of the dashboard is to automatically show timely sales data information- collected from various areas within the organization-in one place. The data shown on the screen is an analysis as to how your business is operating; using graphics, summaries, and lists to display the information.

Information shown on the Dashboard includes:

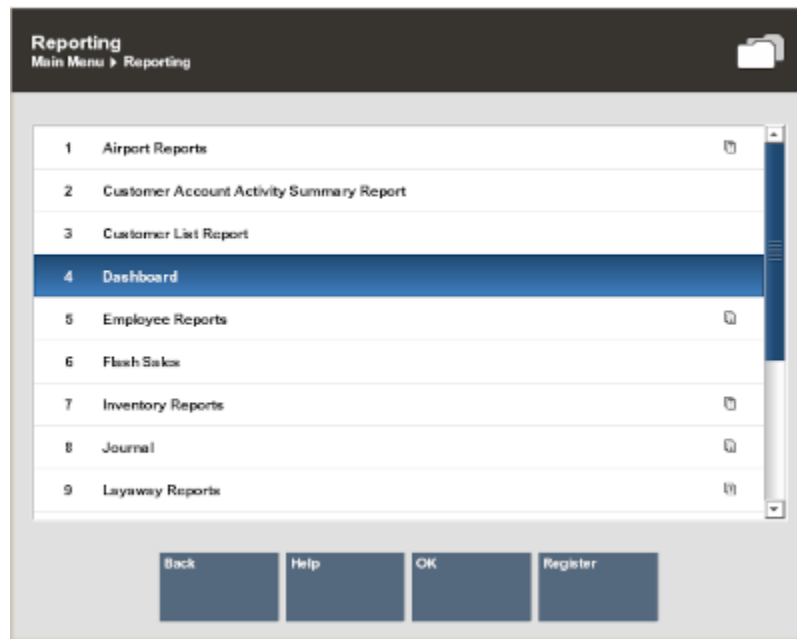
- Sales Performance - WTD, MTD, and YTD values as a running totals section, up to and including the current day's sales
- Net Sales for the Top 5 Departments from today

- The top 5 best-selling items from today
- The top 5 sales associates from today
- Store Goals performance data

In addition to the information displayed on the page, menu options are provided to allow you to view and print the Flash Sales report, the Daily Sales report, the Best Sellers report, and the Employee Tasks report.

To view the dashboard, select the **Dashboard** option from the **Reporting** menu and press **Enter**.

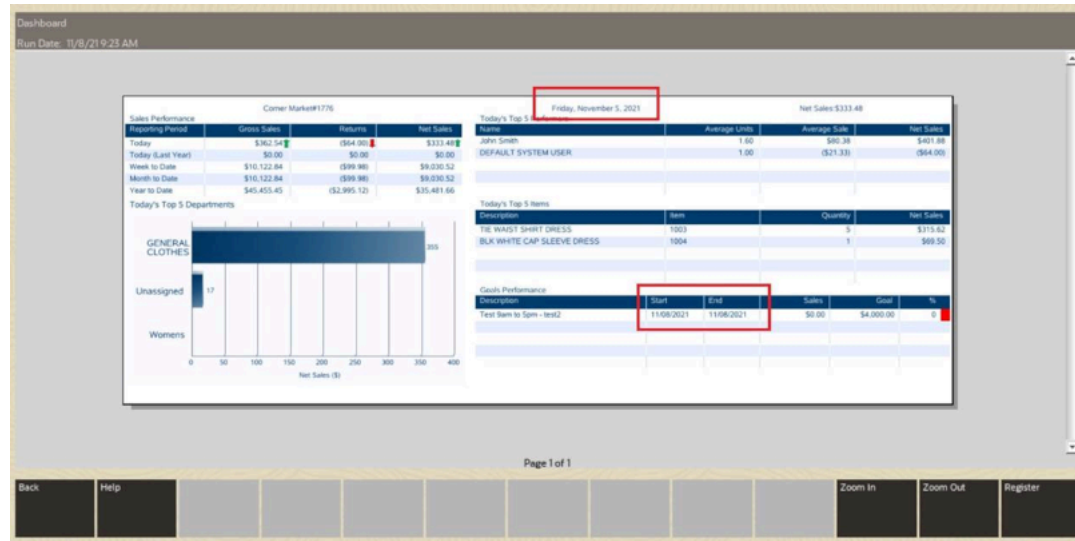
Figure 26-10 Reporting Menu



Dashboard Information

The **Dashboard** screen is divided into several informational areas as shown in the figure below:

Figure 26-11 Dashboard Screen



Dates

Generally, when a store is closed each night, the system date (current calendar date) and the business date will be the same. In cases of 24/7 trading, when the store is not closed for the night and reopened the next morning, the system date and business date will not be the same date. The business date remains unchanged, and the system date reflects the current calendar date.

For example, the date shown on the top of the report (dashboard) is Friday November 5, 2021. This is the business date.

The date highlighted in the Goals Performance area shows the start and end dates as 8 November. This reflects the system date, that is, when the report was run.

Sales Performance

This section shows the Gross Sales, Returns, and Net Sales for Today, a year ago (Today - last year), Week-to-Date, Month-to-Date, and Year-to-Date. The data displayed in this section is a running totals section. This information shows the current day's sales in near real time, so these values change depending on when the Dashboard is displayed.



Note:

Additional 'sales data is available on the Flash Sales and other Sales reports.

Top 5 Departments

This section shows a graph representing the top 5 department sales. One axis of the graph shows the Net Sales dollars, and the other shows the Department ID.

Top 5 Performers

This section shows the top 5 sales associates from today, listed in descending order, based on Net Sales dollars. In addition to Net Sales dollars, the Units per Transaction (UPT), and Average Sale dollars are also displayed.



Note:

How the UPT and Average Sale data are calculated:

Units per transaction = total units sold/# of transactions

Average Sale = Net Sales/# of transactions

Hot 5 Items

This section shows the top 5 selling items from today. The items are ranked in descending order, based on Net Sales dollars. The item ID, description, and quantity sold are shown for each item in the list.



Note:

Non-merchandise items are not included in this list.

Store Goals Performance

This section shows the currently active goals for the store. Information shown here includes the goal description, effective and ending dates, the goal, and the percent completed toward the goal.

Sales and Productivity Dashboard

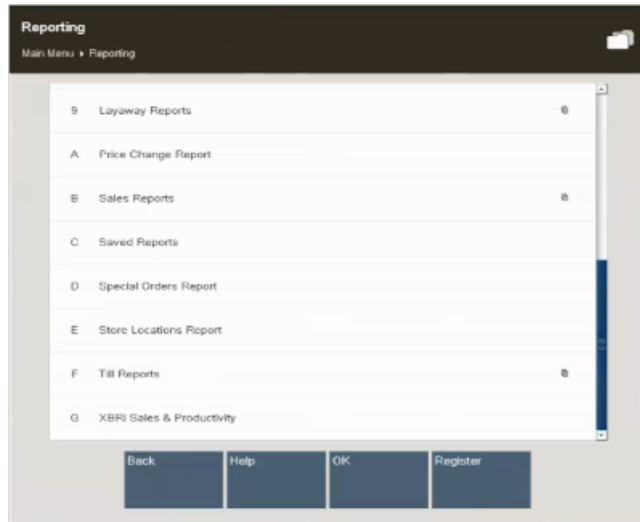
You can review the Oracle Retail XBRI Sales and Productivity dashboard from Xstore.

To view the XBRI Sales and Productivity Dashboard:

1. Select **Inventory Reports** from the Back Office Reporting Menu.
2. Select **XBRI Sales & Productivity** from the Inventory Reports menu.

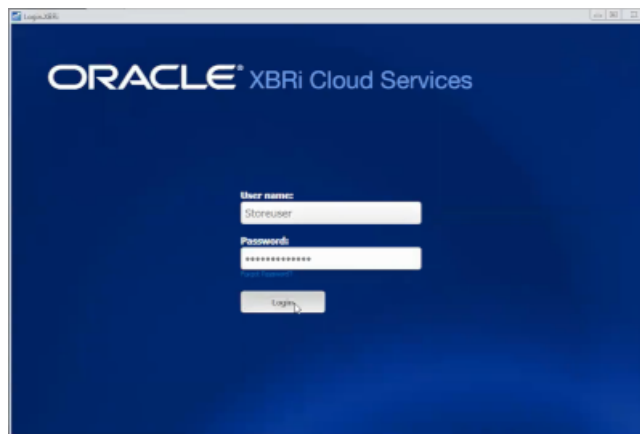
Xstore Classic calls the URL to XBRI.

Figure 26-12 Reporting Menu



3. Login to XBRI Cloud Services using your User name and Password.

Figure 26-13 XBRI Login Screen



4. The Sales Analysis screen is displayed.

Figure 26-14 XBRI Sales Analysis Screen with Data



5. Select report parameters as required such as Region, District, Store and Period.

Figure 26-15 XBRI Sales Analysis Screen



6. Select Period Trend.

Figure 26-16 XBRi Sales Analysis Period Trend



Figure 26-17 XBRi Sales Analysis



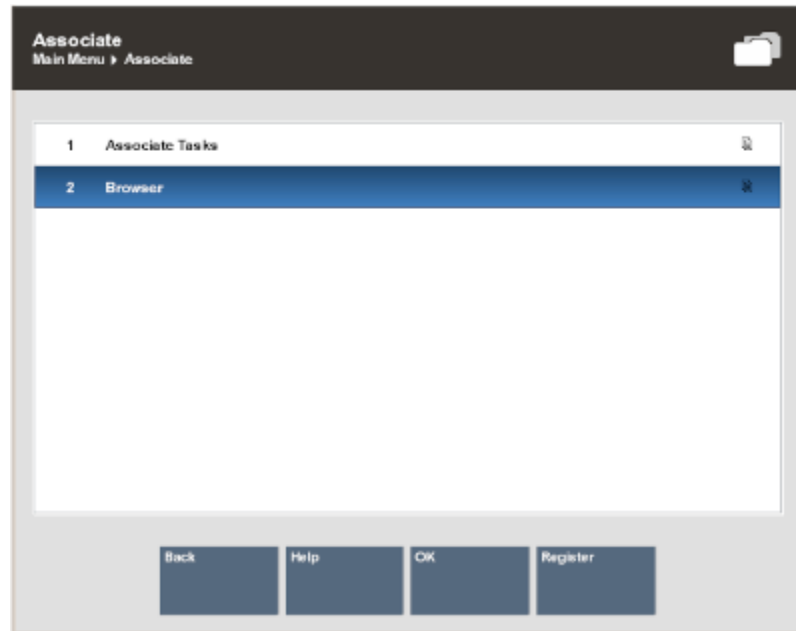
Select X to close the screen and return to Xstore Classic.

Opening a Browser

Your system may provide an option to access a web browser for navigating Internet sites. The option is available from the Back Office Main Menu. If this option is available to you, you may have a selection of browsers from which you can choose.

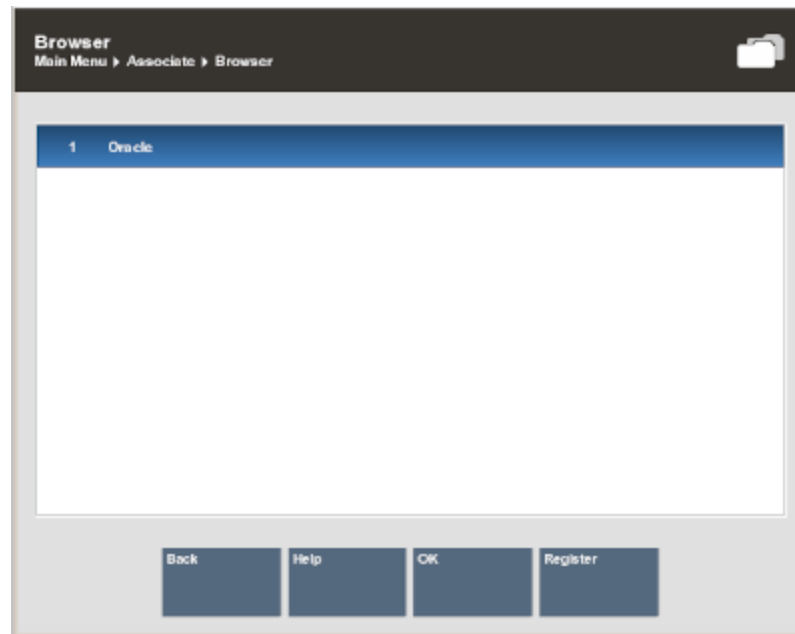
1. Select the **Browser** option from the Back Office Main Menu Associate option.

Figure 26-18 Associate Menu - Browser Option



2. Select an option from the configured websites listed on the Browser menu. Use the up and down arrow keys to navigate among the options and press **Enter**.

Figure 26-19 Browser Menu Options



The system opens the supported browser within the Oracle Retail Xstore Point of Service application and displays the website that you selected. For example, Oracle website is shown in the figure that follows. The Browser option allows you to access information without having to exit from Oracle Retail Xstore Point of Service.

 Note:

Certain plugins such as ActiveX and Flash are not supported, therefore specific websites may not load or display as expected.

The Classic Xstore embedded browser only supports pages that are fully compatible with Microsoft's Internet Explorer web browser.

3. If you navigate to additional websites from within the browser, use the **Browser Back** or the **Browser Forward** options to navigate among other websites that you visited during a browser session.

Figure 26-20 Browser Buttons

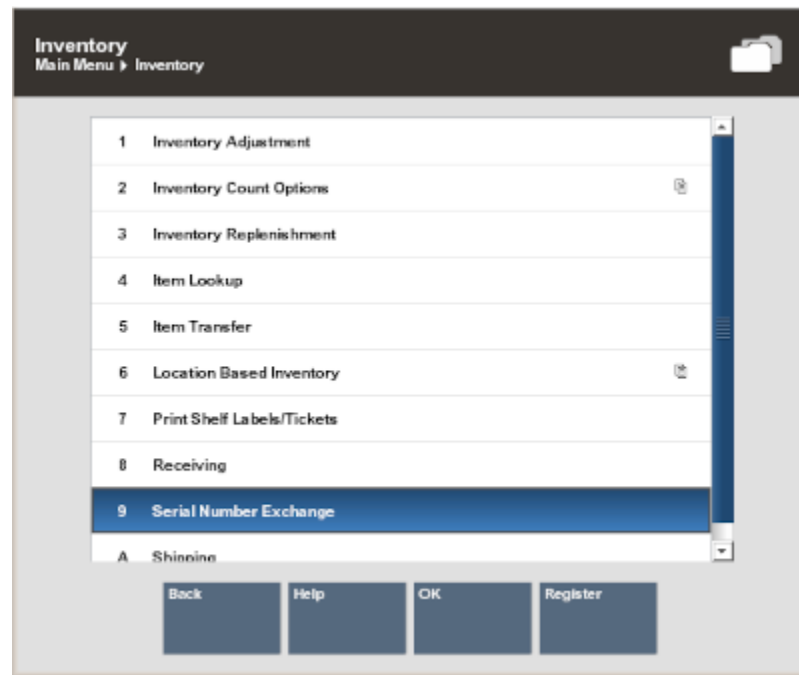


4. After you are finished working in the web browser, select the **Back** option to return to the list of websites on the Browser Menu in Oracle Retail Xstore Point of Service. You may then repeatedly use **Back** to return to previous screens as necessary.

Exchanging Serial Numbers

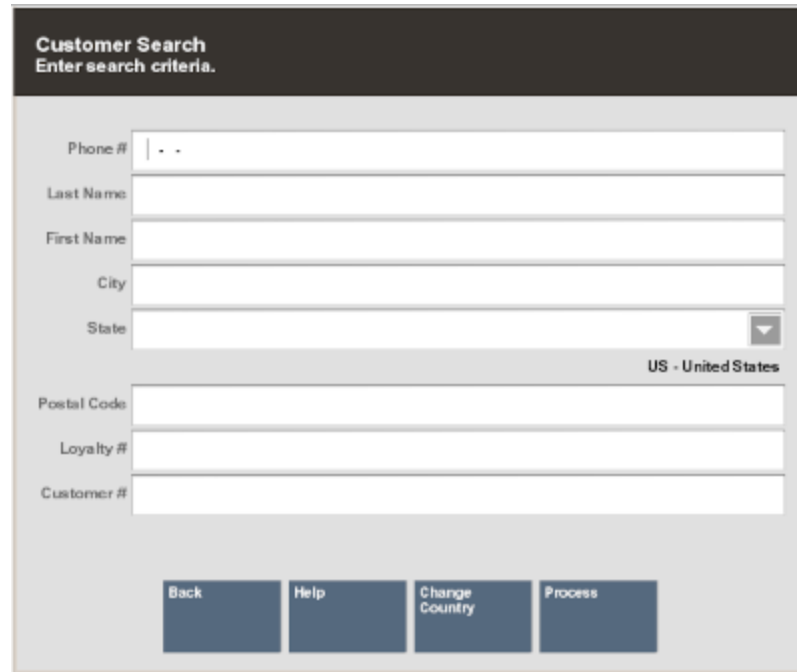
This option allows a serialized item to be exchanged and the new serial number to be linked with the old transaction. Blind or unverified returns are not supported.

Figure 26-21 Inventory Menu - Serial Number Exchange



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

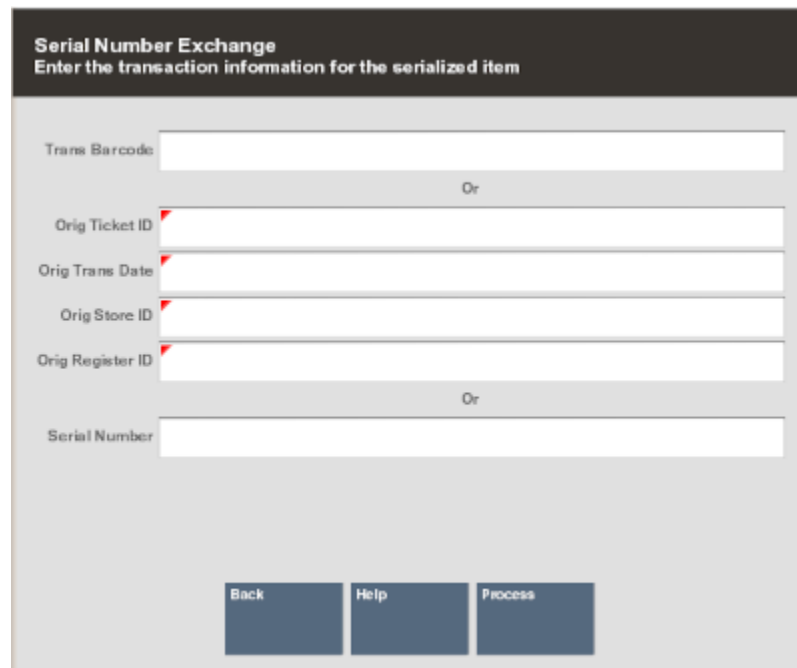
Figure 26-22 Customer Search



The form is titled "Customer Search" with the instruction "Enter search criteria." It contains several input fields: "Phone #" with a placeholder "- -", "Last Name", "First Name", "City", "State" (a dropdown menu currently showing "US - United States"), "Postal Code", "Loyalty #", and "Customer #". At the bottom, there are four buttons: "Back", "Help", "Change Country", and "Process".

2. Enter the criteria to search for the customer.

Figure 26-23 Transaction Search



The form is titled "Serial Number Exchange" with the instruction "Enter the transaction information for the serialized item". It contains input fields for "Trans Barcode", "Orig Ticket ID", "Orig Trans Date", "Orig Store ID", and "Orig Register ID". There are "Or" labels between the "Trans Barcode" and "Orig Ticket ID" fields, and between the "Orig Register ID" and "Serial Number" fields. The "Serial Number" field is at the bottom. At the bottom of the form, there are three buttons: "Back", "Help", and "Process".

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

Figure 26-24 Select Item

Item ID	Original Serial Number	New Serial Number
101000018 Regular_UIN(Serial)_Item	907654321	
101000018 Regular_UIN(Serial)_Item	87654321	
1009 MAXI LENGTH TANK DRESS	76543210	

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

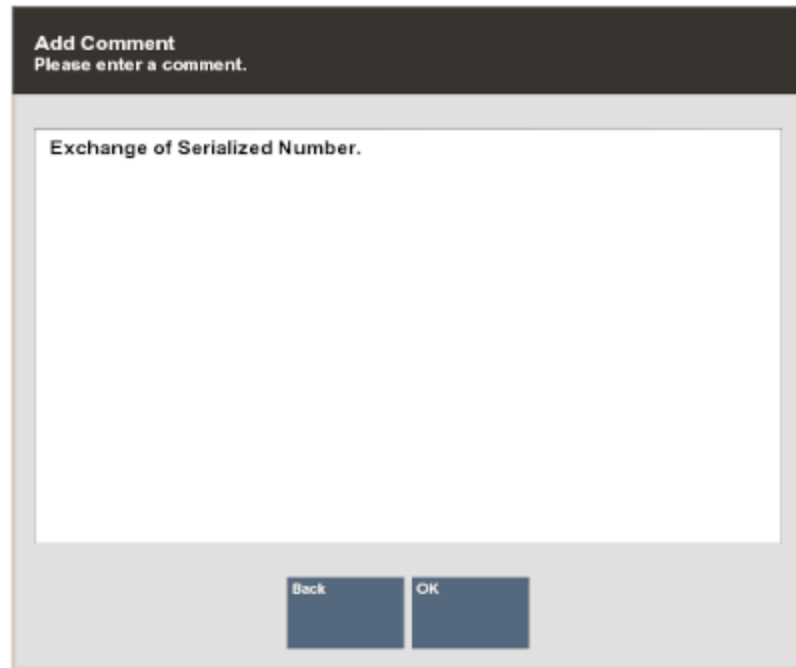
Figure 26-25 Serial Number Exchange Reason Code List

Reasons

- Did Not Like
- Did Not Fit
- Damaged
- Open Box
- Unusable
- Repairable
- Exchange

5. Select a reason code from the list.

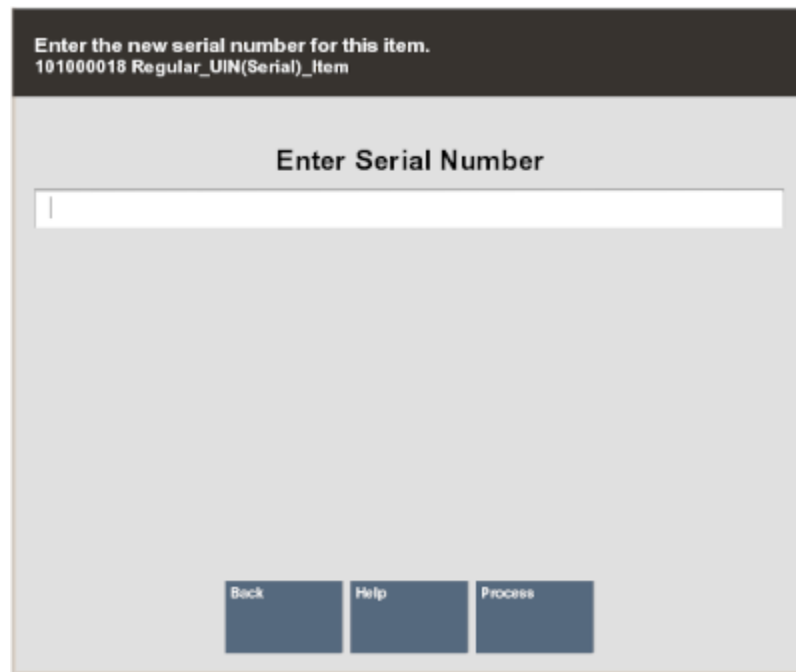
Figure 26-26 Serial Number Exchange Comment Prompt



The dialog box has a dark header bar with the text "Add Comment" and "Please enter a comment." Below this is a large white text area containing the text "Exchange of Serialized Number." At the bottom of the dialog box are two buttons: "Back" and "OK".

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

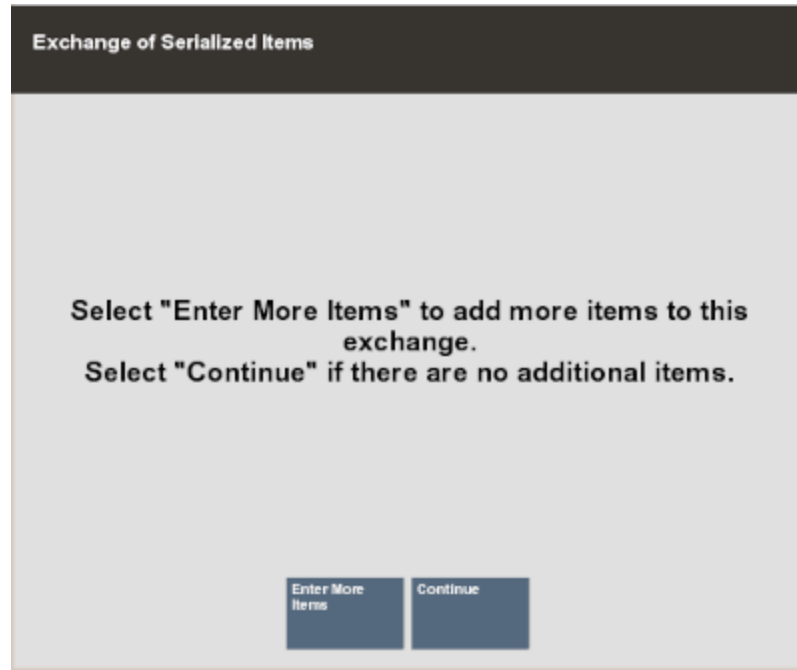
Figure 26-27 New Serial Number Prompt



The dialog box has a dark header bar with the text "Enter the new serial number for this item." and "101000018 Regular_UIN(Serial)_Item". Below this is a light gray area with the text "Enter Serial Number" and a white text input field. At the bottom of the dialog box are three buttons: "Back", "Help", and "Process".

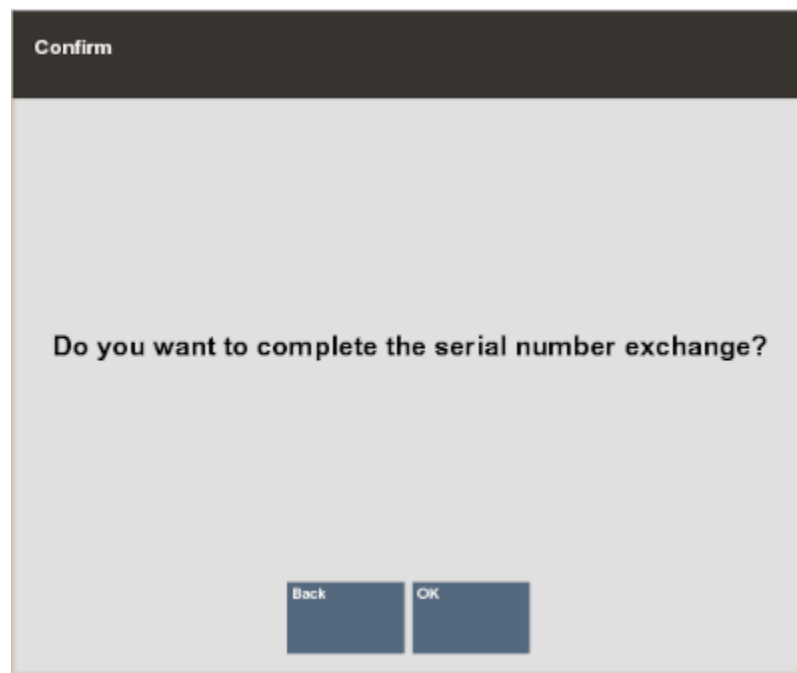
7. Scan or enter the new serial number.

Figure 26-28 Serial Number Exchange More Items Prompt



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

Figure 26-29 Complete Serial Number Exchange Prompt



9. Select **OK** to complete the serial number exchange.
A receipt ticket prints listing each item exchanged and the new serial number for each item. Only the items that have new serialized numbers will print on the ticket. The exchange receipt does not display the price but shows Exchange Receipt.

 Note:

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