

**Oracle® Retail Store21 Point of  
Service**  
User Manual  
Release 4.71

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# CHAPTER 1

## About This Guide

### Overview

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

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Store21 is a point-of-sale (POS) application for use in store registers. Store21 is used to perform standard POS functionality, including sales, layaways, send sales, and returns. Additionally, Store21 provides other services including deals, discounts, inventory tracking, time cards, loyalty programs, and more.

### Audience

This manual describes the use of Store21 in a point-of-sale environment. This manual is intended for use by register users (cashiers and managers), cashier trainers, and technical personnel who need to know and understand Store21 processes. This manual assumes that the reader has some basic knowledge of computers and their use.

### Assumptions

This manual assumes that Store21 is installed, configured properly, and running. This manual also assumes that data has been populated in the database and the system has connectivity to the central database server.

### About This Manual

The following chapters are available in this manual:

- ["Screen Conventions" on page 3](#) describes the layout of the Store21 interface and the terminology used to describe it.
- ["Register Screens" on page 17](#) describes the different register screens that may be used during normal register activity.
- ["Entering Sales" on page 35](#) provides step-by-step procedures required for performing a normal sale transaction.
- ["Communications" on page 81](#) describes the different types of text messages that appear in Store21.
- ["Returns" on page 103](#) provides step-by-step procedures for performing returns.
- ["Tenders" on page 135](#) provides the step-by-step procedures for applying tenders to transactions.

- ["Customer Information" on page 183](#) describes the procedures for adding customers to the system, looking up existing customers, and editing customer information at the register.
- ["Layaways" on page 201](#) provides the procedures related to layaway transactions and layaway pickups and maintenance.
- ["Send Sales" on page 229](#) explains the procedure for creating a Send Sale.
- ["Distributed Orders" on page 231](#) provides the procedure for the creation and setup of a Distributed Order.
- ["Repair/Alterations" on page 235](#) contains the procedures describing how to create Repair and Alteration transactions, as well as the procedures for the management of Repair and Alterations and the pickup of items that were repaired or altered.
- ["Miscellaneous Register Functions" on page 261](#) describes several common register functions that will often need to be performed by cashiers.
- ["Register Close" on page 279](#) describes the procedure for a cashier to close a register and clock out at the end of the day.

## Additional Information

**Store21 User Manual** - Describes the procedures required to perform transaction entry, tendering, and other miscellaneous functions performed by cashiers and store associates on a day-to-day basis.

**Store21 Manager's Guide** - Describes the procedures required for performing the manager-level functions available within Store21. These procedures include the maintenance of Time and Attendance records, using the Electronic Journal, Scheduling, and many other manager activities.

**Store21 Shipping, Receiving, and Inventory Manual** - Describes the procedures required to perform the closely-related functions of shipping, receiving, and inventory control.

**Store21 Technical Guide** - This book provides a summary of all new features for the software version and the new/modified/deleted configurable (code and code value) definitions and settings. It includes modifications to the table structures, indexes, references, views, triggers, etc. at the programmer and implementation personnel level.

**Store21 File Interface Guide** - This book is a data dictionary for the files that are downloaded by Store21 systems and uploaded to corporate. The files used to process updates to Store21 operating tables are described in this document. This document is intended for programmers and implementation personnel.

**Store21 TLog Interface Guide** - This book is a data dictionary for the Transaction Log (TLog) files that are created by Store21 systems and uploaded to corporate. The Transaction Log contains information describing all the transactions performed by a Store21 system. This document is intended for programmers and implementation personnel.

**CHAPTER 2*****Screen Conventions*****Overview**

This section focuses on learning your way around Store21. You will learn about the types of screen conventions used to initiate Store21 features:

- Function Buttons
- Focus Bar
- Message Box
- List Box
- Search Form
- Data Entry Box
- Alert Message
- System Information Prompt
- Touch Screen Menu

Provided in this section are brief descriptions and examples of the conventions. Once you are familiar with them, you will have a good understanding of how to use Store21.

## Function Buttons

Function Buttons indicate which keyboard function keys to press to initiate actions. The Function Names list the available actions. The function names and the function buttons are displayed along the bottom of the screen. It is important to point out that the description and functionality of the buttons change depending on the process.

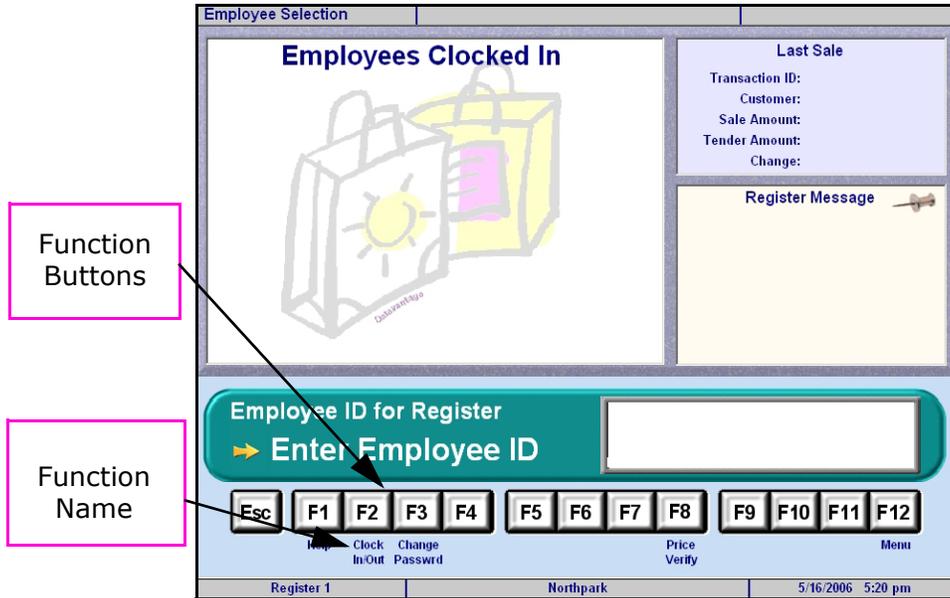


Figure 2-1: Function Button Example

- **Function Buttons** — initiate the action and indicate which keyboard function key to press. Also referred to as Function Keys
- **Function Names** — lists the available Store21 actions

## Focus Bar

The focus bar is the main communication area on the screen. Located just above the function buttons, the focus bar contains a Message Area and a Text Box.

- **Message Area** — prompts the user for information on the focus bar.
- **Text Box** — provides a location on the focus bar to enter information. By following the instructions in the message area, you enter clock in, login, or transactional information.



Figure 2-2: Focus Bar Enter Employee ID

The focus bar uses colors to indicate the specific function. The color of the focus bar helps quickly identify the proper transaction type, helping to reduce transaction errors:

- **Purple** — change password, layaways
- **Teal** — tender entry
- **Yellow** — clock in information
- **Medium Blue** — sales items
- **Red** — return merchandise
- **Dark Blue** — send sales, login information
- **Dark Green** — distributed orders
- **Gray** — edit mode

---

**Note:** Individual customers may change the color of the focus bars. The examples shown are taken from the Base version of the Store21 software.

---

## Using the Focus Bar

In the example that follows, the Message Area prompts for an Employee ID and password. The **[ENTER]** key is normally used to accept information entered into the focus bar.

1. At the Employee Selection screen, the focus bar prompts for an Employee ID.



Figure 2-3: Focus Bar Enter Employee ID

- Key in the Employee ID then press <Bold>[ENTER]<Bold>. The focus bar prompts for a password.



Figure 2-4: Focus Bar Enter Password

- Key in the password then press <Bold>[ENTER]<Bold>. Store21 opens the sales screen and displays the Associates Credited with Sale window.

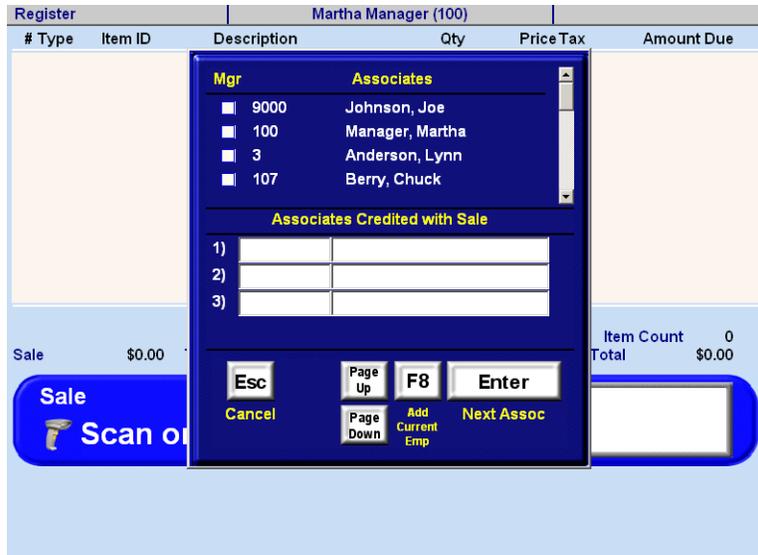


Figure 2-5: Sales Screen and Associates Credited Window

## Message Box

A Message Box requests confirmation or cancellation of an action. A Message Box appears automatically when you initiate a task that requires confirmation. The Message Box contains:

- **Message Area** — contains the confirmation request
- **Function Buttons** — initiate the action and indicate which keyboard key to press
- **Response Option(s)** — lists the available answers



Figure 2-6: Message Box Example

## Using a Message Box

In this example, the Message Box requests an employee's clock-in confirmation.

1. At the Employee Selection screen, press **[F2]**. The focus bar prompts for an Employee ID.



Figure 2-7: Focus Bar Clock-in/out

2. Key in the appropriate Employee ID, then press **<Bold>[ENTER]<Bold>**. The focus bar then prompts for a password.



Figure 2-8: Focus Bar Clock-in/out Password

3. Key in the appropriate password, then press **<Bold>[ENTER]<Bold>**. The Message Box will display this confirmation request.



Figure 2-9: Message Box Clock-In/Out

4. Press **[Y], Yes**, to confirm the clock in. The Type of Hours list box displays.

## List Box

A List Box is an itemized selection box that automatically appears when you must select a parameter. It will also appear when you press a lookup key, such as **[F2]**. The list box contains:

- **Selection Description** — explains what you are selecting
- **List of Selections** — itemizes the available choices
- **Function Buttons** — initiate the action and indicate which keyboard key to press
- **Function Names**— identify the available actions

**Note:** Contents of List Boxes are determined by the home office.

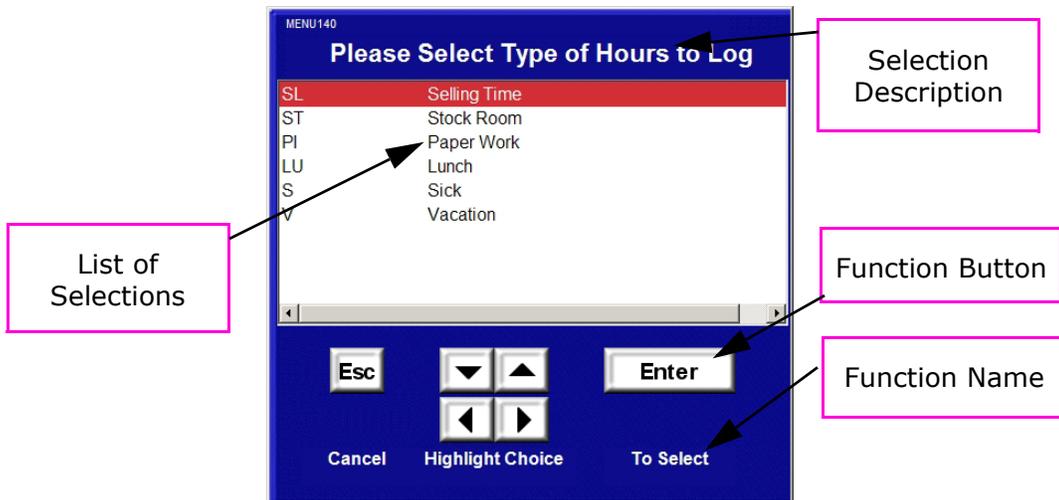


Figure 2-10: List Box Example

## Using a List Box

The example that follows completes the clock-in procedure from ["Using a Message Box" on page 7](#).

1. In the Type of Hours list box, highlight the appropriate hour type shown above.

**Note:** Throughout this text, the word "highlight" means to press the up/down or right/left arrow keys on the keyboard to select the appropriate option in a list box.

2. Press <Bold>[ENTER]<Bold>. The clock-in information displays on the Employee Selection screen.



*Figure 2-11: Employee Selection Screen Showing Employees Clocked In*

## Search Form

In a Search Form, you enter parameters, or criteria, to initiate a database search; it automatically appears when the system requires specific information from you. The Search Form contains:

- **Search Description** — identifies the category of your search
- **Search Parameters** — shows the options available to initiate a search
- **Search Fields** — provide data-entry areas
- **Function Buttons** — indicate which keyboard key to press and initiates the action
- **Function Names** — identify the available search actions

**Note:** Search Boxes and the available search parameters are configurable by the home office.



Figure 2-12: Search Form Example

## Search Commands

The search commands common to all types of Search Forms include:

- **[F1], Help** — displays a help message, if available
- **[F6], Clear Search** — removes all parameters from the search form
- **[F7], List All** — lists all, when available
- **[F8], Execute Search** — initiates the search
- Other search-type specific commands will show as applicable

**Notes:**

- To initiate a search, you need only the first few letters or numbers in the appropriate search parameter(s).
- If you do not know the first letter or number, enter a percent sign (%) before the characters you do know. For example, if you key in "%john" into the Customer Name field, the search result will be names with the letters "john" in them, such as Johns, Johnson, Little john, etc.
- The more parameters you enter, the narrower the search.
- If there is not a match to one of the parameters, the system uses the remaining parameters to conduct a broader search.
- If the system cannot find any matches, a message appears.

## Using Search Boxes

The example that follows reflects using the Customer Search Form.

1. In the Last Name and/or First Name field, key in the customer's name.



**Customer Search**

Customer ID:

Last Name:

First Name:

City:

Postal Code:

Phone Number: ( ) -

Esc   F1   F2   F3   F4   F5   F6   F7   F8

Cancel Search   Help   Empl Sale   Add Cust   Clear Search   List All   Execute Search

Figure 2-13: Search Form Example

**Note:** Press <Bold>[ENTER]<Bold> to move between the fields.

2. Press **[F8], Execute Search**. A list of customers displays who meet your parameters.

## Data Entry Box

The Data Entry Box is an information input form. This form requires specific information about the initiated activity. Data Entry Boxes contain:

- **Selection Description** — defines the type of information
- **Information Field** — provides entry locations for the required information
- **Function Buttons** — initiate the action and indicate which keyboard key to press
- **Function Names** — identify the available actions

The screenshot shows a form titled "Tax Exempt Customer Information". It contains several input fields with red asterisks indicating they are required. The fields are: Transaction (39918), Customer Name (Findley, Rebecca), Address (123 Main St), City (Solon), State (OH), and Zip Code (44121). There are also fields for Reason and Tax Exempt #. At the bottom, there are four buttons: Esc (Cancel Tax), F2 (Save), F8 (Save), and Enter (To move to next item). Callouts from external boxes point to the Selection Description, Information Field, Function Buttons, and Function Names.

Figure 2-14: Data Entry Box Example

## Using a Data Entry Box

The example that follows is part of a tax-exempt sales transaction.

1. At the Tender list box, press **[F6], Change Tax**. The system displays the Tax Exempt Customer Information box.

This is a duplicate of the screenshot in Figure 2-14, showing the "Tax Exempt Customer Information" form with its required fields and function buttons.

Figure 2-15: Tax Exempt Customer Information

Red text in the description field indicates that it is a required field. The data cannot be saved until there is an entry in each required field.

2. Key in the required information, then press **[F8], Save**, to save the data. The transaction is now tax exempt.

## Alerts

System Alerts are visual indicators generated by the system to notify managers and sales associates of activities that require attention. The Alerts are highly configurable and combine color, text, and icons to indicate the priority level of the Alert. Icons appear to the right of the message, showing the priority level of the current messages. The icons are displayed going left to right, beginning with the highest priority.



Figure 2-16: Alert Example

1. Alerts display when the system detects that there is an activity or transaction that needs the attention of a store associate.
2. Once an Alert is indicated on the item screen, an associate can display the Action Items shown below by pressing **[F9], Alerts**.



Figure 2-17: Alerts Function Button

**Note:** The ability to react to an Alert will depend upon the store associate's position and assigned security level. For example, if a sales associate is not authorized to process an order from another store, he/she will not be able to respond to the Alert that indicates a new order request is waiting.

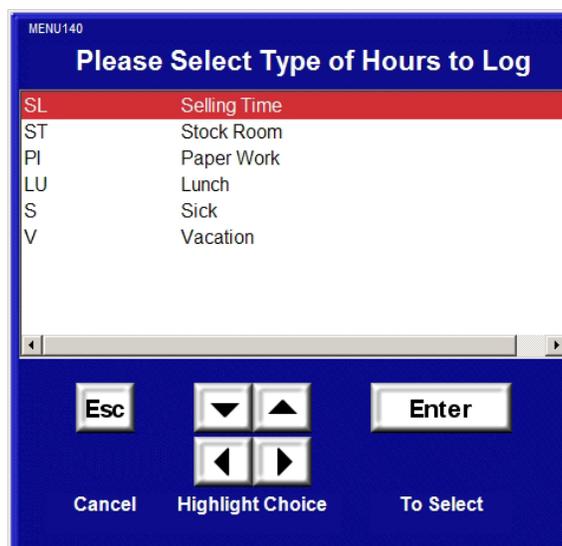


Figure 2-18: Alert Action Items

## System Information Prompts

Throughout Menu21 and Store21, the system will display prompts to indicate the system is processing a request or transaction.

The following prompt displays during a customer search.



*Figure 2-19: Please Wait Window*

It is important to wait for the system to re-prompt for the next step.

During the tender process, the system will prompt you to remove and insert Gift Certificates, Checks, Travelers Checks, and other tenders, depending upon the tender selected. Wait and read each prompt carefully to ensure that the correct tender is franked with the correct information.

## Touch Screen Functionality

Touch screen Functionality in Store21 is a configurable option. The touch screen shows the keyboard, number pad and function keys on the screen. Throughout the system, touch the spot on the monitor where the function key or function name displays. The functionality of the Store21 register system remains the same. In addition to touching the monitor, you can select the appropriate functions by using a mouse to point to a selection and clicking the left mouse button. [Figure 2-20](#) is an example of the touch screen.

The F-key functionality of the keyboard has been incorporated into the function buttons along the right side of the screen monitor.

**Note:** The Touch screen functionality requires the use of a monitor set to 1024 x 768 resolution.

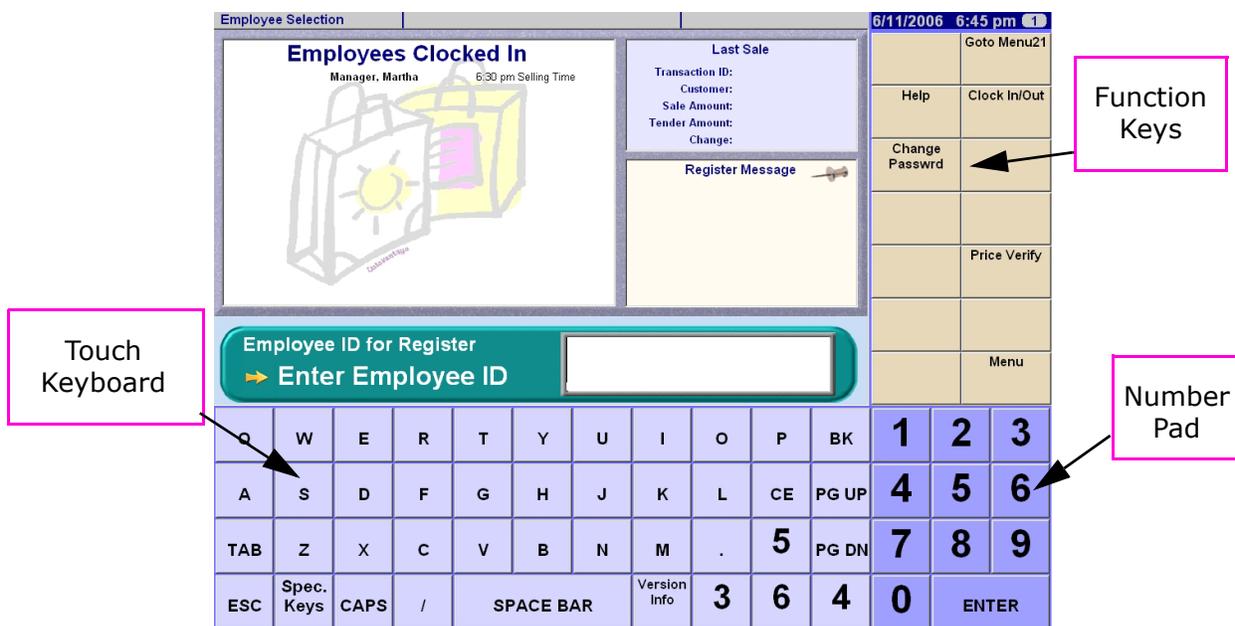


Figure 2-20: Employee Selection Screen with Touch Screen Enabled



## CHAPTER 3

## Register Screens

### Overview

There are several areas that cashiers must access during the day to perform many functions on the registers. These include:

- Access the Register Screen
- Access the Menu Screen
- Cashier Mode

### Register Screen

Once the register is open, the cash drawer counted, and employees are clocked in, employees can access the Register screen to ring sales, process returns, check gift card balances, and search for items.

1. Go to the Employee Selection screen.



Figure 3-1: Employee Selection Screen



Figure 3-2: Employee ID for Register Focus Bar

- Key the employee ID into the focus bar. Press **[ENTER]**.

Employee ID for Register  
 Enter Password

Figure 3-3: Password for Register Focus Bar

- Key in the password. Press **<Bold>[ENTER]<Bold>**. The Register screen displays along with the Associates Credited with Sale input box. See ["Cashier Mode" on page 20](#) for more information about this input box.

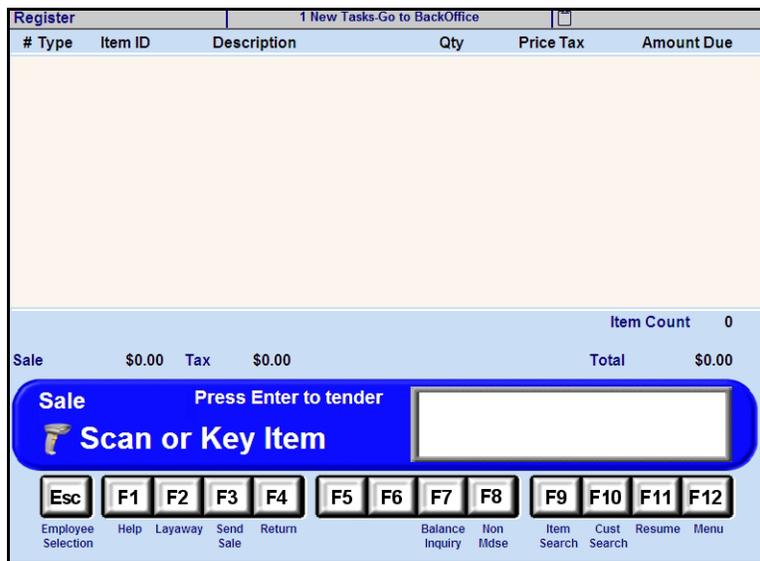
#	Type	Item ID	Description	Qty	Price Tax	Amount Due
<b>Mgr Associates</b>						
<input type="checkbox"/>		3	Anderson, Lynn			
<input type="checkbox"/>		107	Berry, Chuck			
<input type="checkbox"/>		100	Manager, Martha			
<input type="checkbox"/>		105	Brown, James			
<b>Associates Credited with Sale</b>						
1)						
2)						
3)						
Sale \$0.00						Item Count 0
Total \$0.00						

Control Panel: Esc, Page Up, F8, Enter, Page Down, Add Current Emp, Next Assoc

Figure 3-4: Register Screen with Associates Credited with Sales Input Box

- To apply the credit to yourself, press **[F8], Add Current Emp**.
- The Customer Search form displays. To omit the customer information from the sale, press **[ESC]**.

6. The Register screen displays.



#	Type	Item ID	Description	Qty	Price Tax	Amount Due
---	------	---------	-------------	-----	-----------	------------

Sale \$0.00 Tax \$0.00 Total \$0.00

Item Count 0

Sale Press Enter to tender

Scan or Key Item

Esc F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12

Employee Selection Help Layaway Send Sale Return Balance Inquiry Hon Mide Item Search Cust Search Resume Menu

Figure 3-5: Register Screen

**Note:** See [“The Basic Transaction” on page 38](#), for using the Customer Search form and processing transactions.

## Cashier Mode

Cashier Mode allows the employee who is ringing a sale to credit the appropriate associate(s) with the sale transaction; each sale requires at least one associate to receive credit. Entering Cashier Mode occurs automatically after an employee enters the employee ID and password into the focus bar of the Employee Selection screen. The Register screen displays along with the Associates Credited with Sale input box.

The screenshot shows the Register screen with a central dialog box for selecting associates. The dialog box has a title bar with 'Mgr' and 'Associates'. Below the title bar, there is a list of associates with checkboxes: 3 Anderson, Lynn; 107 Berry, Chuck; 100 Manager, Martha; and 105 Brown, James. Below this list is a section titled 'Associates Credited with Sale' with three numbered input fields (1), (2), and (3). At the bottom of the dialog box, there are several buttons: 'Esc', 'Page Up', 'F8', 'Enter', 'Page Down', 'Add Current Emp', and 'Next Assoc'. The background shows a table with columns: #, Type, Item ID, Description, Qty, Price Tax, and Amount Due. The 'Sale' amount is \$0.00 and the 'Total' is \$0.00. There is also an 'Item Count' of 0.

Figure 3-6: Associates Credited with Sale Input Box

**Note:** The home office can configure the system to credit from 1 to 5 associates on a single sale.

1. Enter the associate's ID. There are three ways to enter the associates for credit:
  - a. To apply the credit to yourself, press **[F8]**, **Add Current Emp**.
  - b. Key each associate's ID number into the blank field on the left. Press **[ENTER]**.
  - c. If a mouse is available, position the mouse pointer on the associate's name and double-click with the left mouse button.

The name associated with the ID number displays in the box.

Figure 3-7: Associates Credited with Sale Information

2. Enter the next sales associate's ID or press **[ENTER]** to continue the sale.
3. The system validates the employee number. If no sales associate's number is entered or if an invalid sales associate's number is entered, an error message displays.



Figure 3-8: Enter Sales Associate - Error Message

- a. Press **[ENTER], To Continue**, to return to the Associates input box.
  - b. Re-enter an employee's ID.
4. Repeat steps 1 and 2 until all employees to be credited with the sale are entered.

#### Notes:

- The employee to be credited does not have to be clocked in to receive credit for the transaction.
- If you do not know the employee's ID, you can look up the number. Press the **[PgUp]** or **[PgDn]** key on the keyboard to scroll through the list of active employees at the top of the Associates data entry box.

5. The Customer Search form displays. See ["Access the Customer Search Form" on page 184](#), for information on searching and capturing customer data.



**Customer Search**

Customer ID:

Last Name:

First Name:

City:

Postal Code:

Phone Number: (  ) -

Esc   F1   F2   F3   F4   F5   F6   F7   F8

Cancel Search   Help   Empl Sale   Add Cust   Clear Search   List All   Execute Search

*Figure 3-9: Customer Search*

The associate to receive credit for an item can be changed during a sale transaction. See ["Modify Lines" on page 60](#), for information about modifying line-items of a sale.

## Menu Screen

Many cashier functions require store employees to open the Menu screen which is where the Top of Menu list is located. It is accessible from both the Employee Selection screen and the Register screen.

1. From either the Employee Selection screen or the Register screen, press **[F12]**, **Menu**, to access the Back Office Top of Menu.



Figure 3-10: Employee Selection Screen (left) - Register Screen (right)

**Note:** The **[F12]** function key is also known as the Back Office Menu button.

2. Store21 prompts for the employee ID and password.

<p><b>IF...</b></p> <p>accessing <b>[F12], Menu</b>, from the Employee Selection screen</p>	<p><b>THEN...</b></p> <p>a. The color of the focus bar changes to blue and prompts for the Employee ID.</p>  <p><i>Figure 3-11: Focus Bar Prompt for Employee ID</i></p> <p>b. Enter your Employee ID and press <b>[ENTER]</b>. The focus bar prompts for the Password.</p>  <p><i>Figure 3-12: Focus Bar Prompt for Password</i></p> <p>c. Enter your password and press <b>[ENTER]</b>.</p>
<p><b>IF...</b></p> <p>accessing <b>[F12], Menu</b>, from the Register screen</p>	<p><b>THEN...</b></p> <p>a. The System Security input form displays.</p>  <p><i>Figure 3-13: System Security Input</i></p> <p>b. Key in the Employee ID and Password and press <b>[ENTER]</b>.</p>

3. The Menu screen displays with the Top of Menu.



Figure 3-14: Top of Menu Screen

**Notes:**

- The contents of the Top of Menu list that displays are dependent upon the authorized security level of the employee. Some options may not be visible, and some options may require additional manager-level security to activate the function.
- When attempting to access **Menu**, employees without the authorized security level will see a message stating that they cannot perform the operation and will be returned to the Employee Selection screen.



## CHAPTER 4

## *Register Open*

### Overview

Before you can use a register for transaction processing, the register needs to be opened and, depending on the configuration of your system, you need to be clocked in to the system. This chapter guides you through the process of clocking in and opening the register.

The register-opening procedure is configurable depending on the functionality selected for your system, but may include error reporting. The system may display errors that occurred during the previous day's closing process. Follow your company's procedure or call the help desk to clear the error.

This chapter contains the following sections:

- Clock In
- Begin Count Cash Drawers
- Count the Cash Drawer

## Clock In

After clocking in, employees can count cash drawers and assign/manage tills, according to their security level. Only employees who are clocked in have access to the system. Depending upon the system’s configuration, employees who are already clocked in (either by using the Offline Timeclock or still clocked in from a previous session) do not have to clock in again.



Figure 4-1: Employee Selection Screen

1. Press **[F2]**, **Clock In/Out**, to clock in. The focus bar turns yellow and prompts for an employee ID.



Figure 4-2: Focus Bar Clock In/Out Clerk ID

2. Key in the Employee ID and press **[ENTER]**. The focus bar prompts for an employee password.



Figure 4-3: Focus Bar Clock In/Out Clerk Password

3. Key in the password and press **[ENTER]**.

The Type of Hours list displays.

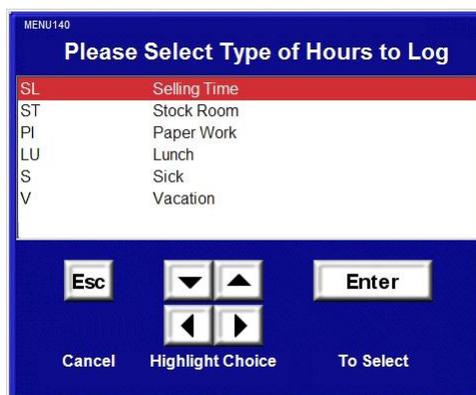


Figure 4-4: Type of Hours to Log List Box

**Note:** Types of Hours are defined by the home office.

4. Highlight the appropriate hour type and press **[ENTER]**.

The employee's name, the time, and the hour type display on the screen.



Figure 4-5: Employee Clocked In

Employees who are clocked in can perform non-tender transactions at this point, including counting the cash drawer or issuing tills.

## Begin Count Cash Drawers

The cash drawer must be counted before employees can ring transactions on it. This Begin Count on the cash drawer assigns the drawer to the current register.

1. From the Back Office Top of Menu, highlight **Cash Drawer Management...** and press <Bold>[ENTER]<Bold>. The Cash Drawer Management menu displays.



Figure 4-6: Cash Drawer Management Menu

2. Highlight **Count Cash Drawer** and press <Bold>[ENTER]<Bold>. The cash drawer opens and the Begin Counting screen displays.

Count Cash Drawer		Martha Manager (100)	
Register #1	Begin Counting	1 of 1	
<b>CASH</b>			
Description	Qty X	Value =	Amount
Pennies (50/roll)	50 X	0.01 =	0.50
Nickels (40/roll)	40 X	0.05 =	2.00
Dimes (50/roll)	50 X	0.10 =	5.00
Quarters (40/roll)	40 X	0.25 =	10.00
Half Dollars	0 X	0.50 =	0.00
Dollar Coin	0 X	1.00 =	0.00
Ones	20 X	1.00 =	20.00
Two Dollar	0 X	2.00 =	0.00
Fives	4 X	5.00 =	20.00
Tens	4 X	10.00 =	40.00
Twenties	<input type="text" value="50"/> X	20.00 =	100.00
Fifties	0 X	50.00 =	0.00
Hundreds	0 X	100.00 =	0.00
<b>Total:</b>			197.50

Cancel Help Save

Register 1 Northpark 5/29/2006 11:20 am

Figure 4-7: Begin Counting Screen

3. Key in the quantities - not the dollar amounts - of the appropriate cash denominations, pressing <Bold>[ENTER]<Bold> to move between the fields.

### Notes:

- For example, if you have \$2.50 in nickels, key "50" into the QTY (of nickels) column. Press <Bold>[ENTER]<Bold>. The system multiplies 50 by the value of the denomination, in this case \$.05, and \$2.50 appears in the Amount column.
- The default list of denominations is determined by the home office.

4. When the total amount at the bottom of the register's Begin Counting screen equals the starting cash in the drawer, press **[F8]**, **Save**. A confirmation message displays.



Figure 4-8: Cash Drawer - Count Complete Confirmation

5. Press **[ENTER]** to continue.
6. If a variance occurs, Store21 displays a prompt to accept the variance or not.  
A variance occurs if there is difference between the amount of cash just counted and the amount Store21 is programmed to expect which is the amount declared at the End Count of the register's cash drawer the previous business day.



Figure 4-9: Confirmation Screen Cash Variance

- a. Press **[N]**, **No**, to return to the Begin Count screen to re-enter the cash count.
  - b. Press **[Y]**, **Yes**, to accept the variance.
7. The system saves the information and prints a Begin Count receipt. If configured to do so, the Begin Count receipt lists each cash denomination name, the quantities of each denomination, and the extended count. It may also list the Expected Amount - a.k.a. variance amount ([Figure 4-9](#)) - and the Difference between them.

## Count the Cash Drawer

The last step in opening a register is to count the cash drawer or issue tills, depending on the type of cash-accounting method used by the store. To access these options, press **[F12]**, **Menu**, at the Employee Selection screen to open the Top of Menu. See Cash Drawer Management in the Store21 User Guide for more information.

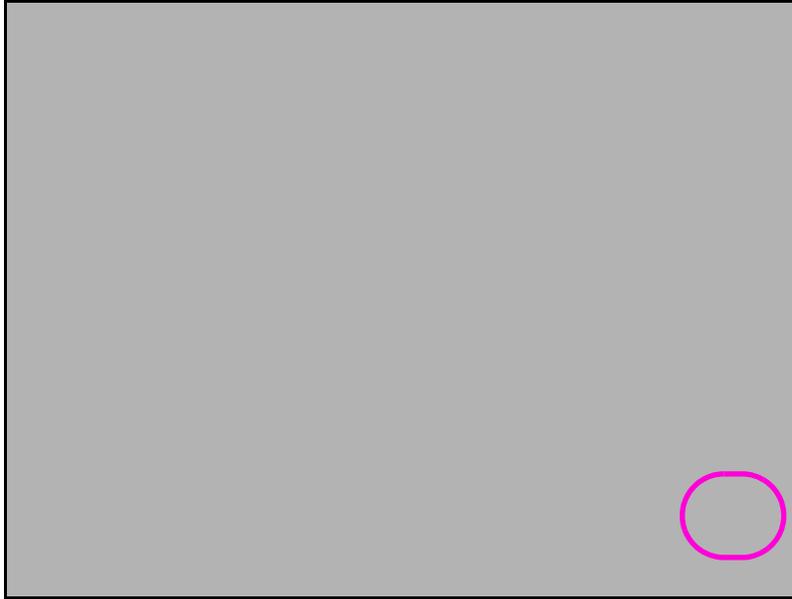


Figure 4-10: Employee Selection Screen

1. Press **[F12]**, **Menu**, at the Employee Selection screen. The focus bar prompts for the Employee ID.



Figure 4-11: Focus Bar - Employee ID

2. Key in the Employee ID and press **[ENTER]**. The focus bar prompts for the Password.



Figure 4-12: Focus Bar - Password

3. Key in the Password and press **[ENTER]**.

Top of Menu displays.



*Figure 4-13: Top of Menu*

4. Highlight "Cash Drawer Management" and press **[ENTER]**. See Begin Count Cash Drawers in the Store21 User Guide for more information about how to Count the Cash Drawer.

Once the cash drawer is counted, employees who are clocked in and have the appropriate level of security can ring sales.



## CHAPTER 5

## *Entering Sales*

### Overview

Each sale transaction type is included in this chapter. The instructions include step-by-step details and the optional choices that are available. These are the items considered in a sale transaction:

- The Basic Transaction
- Entering Items
- Searching For Items
- Entering Non-Merchandise Items
- Gift Cards
- Manual Gift Card Activation
- Gift Card Balance Inquiry
- Discount Cards
- Kit-Priced Items
- Modifying Line Items
- Discounting Items and Transactions

All examples in this chapter assume that the register is open, the cash drawer is counted, and the cashier employee is clocked in. The first section steps through a basic transaction. The remainder of the chapter explains the options available for each component of the transaction.

## The Register Screen

All sales transactions start at the Register screen.

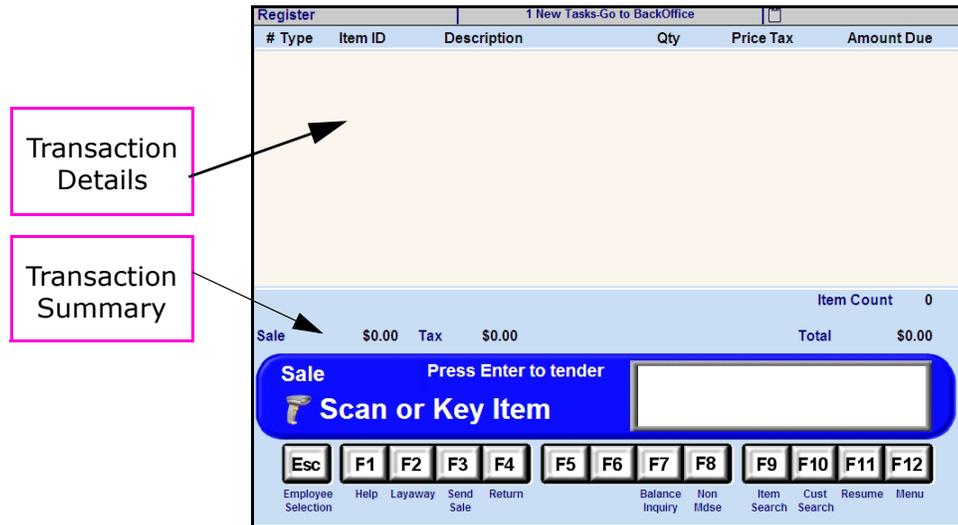


Figure 5-1: Register Screen

- **Transaction Details** - information about the items of the transaction
- **Transaction Summary** - the running totals for the transaction

## Item Information

When the Register screen opens, the system is in Sale Item mode. This mode allows the system to populate information to the screen about the items involved in the transaction and record the details of the transaction. This is a description of the transaction information the Register screen displays:

#	Type	SKU	Description	Qty	Price	Tax	Amount Due
3	Send	101	10 K Garnet/Dia Ring	1	129.99	SENDSALE	129.99
<b>Elvis Presley</b>				Item Count		1	
Sale		\$129.99	Tax	\$0.00	Total		\$129.99

The diagram shows a screenshot of the Register screen with a table of transaction details. Callouts A through L are placed around the table, with arrows pointing to specific fields:

- A** points to the line item number '3'.
- B** points to the transaction type 'Send'.
- C** points to the item SKU number '101'.
- D** points to the item description '10 K Garnet/Dia Ring'.
- E** points to the quantity '1'.
- F** points to the price '129.99'.
- G** points to the tax code 'SENDSALE'.
- H** points to the amount due '129.99'.
- I** points to the 'Sale' amount '\$129.99'.
- J** points to the 'Tax' amount '\$0.00'.
- K** points to the 'Total' amount '\$129.99'.
- L** points to the 'Item Count' '1'.

Figure 5-2: Transaction Details

- A** - sequential line item number
- B** - transaction type (i.e. Send, Repair, Return)
- C** - item SKU number
- D** - description
- E** - quantity of items
- F** - price of each item
- G** - tax code (for sales tax - based on appropriate tax tables)
- H** - amount due (price \* quantity)
- I** - total sale without tax
- J** - sum of the tax due for the items sold
- K** - grand total due from the customer
- L** - total item count

## The Basic Transaction

Before looking at each sale type and option, it is important to understand the basic transaction. The first sale after clocking in begins at the Employee Selection screen. The initial screen for subsequent sales is the Register screen.



Figure 5-3: Employee Selection Screen

1. In the focus bar, key in your Employee ID and press **[ENTER]**. The focus bar prompts for your password.



Figure 5-4: Enter Password Focus Bar

2. Key in your password and press **[ENTER]**. The Register screen and the Associate Credited with the Sale form display.

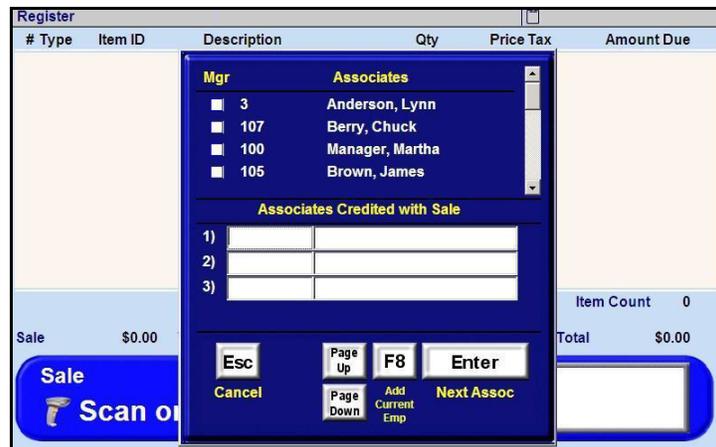


Figure 5-5: Register Screen and Associate Credited with Sale Input Form

- Key in the Employee ID of the associate to be credited with the sale and press **[ENTER]**. The system validates the Employee ID and displays the associate's name.

The screenshot shows a software interface with a blue background. At the top, there are two tabs: "Mgr" and "Associates". Below the tabs is a list of associates with checkboxes:

Mgr	Associates
<input type="checkbox"/> 3	Anderson, Lynn
<input type="checkbox"/> 107	Berry, Chuck
<input type="checkbox"/> 105	Brown, James
<input type="checkbox"/> 104	Dylan, Bob

Below this list is a section titled "Associates Credited with Sale" containing a table:

	Employee ID	Associate Name
1)	107	Chuck Berry
2)		
3)		

At the bottom of the screen are several buttons: "Esc" (labeled "Cancel" below it), "Page Up", "Page Down", "Enter" (labeled "Next Assoc" below it), and "Next Assoc".

Figure 5-6: Validated Sales Associate

- Repeat step 3 as necessary. When all associates who are to receive credit are entered, press **[ENTER]**.
- The Customer Search screen displays.  
Do one of the following:

The screenshot shows the "Customer Search" screen. It features a header with a family icon on the left and a binoculars icon on the right. Below the header are several input fields:

- Loyalty #: [text input]
- Last Name: [text input]
- First Name: [text input]
- City: [text input]
- Postal Code: [text input]
- Phone Number: ( ) - [text input]

At the bottom of the screen is a row of function key buttons: Esc (Cancel Search), F1 (Help), F2 (Empl Sale), F3, F4, F5 (Add Cust), F6 (Clear Search), F7 (List All), and F8 (Execute Search).

Figure 5-7: Customer Search Screen

- Scan the loyalty card. Continue with step 7.
- Enter the Loyalty Card Number in the prompt, then press **[ENTER]**. Continue with step 7.
- Press **[ESC]** to cancel. If sale transactions do not require customer information, continue with step 7.
- Key in the customer's search criteria, then press **[F8]**, **Execute Search**.

**Note:** To widen the search, use the "%" key before and/or after entering one or more characters into the fields. Narrow the search by using multiple fields.

- If the customer is not found, a blank Customer Maintenance screen displays.
- If the customer is found, the system displays the Customer Maintenance screen with the customer’s personal information.

Figure 5-8: Customer Maintenance Screen

**Note:** If your system is configured to use the Loyalty system, the Customer Maintenance screen also includes information about the customer’s loyalty account.

6. Key in the new customer’s information, or press **[F7]**, **Edit**, to edit the existing customer’s information, if necessary. Press **[ENTER]**. The Register screen displays with the customer’s name.

Figure 5-9: Register Screen with Customer’s Name

- Use the hand scanner to scan the bar code of an item, or key in the UPC number associated with the item into the focus bar. If you key in the item, press **[ENTER]**. The item displays on the register screen with the applicable information.



Figure 5-10: Register Screen with Item Entered

- Press **[ENTER]** to begin the tender process. The Tender List displays.

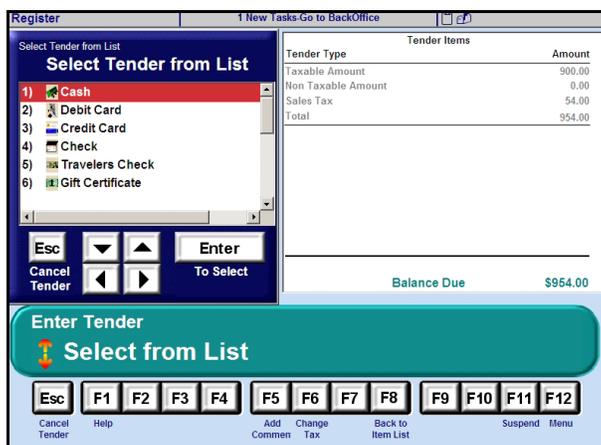


Figure 5-11: Tender List

- Each tender type requires different steps to complete the tender process. See ["Basic Tender Process - Tender Mode"](#) on page 136, for full details. Highlight **Cash** and press **[ENTER]**. The system prompts for the amount of cash you accept from the customer.



Figure 5-12: Cash Tender Focus Bar

**Note:** Store21 assumes the decimal point in a tender entry. Key in the entire dollar/cents amount, including the last 2 digits. For example, the entry for twenty-five dollars is **[2500]**.

10. Key in the amount of cash received from the customer and press **[ENTER]**. The system displays the Sale Complete confirmation message. The customer's change due, if any, displays in red.

The screenshot shows a 'Register' window with a blue dialog box in the foreground. The dialog box contains the text 'Is this sale complete?' and 'Choose Yes to Print Receipt. Choose No to Return to Tendering.' Below this text are three buttons: 'Y Yes', 'N No', and 'F8 Gift Rec'. The background window shows a receipt summary with the following data:

Tender Type	Amount
taxable Amount	900.00
n Taxable Amount	0.00
les Tax	54.00
tal	954.00
sh	1,000.00

Below the receipt summary, the text 'Amount Due Customer' is displayed in red, followed by '(\$46.00)'. At the bottom of the window, there is a row of function keys: Esc, F1, F2, F3, F4, F5, F6, F7, F8, F9, F10, F11, F12.

Figure 5-13: Register Screen - Sale Complete

11. Press **[Y]**, **Yes** to complete the transaction and print the receipt.

If the system is configured to include Loyalty Programs and the customer has a loyalty account, the points earned and current loyalty point balance is displayed on the bottom of the receipt, as well as the number of points in escrow, if any.

## Enter Item Numbers

Begin a Basic Transaction (see [“The Basic Transaction” on page 38](#) for more information). Once you capture the customer’s information, you can enter several types of items, such as merchandise items, non-merchandise items, returns, etc. from the Register screen ([Figure 5-9](#)).

- Enter the item number into the focus bar.
  - If you are using the keyboard, key in the Long SKU, Short SKU, or UPC number. Press **[ENTER]**.
  - If you are using a hand scanner, scan the item’s UPC label. You do not need to press **[ENTER]**.

The screenshot shows the Register screen for 'Joe Trainer'. At the top, it displays 'Sale \$0.00 Tax \$0.00' and 'Item Count 1 Total \$0.00'. The main focus bar is blue and contains the text 'SALE Press Enter to tender' and 'Scan or Key Item'. The item number '1000259' is entered in the white input field. Below the focus bar is a row of function keys: Esc, F1-F4, F5-F8, and F9-F12. Each key has a corresponding label: Employee Selection, Help, Layaway, Send Sale, Return, Non Mdse, Item Search, Cust. Search, Resume, and Menu.

Figure 5-14: Enter Single Item

- If you do not know the item number and cannot scan the item, press **[F9]**, **Item Search**, to open the Item Search form to find the item number. See [“Search for Items” on page 44](#).
- To key in multiples of an item, key the quantity, a slash, then the item number.

The screenshot shows the Register screen with the focus bar containing 'SALE Press Enter to tender' and 'Scan or Key Item'. The input field now contains '3/1000259', indicating a quantity of 3 for item 1000259.

Figure 5-15: Enter Multiple Quantity

Whichever method of entering the item number you use, the system looks up the price and displays the item information on the screen.

Register		Martha Manager (100)		18		
#	Type	SKU	Description	Qty	Price Tax	Amount Due
2		1000259	14KT YG ONYX DIA	3	900.00 R	2,700.00
Joe Trainer						Item Count 1
Sale \$2,700.00 Tax \$108.00				Total		\$2,808.00

Figure 5-16: Register Screen - Multiple Item Quantity

## Search for Items

If you do not know the number for an item, use one of the tools in the Item Search form to find and enter the number into the focus bar of the Register screen.

- From the Register screen (Figure 5-9), press **[F9]**, **Item Search**, to open the Item Search form.

Figure 5-17: Item Search Form

- Key in the appropriate search parameters. Place the character "%" before and/or after the parameter to widen the search.
  - You can search on part of any parameter, beginning with the first character.
  - You can search on the product's description, or part of the description, beginning with the first character.
  - Keywords can have up to 30 characters. Only 1 keyword can be used at a time. (Do not enter multiple keywords separated by commas.)
  - You can execute a narrower search by entering more parameters. For example, if "%2%" is entered into the Item ID field, and "%pant%" is entered in the Description field, only items matching both of these parameters display in the list.

SEARCH100

Select from List

Item ID	UPC	Item Description	Style	Dimensions	Department / Class	Regular Price
99201		Brushed Twill Pant	992	4//	0429/0429	49.50
99202		Brushed Twill Pant	992	5//	0429/0429	49.50
99203		Brushed Twill Pant	992	6//	0429/0429	49.50
99204		Brushed Twill Pant	992	7//	0429/0429	49.50
99205		Brushed Twill Pant	992	8//	0429/0429	49.50
99206		Brushed Twill Pant	992	9//	0429/0429	49.50
99207		Brushed Twill Pant	992	10//	0429/0429	49.50
99208		Brushed Twill Pant	992	11//	0429/0429	49.50
99209		Brushed Twill Pant	992	12//	0429/0429	49.50
99210		Brushed Twill Pant	992	13//	0429/0429	49.50
99211		Brushed Twill Pant	992	14//	0429/0429	49.50
99212		Brushed Twill Pant	992	15//	0429/0429	49.50

Esc    ▲ ▼    Enter    F7  
 Cancel    Highlight Choice    Add To Sale    Locate

Figure 5-18: Search Form Results with Two Parameters

## Look up Item Numbers Using Lookup Lists

Search one or more of the parameter fields. Style, Department, Class, and Vendor fields have associated lookup functions.



Item Search

Item ID:

UPC:

Description:

Style:

Department:

Class:

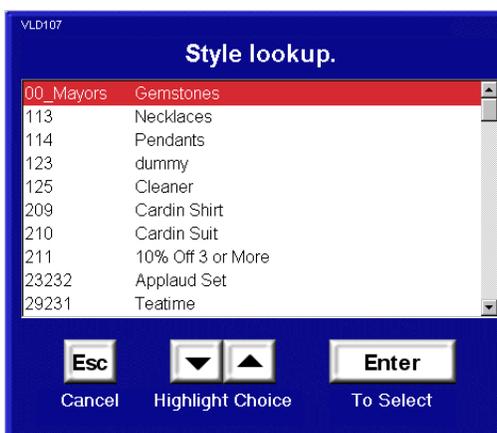
Vendor:

Esc F1 F2 F3 F4 F5 F6 F7 F8

Cancel Search Help Clear Search List All Execute Search

Figure 5-19: Item Search Form

1. Put the cursor in the desired field, such as Style, of the search form. Press **[F2]**, **Lookup**, to display a lookup list.



VLD107

Style lookup.

Item ID	Description
00_Mayors	Gemstones
113	Necklaces
114	Pendants
123	dummy
125	Cleaner
209	Cardin Shirt
210	Cardin Suit
211	10% Off 3 or More
23232	Applaud Set
29231	Teatime

Esc ▼ ▲ Enter

Cancel Highlight Choice To Select

Figure 5-20: Style Lookup List

- Highlight the appropriate item (ex: "209") and press **[ENTER]**. The Item Search form displays with the item selected above entered as a search parameter.

Figure 5-21: Item Search by Style Number

- Press **[F8]**, **Execute Search**.
- The system finds items that match your search parameters and lists them in the Select from List.

Item ID	UPC	Item Description	Style	Dimensions	Department / Class	Regular Price
209		WHT Cardin Drss Shirt	209	WHITE/10/		75.00

Figure 5-22: Select Item from List

- Highlight the correct item and press **[ENTER]**. The item information appears on the Register screen.

Register		Martha Manager (100)			18	
#	Type	SKU	Description	Qty	Price Tax	Amount Due
2		1000259	14KT YG ONYX DIA	3	900.00 R	2,700.00
3		209	WHT Cardin Drss Shirt	1	75.00 R	75.00

Figure 5-23: Selected Item on Register Screen

## Enter Items Not Found In the System

Store21 can be configured by the home office to enable or disable entering items manually into the register that cannot be scanned or located using the Item Lookup function. This is called a Forcesku. Since the Forcesku process has multiple features to be configured by the home office which either accepts the input keyed in by the cashier or assigns the item to a default group, it is important that the cashier follow the prompts that are presented by the system.

---

**Note:** Only one of the following Forcesku methods can be enabled by the home office.

---

### When Forcesku is not Enabled

If Forcesku is not enabled, Store21 will not recognize any item number or UPC that does not have an item record in the system.

1. Scan or key the item number into the focus bar and press **[ENTER]**. Store21 searches for but cannot locate the item. The item-entry process stops, and an error message displays.



Figure 5-24: Invalid Item Error Message

2. Presses **[ENTER]**. The focus bar prompts to "Scan or Key Item". The item number that could not be found is not recorded in the transaction.

### When Forcesku is Enabled

If Forcesku is enabled, Store21 provides methods to key in any item number or UPC that does not have an item record in the system. The specific Forcesku method to use is determined by the home office.

#### ***Store21 is Configured to Manually Key Items***

1. Scan or key the item number into the focus bar and press **[ENTER]**. Store21 searches for but cannot locate the item. The focus bar prompts to confirm the item number.



Figure 5-25: Item Number Confirmation Focus Bar

2. Scan or key in the item number again and press **[ENTER]**. The focus bar prompts for the description.

3. Key in the description and press **[ENTER]**. The focus bar prompts for the price.
4. Key in the price and press **[ENTER]**. The register screen displays the information entered: item number, description, and price. The tax amount must be entered separately. See ["Changing Taxes" on page 64](#).

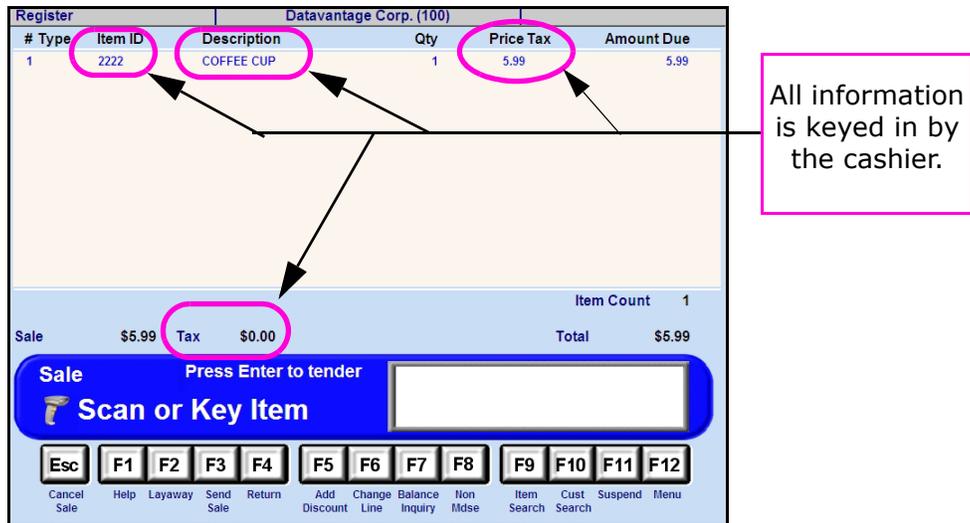


Figure 5-26: Register Screen with Manually-Entered Item

**Note:** Use of the Forcesku function is determined by the home office.

5. Press **[ENTER]**. The item appears on the register screen, and the focus bar prompts to enter the next item number or to tender the transaction.

### ***Store21 is Configured to Select Groups of Items from a List***

1. Scan or key the item number into the focus bar and press **[ENTER]**. Store21 searches but cannot locate the item. Store21 displays an error message that the item was not found.



*Figure 5-27: Item Not Found Error Message*

2. Press **[ENTER]** to continue.
3. The Dump SKU list displays the item descriptions for the pre-defined Dump SKU items.



*Figure 5-28: Dump SKU List*

---

**Note:** The home office defines the names of the Dump SKU items.

---

4. Highlight the appropriate item in the list and press **[ENTER]**. Store21 assigns the Dump SKU item number according to the selection. The focus bar prompts for the first description.
5. Key the description into the focus bar and press **[ENTER]**. The system may also display prompts for additional descriptive information such as the brand, style, and color of the item.
6. Key in the additional information if prompted, pressing **[ENTER]** after each. The focus bar prompts for the price.
7. Key in the price and press **[ENTER]**. The register screen displays the information entered into the focus bars: Item ID, Description, and Price. The Item ID is from the Dump SKU, and the Description displays each of the item descriptions entered,

separated by a vertical bar ('|'). The Price displays the amount entered, and the tax amount is based upon the tax group that is associated with the Dump SKU item.

Register						
Datavantage Corp. (100)						
#	Type	Item ID	Description	Qty	Price Tax	Amount Due
1		6660	6660 MY BRAND SHIRT REF	1	6.99 R	6.99

Descriptions and price are manually entered.

Sale						\$6.99	Tax		\$0.42	Item Count		1
Total						\$7.41						

Figure 5-29: Register Screen with Dump SKU Item

**Note:** The number and type of descriptions for the item is determined by the home office.

8. The focus bar prompts to enter the next item number or to tender the transaction.

## Enter Non-Merchandise Items

Some items are defined as non-merchandise items, including Gift Cards, Shipping Fees, Repairs, etc.

1. At the Register screen (Figure 5-9), press **[F8]**, **Non Mdse**, to display the non-merchandise list.

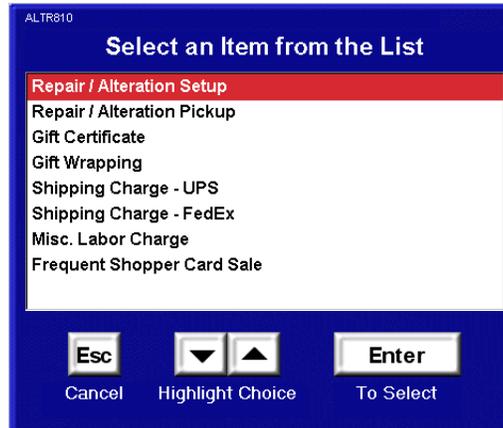


Figure 5-30: Non-Merchandise List

**Note:** The corporate office defines the non-merchandise items.

2. Highlight the appropriate item in the list and press **[ENTER]**. The focus bar prompts for more information, depending on your selection.
3. Key in the appropriate information according to the prompts and press **[ENTER]**. The non-merchandise item appears on the Register screen.

Register		Martha Manager (100)		18			
#	Type	SKU	Description	Qty	Price	Tax	Amount Due
1		9999991	Shipping Charge - UPS	1	9.00	N	9.00
2		9999995	Gift Certificate	1	50.00	N	50.00
			000200				

Figure 5-31: Register Screen with Gift Certificate

## Gift Cards

Gift Cards are sold as non-merchandise items and have some special rules and limitations. Gift Cards can be activated, reloaded (additional value added to the balance of an activated card) and used as a tender.

### Activate a Gift Card

**Note:** The Gift Card functionality is highly configurable and the examples listed below are provided for a basic overview of the Gift Card Functionality.

1. At the Register screen ([Figure 5-9](#)), press **[F8]**, **Non Mdse**, to display the non-merchandise list.

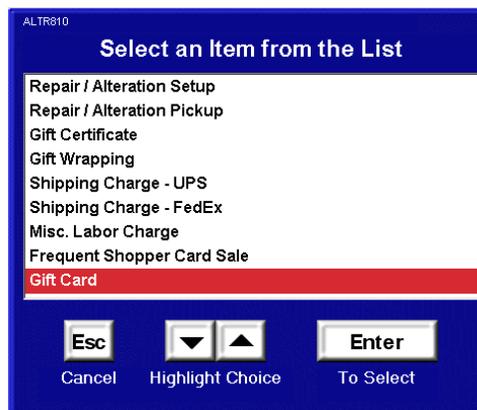


Figure 5-32: Non-Merchandise List

2. Highlight Gift Card and press **[ENTER]**. The focus bar prompts you to swipe or key in the Gift Card number.



Figure 5-33: Focus Bar Gift Card Account Number

3. Swipe or key in the account number. A confirmation prompt displays.



Figure 5-34: Gift Card Confirmation Message

4. Press **[Y]** to activate a new card, or press **[N]** to reload an existing card. The focus bar prompts for the amount.



Figure 5-35: Focus Bar Gift Card Amount

5. Key in the amount and press **[ENTER]**. The system activates the card with the amount entered. A message displays showing the gift card's balance.



Figure 5-36: Gift Card Balance Inquiry

6. Press **[ENTER]**. The Gift Card is added as a line item on the sale transaction. Continue to add items or tender the transaction as normal.

## Manual Gift Card Activation

If the automated activation process fails, Gift Cards can be manually activated and re-loaded.

1. If an error message displays during Gift Card Activation, press **[ENTER]**. The manual activation screen displays.



Figure 5-37: Gift Card Manual Activation

2. Call the listed phone number and key in the required information.
3. Key in the Approval Code and Amount and press **[ENTER]**. The Gift Card is added as a line item on the sales transaction.
4. Continue to add items or tender the transaction.

## Gift Card Balance Inquiry

A Gift Card Balance Inquiry is available from the Register screen ([Figure 5-9](#)).

1. Press **[F7]**, **Balance Inquiry**. An input message displays.



*Figure 5-38: Gift Card Inquiry Message*

2. Swipe or key in the Gift Card number and press **[ENTER]**. The system processes the request and displays the current Gift Card Balance in a message.



*Figure 5-39: Gift Card Balance Message*

3. Press **[ENTER]**. A Balance Inquiry receipt prints.

## Discount Cards

Discount cards are sold or given to a customer to be redeemed at a future date for a given discount. Discount cards can be set up with predetermined or associate-entered card expiration dates. Card expiration date reminders and functionality to renew the cards are built into the system. Discount cards are highly configurable and can vary widely in their features. Some of these variations may include:

- Customer information may be required to purchase a Discount Card.
- The Discount Card can be configured to require a certain security level of the employee to sell or redeem the card.

## Selling a Discount Card

1. At the Register screen ([Figure 5-9](#)), press **[F8]**, **Non Mdse**, to display the non-merchandise list.

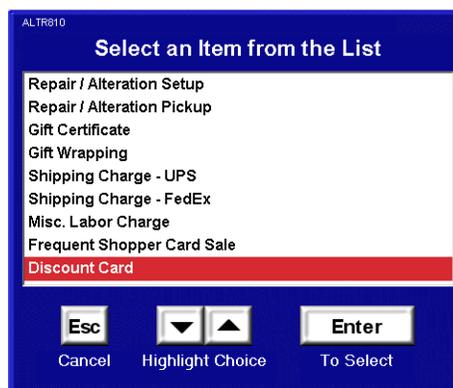


Figure 5-40: Non Merchandise List

---

**Note:** The corporate office defines the names of the Discount Cards

---

2. Highlight the option **Discount Card** and press **[ENTER]**. The focus bar prompts for the Discount Card number.



Figure 5-41: Discount Card Number Focus Bar

- Swipe the magnetic stripe (if available), key in, or scan the bar code (if available) of the discount card number and press **[ENTER]**. The system displays a confirmation prompt to issue a new card or renew an existing card.

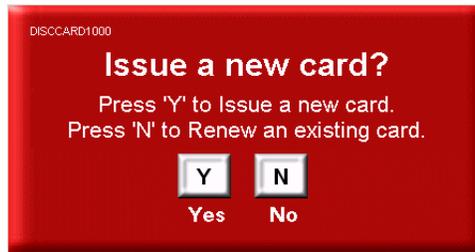


Figure 5-42: Discount Card Confirmation Message

- Press **[ENTER]** to accept the default expiration date or key in a new expiration date. Press **[ENTER]**. The system displays the discount card and any associated cost as a line item on the Register screen.

#	Type	SKU	Description	Qty	Price	Tax	Amount Due
1		950	SILVER DISCOUNT CARD 11225	1	10.00		10.00

Figure 5-43: Discount Card Line Item

- Continue to add items or tender the transaction.

**Note:** Discount cards may not be sold or renewed as part of a Layaway transaction or an Employee Sale.

## Renewing a Discount Card

An associate may renew discount Cards for a predetermined amount of time. The functionality is much like the sale of the Discount Card except that the calculation of the new expiration date will be based on the original expiration date.

- When a customer is redeeming a Discount Card, the system may display a prompt to renew the Discount Card.

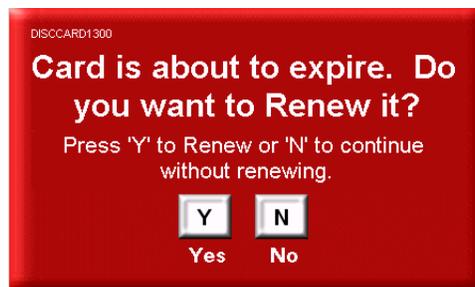


Figure 5-44: Renew Discount Card Prompt

2. Press **[N], No**, to continue the sale without renewing, or press **[Y], Yes**, to renew the Discount Card. If renewing, The Non-Merchandise list displays.

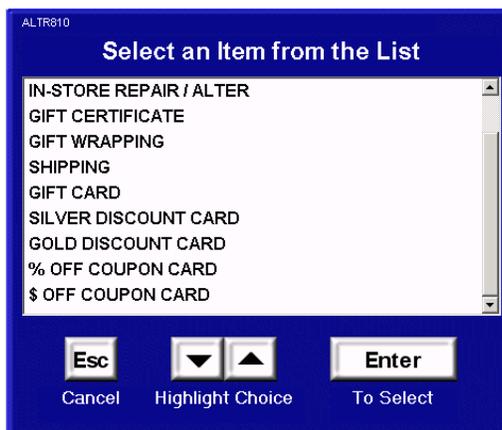


Figure 5-45: Non-Merchandise List

3. Select the Discount Card. Enter the Discount Card number. The customer may choose to receive a new card or renew an existing card. A confirmation prompt displays.

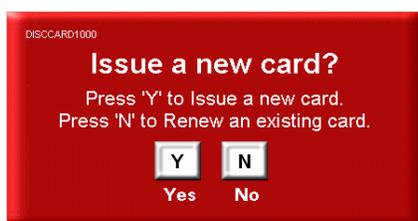


Figure 5-46: Issue New Discount Card Message

4. Press **[N], No**, to renew the existing card. The system searches the local database for the Discount Card and attempts to update the customer information and calculate the new expiration date.
5. If the system fails to find the Discount Card, the system displays a prompt for the associate to accept and continue with the renewal. When accepted or when found the system displays the new expiration date.



Figure 5-47: Discount Card - Accept Expiration Date

- Press **[ENTER]**. The system displays the discount card and any associated cost as a line item on the Register screen.

#	Type	SKU	Description	Qty	Price	Tax	Amount Due
1		950	SILVER DISCOUNT CARD 11225	1	10.00		10.00

Figure 5-48: Discount Card Line Item

## Redeeming A Discount Card

A discount card is redeemed in the same way that a normal discount is applied to a transaction.

- Begin a sale transaction, and scan or key in at least one item.



Figure 5-49: Register Screen

- Press **[F5]**, **Add Discount**. The Discount list displays.

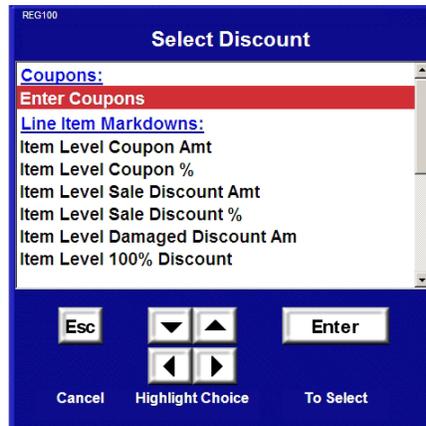


Figure 5-50: Discount List

- Highlight the appropriate discount. Press **[ENTER]**. The focus bar prompts for the Discount Card Account Number.



Figure 5-51: Discount Card Account Number Prompt

- Key the Discount Card Account Number and press **[ENTER]**, or swipe the Discount Card. Depending on the items selected and the Discount Card selected, the discount is applied and displays on the Register screen.

#	Type	SKU	Description	Qty	Price	Tax	Amount Due
2		102	14K Amethyst Ring Silver Frequent Buyer	1	189.99	R	170.99
3		103	1.61CT. Oval Silver Frequent Buyer	1	125.00	R	112.50
4		104	Onyx/Gold Earr-Drop Silver Frequent Buyer	1	350.00	R	315.00
5		105	STAROFDAVID PIN Silver Frequent Buyer	1	29.95	R	26.95
6		106	10 KTYG DIA RING Silver Frequent Buyer	1	199.95	R	179.95
7		107	14KY PEARL/GOLD PENDANT Silver Frequent Buyer	1	95.00	R	85.50
<b>Elvis Presley</b>							Item Count 7
Sale \$1,007.88 Tax \$78.11					Total		\$1,085.99

Figure 5-52: Register Screen with Discounts

The discount(s) appears on a separate line, and are applied to the appropriate item(s).

## Return a Discount Card and Refund a Discount Card Renewal

Discount Cards may be returned and Discount Card Renewals refunded using the return functionality. See [Chapter 7, "Returns"](#) for more information.



*Discount Card returns and refunds require the user to bypass the Return Verification process.*

## Kit-Priced Items

The Kit-Priced items are a group of separate items normally sold together. The Kit-Priced item is designed to speed up transactions when multiple items that are normally sold together are part of the transaction. Customers may also receive a special price when the items are purchased together as a group. When a Kit-Priced item is scanned or keyed into the system, a special price displays on the Register screen for that item. It includes the purchase price of the related items. The Kit-Priced item can be modified, deleted, returned etc.

1. Begin a sale transaction.
2. Key in or scan the item and press **[ENTER]**. If the item number entered is for a kit, the system will display the item description with a kit price, and list all the related items that are included in the kit price.

Register		Martha Manager (100)			18	
#	Type	SKU	Description	Qty	Price Tax	Amount Due
1		20000	Clothing Package	1	149.99 R	149.99
2		99201	Brushed Twill Pant	1	0.00 R	0.00
3		99401	Celestial Cardigan	1	0.00 R	0.00
4		99301	Matching Celestial Mock	1	0.00 R	0.00

Figure 5-53: Register Screen Kit Price

## Modify Lines

If you incorrectly enter information, or if the customer changes his/her mind about a line item on the transaction, you can modify the line on the Register screen. You can change the associate assigned, quantity, price, tax type, or delete the item from the sale.

From a sale transaction with at least one item, perform the required procedure as described below.

#	Type	SKU	Description	Qty	Price Tax	Amount Due
1		1000259	14KT YG ONYX DIA	1	900.00 R	900.00

Sam Adams		Item Count	1
Sale	\$900.00	Tax	\$54.00
		Total	\$954.00

SALE		Press Enter to tender		<input type="text"/>								
Scan or Key Item												
Esc	F1	F2	F3	F4	F5	F6	F7	F8	F9	F10	F11	F12
Cancel Sale	Help	Layaway Sale	Send Return	Add Discount	Change Line	Balance Inquiry	Non Mds	Item Search	Cust. Search	Suspend	Menu	

Figure 5-54: Register Screen

## Changing Associate

Reassign the credit for a sale from one sales associate to another.

1. From the Register screen, press **[F6], Change Line**. The focus bar turns gray and prompts you to highlight the item to change.



Figure 5-55: Register Screen - Change Line

2. Highlight the item to change.
3. Press **[F4], Change Assoc**. The Associates data entry form displays with the original associate's number displays.

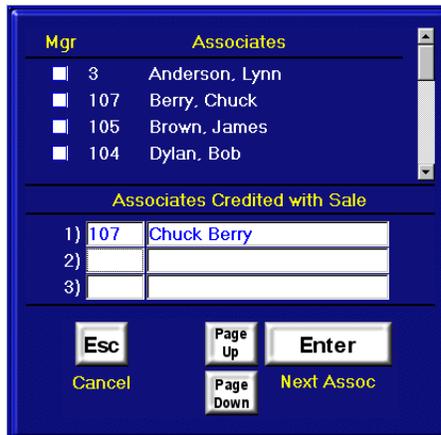


Figure 5-56: Associate Credited with Sale

4. Key in the new associate(s) number and press **[ENTER]**.
5. If necessary, repeat step 4 for each additional associate being added to the transaction.
6. The new associate's name populates the Associates form. Press **[ENTER]**.  
The Change Associate function changes the associate number associated with the item.

## Changing Quantities

Large quantities of items can be quickly entered into the system by using the change quantity function. Notice the items and quantities in the kit-priced items example below.

Register		Martha Manager (100)		18		
#	Type	SKU	Description	Qty	Price Tax	Amount Due
1		20000	Clothing Package	1	149.99 R	149.99
2		99201	Brushed Twill Pant	1	0.00 R	0.00
3		99401	Celestial Cardigan	1	0.00 R	0.00
4		99301	Matching Celestial Mock	1	0.00 R	0.00

Figure 5-57: Register Screen to Change

1. At the Register screen, press **[F6], Change Line**. The focus bar turns gray and prompts you to highlight the item to change.



Figure 5-58: Focus Bar - Highlight Prompt

2. Highlight the item to change. Press **[F5], Change Quantity**. The focus bar displays the original quantity and prompts for the new quantity.



Figure 5-59: Focus Bar - Enter Quantity

3. Key in the new quantity and press **[ENTER]**. The new quantity displays on the screen.

Register		Martha Manager (100)		18		
#	Type	SKU	Description	Qty	Price Tax	Amount Due
1		20000	Clothing Package	3	49.99 R	449.97
2		99201	Brushed Twill Pant	3	0.00 R	0.00
3		99401	Celestial Cardigan	3	0.00 R	0.00
4		99301	Matching Celestial Mock	3	0.00 R	0.00

Figure 5-60: Register Screen Price Changed

**Note:** In the example above only the first item quantity is changed, but since the item is a Kit item, all associated item quantities are changed by the system.

## Changing Prices

Override a price that is assigned to an item. This affects only the current sale.

Register		Martha Manager (100)		18		
#	Type	SKU	Description	Qty	Price Tax	Amount Due
1		20000	Clothing Package	1	149.99 R	149.99
2		99201	Brushed Twill Pant	1	0.00 R	0.00
3		99401	Celestial Cardigan	1	0.00 R	0.00
4		99301	Matching Celestial Mock	1	0.00 R	0.00

Figure 5-61: Register Screen

1. At the Register screen, press **[F6]**, **Change Line**. The focus bar turns gray and prompts to highlight the item to change.

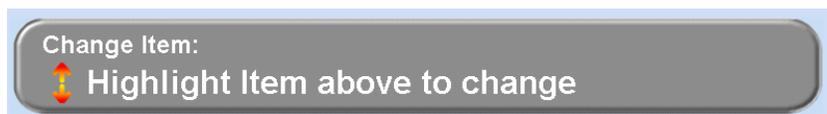


Figure 5-62: Focus Bar Change Item

2. Highlight the correct item. Press **[F6]**, **Change Price**. The focus bar displays the original price and prompts for the new price.



Figure 5-63: Focus Bar Original Price

3. Key in the new price and press **[ENTER]**. The Price Override Reason list displays.



Figure 5-64: Price Override Reason

**Note:** The corporate office defines the price override reasons and may configure the system to require manager approval for price overrides. If so, the security form displays, requesting the appropriate employee number and password.

4. Highlight the price change reason and press **[ENTER]**. The new price appears on the Register screen.

## Changing Taxes

### Item-Level Tax Changes

This changing tax process will change the tax for an individual item. See [“Transaction-Level Tax Changes” on page 67](#), for transaction-level changes.

1. At the Register screen, press **[F6]**, **Change Line**. The focus bar turns gray and prompts to highlight the item to change.



Figure 5-65: Focus Bar Change Item

2. Highlight the item to change and press **[F7]**, **Change Tax**. The Select Tax Location list appears.

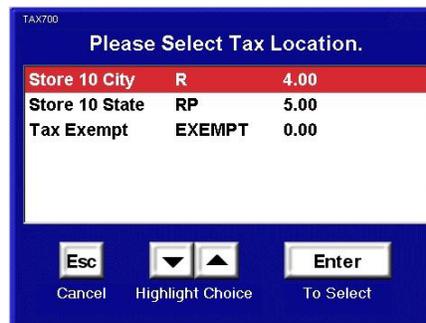


Figure 5-66: Tax Location List

---

**Note:** Depending on your tax selection, the screen may prompt for more information.

---

3. Highlight the new tax location and press **[ENTER]**. The list disappears and the new tax code displays on the Register screen.
4. Repeat these steps to change additional items. If the entire transaction is to be changed, process all items at once. See [“Change Tax Location \(Rate\)” on page 67](#).

## Tax Exempt Items

1. At the Register screen, press **[F6]**, **Change Line**, to initiate the tax exempt feature. The focus bar turns gray and displays the prompt "Highlight Item above to change".



Figure 5-67: Focus Bar Change Item

2. Highlight the item to change.
3. Press **[F7]**, **Change Tax**. The Tax Location list displays.

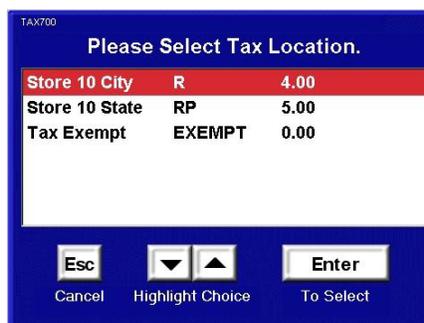


Figure 5-68: Tax Location

4. Highlight **Tax Exempt** and press **[ENTER]**.
5. The Tax-Exempt Reason list displays.

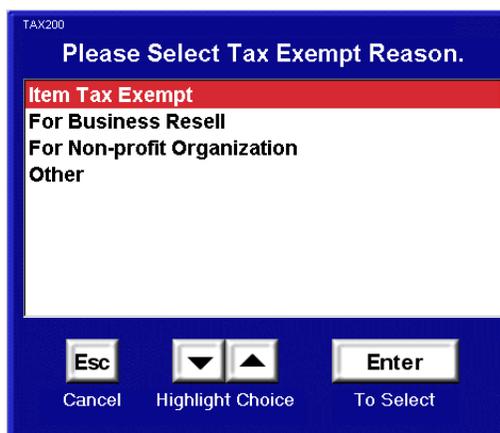


Figure 5-69: Tax Exempt Reason

---

**Note:** Tax Locations and amounts are set by the home office.

---

6. Highlight the appropriate tax exempt reason and press **[ENTER]**.
-

- The Tax Exempt Customer Information data entry form displays. The Reason field is populated with the information supplied in the previous step.

**Tax Exempt Customer Information**

Transaction: 11 \*Required Field

Reason: RESELL For Business Resell

\*Title, First Name, Last Name: \_\_\_\_\_

\*Address (#, street, apt): \_\_\_\_\_

\*City: \_\_\_\_\_ \*State: \_\_\_\_\_ \*Postal Code: -

Region: \_\_\_\_\_ Country: US

Phone: ( ) - \_\_\_\_\_

\*Tax Exempt ID: \_\_\_\_\_

Cancel                      Save                      To Move To Next Item

Figure 5-70: Tax Exempt Customer Information

**Note:** If a customer is assigned to the sale, his/her information displays by default.

- Key in the customer's information as necessary, pressing **[ENTER]** to move between the fields.
- Fields marked with an asterisk (\*) are required and you cannot continue until these fields are completed.
- Press **[F8]**, **Save**. The system returns to the Register screen. "EXEMPT" displays in the Tax column on the Register screen for the item.

Register		Martha Manager (100)			18	
#	Type	SKU	Description	Qty	Price Tax	Amount Due
1		20000	Clothing Package	1	149.99 EXEMPT	149.99
2		99201	Brushed Twill Pant	1	0.00 R	0.00
3		99401	Celestial Cardigan	1	0.00 R	0.00
4		99301	Matching Celestial Mock	1	0.00 R	0.00

Figure 5-71: Register Screen with Tax Exempt Item

- Repeat these steps for additional items to be tax exempt. If the entire transaction is tax exempt, process them all at once. See ["Change Transaction to Tax Exempt" on page 69](#).

## Transaction-Level Tax Changes

Transaction-level tax changes can be initiated after all items for a sale transaction are entered and the tendering process is started. See ["Tender Process" on page 135](#).

### Change Tax Location (Rate)

1. Before selecting and adding tender, press **[F6], Change Tax**.

Figure 5-72: Register Screen in Tender Mode

2. If configured to do so, Store21 will verify the security level required to perform a tax override, and if necessary, prompt for authorization.

Figure 5-73: System Security Form

3. An associate with the necessary security level enters their Employee ID and Password.

- The Select Tax Location list appears, which contains all of the allowable, pre-defined types of tax changes.



Figure 5-74: Tax Location

- Highlight the appropriate tax selection and press **[ENTER]**. The screen changes in accordance with the type of tax change.

**Note:** Depending on your tax change selection, the screen may prompt for more information.

- If the transaction remains taxable but the rate changes, the list disappears and the new tax code displays on the Register screen.

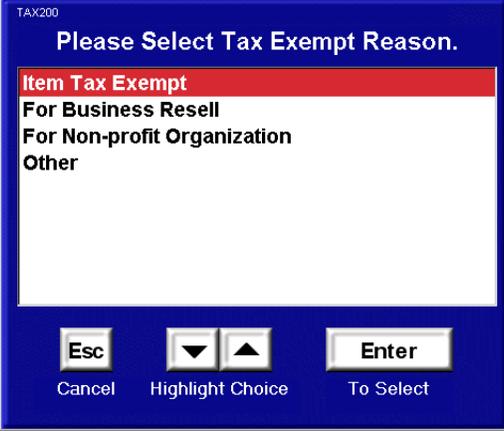
Register		Martha Manager (100)		18			
#	Type	SKU	Description	Qty	Price	Tax	Amount Due
2		1000259	14KT YG ONYX DIA	3	900.00	PR	2,700.00
3		209	WHT Cardin Drss Shirt	1	75.00	PR	75.00

Figure 5-75: Register Screen - Tax Code Change

- The Register screen returns to tender mode. See ["Tender Process" on page 135](#).

## Change Transaction to Tax Exempt

1. If the transaction is being changed to tax exempt, the Tax Exempt Reason list displays.



TAX200

Please Select Tax Exempt Reason.

Item Tax Exempt  
For Business Resell  
For Non-profit Organization  
Other

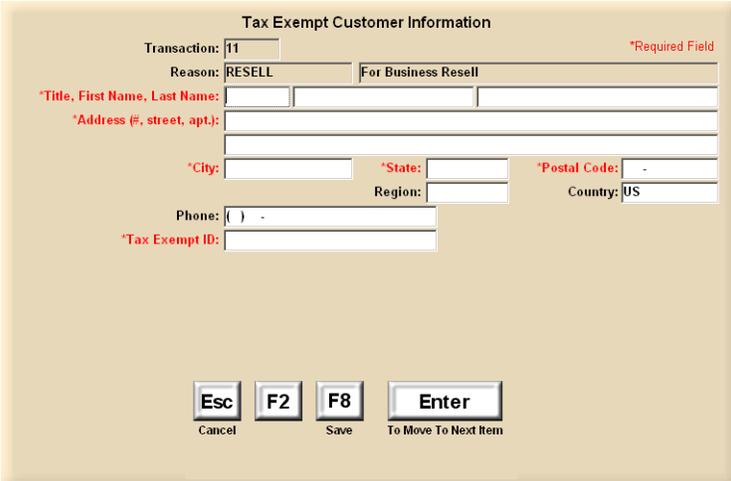
Esc    ▼ ▲    Enter  
Cancel    Highlight Choice    To Select

Figure 5-76: Tax Exempt Reason List

**Note:** Tax Locations and amounts are set by the home office.

2. Highlight the appropriate reason and press **[ENTER]**. The Tax Exempt Customer Information form displays.

If a customer is assigned to the sale, his/her information displays by default.



Tax Exempt Customer Information

Transaction: 11 \*Required Field

Reason: RESELL For Business Resell

\*Title, First Name, Last Name:

\*Address (#, street, apt.):

\*City:  \*State:  \*Postal Code: -

Region:  Country: US

Phone: ( ) -

\*Tax Exempt ID:

Esc    F2    F8    Enter  
Cancel    Save    Save    To Move To Next Item

Figure 5-77: Tax Exempt Customer Information Form

**Note:** The home office determines which fields are '\*Required'.

- a. The Reason field is populated with the reason selected from the list ([Figure 5-76](#)).

- b. Key in the customer's information as necessary, pressing **[ENTER]** to move between the fields.
  - c. Press **[F8]**, **Save**. The customer information is recorded for the tax exempt transaction.
3. The Register screen displays with the sales tax removed for the entire transaction.

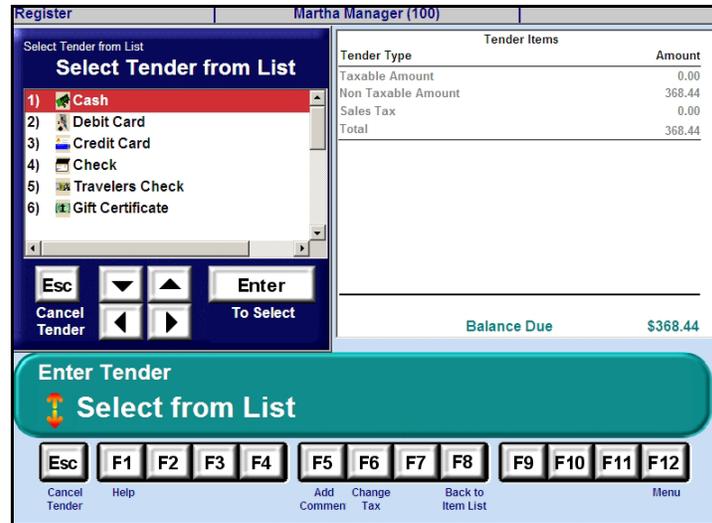


Figure 5-78: Register Screen in Tender Mode with Tax Exempt

4. The Register screen returns to tender mode. See ["Tender Process" on page 135](#). Pressing **[F8]**, **Return to Item List**, displays the Register screen, and items can be added, deleted, or changed.

#### Notes:

- Once the taxes have been changed at the transaction level, returning to the Register Mode and attempting to change the taxes on the item level results in an error message.

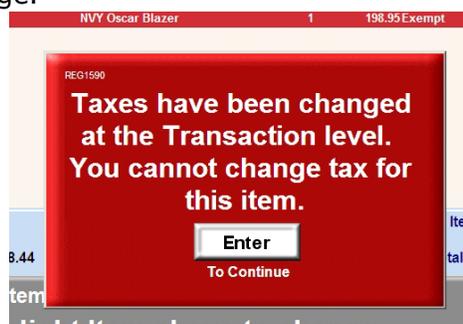


Figure 5-79: Register Screen - Taxing Error Message

- Items added to the Item List on the Register screen after the taxes are changed receive the same tax rate (or exempted) as the rest of the transaction.

## Delete Items

Delete items from a transaction before it is tendered.

1. At the Register screen with a transaction in progress, press **[F6], Change Line**. The focus bar turns gray and prompts to highlight the item to change.



*Figure 5-80: Focus Bar Change Item*

2. Highlight the item to delete and press **[F8], Delete Line**. A confirmation prompt displays.



*Figure 5-81: Confirmation Message*

3. Press **[Y], Yes**, to confirm the deletion. The item is removed from the Register screen.

## Discount Items and Transactions

You can discount particular line items or the entire transaction. The home office may determine that some items may not receive markdowns.

### Line-Item Discounts

Line-Item discounts are entered into the Register at the time of the sale. Except where noted, each line item can be discounted without regard to other items on the transaction, such as a markdown for damaged items or floor models.

### Markdowns

Line-item markdowns are designed to discount one item in a transaction.

1. At the Register screen with the items entered, press **[F5]**, **Add Discount**. The focus bar turns gray and prompts to highlight the item to discount.



Figure 5-82: Focus Bar Highlight Item to Discount

2. Highlight the appropriate item to discount and press **[ENTER]**. The Choose Discount list appears.

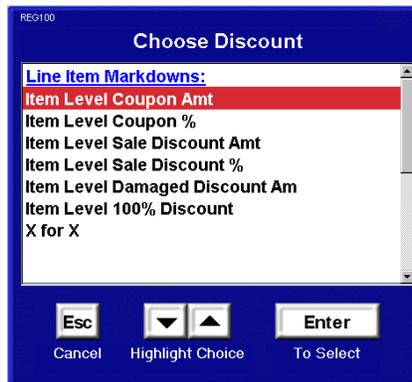


Figure 5-83: Choose Discount

---

**Note:** The corporate office defines the discount choices.

---

- Highlight the appropriate line-item discount type and press **[ENTER]**. Depending on your selection, the system either returns to the Register screen with the discount displayed, or the Discount form appears.

Figure 5-84: Enter Discount Amount

- If the Discount form displays, key in the discount amount or percentage, then press **[ENTER]**. The Register screen shows the discount.

Register		Martha Manager (100)			18		
#	Type	SKU	Description	Qty	Price	Tax	Amount Due
1		201	NAVY Oscar Blazer	1	198.95	R	198.95
3		200	YRND BLAZER	1	100.00	R	100.00
4		212	NAVY Botany Suit	1	249.95	R	224.95
			Item Level Coupon Amt		(25.00)		

Figure 5-85: Register Screen Item Level Coupon

**Note:** The system may prompt for a coupon number or additional information depending on your configuration.

## X For X Discount

An X For X discount is a line-item discount that is defined at the register before adding the discount items to a transaction. For example, an X For X discount might be “purchase 3 pairs of socks for \$10 that regularly sell for \$4.00 each”.

- At the Register screen, *before* entering an item number, press **[F5]**, **Add Discount**. The Discount list displays.

Figure 5-86: Choose Discount

- Select **X For X** and press **[ENTER]**.

3. Key in the item quantity at the prompt or choose it from a pop-up list defined by the home office.



Figure 5-87: X For X Discount Quantity Prompt

- a. Press **[ENTER]** to continue.
  - b. Press **[ESC], Cancel**, to cancel the action and return to the Register screen.
4. Key in the total amount for the discount at the prompt.



Figure 5-88: X For X Discount Price Prompt

- a. Press **[ENTER]** to continue.
  - b. Press **[ESC], Cancel**, to cancel the action and return to the Register screen.
5. The focus bar displays the discount's definition.



Figure 5-89: Focus Bar - X For X Discount Defined

6. Scan or key in the first item number and press **[ENTER]**. The item appears on the Register screen at the full price.

7. Scan or key in the second item number and press **[ENTER]**. The item appears on the Register screen at the full price.



Figure 5-90: Register Screen - X For X Discount Two of Three Items

8. If you press **[ESC]** before entering the last item of the X For X Discount, a warning message displays to advise you that the discount has not yet been applied and that all items included in the discount will be deleted from the transaction.



Figure 5-91: Discount Cancellation Warning

- a. Press **[Y]**, **Yes**, to cancel the discount and remove all discount items from the screen.
  - b. Press **[N]**, **No**, to return to the discount in progress on the register screen.
9. Scan or key in the third item number and press **[ENTER]**. Notice that the discount price is applied to all three items.



Figure 5-92: Register Screen - X For X Discount Three of Three Items

**Notes:**

- If an X For X Discount results in a higher amount than the total regular cost of the items entered, an error message displays. For example, if the user enters a discount that is 2 for \$300, and the cost of each item is \$120, the total (\$240) is less than the X For X Discount amount. The items are entered into the transaction, but the discount cannot be applied.
- The discounted price for any item that is included in the X For X Discount cannot be changed using the **[F6], Change Price**, function.
- Any combination of items numbers can be included in the X For X Discount except those that expressly prohibit discount pricing, as determined by the home office.

## Transaction Level Discounts

Transaction-level discounts are applied in the same manner as the line-item discounts.

1. At the Register screen with the items entered, press **[F5], Add Discount**. The focus bar turns gray and prompts to highlight the item to discount.

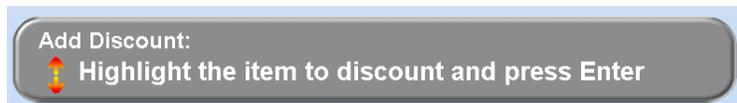


Figure 5-93: Focus Bar Highlight Item to Discount

2. Highlight ANY item to discount. Press **[ENTER]**.



*For transaction-level discounts, it does not matter which item is highlighted.*

3. The Select Discount list displays the discount types defined by the home office.

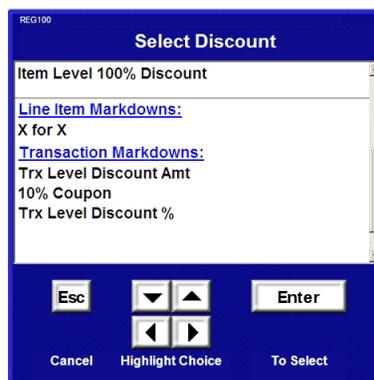


Figure 5-94: Select Discount List

4. Scroll the discount-type list to locate the Transaction Markdowns.
5. Highlight the appropriate transaction discount type and press **[ENTER]**. The system applies the transaction discount equally to each item in the transaction.

## Deal Pricing Discounts

Deal Pricing Discounts are automatically applied to items that have been scanned and are included in the discount. There are many variations of deal discounts, an example as shown below lists 10% off 3 or more items.

1. Key in or scan the first 2 items. The items display on the Register screen without discount.
2. Key in or scan the 3rd item. At that point, the 3 items meet the criteria set for the discount, and the system applies the discount to the 3 items.

Register		Martha Manager (100)		18		
#	Type	SKU	Description	Qty	Price Tax	Amount Due
2		211	Silk Tie	1	15.00 R	13.50
			10% Off 3 or More!		(1.50)	
3		211	Silk Tie	1	15.00 R	13.50
			10% Off 3 or More!		(1.50)	
4		211	Silk Tie	1	15.00 R	13.50
			10% Off 3 or More!		(1.50)	

Figure 5-95: Register Screen 10% off 3 or More

---

**Note:** Not all items qualify for all deal discounts.

---

## Employee Discounts

Sales to employees are entered as transaction-level or item-level discounts. Employee discounts are either automatically applied or manually entered, based upon company policy. The employee must be associated with the sale as an employee and also as a customer in the store where the purchase is being made.



*When entering the employee as a customer, ensure the 'Customer Emp ID' field is filled in on the Customer Maintenance screen. The system validates the Employee ID against the customer maintenance record to complete the employee discount.*

1. At the Register screen, press **[F10], Cust Search**, to display the Customer Search form.

Figure 5-96: Customer Search Form

2. Press **[F3], Emp Sale**. The Employee number input form displays.

Figure 5-97: Enter Employee Number

3. Key in the employee number and press **[ENTER]**.

Lynn Anderson (3)					
Sale	\$0.00	Tax	\$0.00	Total	\$0.00

Figure 5-98: Employee Sale with Employee Identified

4. The employee is assigned to the sale as a customer.

---

**Note:** The employee number displays, indicating the employee is also a customer.

---

- Key in or scan the items and press **[F5]**, **Add Discount**. The focus bar turns gray and prompts to highlight the item to discount.

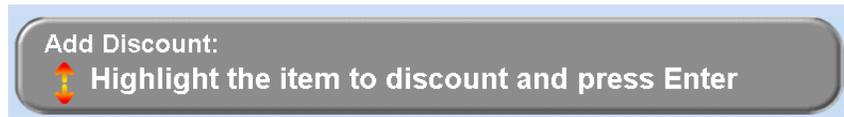


Figure 5-99: Focus Bar - Highlight Item to Discount

- Press **[ENTER]**. The Choose Discount list displays.



Figure 5-100: Choose Discount List

---

**Note:** The corporate office configures the available employee discounts.

---

- Highlight Employee Discount and press **[ENTER]**. The Register screen reflects the discount.

---

**Notes:**

- The corporate office may configure the system to require manager approval for employee sales. If so, the security form displays, requesting the appropriate employee number and password ([Figure 5-73](#)).
  - Key in the employee number and press **[ENTER]** to move to the Password field. Key in the password and press **[ENTER]**. If the employee has the proper security level, the lock opens and the Register screen appears with the employee discount displayed. If the employee does not have the proper security level a message displays.
-

8. Press **[ENTER]**. Depending on your selection, the system returns to the Register screen with the discount displayed, or the Discount form appears.



*Figure 5-101: Enter Discount Amount*

9. In the Discount form, key in the discount and press **[ENTER]**. The Register screen reflects the discount.

## CHAPTER 6

# Communications

### Overview

Communications include all forms of text messages processed by the register, and are generated from three sources. The home office sends various messages and information to the store through the polling process; managers post local messages through the register; and Store21 generates system messages, as applicable. All communications are accessible through the register - some from the Opening screen and others from the Employee Selection screen.

On-screen messages display when available. The Opening screen has two components that display current messages to employees. These are the Alerts window for system messages and the Corporate Message window for the message-of-the-day. The Employee Selection screen displays register messages in the Register Message window for viewing by all employees. The home office can send messages to employees which will display when the employees clock in on a register.

The exact number of components in your Store21 system is configured by the home office. Your system may include the following components:

- Alerts
- Store Sales Information
- Corporate Message
- Action Items
- E-Mail
- Documents
- Events
- Tasks

These are the communications components available on the Opening screen.

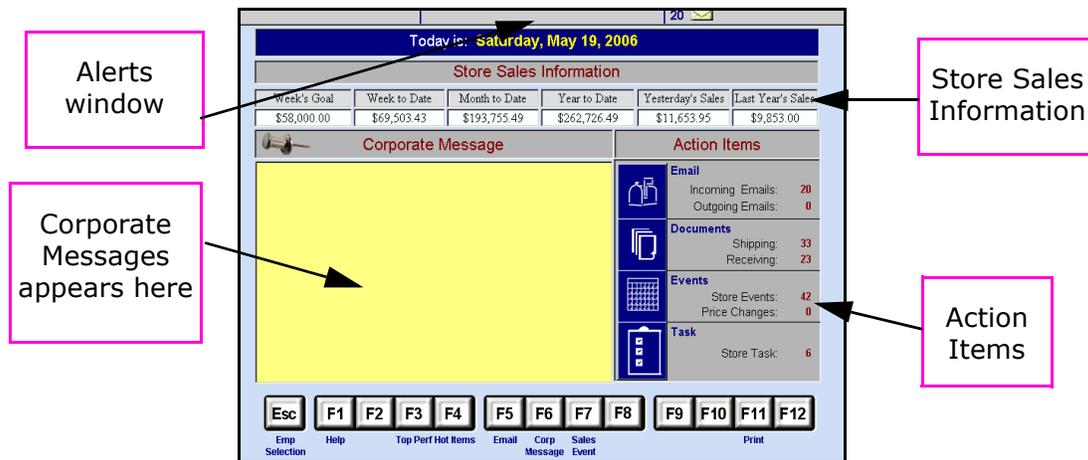


Figure 6-1: Opening Screen Message Areas

#### Notes:

- The function button **[F12], Menu**, is also called "Back Office Menu".
- After pressing **[F12], Menu**, the system prompts for Employee ID and Password.
- The contents of the Top of Menu that displays is dependent upon the authorized security level of the employee. Most communications-editing functions require manager-level security.
- When attempting to access **Menu**, employees without the authorized security level will see a message stating that they cannot perform the operation and will be returned to the Employee Selection screen.
- Instructions in this chapter assume that the user has the appropriate level of security for each function.

## Alerts

Alert messages are generated by the Store21 system, and display on the top-most row of the screen, right above the date. The background color of the alert message area and the message itself are configurable. The color determines the urgency of the message - red is commonly the highest priority. Icons appear to the right of the alert messages, in priority level from left to right, with the leftmost icon indicating the highest priority message.

Alerts notify employees of activities that require attention. The system removes the alert message and the icon when the activity is addressed.

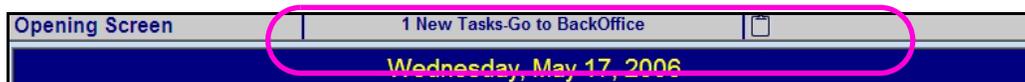


Figure 6-2: Alerts Message

1. From the Opening screen, Press **[ESC]** to open the Employee Selection screen.



Figure 6-3: Employee Selection Screen

2. Press **[F12]**, **Menu**.

3. Enter the employee ID and password into the focus bar as prompted. The Menu screen displays.



Figure 6-4: Menu Screen

4. Press **[F9], Alerts**.
5. The Action Items list displays.



Figure 6-5: Action Items List

6. Highlight an action item and press **[ENTER]**. The item functionality is initiated. See ["E-Mail" on page 87](#), for more information.
7. Press **[F9], Menu**, to toggle between the Action Items list and the Top of Menu.

## Store Sales Information

The Store Sales Information section displays the store's sales history and comparative goals. The information is compiled by the system.

Store Sales Information					
Week's Goal	Week to Date	Month to Date	Year to Date	Yesterday's Sales	Last Year's Sales
\$58,000.00	\$69,503.43	\$193,755.49	\$262,726.49	\$11,653.95	\$9,853.00

Figure 6-6: Store Sales Information

## Corporate Message

The Corporate Message box displays on the Opening screen with messages for all employees to read. The messages are sent through the polling process each day. To read an entire message, select it from the list and press **[F6], Corp Message**. To return to the Opening screen, press **[F2], Menu**.

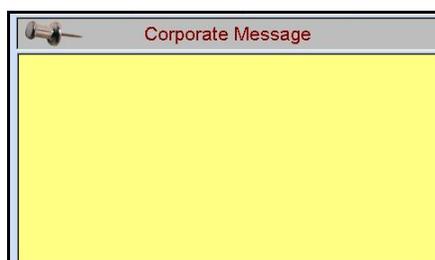


Figure 6-7: Corporate Message Box

## Action Items

The Action Items section of the Opening screen provides a summary of other active communications. These include reading incoming and creating outgoing E-Mail messages, reviewing shipping and receiving documents, reviewing store sales events, and listing miscellaneous tasks. The quantities of documents posted are shown to the right of the description. Access each of these Action Items through the methods indicated. The E-Mail functions and the read-only Events list are available through the function buttons of the Opening Procedure screen. The remaining Action Items communications are accessible through the Manager's Menu.

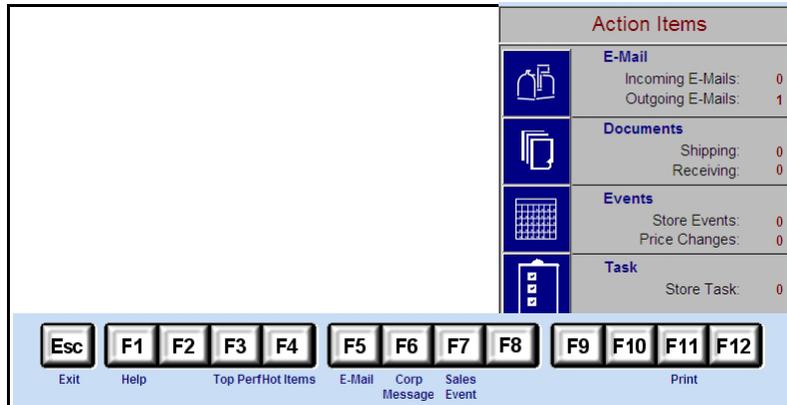


Figure 6-8: Opening Screen - Action Items List

- Press **[F5]**, **E-Mail**, to access incoming and create outgoing E-Mail messages.  
See ["Documents" on page 96](#) for instructions to view the Shipping and Receiving documents.
- Press **[F7]**, **Sales Events**, to review Store Events.  
See ["Tasks" on page 101](#) for instructions to access the Store Task list.

## E-Mail

Store21 provides convenient E-Mail access either from this Opening screen or from the Back Office Menu. E-Mail messages are sent and received during the polling process. The E-Mail package allows users to send, save, file, and print E-Mail messages.

**Note:** The following instructions are based on the E-Mail package included in the base product. Your company may choose to install a different E-Mail package or none at all. Refer to your company instructions for operation of those packages.

### Access E-Mail from the Opening Screen

In the screen that displays during the Register Open process, press **[F5], Email**.

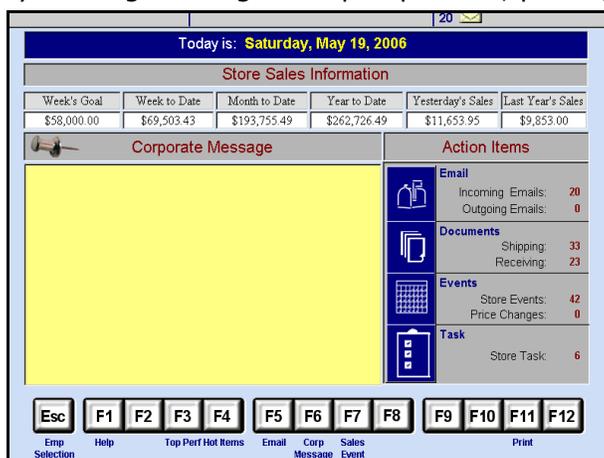


Figure 6-9: Opening Screen

### Access E-Mail from the Back Office Menu

Access the Top of Menu screen from either the Employee Selection screen ([Figure 6-3](#)) or the Register screen where the **[F12], Menu**, function button is enabled.



Figure 6-10: Top Of Menu

1. Highlight **Administrative** and press **[ENTER]**. The Administrative menu displays.



Figure 6-11: Administrative Menu

2. Highlight **E-Mail** and press **[ENTER]**.

### Access E-Mail from the Manager Menu

Access the Top of Menu screen from either the Employee Selection screen ([Figure 6-3](#)) or the Register screen where the **[F12]**, **Menu**, function button is enabled.

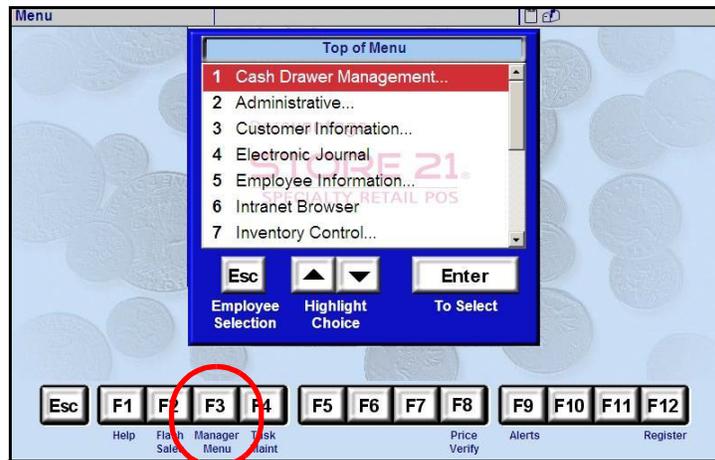


Figure 6-12: Top Of Menu

1. Press **[F3]**, **Manager Menu**. The Manager Menu screen displays.

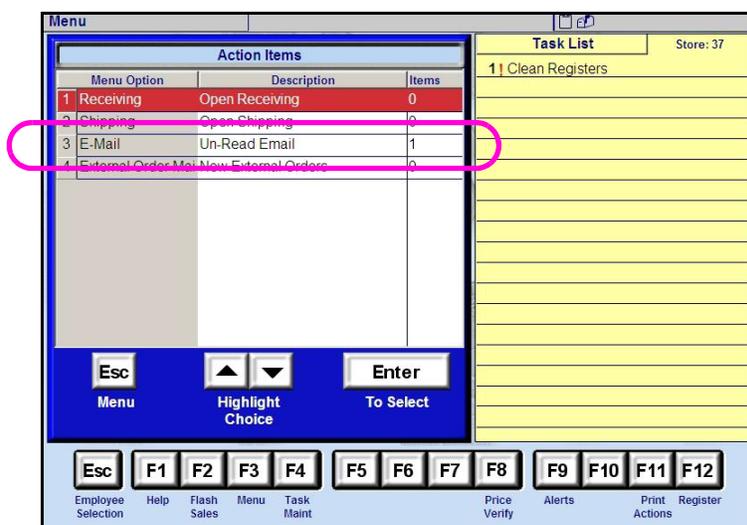


Figure 6-13: Manager Menu Screen

2. Highlight **E-Mail** and press **[ENTER]**.

## View E-Mail Messages

You can view new, unread E-Mail messages or older, saved messages.

### New Messages

1. Using one of the methods of accessing E-Mail, the E-Mail screen displays. If new, unread messages are available, the E-Mail to Read list displays.

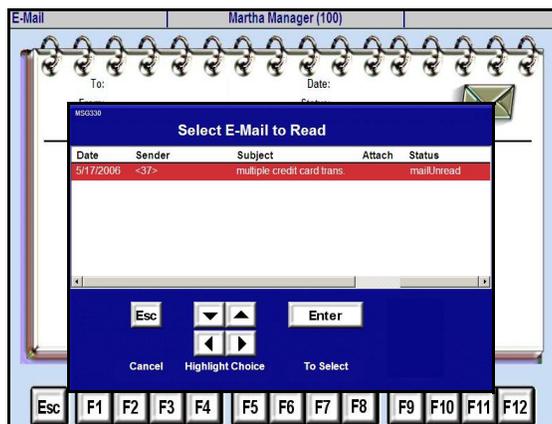


Figure 6-14: E-Mail Screen with Unread E-Mail List

- Highlight the appropriate message and press **[ENTER]**. The message displays.

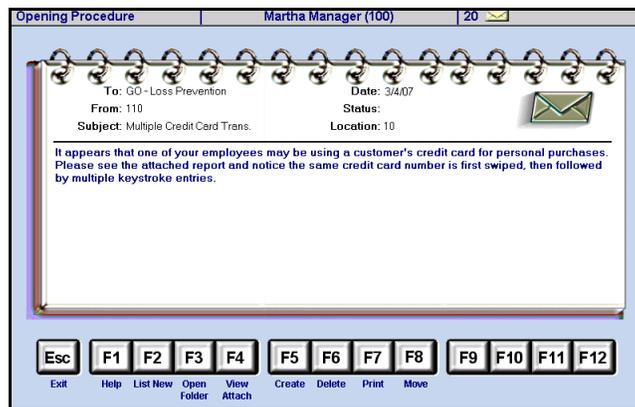


Figure 6-15: E-Mail Message

### Saved Messages

- Using one of the methods of accessing E-Mail, the E-Mail screen displays. If no new messages are available, Store21 displays a message.

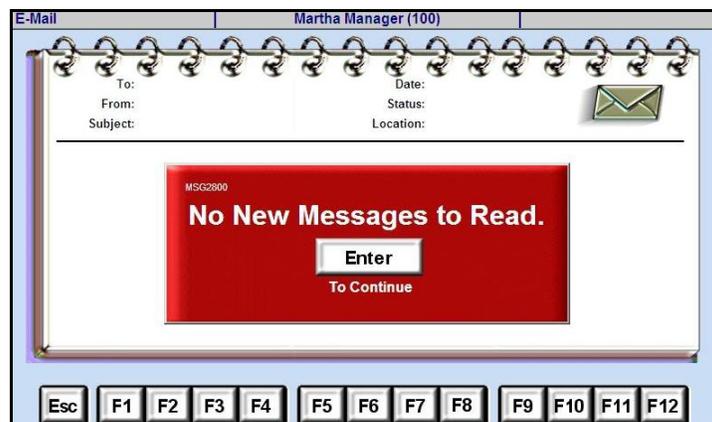


Figure 6-16: E-Mail No New Messages



## E-Mail Screen Functions

Manage the E-Mail messages from the E-Mail screen.

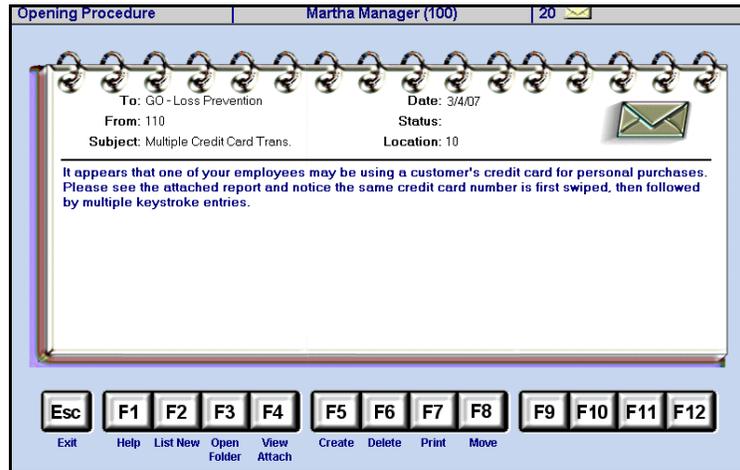


Figure 6-19: E-Mail Message Screen

4. From the E-Mail message screen, use the function buttons to view attachments, view other messages, and perform E-Mail maintenance:
  - Press **[F2]**, **List New**, to list only new E-Mail.
  - Press **[F3]**, **Open Folder**, to view the entire folder list.
  - Press **[F4]**, **View Attach**, to view the E-Mail attachment, if applicable.
  - Press **[F5]**, **Create**, to create a new E-Mail.
  - Press **[F6]**, **Delete**, to delete the E-Mail.
  - Press **[F7]**, **Print**, to print the E-Mail to the report printer.
  - Press **[F8]**, **Move**, to move the E-Mail to a folder.

---

**Note:** Once an E-Mail message is viewed, the system moves it to the "Read" or "Mail Read" folder.

---

## Create E-Mail Messages

1. With the E-Mail Message screen visible (Figure 6-19), you can create an E-Mail message. Press **[F5]**, **Create**, The E-Mail Recipient list appears.

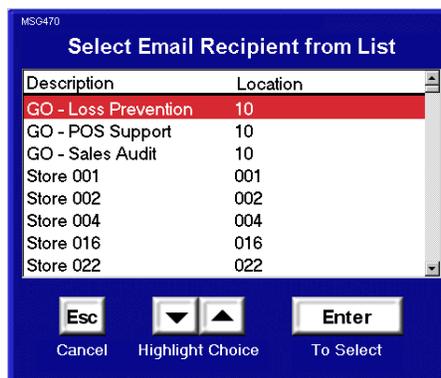


Figure 6-20: E-Mail Recipient List

**Note:** E-Mail recipients can be assigned or restricted by the home office.

2. Highlight the appropriate recipient and press **[ENTER]**. The recipient code appears in the "To" field of the E-Mail message.

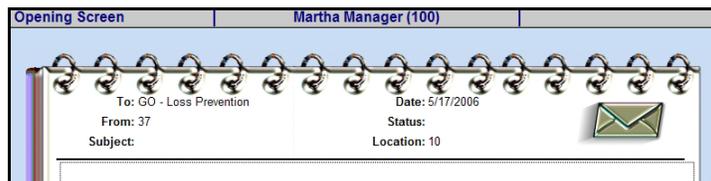


Figure 6-21: E-Mail Header Section

3. Press **[ENTER]** to move the cursor to the Subject field. Type the appropriate information. This field cannot be blank.
4. Press **[ENTER]** to move the cursor to the message area and type your message.
5. Press **[F8]**, **Save**. The message is saved in the E-Mail Out Box folder to be sent during polling. All out-going E-Mail messages can be viewed in the Out-Going Mail folder.

**Note:** To cancel the message, press **[ESC]**. A message appears, asking you to confirm the cancellation. Press **[Y]**, **Yes**, to cancel the E-Mail.

6. Press **[ESC]**, **Exit**, to exit the E-Mail screen and return to the Opening screen.

## View E-Mail Attachments

E-Mail with attachments in Store21 are identified in the list with a paperclip icon below the column named Attach.

1. Highlight the appropriate message and press **[ENTER]** to open the message.

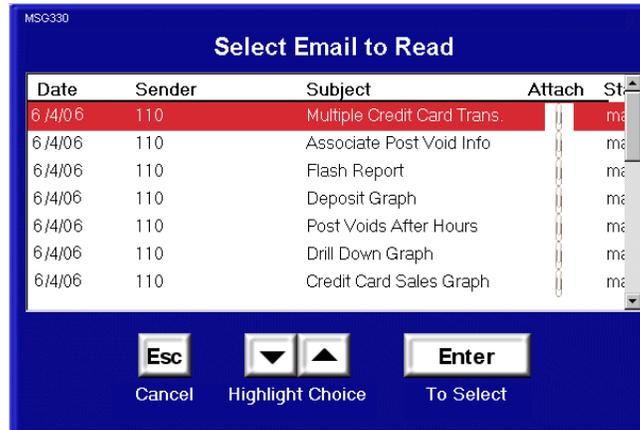


Figure 6-22: E-Mail Screen

2. With an E-Mail message displayed, press **[F4]**, **View Attach** (Figure 6-19). The E-Mail attachments list displays.

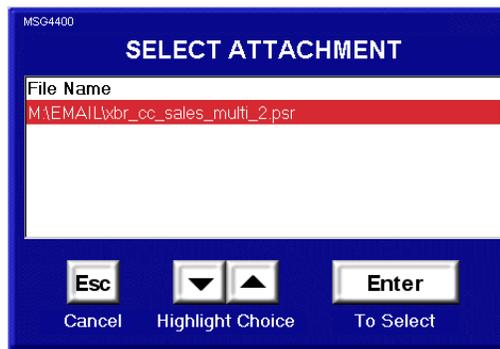


Figure 6-23: Attachment List

---

**Note:** Attachments are written in another application such as Excel. When the attachment is selected, Store21 opens the application viewer. The external application usually requires the use of a mouse.

---

**Note:** The function name for **[F4]**, **View Attach**, only displays if the E-Mail has an attachment associated with it.

---

3. Highlight the desired attachment and press **[ENTER]**. Store21 initiates the appropriate software application, and the attachment displays.
-

## Delete E-Mail Message

With the E-Mail message displayed (Figure 6-19), press **[F6], Delete**.

## Print E-Mail Messages

With the E-Mail message displayed (Figure 6-19), press **[F7], Print**, to print the message on the report printer.

## Move E-Mail Messages

After reviewing E-Mail messages, you can move them to default mail folders or to custom folders.

1. With the E-Mail message displayed (Figure 6-19), press **[F8], Move**, to move the message. The mail folder list displays.



Figure 6-24: E-Mail Folder List

2. Highlight the desired mail folder. Press **[ENTER]** to select.
3. The Status of the E-Mail message is changed to the name of the mail folder.

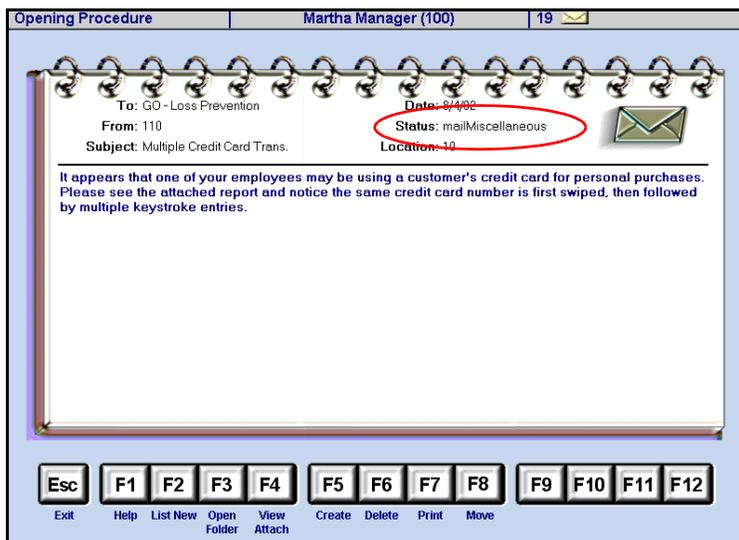


Figure 6-25: E-Mail Status

4. Press **[ESC]** to exit E-Mail and return to the screen where the E-Mail function was initiated (the Opening screen, the Manager Menu, or the Administrative Menu).

## Documents

Shipping documents are uploaded to and Receiving documents are downloaded from the corporate office during the polling process each day. The Opening screen is designed to advise employees of the documents' status only. To access these documents for editing, use the Menu to either open the Top of Menu, Inventory Control or the Manager Menu, Action Items.

### Access Action Items Documents

This is the Opening screen that displays during the Register Open process.

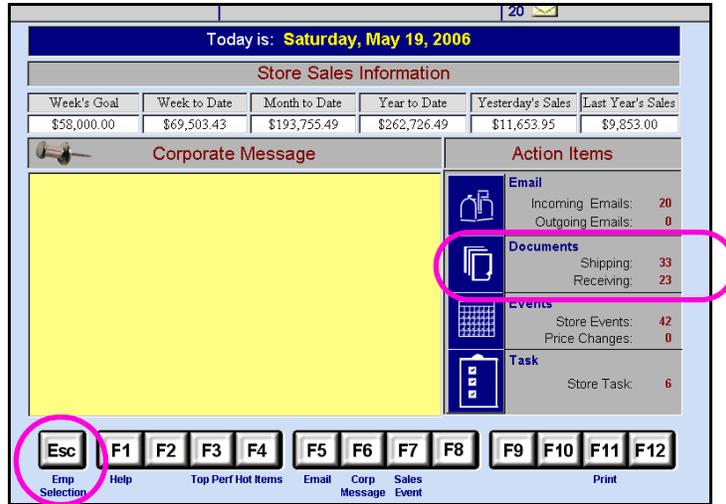


Figure 6-26: Opening Screen

1. From the Opening screen, press [ESC] to open the Employee Selection screen.

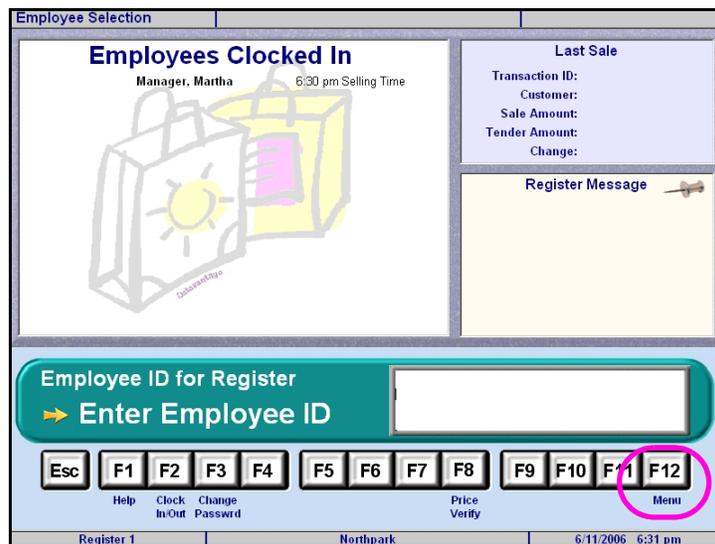


Figure 6-27: Employee Selection Screen

2. Press **[F12]**, **Menu**.
3. Enter the employee ID and password into the focus bar as prompted. The Menu screen displays.



Figure 6-28: Top of Menu Screen

4. Choose between two methods to access the documents - through Top of Menu or from Manager Menu.

## Access Documents through Top of Menu

1. From the Top of Menu, highlight **Inventory Control** and press **[ENTER]**.



Figure 6-29: Top of Menu - Inventory Control

2. The Inventory Control Menu displays.

3. Highlight **Receiving** or **Shipping** and press **[ENTER]**.



Figure 6-30: Inventory Control Menu

4. Process the Documents as necessary.

**See also:** *Shipping, Receiving, and Inventory Manual* for more information.

## Access Documents through Manager Menu

1. From the Menu screen, press **[F3]**, **Manager Menu**.

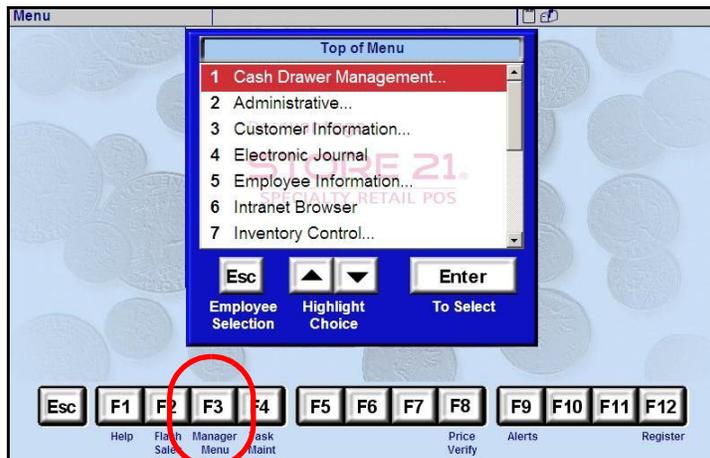


Figure 6-31: Menu Screen



## Store Events

Store Events are notifications of special sales events and price changes. They are downloaded from the corporate office through the polling process.

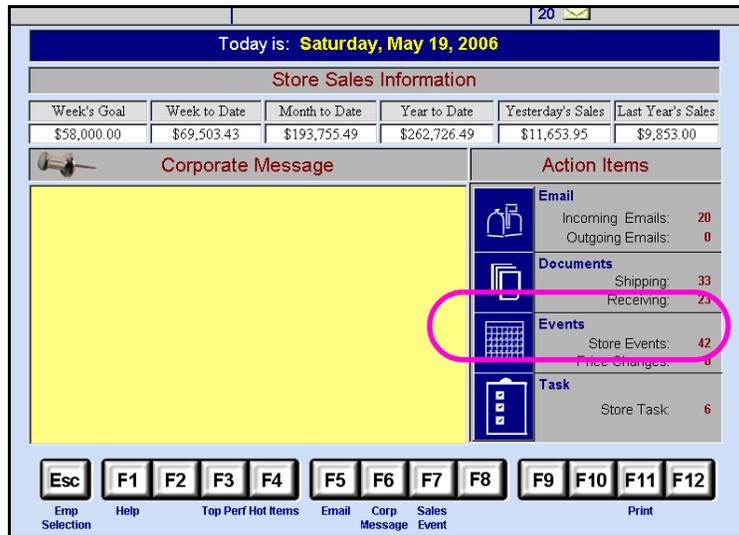


Figure 6-33: Opening Screen

1. From the Opening screen, press **[F7]**, **Sales Event**, to review the list.

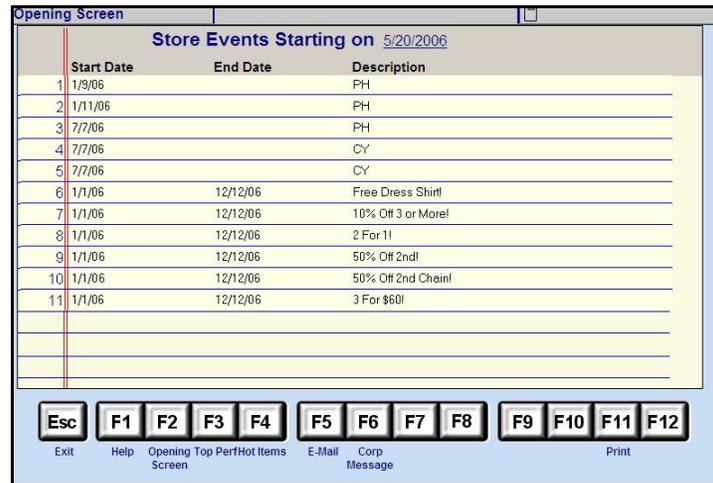


Figure 6-34: Store Sale Events

**Note:** The Store Events report lists only current or up-coming sale events.

2. Press **[F11]**, **Print**, to print the list to the report printer.
3. Press **[F2]**, **Opening Screen**, to return to the Opening screen.

## Tasks

Tasks are activities that employees need to perform. The Opening screen displays the task in the Alerts window, and the total number of current tasks is shown under Action Items.



Figure 6-35: Opening Screen

Employees with the appropriate security level can create new tasks and perform other task maintenance.

## Employee Messages

The home office can send messages to specific employees or to all employees. The messages display after the employee successfully clocks in and can be printed to the receipt printer. The message can be configured to display for a range of dates or until acknowledged by the employee(s).

As part of the clock-in process, the employee selects the type of hours to log. Then, if an Employee Message is available, it will display in the language appropriate for the employee to read.

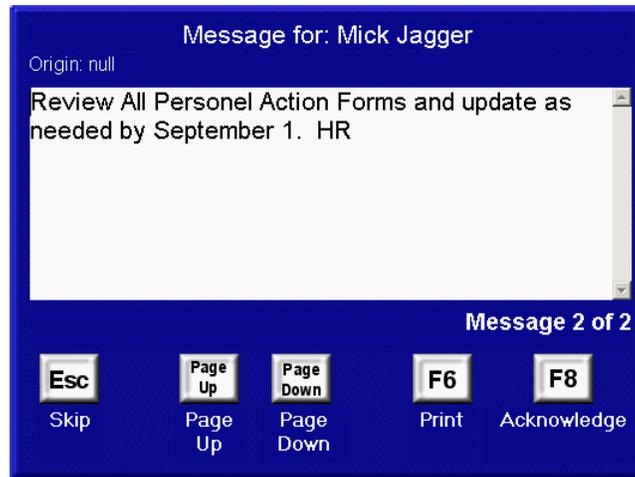


Figure 6-36: Employee Message

The employee can skip the message, print it, or acknowledge it.

- Press **[ESC], Skip**, to skip the message. It will reappear the next time the employee clocks in.
- Press **[F6], Print**, to print the message to the receipt printer.
- Press **[F8], Acknowledge**, to acknowledge the message. After a message is acknowledged by an employee, it will no longer display.

# CHAPTER 7

## Returns

### Overview

Returns are previously-sold items that are returned to the store by customers. Store21 accepts returns from the Register screen. The home office determines if returns can be part of a mixed transaction or must be processed alone, and whether or not the system requires the returning customers' information. Returns can also be processed with or without the receipt.

The home office determines whether or not to enable the Store21 Return Verification feature, and it may adopt certain business rules that apply to each return transaction:

- A customer must be assigned to the return transaction.
- A sales associate may change the customer on the transaction even if that customer was set using a verified return.
- Gift Receipts are treated as original sales receipts to the customer.
- Quantities of items being returned are limited by the system to the quantity shown on the receipt.
- The system allows items listed on a receipt to be returned only one time.
- Tax refund amounts for returning items are determined by the location of the original store where items were purchased, as determined by the sales receipt. If a customer does not have the original receipt, the return store's tax rate is used.

All Return Transactions begin from the Register screen. The **[F4]** function key is a toggle between Sale mode and Return mode. In Sale mode, the focus bar is blue; in Return mode, the focus bar is red.

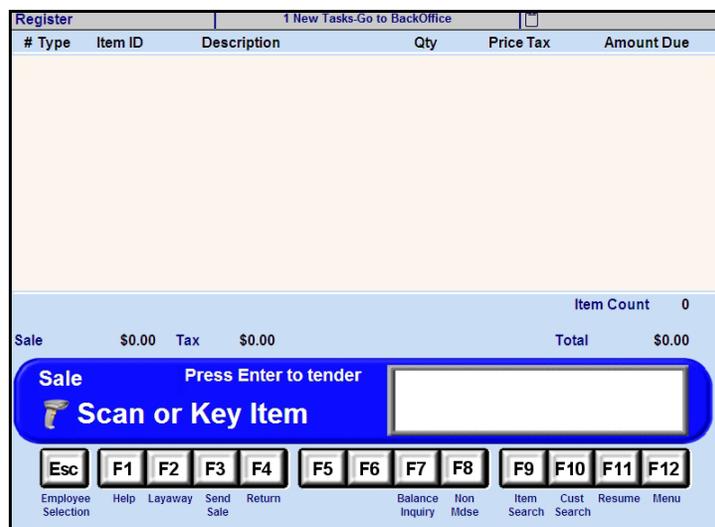


Figure 7-1: Register Screen

This chapter includes the following information:

- Entering Returns with Original Receipt
- Entering Returns when Original Receipt is not Found
- Entering Returns without Original Receipt
- Using Verify-1 Return Authorization
- Return Tenders
- Taxes for Return Items
- Return Policy

## Returns Using Return Verification

Return Verification is the optional process that Store21 uses to recall the original receipt information for the transaction in order to verify the return eligibility of the item(s) being returned. The home office determines whether or not to use the Return Verification feature.

### Return With Original Receipt

Use this method if the customer returns merchandise and presents the original sales receipt. The home office determines whether to use the Return Verification feature or to perform simple return transactions. The processes are slightly different.

1. From the Register screen (Figure 7-1), press **[F4], Return**.
2. The system displays a confirmation message asking whether the customer has the original sales receipt.



Figure 7-2: Original Sales Receipt Prompt

3. Press **[Y], Yes**. The system displays the Original Transaction Search form.

A screenshot of a software form titled 'Original Transaction Search'. The form has a blue border and contains the following elements: a 'Scan Barcode' field with the value '0018605246503036', a '- OR -' separator, and three input fields for 'Store No:', 'Transaction Id:', and 'Date:'. Below these fields is the instruction 'Scan / key barcode or enter original transaction information'. At the bottom, there is a row of function keys: Esc (Cancel Search), F1 (Help), F2 (Use Receipt), F3 (Clear Search), F4 (Execute Search), F5, F6, F7, and F8.

Figure 7-3: Original Transaction Search Form

4. Enter the search criteria:
  - Scan or key the barcode number from the original sales receipt.
  - Key in the original Store Number, Transaction ID, and Transaction Date.
5. Press **[F8], Execute Search**. The system searches the local database for the original transaction.

- If the system locates the original sale transaction, the receipt information displays on the Return Verification screen. Each item that is eligible to be returned is listed on the upper portion of the screen. The lower portion of the screen lists items from the receipt that were previously returned, and are, therefore, no longer eligible for return.

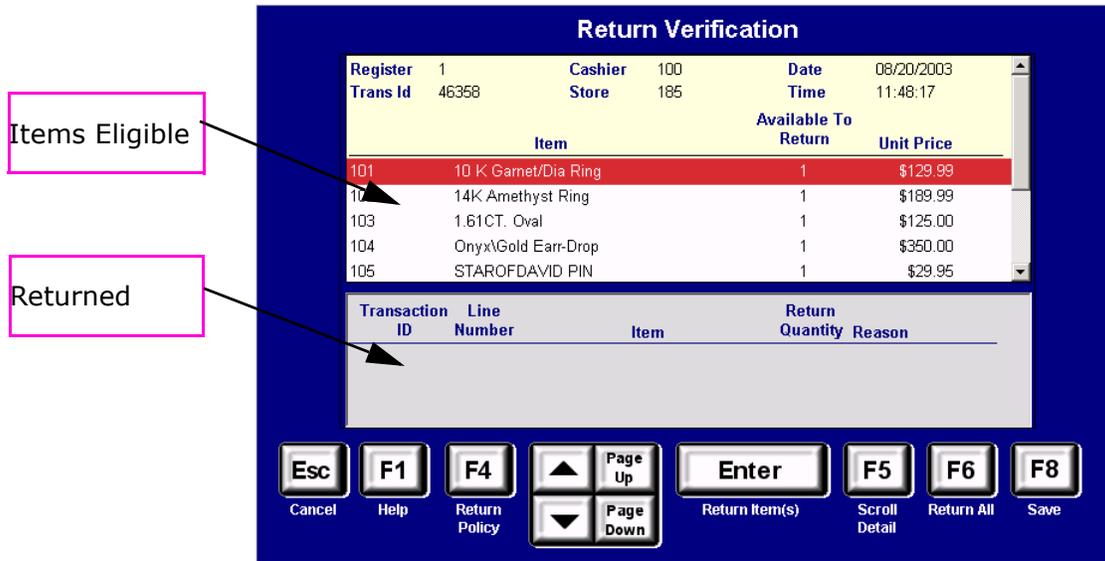


Figure 7-4: Return Verification Screen

- Either all items can be selected for return at once, or individual items can be selected.
  - Highlight the item to be returned and press **[ENTER]**. Repeat for each item to be returned.
  - To return all items on the receipt, press **[F7]**, **Return All**. The Return Reason list displays.



Figure 7-5: Return Reason Codes

**Note:** Return Reasons are configurable and are determined by the home office.

8. Highlight the appropriate reason for the return and press **[ENTER]**. The Return Verification screen displays the item being returned in the lower portion of the screen and changes the item quantity to '0' in the Available to Return column on the screen.

**Return Verification**

Register	1	Cashier	100	Date	3/15/2007
Trans ID	504	Store	37	Time	3:38:33 PM

Item	Available To Return	Unit Price
209 WHT Cardin Drss Shirt	0	\$75.00
102 14K Amethyst Ring	1	\$189.99
1000197 14KY 4CT S-LNK DIA NCK	1	\$7,575.00

Transaction ID	Return Date	Item	Return Quantity	Reason
*541	3/16/2007	209 WHT Cardin Drss Shirt	1	Changed Mind

Buttons: Esc (Cancel), F1 (Help), F4 (Return Policy), Page Up/Down, Enter (Return Items), F5 (Scroll Detail), F6 (Return All), F8 (Save).

Figure 7-6: Return Verification With Returned Item

9. If the original quantity of items on the receipt is greater than '1', enter the quantity of the item to be returned and press **[F8]**, **Save**, to save the data.

#### Notes:

- If the Return Reason Code **Damaged** is selected, additional prompts may display.

Return Comment

**Enter Return Comment**

Input field for comment.

Buttons: Esc (Cancel), F8 (Save).

Figure 7-7: Item Return Comment

- Type the return comment and press **[F8], Save**.
- The system prints an additional receipt for any damaged merchandise.

- 10.** Store21 may be configured to capture the customer's information from the original sale transaction. If the customer has not already been identified by Return Verification, the Customer Search form displays.

**Customer Search**

Customer ID:

Last Name:

First Name:

City:

Postal Code:

Phone Number: (  ) -

Esc F1 F2 F3 F4 F5 F6 F7 F8

Cancel Search Help Empl Sale Add Cust Clear Search List All Execute Search

Figure 7-8: Customer Search Form

**Note:** Search for an existing customer or add a new customer (see ["Using the Customer Search Form" on page 187](#)). At the Customer Maintenance screen, press **[ESC]** to return to the Register screen where the return transaction is in progress.

- 11.** Store21 displays a data entry form to gather additional customer information, if it is required by the home office. Key in any additional information or make any necessary changes, then press **[F8], Save**.

**Enter Customer Information**

\*Last Name:

\*First Name:

\*Address:

\*Postal Code:

\*City:

\*State:

Phone: (  ) -

Country:

\*Required Field

Esc F2 F8 Enter

Cancel Save To Move To Next Item

Figure 7-9: Customer Information Form For Returns

**Note:** By default, the Customer Information form shows information for the customer selected above or who was identified by the Return Verification process. If a different customer is returning the items, overtype the entries with the information of the customer making the return.

**12.** The system displays the returned item in red text on the Register screen.

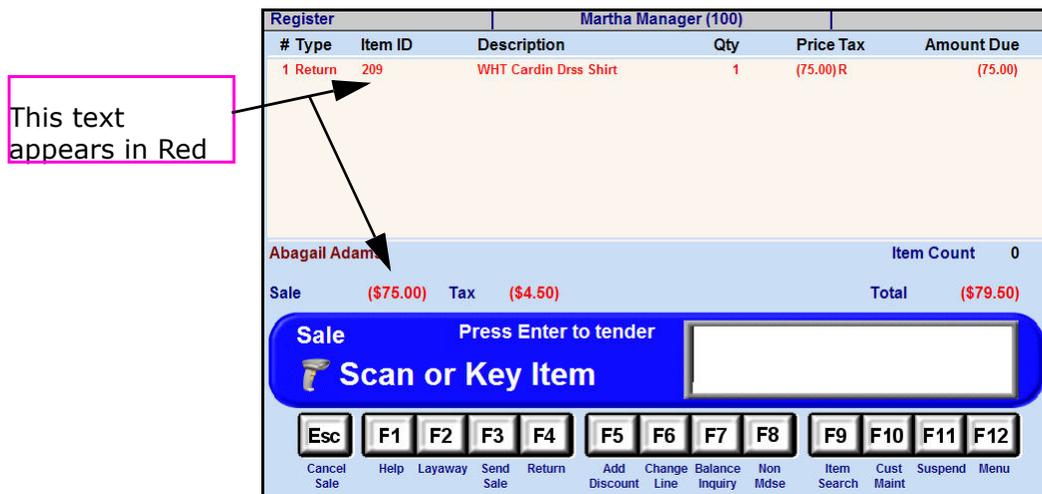


Figure 7-10: Register Screen Return Item

**13.** Press **[ENTER]** to tender the transaction or press a function key to perform other operations.

## Original Receipt is not Found

Customers may have original receipts from different store locations or older POS systems that are not in the system's database. Store21 has a special function that is designed to handle these returns.

1. From the Register screen (Figure 7-1), press **[F4]**, **Return**. The system displays a confirmation message asking if the customer has the original sales receipt.



Figure 7-11: Original Sales Receipt Prompt

2. Press **[Y]**, **Yes**.
3. The system displays the Original Transaction Search form.



Figure 7-12: Original Transaction Search Form

4. Enter the search criteria by doing one of the following:
  - Scan or key the barcode number from the original sales receipt.  
- OR -
  - Key in the original Store Number, Transaction ID, and Transaction Date.

- Press **[F8]**, **Execute Search**. The system searches the local and/or home office data base for the original transaction. If the system fails to find the receipt, an error message displays.



Figure 7-13: Return Receipt not Found

- Press **[ENTER]**. The Original Transaction Search form displays again.

Figure 7-14: Original Transaction Search



*If a receipt is not found, clear the search screen and re-process the request as a double-check before going to the next step.*

- Press **[F4]**, **Use Receipt**. The focus bar on the Register screen turns red and prompts for the return item number.

Figure 7-15: Return Focus Bar

- Scan, or key in the item number from the original receipt and press **[ENTER]**.

9. The Return Reason list displays.



Figure 7-16: Return Reason Code List

---

**Note:** Return Reasons are configurable and are determined by the home office.

---

10. Highlight the appropriate Return Reason and press **[ENTER]**. Depending upon the reason selected, a Return Comment input box may display.



Figure 7-17: Return Comment Input Box

11. Enter appropriate comments and press **[F8]**, **Save**.

12. The Original Receipt Information data entry form displays.



The form is titled "Original Receipt Information" and contains the following fields:

- Does Customer Have Original Receipt? (Y/N)
- Original Store Number
- Original Transaction ID
- Original Sale Date
- Gift Item? (Y/N)
- Coded Gift Price

At the bottom, there are three buttons: "Esc" (Cancel), "F8" (Save), and "Enter" (To Move To Next Item).

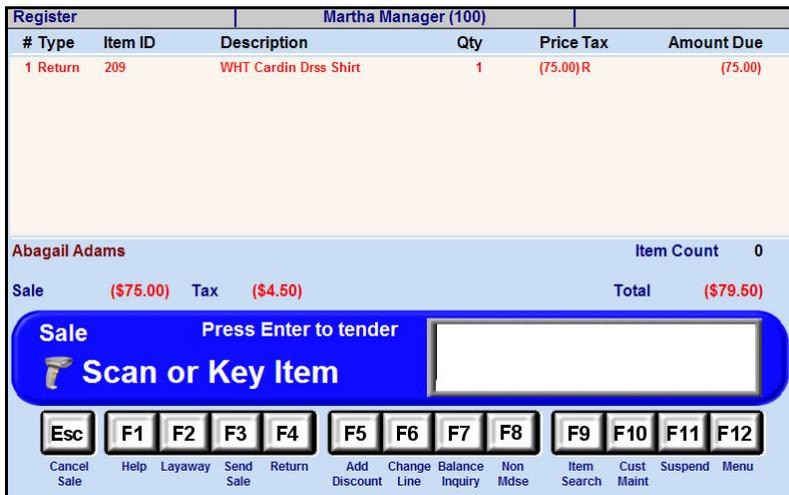
Figure 7-18: Original Receipt Information

**Note:** Gift Item (Y/N) is a required field.

13. The system populates the fields with the information from the Transaction Search form. Key in the information for the other fields.

14. Press **[F8]**, **Save**.

15. The Register screen displays the return item in red.



The Register screen displays the following information:

#	Type	Item ID	Description	Qty	Price Tax	Amount Due
1	Return	209	WHT Cardin Drss Shirt	1	(75.00)R	(75.00)

Customer: Abigail Adams  
Item Count: 0

Sale: (\$75.00) Tax: (\$4.50) Total: (\$79.50)

Buttons: Sale, Press Enter to tender, Scan or Key Item

Function Keys: Esc, F1, F2, F3, F4, F5, F6, F7, F8, F9, F10, F11, F12

Descriptions for Function Keys: Cancel Sale, Help, Layaway, Send Sale, Return, Add Discount, Change Line, Balance Inquiry, Non Mdse, Item Search, Cust Maint, Suspend, Menu

Figure 7-19: Register Screen with Return Item

16. Verify that the item price matches the receipt for the price paid. If necessary, press **[F6]**, **Change Line**, to modify the price. See ["Changing Prices" on page 63](#), for more information.

17. Press **[ENTER]** to tender the transaction or press **[F4]**, **Sale**, to enter additional items.

## Returns Without Receipt

Customers may not have the original receipts for the item(s) they wish to return.

1. From the Register screen (Figure 7-1), press **[F4], Return**. The system displays a confirmation message asking if the customer has the original sales receipt.



Figure 7-20: Confirmation Prompt - Original Sales Receipt

2. Press **[N], No**.
3. If the customer has not already been associated with the transaction, the Customer Search form displays.



Figure 7-21: Customer Information

**Note:** To search for an existing customer or add a new customer See ["Using the Customer Search Form" on page 187](#). At the Customer Maintenance screen, press **[ESC]** to return to the Register screen where the return transaction is in progress.

4. The Register screen displays, and the focus bar turns red, indicating that Store21 is in Return mode. The focus bar prompts for the return item.



Figure 7-22: Focus Bar Return

5. Scan, or key in the item number and press **[ENTER]**. The Return Reason Code list displays.

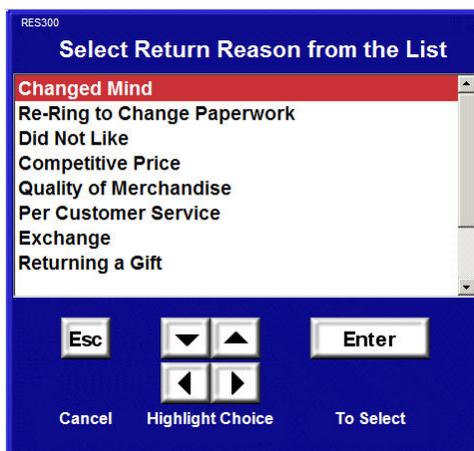


Figure 7-23: Return Reason Code List

6. Highlight the correct return reason code and press **[ENTER]**.
7. The system displays the item's Price History. Select the appropriate price, according to company's return policy.



REG120

Price History.

Item Price	Start Date	End Date
\$75.00	Regular Price	
\$67.50	5/9/06	6/5/06
\$66.25	3/9/06	4/4/06
\$60.00	2/2/06	3/3/06

Esc    ▼ ▲    Enter  
Cancel    Highlight Choice    To Select

Figure 7-24: Price History List

8. Highlight the appropriate item price and press **[ENTER]**. A Return Comment input box displays.



A screenshot of a software window titled "Return Comment". The window has a dark blue background. At the top, it says "Return Comment" in small white text, followed by "Enter Return Comment" in larger white text. Below the title is a large white rectangular text input area. At the bottom of the window, there are two buttons: "Esc" with "Cancel" underneath it, and "F8" with "Save" underneath it.

Figure 7-25: Return Comment Input Box

9. Enter appropriate comments and press **[F8]**, **Save**. The Customer Information form displays.



A screenshot of a software window titled "Enter Customer Information". The window has a light beige background. It contains several text input fields with labels in red: "\*Last Name: Adams", "\*First Name: Abigail", "\*Address: 123", "\*Postal Code: 44139-", "\*City: Solon", "\*State: OH", "Phone: ( ) -", and "Country: US". A red asterisk and the text "\*Required Field" are located at the bottom left. At the bottom of the window, there are four buttons: "Esc" (Cancel), "F2", "F8" (Save), and "Enter" (To Move To Next Item).

Figure 7-26: Customer Information Input Form

10. Key in any additional required information, press **[F8]**, **Save**, to save the data.

11. The system displays the returned item in red text in the Register screen.

Register		Martha Manager (100)				
#	Type	Item ID	Description	Qty	Price Tax	Amount Due
1	Return	205	NVY Givenchy Slack	1	(59.95)R	(59.95)

Abigail Adams Item Count 0

Sale (\$59.95) Tax (\$3.60) Total (\$63.55)

Return
Press Enter to tender

Esc  
Cancel Sale
F1  
Help
F2  
Layaway
F3  
Send Sale
F4  
Sale

F5  
Add Discount
F6  
Change Line
F7  
Balance Inquiry
F8  
Non Mdse

F9  
Item Search
F10  
Cust Maint
F11  
Suspend
F12  
Menu

Figure 7-27: Register Screen Return Item

12. If necessary, press **[F6], Change Line**, to modify the price. See ["Changing Prices" on page 63](#), for more information.
13. Press **[ENTER]** to tender the transaction, or press **[F4], Sale**, to enter additional items.

## Returns When Not Using Return Verification

### Return With Receipt

This is the process that Store21 uses for customer returns with receipt.

1. From the Register screen ([Figure 7-1](#)), press **[F4]**, **Return**.
2. If the customer has not already been associated with the transaction, the Customer Search form displays.



The Customer Search form is titled "Customer Search" and features a family icon on the left and a binoculars icon on the right. It contains the following input fields:

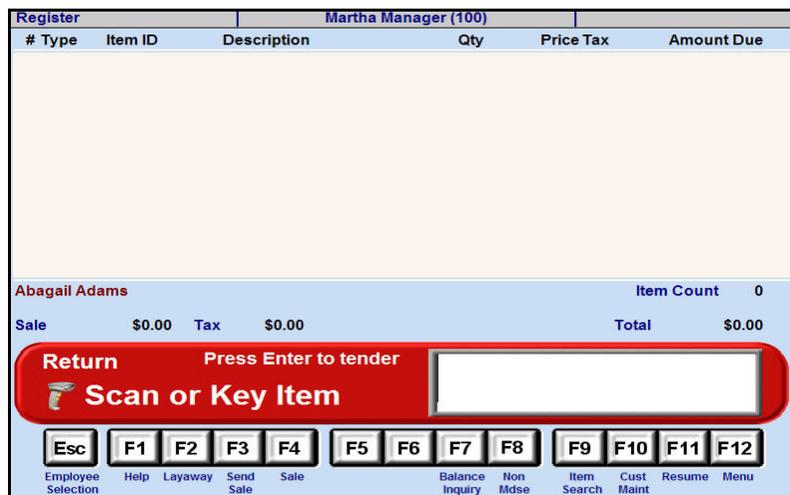
- Customer ID:
- Last Name:
- First Name:
- City:
- Postal Code:
- Phone Number: (  ) -

At the bottom, there is a row of function keys: Esc, F1, F2, F3, F4, F5, F6, F7, F8. Below these keys are their respective labels: Cancel Search, Help, Empl Sale, Add Cust, Clear Search, List All, and Execute Search.

Figure 7-28: Customer Information

**Note:** Search for an existing customer or add a new customer (see ["Using the Customer Search Form" on page 187](#)). At the Customer Maintenance screen, press **[ESC]** to return to the Register screen where the return transaction is in progress.

3. The Register screen displays, and the focus bar is red, indicating that Store21 is in Return mode.



The Register screen shows a transaction for "Martha Manager (100)". The main area is a table with the following columns: #, Type, Item ID, Description, Qty, Price Tax, and Amount Due. The table is currently empty.

Below the table, the following information is displayed:

- Customer Name: Abigail Adams
- Item Count: 0
- Sale: \$0.00
- Tax: \$0.00
- Total: \$0.00

A red banner at the bottom of the screen contains the text "Return" and "Press Enter to tender". Below this banner is a large input field with the text "Scan or Key Item".

At the bottom of the screen, there is a row of function keys: Esc, F1, F2, F3, F4, F5, F6, F7, F8, F9, F10, F11, F12. Below these keys are their respective labels: Employee Selection, Help, Layaway, Send Sale, Sale, Balance Inquiry, Non Mdse, Item Search, Cust Maint, Resume, and Menu.

Figure 7-29: Register Screen in Return Mode

4. Scan, or key in the item number of the item being returned and press **[ENTER]**.
5. The Reason list displays.

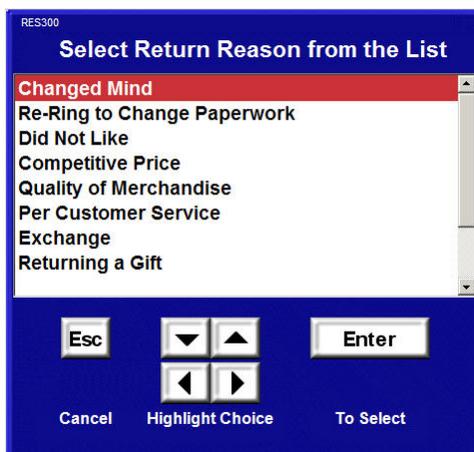


Figure 7-30: Return Reason Codes

---

**Note:** Return Reasons are configurable and are determined by the home office.

---

6. Highlight the appropriate reason for the return and press **[ENTER]**.

---

**Notes:**

- If the Return Reason Code **Damaged** is selected, additional prompts may display.

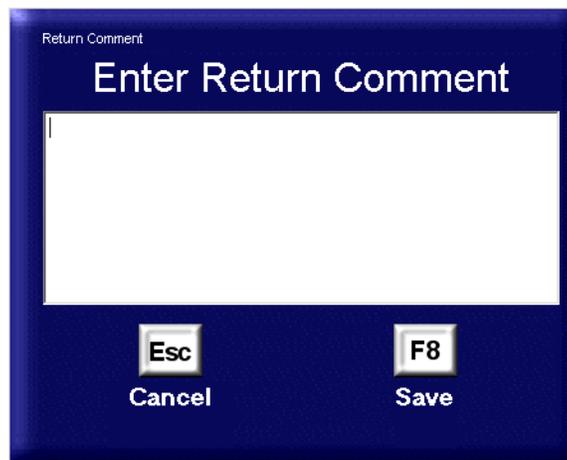


Figure 7-31: Item Return Comment

- Type the comments and press **[F8]**, **Save**.
  - The system prints an additional receipt for any damaged merchandise.
-

- The system displays the returned item in red text on the Register screen, and the Original Receipt Information form displays.

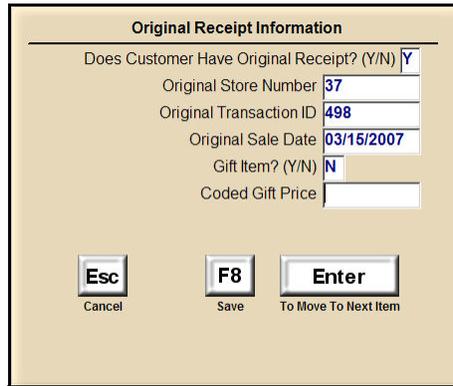


Figure 7-32: Register Screen Return Item

- Key in the information from the sales receipt, pressing **[ENTER]** to move to the next field. Press **[F8], Save**, to save the information.
- Store21 displays a data entry form to capture additional customer information, if it is required by the home office.

By default, the Customer Information form shows the information for the customer who was selected above, or who was identified by the Return Verification process. If a different customer is returning the item, overtype the entries with the information of the customer making the return.

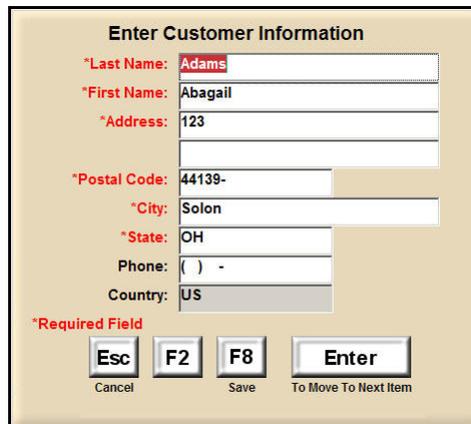


Figure 7-33: Customer Information Form For Returns

---

**Note:** The home office determines with fields are required.

---

- Key in any additional required information and press **[F8], Save**.

11. The Register screen displays the item being returned in red text.

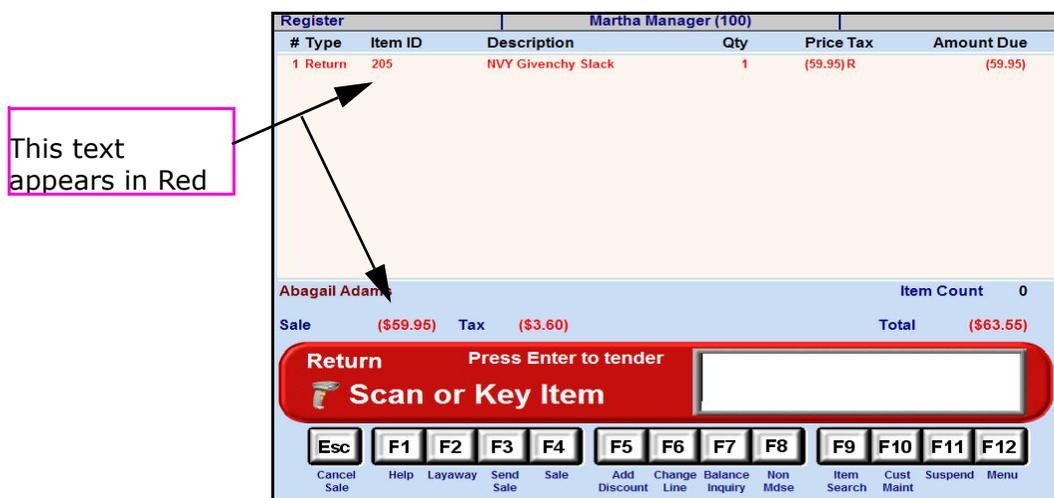


Figure 7-34: Register Screen With Return Items In Red

12. Press **[ENTER]** to tender the transaction or press a function button to perform other operations.

## Original Receipt is not Found

Customers may have original receipts from different store locations or older POS systems that are not in the system's database. Store21 has a special function that is designed to handle these returns.

- From the Register screen ([Figure 7-1](#)), press **[F4]**, **Return**. If the customer has not already been associated with the transaction, the Customer Search form displays.

The screenshot shows the 'Customer Search' form. It has a title 'Customer Search' and a magnifying glass icon. The form contains the following fields:

- Customer ID:
- Last Name:
- First Name:
- City:
- Postal Code:
- Phone Number: (  ) -

At the bottom, there is a row of function buttons: Esc, F1, F2, F3, F4, F5, F6, F7, F8. Below these buttons are their respective labels: Cancel Search, Help, Empl Sale, Add Cust, Clear Search, List All, and Execute Search.

Figure 7-35: Customer Information

**Note:** To search for an existing customer or add a new customer (see ["Using the Customer Search Form" on page 187](#)). At the Customer Maintenance screen, press **[ESC]** to return to the Register screen where the return transaction is in progress.

- The Register screen displays, and the focus bar is red, indicating that Store21 is in Return mode.



Figure 7-36: Register Screen in Return Mode

- Scan, or key in the item number of the item being returned and press **[ENTER]**.
- The Reason list displays.

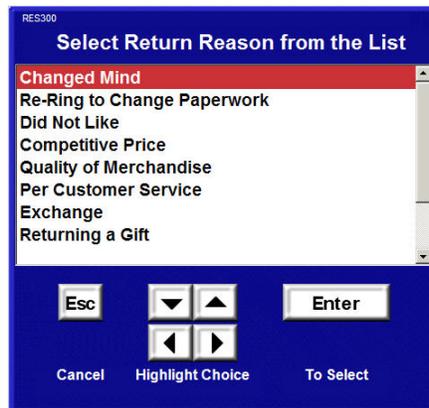


Figure 7-37: Return Reason Codes

---

**Note:** Return Reasons are configurable and are determined by the home office.

---

- Highlight the appropriate reason for the return and press **[ENTER]**.

**Notes:**

- If the Return Reason Code **Damaged** is selected, additional prompts may display.

Figure 7-38: Item Return Comment

- Type the comments and press **[F8], Save.**
- The system prints an additional receipt for any damaged merchandise.

6. The system displays the returned item in red text on the Register screen, and the Original Receipt Information form displays.

Figure 7-39: Register Screen Return Item

7. Key in the information from the sales receipt, pressing **[ENTER]** to move between fields.



*If the return is from a gift receipt, place a 'Y' in the Gift Item field and key in the Coded Gift Price the encoded price that is printed on the receipt.*

8. Press **[F8], Save**, to save the information.
9. Store21 displays a data entry form to capture additional customer information, if it is required by the home office.

By default, the Customer Information form shows the customer’s information who was selected above or who was identified by the Return Verification process. If a different customer is returning the item, overtype the entries with the information of the returning customer.

Figure 7-40: Customer Information Form For Returns

**Note:** The home office determines which fields are required.

- 10. Key in any additional required information and press **[F8], Save.**
- 11. The Register screen displays the item being returned in red text.

This text appears in Red

#	Type	Item ID	Description	Qty	Price Tax	Amount Due
1	Return	205	NVY Givenchy Slack	1	(59.95) R	(59.95)

Figure 7-41: Register Screen With Return Items In Red

- 12. Press **[F6], Change Line**, to modify the price, if applicable. See ["Changing Prices" on page 63](#), for more information.
- 13. Press **[ENTER]** to tender the transaction or press a function key to perform other operations.

## Returns Without Receipt

Customers may not have the original receipt for the item(s) they wish to return.

1. From the Register screen ([Figure 7-1](#)), press **[F4]**, **Return**.
2. If the customer has not already been associated with the transaction, the Customer Search form displays.

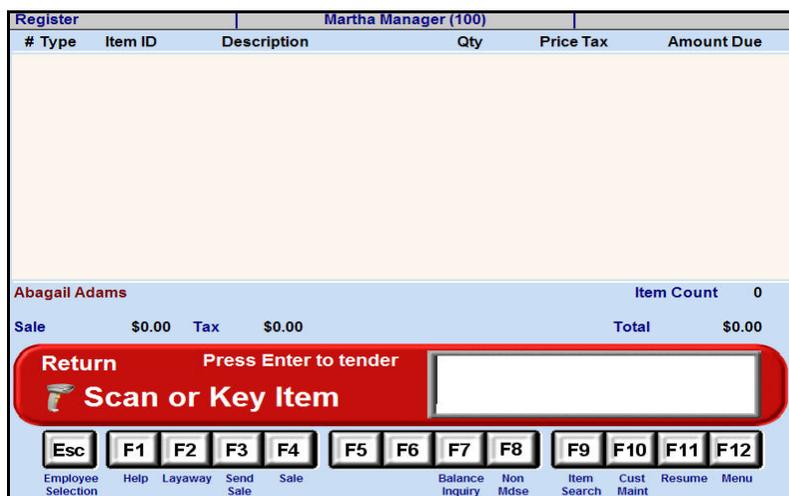


The Customer Search form is titled "Customer Search" and features a magnifying glass icon. It contains the following fields:

- Customer ID:
- Last Name:
- First Name:
- City:
- Postal Code:
- Phone Number: (  ) -

At the bottom, there is a row of function keys: Esc (Cancel Search), F1 (Help), F2 (Empl Sale), F3 (Add Cust), F4 (Clear Search), F5 (List All), F6 (Execute Search), F7, and F8.

Figure 7-42: Customer Information



The Register screen shows a transaction for "Martha Manager (100)". The screen is in Return mode, indicated by a red bar at the bottom with the text "Return Press Enter to tender" and "Scan or Key Item".

#	Type	Item ID	Description	Qty	Price Tax	Amount Due
Abigail Adams						
Sale						Item Count 0
					Tax \$0.00	Total \$0.00

At the bottom, there is a row of function keys: Esc (Employee Selection), F1 (Help), F2 (Layaway), F3 (Send Sale), F4 (Sale), F5 (Balance Inquiry), F6 (Non Mdse), F7 (Item Search), F8 (Cust Maint), F9 (Resume), F10 (Menu), F11, and F12.

Figure 7-43: Register Screen in Return Mode

**Note:** To Search for an existing customer or add a new customer (see ["Using the Customer Search Form" on page 187](#)). After locating or adding the new customer on the Customer Maintenance screen, press **[ESC]** to return to the Register screen where the return transaction is in progress. The Register screen now displays the focus bar as red, indicating that Store21 is in Return mode.

3. Scan or key in the item number of the item being returned and press **[ENTER]**.
4. The Reason list displays.

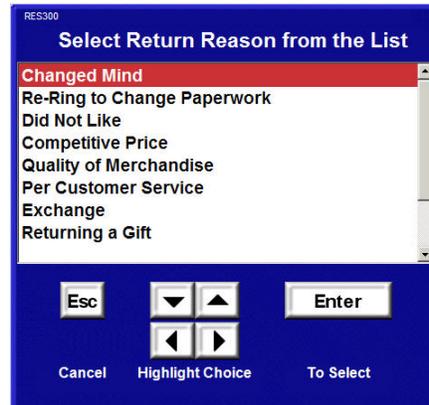


Figure 7-44: Return Reason Codes

---

**Note:** Return Reasons are configurable and are determined by the home office.

---

5. Highlight the appropriate reason for the return and press **[ENTER]**.

---

**Notes:**

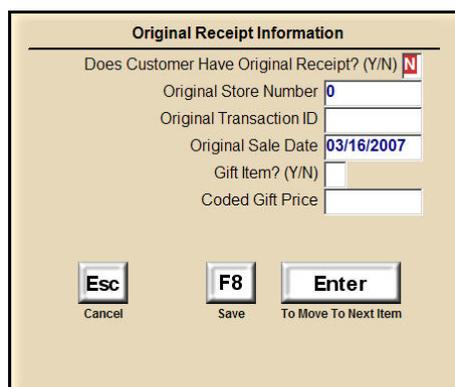
- If the Return Reason Code **Damaged** is selected, additional prompts may display.



Figure 7-45: Item Return Comment

- Type the comments and press **[F8], Save.**
  - The system prints an additional receipt for damaged merchandise.
-

6. The system displays the returned item in red text on the Register screen, and the Original Receipt Information form displays.



**Original Receipt Information**

Does Customer Have Original Receipt? (Y/N) **N**

Original Store Number **0**

Original Transaction ID

Original Sale Date **03/16/2007**

Gift Item? (Y/N)

Coded Gift Price

**Esc** **F8** **Enter**

Cancel Save To Move To Next Item

Figure 7-46: Register Screen Return Item

7. Key '**N**' into first field and press [**F8**], **Save**.

After entering 'N' that the customer does not have the receipt, Store21 does not accept entries into any other fields.

8. The system displays the item's Price History.



REG120

**Price History**

Price	Start Date	End Date
59.950	Regular Price	
\$67.50	5/9/06	6/6/06
\$56.25	3/9/06	4/4/06
\$60.00	2/2/06	3/3/06

**Esc** **Enter**

Cancel Highlight Choice To Select

Figure 7-47: Price History List

9. Highlight the appropriate item price and press [**ENTER**].

- Store21 displays a data entry form to capture additional customer information, if it is required by the home office.

Figure 7-48: Customer Information Form For Returns

**Note:** By default, the Customer Information form shows information for the customer who was selected above, or who was identified by the Return Verification process. If a different customer is returning the item, overwrite the entries with the information of the customer making the return.

- Key in any additional required information and press **[F8], Save**. The system displays the returned item in red text on the Register screen.

#	Type	Item ID	Description	Qty	Price Tax	Amount Due
1	Return	205	NAVY Givenchy Slack	1	(59.95)R	(59.95)

Abigail Adams Item Count 0

Sale (\$59.95) Tax (\$3.60) Total (\$63.55)

**Return** Press Enter to tender

**Scan or Key Item**

Cancel Sale    Help Layaway Send Sale    Add Change Balance Non Item Cust Suspend Menu  
 Discount Line Inquiry Mdse Search Maint

Figure 7-49: Register Screen Return Item

- Press **[ENTER]** to tender the transaction or press **[F4], Sale**, to enter additional items.

## Using Verify-1 Return Authorization

Store21 can be configured to request return authorization from a Verify-1 Return Authorization Server (RAS). This RAS uses customer identification information to track customer return habits and, if necessary, warn users about certain customers.

1. If it is configured in your system, Store21 prompts you to scan or swipe the customer's driver's license or state ID. At this window, do one of the following:

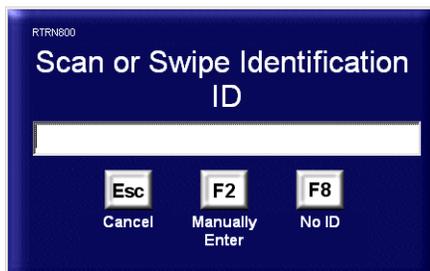
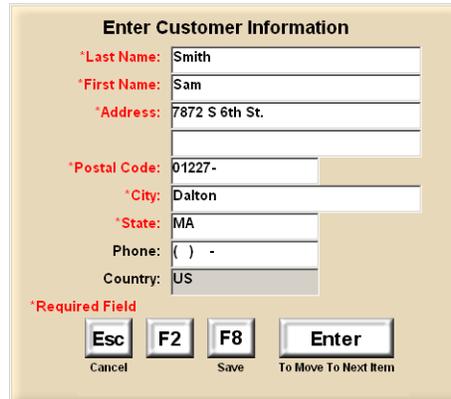


Figure 7-50: Scan or Swipe ID

- Scan the customer's ID. Continue with step 4.
  - Press **[F2]** to manually enter the information about the ID presented by the customer. Continue with step 2.
  - Press **[F8]** to manually enter customer information. Continue with step 3.
  - Press **[ESC]** to return to item entry. Return to item entry.
2. If you chose to manually enter the ID information, Store21 prompts you to enter customer ID information. Enter the required information in the window, then press **[ENTER]** to continue with step 4.

Figure 7-51: Customer ID Information Entry

3. If the customer does not have an ID, Store21 prompts for customer information. Enter the customer information in the required fields, then press **[ENTER]**, **Submit to Return Authorization** to continue.



**Enter Customer Information**

\*Last Name: Smith

\*First Name: Sam

\*Address: 7872 S 6th St.

\*Postal Code: 01227-

\*City: Dalton

\*State: MA

Phone: ( ) -

Country: US

\*Required Field

Esc Cancel F2 F8 Save Enter To Move To Next Item

Figure 7-52: Customer Information Entry

4. The RAS is queried with the customer information and a return authorization response is displayed:
- If the return is authorized, a message appears on the screen. Press **[ENTER]** to continue with tendering.



Figure 7-53: Return Authorized Message

- If the return is authorized with a warning, a message alerts you to the warning. Press **[ENTER]** to continue with tendering.



Figure 7-54: Return Warning Message

A receipt with the warning alert prints for the customer.

- If the customer information must be re-entered manually, a message alerts you. Press **[ENTER]** to return to step 3.



Figure 7-55: Re-Enter Customer Information Message

- If the return is denied, a message alerts you to the denial and the reason for the denial.



Figure 7-56: Return Denied Message

Upon receiving the denial, do one of the following:

- Press **[ENTER]** to cancel the transaction. A receipt prints for the customer.
- Press **[F8]** to override the denial.

A security prompt opens requesting manager approval of the override. A manager enters his/her Employee ID and Password, then presses **[ENTER]** to allow the return transaction to continue with return tendering.



Figure 7-57: Manager Override

## Return Tenders

Store21 can restrict the types of tenders to be refunded to a customer according to the requirements of the home office. When returning items from multiple receipts on a single return transaction, Store21 will use the most restrictive tender to determine the appropriate refund tender. Also, if using Return Verification, the home office may decide either to further restrict the refund tender in accordance with the original form of tender or to apply the standard refund rules.

1. At the conclusion of the transaction, if a refund is due the customer, the Tender list displays with the appropriate tenders.

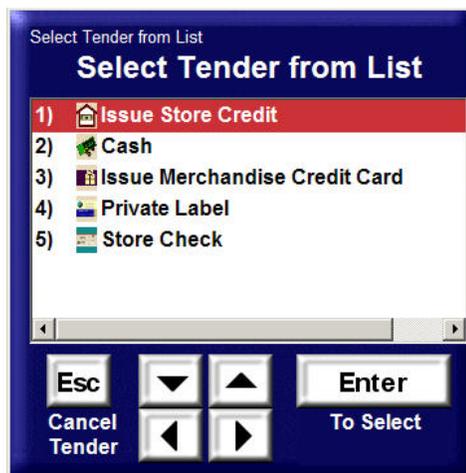


Figure 7-58: Tender List - Standard Refunds



Figure 7-59: Tender List - Restricted Refunds

2. Highlight the appropriate tender and press **[ENTER]**. Complete the tender process. See ["Tender Process" on page 135](#).

## Taxes For Return Items

Tax refunds for a return item are determined by the store number where the item was purchased. This store number is entered into the system using the original receipt, at the beginning of the return transaction. If the customer does not have the original receipt, the tax rate for the store where the return is being performed will be assigned to the return transaction.

## Return Policy

The return policy may be available from the Return Verification screen.

**Return Verification**

Register	1	Cashier	100	Date	08/20/2003
Trans Id	46358	Store	185	Time	11:48:17

Item	Available To Return	Unit Price
101 10 K Garnet/Dia Ring	1	\$129.99
102 14K Amethyst Ring	1	\$189.99
103 1.61CT. Oval	1	\$125.00
104 Onyx\Gold Earr-Drop	1	\$350.00
105 STAROFDAVID PIN	1	\$29.95

Transaction ID	Line Number	Item	Return Quantity	Reason

Cancel Help Return Policy  Return Item(s) Scroll Detail Return All Save

Figure 7-60: Return Verification Screen

1. Press **[F4]**, **Return Policy**. The policy displays as a message prompt.

RTRN600

**We will fully refund most items within 30 days of receipt. This return policy may vary slightly from the store and catalog policies. All returns, exchanges and price adjustments must be made in the country of original purchase.**

Press Y to print or N to return

Yes No

Figure 7-61: Return Policy

---

**Note:** The home office determines the actual text of the return policy to reflect their specific business requirements.

---

2. Respond to the prompt.
    - Press **[Y]**, **Yes**, to print the policy on the receipt printer.
    - Press **[N]**, **No**, to close the message and return to the previous screen.
-



## CHAPTER 8

# *Tenders*

### Overview

After entering items, process the tender to complete the sale transaction. Store21 supports most tender types and allows multiple tenders (split tenders) per transaction. First, select the type of tender the customer presents, then process the tender. The types of tender accepted are determined by the home office. This chapter explains first what the tender process is and how to complete the sale transaction, then provides specific instructions for each of these tender types:

- Cash
- Credit Card
- Private Label Credit Card
- Debit Card
- Check
- Travelers Check
- Gift Certificate
- Store Credit
- Gift Card
- Mall Certificate
- Foreign Currency
- Finance Company
- Payroll Deductions
- House Account
- A/R Account (Accounts Receivable)

### Tender Process

After all sale/return items are in the register for the sale transaction, the register shifts from Register Mode to Tender Mode. This is where you select the tender type and perform the tender process. In addition to the basic tender process, you can also split tender types in a single transaction, change and/or delete tender types during a transaction, and change the tender amounts. For some of these processes, you will toggle between the Tender screen and the Register screen.

## Basic Tender Process - Tender Mode

Most of the steps in processing the various tender types are common to all of them. Refer to this basic tender process to accept the various tenders. Begin the tender process on the Register screen with a **blank** focus bar.

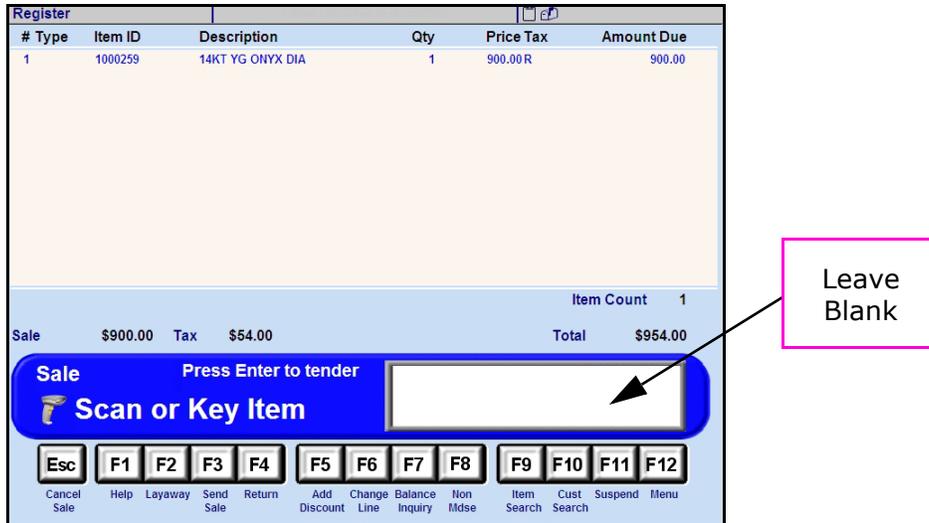


Figure 8-1: Register Screen

- From the Register screen, press **[ENTER]**. The register is now in Tender Mode, and the Tender screen displays. The screen is divided into two sides. The left side shows the list of items being purchased, and the right side details the transaction totals, the tender types and amounts, and the transaction balance status. During the tender process, the left side is often concealed by the Tender list or Store21 messages.

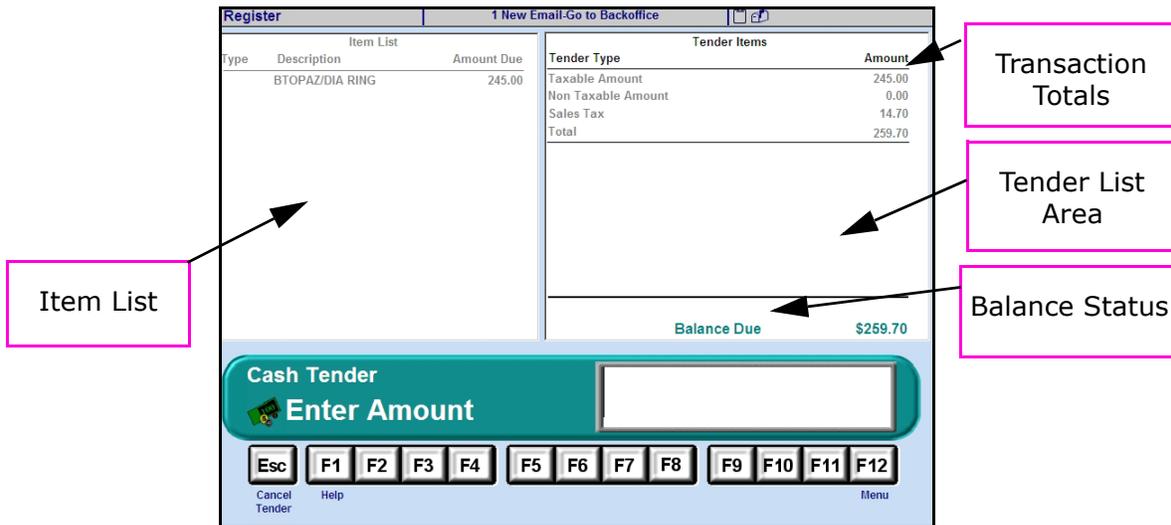


Figure 8-2: Tender Screen in Tender Mode

- The Tender list displays at the beginning of the tender process.

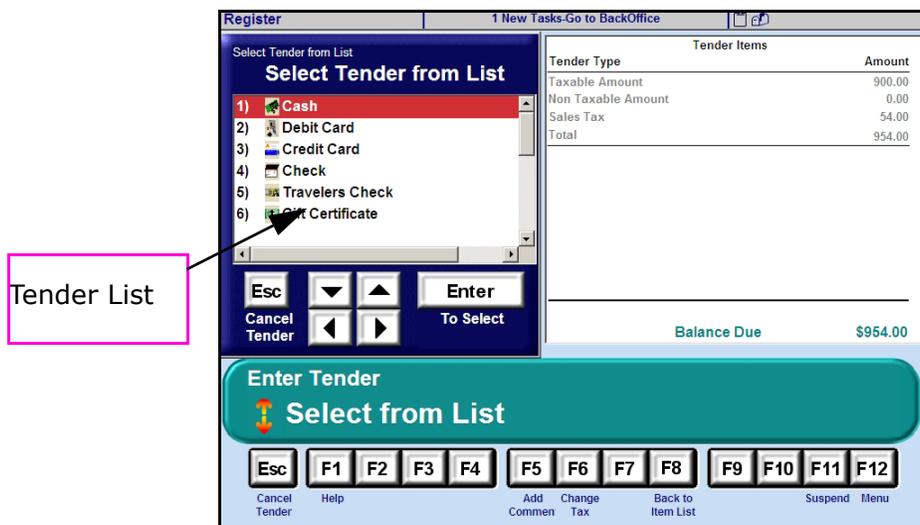


Figure 8-3: Tender Screen with Tender List

**Note:** The Tender list displays all tender types accepted by your store for the specific transaction type, as configured by the home office.

- Select the tender type using either one of two methods:
  - In the Tender list, highlight the appropriate tender type. Press **[ENTER]**.
  - Press the Number Key on the keyboard to select the tender associated with it.
- The focus bar displays the tender type selected, and may prompt one or more times for additional information, depending on the tender type (i.e. Cash Amount, Credit Card number, and expiration date).



Figure 8-4: Focus Bar - Information Prompt

- Scan or key the appropriate information into the focus bars and press **<Bold>[ENTER]<Bold>**.

6. If, after tendering an amount from the customer, an additional amount is due from the customer, the Tender list displays again. Select a tender type and repeat the tendering process until the Balance Due is \$0 or a change amount is due the customer.

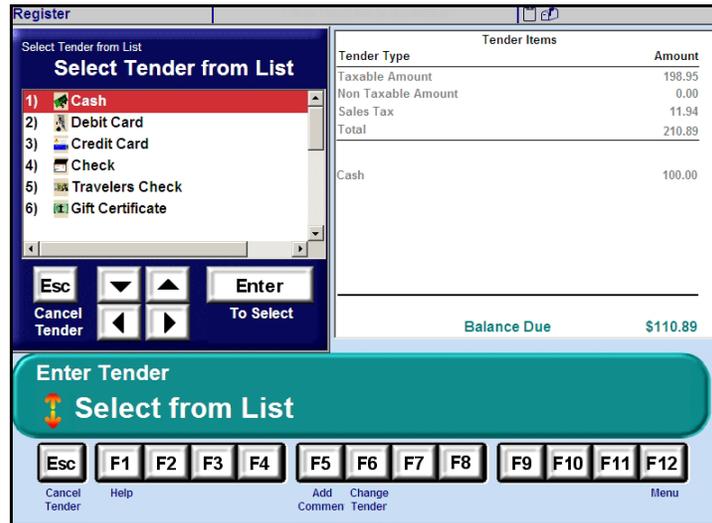


Figure 8-5: Tender Screen with Additional Amount Due

7. The Amount Due the customer, if applicable, displays (in red) on the Tender screen, and a confirmation prompt displays asking if the sale is complete.

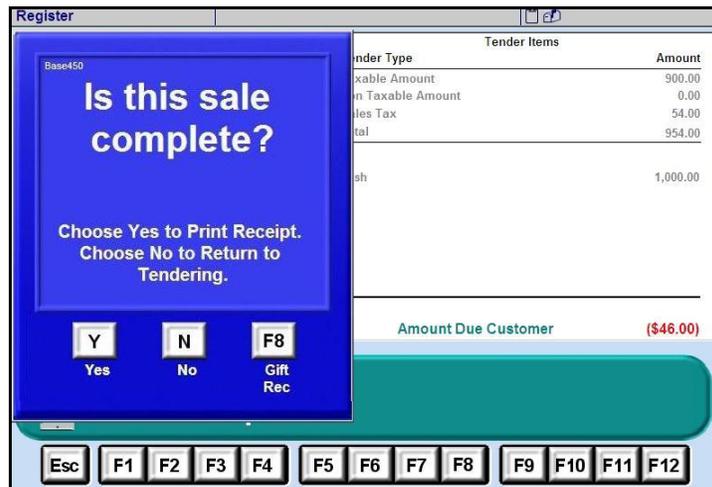


Figure 8-6: Tender Screen with Sale Complete Confirmation Prompt

**Note:** The option to print gift receipts is determined by the home office.

- a. Press **[Y]**, **Yes** to print the receipt(s) which completes the sale transaction. The register drawer opens.
- b. Press **[F8]**, **Gift Receipt** to print a gift receipt. The register drawer opens.

- c. Press **[N]**, **No** to re-open the Register screen in Tender mode where you have the following options:



Figure 8-7: Tender Actions

- 1) Press **[ESC]**, **Cancel Sale**. A confirmation prompt displays.
- 2) Press **[F4]**, **Finish Sale**. The Sale Complete prompt displays.
- 3) Press **[F6]**, **Change Tender**. The system highlights the tender type for deletion that was previously selected on the Tender screen.
- 4) Press **[12]**, **Menu**. The Back Office Top of Menu displays.

---

#### Notes:

- Follow the focus bar prompts.
  - When entering amounts, do not use dollar signs or decimal points.
  - The Tender list will continue to appear as long as there is a Balance Due from the customer.
  - The Customer Search form may display if a customer has not yet been assigned to the transaction. Assign the customer to the transaction, or press **[ESC]** to bypass the search form.
  - If an item in the transaction requires customer information, such as a driver's license number for a check tender, you must enter the information into the register in order to complete the transaction.
  - The receipt prints at the conclusion of the transaction.
-

## Split a Tender

Store21 supports split-tender transactions which allows two or more tender types to be collected for the same transaction. When processing multiple tenders, the order of entering them does not matter unless restricted by the home office.

In the example that follows, the customer pays by gift certificate and cash.



Figure 8-8: Gift Certificate Tender with Balance Due

**Note:** The option to allow split tenders is determined by the home office.

1. Begin with a basic tender process and select Gift Certificate tender. See ["Gift Cards and Gift Certificates" on page 158](#).
  - a. Enter all required gift certificate information, including an amount that is less than the total amount due and press **[ENTER]**.
  - b. The system deducts the entered amount from the balance due.
2. Because the Balance Due is greater than \$0.00, the Tender list displays. Select another tender from the Tender list and press **[ENTER]**.

3. Select **Cash** for this example. The focus bar prompts for the cash amount.

Register		Martha Manager (100)	
Type	Description	Item List	Amount Due
	Dump Men's SKU		900.00
Tender Type		Tender Items	
Taxable Amount		900.00	
Non Taxable Amount		0.00	
Sales Tax		54.00	
Total		954.00	
Gift Certificate		049576	500.00
Balance Due		\$454.00	

**Cash Tender**  
Enter Amount

Esc F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12  
Cancel Tender Help Menu

Figure 8-9: Focus Bar - Cash Tender

4. Enter the cash amount using one of two methods:
- Accept the Balance Due as the default cash amount - just press **[ENTER]**.
  - Key in the cash amount and press **<Bold>[ENTER]<Bold>**.
5. Store21 calculates the Balance Due from the customer.
- If there is no Balance Due from the customer, the Sale Complete prompt displays.
  - If the sale is complete, and if the customer is owed change, it is shown as Amount Due Customer, and the Sale Complete prompt displays.

Register		Martha Manager (100)	
Is this sale complete?		Tender Items	
Choose Yes to Print Receipt. Choose No to Return to Tendering.		Tender Type	
Y Yes N No F8 Gift Rec		Taxable Amount	
		900.00	
		Non Taxable Amount	
		0.00	
		Sales Tax	
		54.00	
		Total	
		954.00	
		Gift Certificate	
		049576	500.00
		Cash	
		500.00	
		Amount Due Customer	
		(\$46.00)	

Esc F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12

Figure 8-10: Split Tender Example

6. Press **[Y]**, **Yes** to print the receipt(s), and open the cash drawer. This completes the transaction.

## Alter Tenders

It is sometimes necessary to change tender amounts and/or tender types during a tender process. Store21 requires employees to delete — not change — a tender and re-enter it.

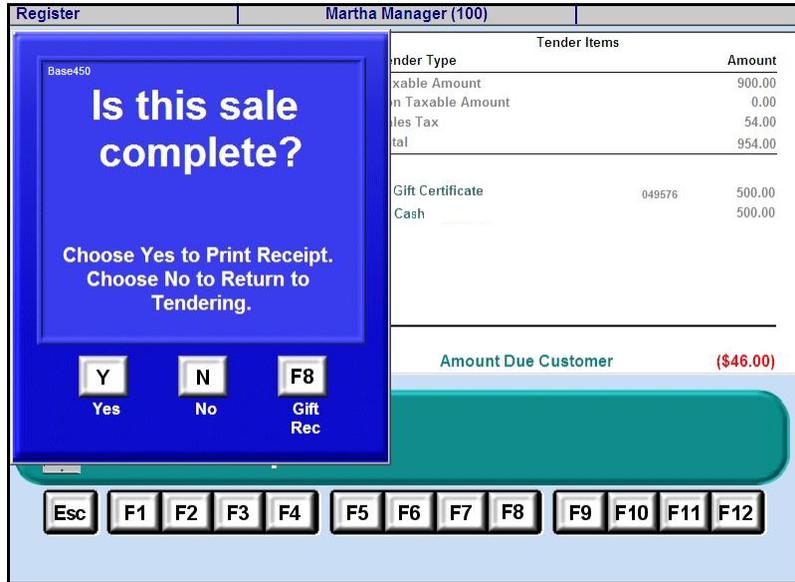


Figure 8-11: Sale Complete Confirmation

At the Sale Complete confirmation prompt, press **[N]**, **No**, to redisplay the Tender list.

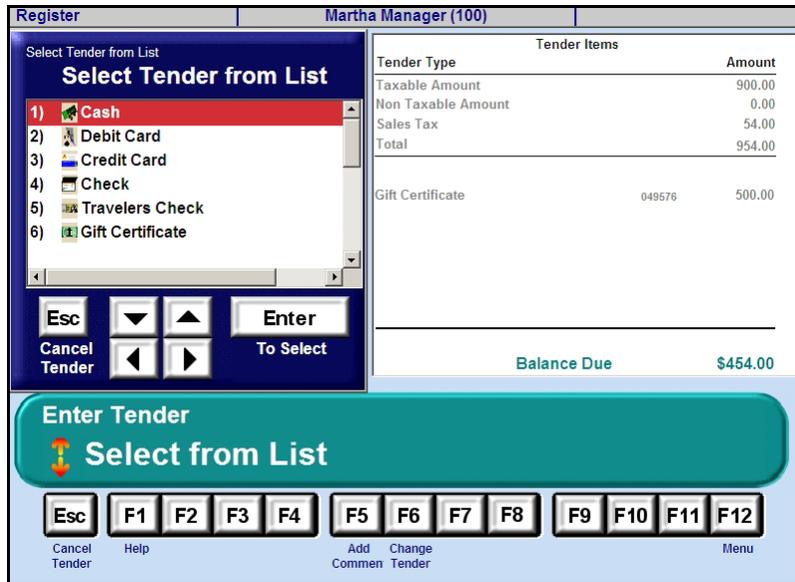


Figure 8-12: Incomplete Sale with Tender List

## Deleting Tenders

1. After pressing **[N], No**, on the Sale Complete prompt, the Tender screen displays with the current sale transaction, and the focus bar prompts to Select an Action from the function buttons.



Figure 8-13: Tender Screen Focus Bar and Function Buttons

2. Press **[F6], Change Tender**. The tender previously entered is highlighted in red, and the function button options change to show new commands.

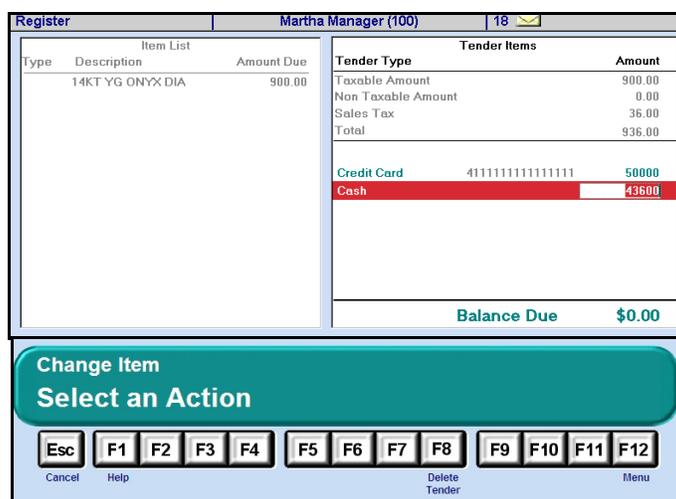


Figure 8-14: Tender Screen - Delete Tender

3. Press the arrow keys on the keyboard to highlight the appropriate tender line item on the right and press **[F8], Delete Tender**. A prompt asks for confirmation.



Figure 8-15: Remove Tender Confirmation

- a. Press **[N], No**, to cancel this action and return to the Tender screen.
  - b. Press **[Y], Yes**, to delete the tender. The tender is removed from the Tender screen.
4. If there are multiple tender line items to delete, repeat these steps for each item.

## Changing Tenders

Changing tenders is actually a misnomer. If the customer wants to change tender types or tender amounts, it is first necessary to delete the tender line item that is to be 'changed'. Deleting the line item voids the back-office processing that Store21 recorded for the tender.

1. Perform the steps to delete the tender (["Deleting Tenders" on page 143](#)). The Tender screen displays, and the register is still in Tender Mode.

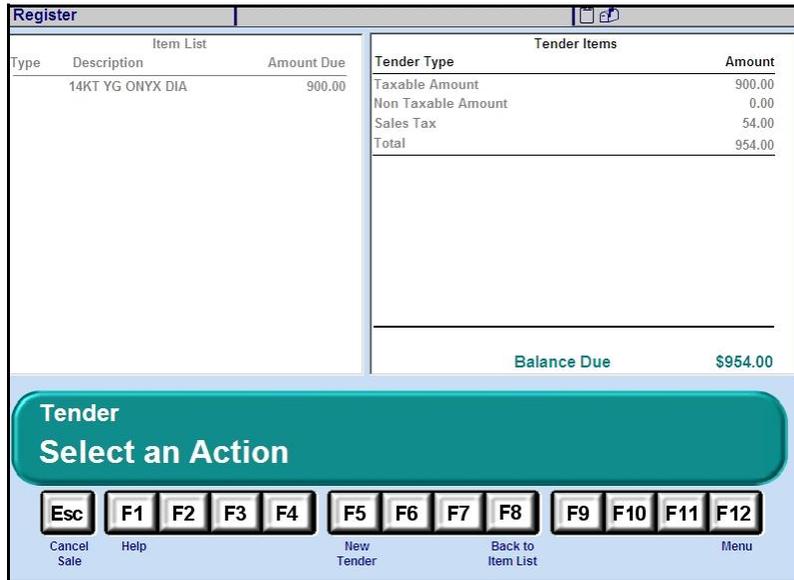


Figure 8-16: Tender Screen - Tender Deleted

2. Press **[F5]**, **New Tender**. The Tender screen changes to show the Tender list.

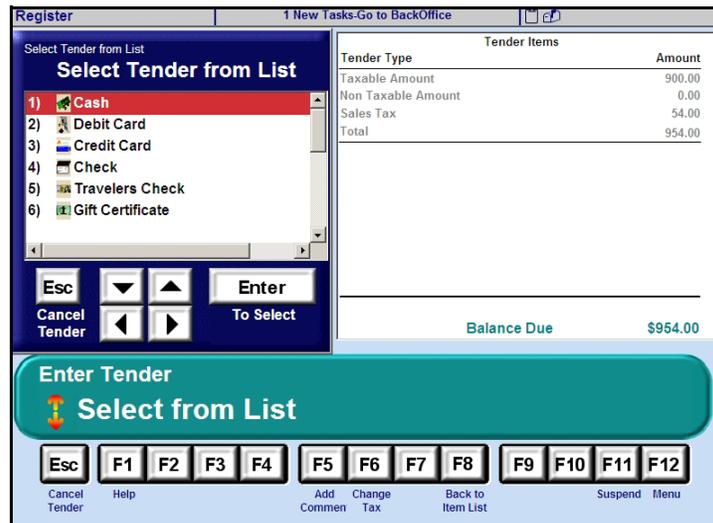


Figure 8-17: Tender Screen - Select New Tender

3. Select the Tender type from the list and press **[ENTER]**.
4. Follow the same steps as previously performed for a basic tender transaction.

## Toggle Between the Tender Screen and Register Screen

Before you select a tender, you can return to the Register screen to modify the sale line items.

1. If one or more tenders are already entered, delete each tender line item.
2. Press **[F8]**, **Back to Item List**. The mode switches to Register Mode, and the Register screen displays.
3. Add or change line items. Press **[ENTER]** to return to the Tender screen.

## Tender Types

A tender is a form of payment a customer uses to pay for the sale transaction. The tender types that are accepted by the store are determined by the home office. Tender types may include domestic and foreign cash and checks, various forms of credit cards, gift card/certificate amounts, coupons, and loans.

### Cash

1. Enter the Tender Mode of the tender process. See ["Basic Tender Process - Tender Mode" on page 136](#), for more information.
2. In the Tender list, use either the arrow keys or the keyboard to select Cash as the tender type. The focus bar prompts for the cash amount from the customer.



Figure 8-18: Focus Bar Cash Enter Amount

3. Key in the amount and press <Bold>[ENTER]<Bold>.
4. The Tender screen shows **Cash** as the tender, and the amount of tender on the right side of the screen.
  - If the amount you enter is equal to or greater than the amount due from the customer, the Sale Complete prompt displays.
  - If an additional amount is due from the customer, the Tender list displays again. Select a tender type and continue the tendering process.
5. The Sale Complete prompt displays.
  - a. If the sale is complete, press **[Y]**, **Yes**, to print the receipt(s).
  - b. If the sale is not complete, press **[N]**, **No**, to return to the Tender screen.

## Credit/Debit Card

Credit cards are classified as either bank credit cards or private-label credit cards. Bank credit cards and debit cards are issued by banks, and are accepted as tender by multiple companies. Private-label credit cards are issued by the home office and are accepted as tender at the issuing company only.

### Bank Credit Card or Private-Label Credit Card

1. Enter the Tender Mode of the tender process. See [“Basic Tender Process - Tender Mode” on page 136](#), for more information.
2. In the Tender list, use either the arrow keys or the keyboard to select Credit Card or Private Label as the tender type. The focus bar prompts for the credit card number.



Figure 8-19: Focus Bar - Credit Card Number

3. Do one of the following to enter the credit card number:
  - Swipe the credit card in the card reader. The system obtains the card number and the expiration date automatically.
  - Enter the credit card manually:
    - 1) Key in the credit card number and press <Bold>[ENTER]<Bold>. The focus bar prompts for the expiration date.



Figure 8-20: Focus Bar Credit Card Expiration Date

- 2) Key in the month/year expiration date in MM/YY format and press <Bold>[ENTER]<Bold>.
4. The focus bar prompts for the amount.



Figure 8-21: Focus Bar Credit Card Amount

5. Credit card tenders are for the amount of the purchase only. Enter the Amount Due either automatically or manually.
  - To accept the Balance Due shown on the Register screen, just press <Bold>[ENTER]<Bold>.
  - Key in the amount and press <Bold>[ENTER]<Bold>.

6. If the credit card is not swiped, a prompt displays with a reminder to imprint the credit card. Press <Bold>[ENTER]<Bold>.
7. The system 'dials out' to obtain authorization. If Store21 cannot 'dial out' properly, the Manual Authorization data entry form displays.



Select

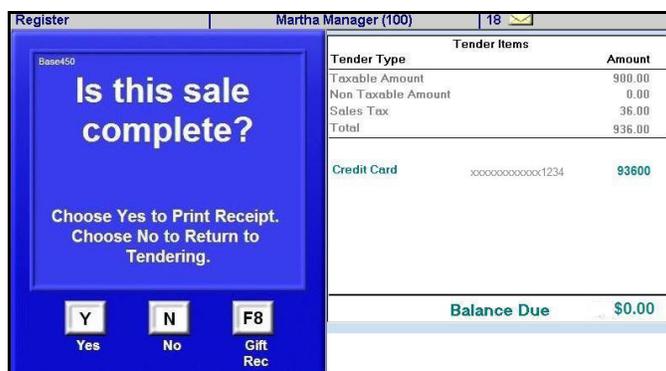
Call for authorization for  
Creditcard#:  
4111111111111111  
Merchant ID:  
4327-1169002  
Phone Number:  
1-800-334-1890.

\_\_\_\_\_

Esc      Enter  
Cancel    Continue

Figure 8-22: Manual Credit Card Authorization

8. Call the toll-free number that displays on the register's manual authorization prompt to obtain authorization. Key the requested data into the phone's keypad. The system provides an authorization code if approved.
  - If the card is approved, enter the authorization code into the input field and press <Bold>[ENTER]<Bold>.
  - If the card is declined, press **[ESC]** to exit. The system returns to the Tender screen.
9. If authorization is obtained, the credit card type, credit card number, and dollar amount to be charged display on the right side of the Tender screen.
10. If the amount of the credit card charge is equal to the amount due from the customer, the Sale Complete prompt displays.
  - a. If the sale is complete, press **[Y]**, **Yes**.



Register      Martha Manager (100)      18

Base450

**Is this sale complete?**

Choose Yes to Print Receipt.  
Choose No to Return to Tendering.

**Y**      **N**      **F8**  
Yes      No      Gift Rec

Tender Items		
Tender Type		Amount
Taxable Amount		900.00
Non Taxable Amount		0.00
Sales Tax		36.00
Total		936.00
Credit Card	xxxxxxxxxxxx1234	936.00
<b>Balance Due</b>		<b>\$0.00</b>

Figure 8-23: Sale Complete Confirmation

- b. If the sale is not complete, press **[N]**, **No**, to return to the Tender screen.
11. Remove the store's receipt copy from the printer, and ask the customer to sign it.
12. Press <Bold>[ENTER]<Bold> to print the customer's copy of the receipt.

- If an additional amount is due from the customer, the Tender list displays on the Tender screen again. Select a tender type and repeat the tendering process.

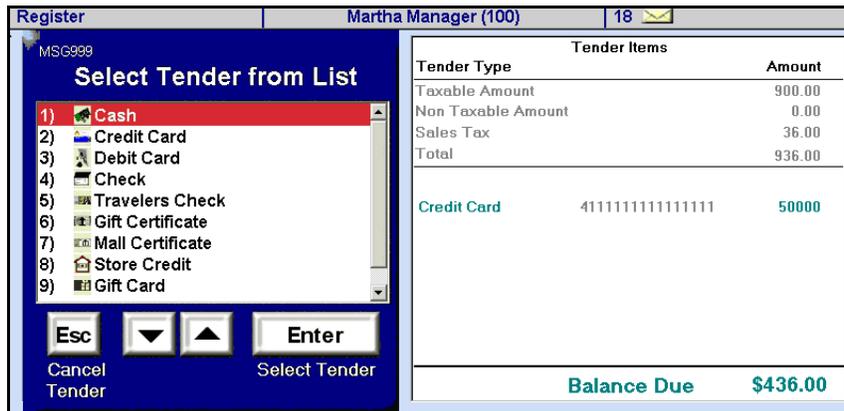


Figure 8-24: Tender List

### Bank Debit Card

Processing Debit cards is very similar to credit cards, and many debit cards also serve as credit cards with popular credit-card company logos. The difference between the credit card and the debit card normally is the use of a PIN number. The PIN number is entered through a PINpad device that is available to the customer.

- Enter the Tender Mode of the tender process. See [“Basic Tender Process - Tender Mode” on page 136](#), for more information.
- In the Tender list, use either the arrow keys or the keyboard to select Debit Card as the tender type. The focus bar prompts for the debit card number.



Figure 8-25: Focus Bar - Debit Card Number

- You cannot enter the card number into the focus bar. Ask the customer to swipe the debit card on the card reader. If you attempt to enter the number from the keyboard, the following error message is displayed:



Figure 8-26: Swipe Card Message

- After the customer swipes the debit card, the PINpad device prompts the customer to key in their PIN (Personal Identification Number).

5. After the customer keys the PIN press **[ENTER]**. The focus bar prompts for the amount.



Figure 8-27: Focus Bar Debit Card Amount

- a. Key in the amount and press **[ENTER]**.
  - b. Store21 processes the transaction.
6. The Tender screen shows **Debit Card** as the tender, the amount of tender on the right side of the screen, and displays the Sale Complete prompt.
7. If the amount of the debit card is equal to the amount due from the customer, the Sale Complete prompt displays.

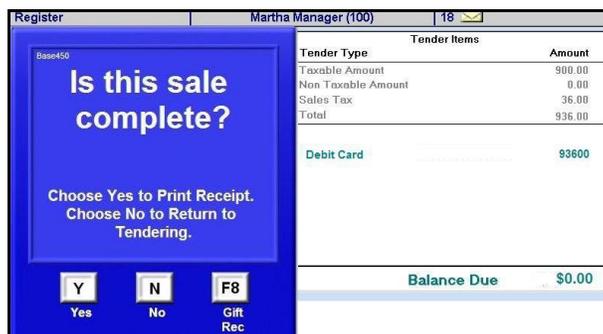


Figure 8-28: Sale Complete Prompt

- a. If the sale is complete, press **[Y], Yes**.
  - b. If the sale is not complete, press **[N], No**, to return to the Tender screen.
8. If an additional amount is due from the customer, the Tender list automatically displays on the Tender screen again. Select a tender type and repeat the tendering process.
9. Remove the store's receipt copy from the printer and ask the customer to sign it. Press **<Bold>[ENTER]<Bold>** to print the customer's copy of the receipt.

## Use a Signature Capture Device

A Signature Capture Device may be connected to the register. This is used to electronically connect to the authorization services provider. It records a customer's signature at the completion of a credit card or debit card sale transaction and provides authorization of the sale.

1. Perform the tendering process of the Credit Card or Debit Card sale transaction until the Sale Completion prompt displays.



Figure 8-29: Sale Complete Prompt

**Note:** The steps required to finalize the sale using the Signature Capture Device are configurable by the home office and vary according to the manufacturer of the device.

2. Press **[Y]**, **Yes**.
3. If the electronic authorization is successful, the system prompts for the customer to sign the Signature Capture Device.



Figure 8-30: Message Prompt - Capture Customer Signature

- a. Ask the customer to sign the device where indicated and press **[ENTER]**.
- b. The receipt(s) print.

4. If the system fails to transmit the signature to the authorization service, an error message displays.



Figure 8-31: Signature Capture Device Failure Message

- a. Press **[ENTER]**. A prompt displays with instructions to obtain the credit authorization manually.



Figure 8-32: Manual Credit Card Authorization

- b. Call the toll-free number that displays on the register to obtain authorization.
- c. Key the requested data into the phone's keypad.
  - 1) The system provides an authorization code if approved. Key the authorization code into the form and press **<Bold>[ENTER]<Bold>**.
  - 2) If the authorization is not obtained, follow your company's policy.
5. If authorization is obtained, the credit card type, number, and dollar amount display on the right side of the Tender screen.

- If the amount of the credit card charge is equal to the amount due from the customer, the Sale Complete prompt displays.

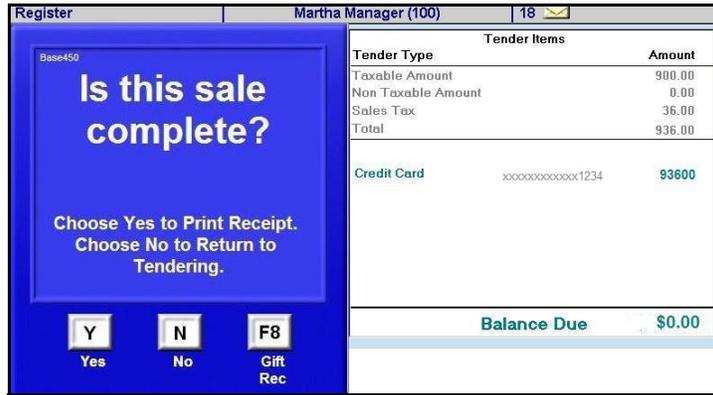


Figure 8-33: Credit Card Sale Transaction Complete

- If the sale is complete, press **[Y], Yes**. Store21 prints the receipt(s).
- If the credit charge was approved manually, and ask the customer to sign the store’s copy of the paper receipt.

## Personal Checks

Tendering a personal check involves collecting personal information from the customer and getting the check authorized. The following steps are written as guidance when tendering checks. The actual steps for your system may vary depending on home-office configuration and check-reading equipment in use.

### Manually Enter Check Account Information

- Enter the Tender Mode of the tender process. See [“Basic Tender Process - Tender Mode” on page 136](#), for more information.
- From the Tender list, use either the arrow keys or the keyboard to select **Check** and press [ENTER].
- The focus bar prompts for the check’s account number.



Figure 8-34: Focus Bar - Check Account Number

- Key the account number and press **[ENTER]**. A prompt displays for the bank’s routing number.



Figure 8-35: Focus Bar - Bank Routing Number

5. Key the bank routing number and press **[ENTER]**.
6. Follow the prompts to enter the customer's personal information.

### ***Use a Check Reader to Collect Information***

A prompt displays to insert the check into the check reader to be scanned.

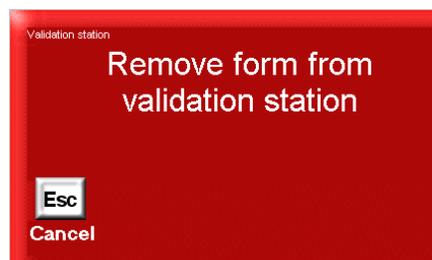


*These instructions refer to a system with a MICR reader installed inside the receipt printer.*



*Figure 8-36: Insert Check for Validation Message*

1. Insert the check in the check reader at the front of the receipt printer. Make sure the check is inserted face up with the account number against the guide at the right side.
2. The reader pulls the check through and reads the information into Store21.
  - a. The system prompts for the removal of the check.



*Figure 8-37: Remove Check Message*

- b. Remove the check and follow the prompts to enter the customer's personal information.

---

## Enter Customer's Personal Information

---

**Note:** The home office configures the requirements for accepting checks, including which prompts display to collect information.

---

1. The system prompts for the customer's driver's license number.

A screenshot of a teal-colored focus bar. On the left, it says "Check Tender:" with a check icon, followed by "Enter DL #". To the right is a white rectangular input field.

*Figure 8-38: Focus Bar Enter Driver's License Number*

2. Key in the customer's driver license number and press **[ENTER]**. The system prompts for the name of the state where the driver's license is issued.

A screenshot of a teal-colored focus bar. On the left, it says "Check Tender:" with a check icon, followed by "Enter DL State". To the right is a white rectangular input field.

*Figure 8-39: Focus Bar Drivers License State*

3. Key in the 2-letter state abbreviation for the issuing state of the driver's license and press **[ENTER]**. The system prompts for the driver's Date of Birth.

A screenshot of a teal-colored focus bar. On the left, it says "Check Tender:" with a check icon, followed by "Enter Date of Birth". To the right is a white rectangular input field containing two vertical bars (//).

*Figure 8-40: Focus Bar Date of Birth*

4. Key in the driver's Date of Birth in MM/DD/YY format (Example:12/29/08) and press **[ENTER]**. The system prompts for the check amount.

A screenshot of a teal-colored focus bar. On the left, it says "Check Tender:" with a check icon, followed by "Enter Check Amount". To the right is a white rectangular input field.

*Figure 8-41: Focus Bar Check Amount*

5. Enter the amount of the check.
  - a. To accept the default Balance Due as the amount of the check, just press <Bold>[ENTER]<Bold>.
  - b. To enter a different amount, key the amount into the focus bar and press <Bold>[ENTER]<Bold>.

- 1) If you enter a check amount that exceeds the amount due, and error message displays.



Figure 8-42: Check Amount Error Message

- 2) Press **[ENTER]**, **To Continue**. Re-enter the check amount.

### **Electronic Personal Check Approval**

After entering check information, Store21 will attempt to obtain electronic authorization.

1. The system 'dials out' for authorization.
  - a. If Store21 cannot 'dial out', the Manual Authorization input form displays.



Figure 8-43: Check - Manual Authorization Input Form

- 1) Call the toll-free number that shows on the register's manual authorization input form to obtain authorization.
- 2) Key the requested data into the phone keypad.
- 3) The authorization system provides an authorization code, if approved.
  - a. If authorization is obtained, key the authorization code into the form on the register and press **<Bold>[ENTER]<Bold>**.  
If the check is declined, press **[ESC]** to cancel the check tender and return to the Tender screen.
2. The Tender screen shows **Check** as the tender, and the amount of the tender on the right side of the screen.
3. You can now complete the transaction.
  - a. If an additional amount is due from the customer, the Tender list displays again. Select a tender type and repeat the tendering process.

- b. If the amount of the check is equal to the amount due from the customer, the Sale Complete prompt displays.

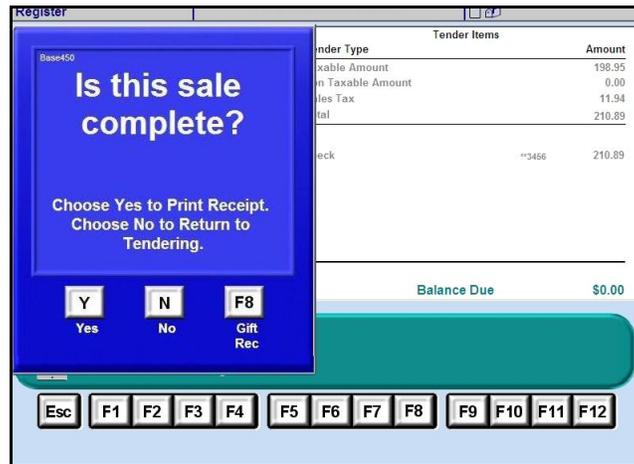


Figure 8-44: Sale Complete Confirmation Message

- 1) If the sale is complete, press **[Y]**, **Yes**, to print the receipt(s).
  - 2) If the sale is not complete, press **[N]**, **No**, to return to the Tender screen.
4. Remove the receipt from the printer and press <Bold>[ENTER]<Bold>.
  5. Frank the check.
    - a. Insert the check into the validation station at the front of the receipt printer. Make sure the check is inserted face down with the account number against the guide at the right side.
    - b. Press <Bold>[ENTER]<Bold>. The printer pulls the check through and franks the back of the check.

## Travelers' Check



*If tendering multiple travelers' checks, process each check separately.*

1. Enter the Tender Mode of the tender process. See ["Basic Tender Process - Tender Mode" on page 136](#), for more information.
2. From the Tender list, use either the arrow keys or the keyboard to select **Travelers' Check** as the tender type. The focus bar prompts for the Travelers' Check amount.



*Figure 8-45: Focus Bar Travelers Check Amount*

3. Enter the amount of the Travelers' Check, then press **[ENTER]**.
4. Travelers' Checks are issued in set denominations; Store21 validates the amount you enter into the focus bar against the list of valid denominations.
  - a. If the amount you enter is not valid, an error message displays.



*Figure 8-46: Travelers' Check Error Message*

---

**Note:** Travelers' Checks are issued in set denominations of \$10.00, \$20.00, \$50.00, and \$100.00. The system validates the denomination.

---

- b. Press **[ENTER], To Continue**. Return to step 3 and enter a valid amount.
5. If an additional amount is due from the customer, the Tender list displays again. Select a tender type and repeat the tendering process.

---

**Note:** Because Travelers' Checks are issued in set denominations, it may be necessary to enter multiple checks to total the sale amount. Repeat Steps 2-4 for each traveler's check used to tender the transaction. Each of the Travelers' Checks are listed on the right side of the Tender screen.

---

- If the sale is complete, press **[Y], Yes**, to print the receipt(s).

- If the sale is not complete, press **[N]**, **No**, to return to the Tender screen.
6. Remove the receipt from the printer and press <Bold>[ENTER]<Bold>.
  7. Follow the prompts on the screen to frank each of the Travelers' Checks.
    - a. Insert the check into the validation station at the front of the receipt printer.
    - b. Press <Bold>[ENTER]<Bold>. The printer pulls the check through and franks the back of the check.

## Gift Cards and Gift Certificates

Gift Cards, Gift Certificates, Mall Certificates, and Store Credit transactions are all very similar in the way they are processed. All of these tender types are issued with a certificate number that is recorded in the store's database. Store21 maintains the certificate number and the current monetary balance of the card/certificate.

### System Verification of Gift Certificate

1. Enter the Tender Mode of the tender process. See ["Basic Tender Process - Tender Mode" on page 136](#), for more information.
2. In the Tender list, use either the arrow keys or the keyboard to select Gift Certificate as the tender type. The focus bar prompts for the gift certificate number.



Figure 8-47: Focus Bar - Gift Certificate Number

3. Scan or key in the gift certificate number and press <Bold>[ENTER]<Bold>.
4. The system searches both the local database and the home-office database.
  - a. If the gift certificate number cannot be verified, an error message displays.



Figure 8-48: Gift Certificate Error Message

---

**Note:** If the system cannot find the gift certificate number in the database, see ["Manual Approval of Gift Certificate" on page 160](#).

---

- b. Press **[ENTER]**, **To Continue**.

5. If Store21 accepts the gift certificate number, the focus bar prompts for the dollar amount.



Figure 8-49: Focus Bar - Gift Certificate Amount

6. Key in the dollar amount of the gift certificate and press [ENTER].
7. The Tender screen shows **Gift Certificate** as the tender, the gift certificate number, and the amount of tender on the right side of the screen.
  - a. If the Balance Due is less than or equal to \$0.00, the Sale Complete prompt displays.



Figure 8-50: Tender Screen - Gift Certificate

- b. If the Balance Due is greater than \$0.00, the Tender list displays again.

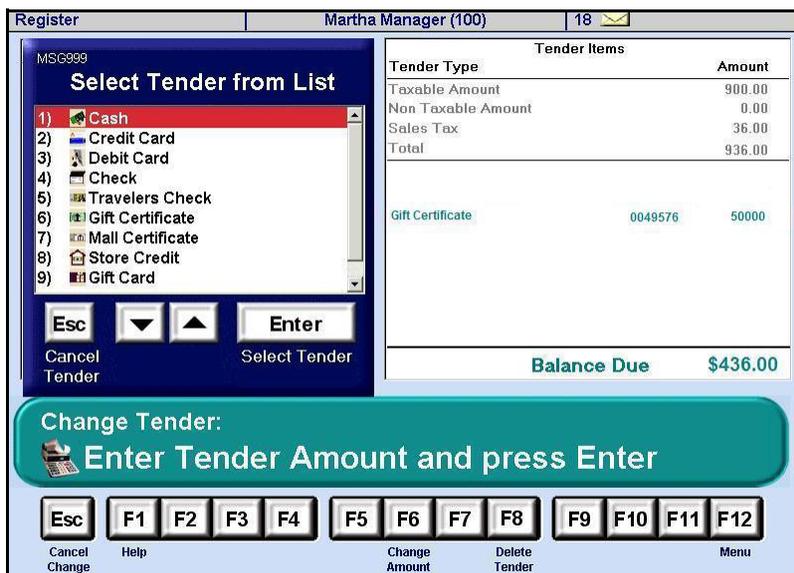


Figure 8-51: Gift Certificate Tender - Sale Complete

- c. Repeat the tender process until the Sale Complete prompt displays.

8. Press **[Y]**, **Yes**, to print the receipt.
9. Remove the receipt from the printer and press <Bold>[ENTER]<Bold>.
10. Insert the gift certificate into the validation station at the front of the receipt printer. Ensure the gift certificate is inserted face down and is against the guide at the right side.
11. Press <Bold>[ENTER]<Bold>. The printer pulls the gift certificate through and franks the back.

### Manual Approval of Gift Certificate

An employee with the authorized level of security can manually approve (override) gift certificates if Store21 cannot find the certificate number in the appropriate database.

1. Perform Steps 1 -4 of System Verification of Gift Certificate. When the system cannot find the gift certificate number, an error message displays.



Figure 8-52: Gift Certificate Not Found Error Message

2. Press **[ENTER]**, **To Continue**. The focus bar prompts for the gift certificate amount.

Figure 8-53: Gift Certificate Tender Amount Focus Bar

3. Key in the amount and press **[ENTER]**. The Security form displays.

Figure 8-54: Security Form

- a. The employee who has the approved level of security to manually authorize the gift certificate must key his/her the employee ID and password.
- b. Press **[ENTER]**.
4. Continue with Step 5 of ["System Verification of Gift Certificate" on page 158](#) to complete the transaction.

## Store Credit

The procedure for accepting Store Credit for tender is nearly the same as for Gift Certificates. Like a Gift Certificate, Store Credit can be processed by Store21 or approved manually.

1. Enter the Tender Mode of the tender process. See ["Basic Tender Process - Tender Mode" on page 136](#), for more information.
2. In the Tender list, use either the arrow keys or the keyboard to select Store Credit as the tender type. The focus bar prompts for the store credit number.



Figure 8-55: Focus Bar - Store Credit Number

3. Scan or key in the store credit number and press <Bold>[ENTER]<Bold>.
4. The system searches both the local database and the home-office database.
  - If the system finds the store credit number in a database, the focus bar prompts for the dollar amount.



Figure 8-56: Focus Bar - Store Credit Amount

- Key in the dollar amount of the store credit and press **[ENTER]**. The Tender screen shows **Store Credit** as the tender, the store credit number, and the amount of tender on the right side of the screen.

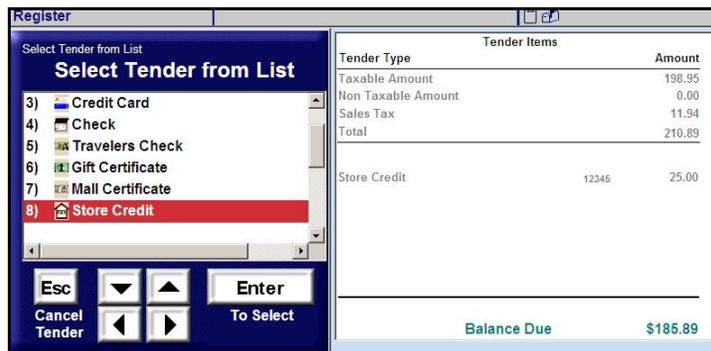


Figure 8-57: Tender Screen - Store Credit

- If the Balance Due is \$0.00, the Sale Complete message displays.
  - If the Balance Due is greater than \$0.00, the Tender list displays again. Repeat the tender process until the Sale Complete message displays.
5. If the Store21 cannot find the store credit number in the database, see ["Manual Approval of Store Credit" on page 162](#).

### Manual Approval of Store Credit

An employee with the authorized level of security can manually approve (override) store credits if Store21 cannot find the credit number in the appropriate database.

1. Perform Steps 1-4 of System Verification of Store Credit. When the system cannot find the store credit number, an error message displays.



Figure 8-58: Store Credit Not Found Error Message

2. Press **[ENTER]**. The focus bar prompts for the store credit amount.



Figure 8-59: Store Credit Tender Amount Focus Bar

3. Key in the amount and press **[ENTER]**. The Security input form displays.



Figure 8-60: Security Form

4. The employee who has the approved level of security to manually authorize (override) the store credit must key his/her Employee ID and Password and press **[ENTER]**.
  - a. If the Balance Due is \$0.00, the Sale Complete confirmation message displays.

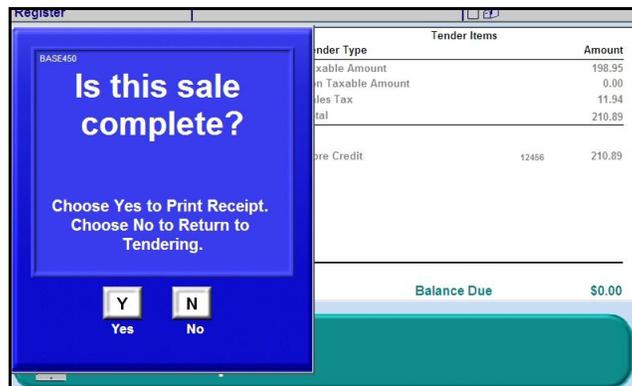


Figure 8-61: Store Credit - Transaction Complete

- b. If the Balance Due is greater than \$0.00, the Tender list displays again. Repeat the tender process until the Sale Complete message displays.

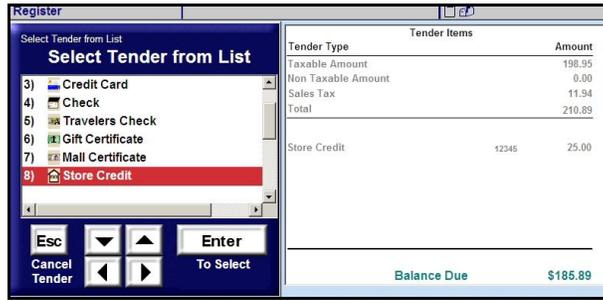


Figure 8-62: Store Credit Transaction - Balance Due

- 5. Press **[Y]**, **Yes**, to print the receipt. A receipt prints, and a prompt displays to print the next copy of the receipt.
- 6. Remove the receipt from the printer and press **<Bold>[ENTER]<Bold>**.
- 7. Insert the store credit slip into the validation station at the front of the receipt printer. Ensure it is inserted face down and is against the guide at the right side.
- 8. Press **<Bold>[ENTER]<Bold>**. The printer pulls the credit slip through and franks the back.

## Gift Card or Mall Certificate

Unlike Gift Certificates or Store Credit, Gift Cards and Mall Certificates are not processed manually. Approval is by Store21.

- 1. Enter the Tender Mode of the tender process. See ["Basic Tender Process - Tender Mode" on page 136](#), for more information.
- 2. In the Tender list, use either the arrow keys or the keyboard to select Gift Card as the tender type. The focus bar prompts for the gift card number.



Figure 8-63: Focus Bar - Gift Card Number

- 3. Scan, or key in the gift card number and press **<Bold>[ENTER]<Bold>**.
- 4. Store21 searches the home-office database.
  - If the system finds the gift card number in the database, the focus bar prompts for the dollar amount.



Figure 8-64: Focus Bar - Gift Card Amount

- If the gift card number cannot be located, an error message displays.

- Press **[ENTER]**. Re-enter the gift card number in the focus bar, or press **[ESC]** to cancel the tender.



Figure 8-65: Gift Card Number Not Found Error

5. Key in the dollar amount of the gift card, or leave the focus bar blank and press **[ENTER]**. A prompt displays while the system 'reads' the balance available on the gift card.



Figure 8-66: Gift Card Authorization Processing

6. If the amount keyed into the focus bar exceeds the gift card balance, a message prompt displays.



Figure 8-67: Gift Card Limit Message

7. Press **[ENTER]** to accept the authorized amount of the gift card, or press **[ESC]** to cancel the Gift Card tender.
8. If the balance of the gift card is less than the Balance Due for the sale transaction, the Tender list displays again. Repeat the tender process until the Sale Complete message displays.

9. The amount of the gift card tendered displays on the right side of the Tender screen.

Tender Type	Amount
Taxable Amount	900.00
Non Taxable Amount	0.00
Sales Tax	36.00
Total	936.00
Gift Card	50000
Cash	43600
Balance Due	\$0.00

Figure 8-68: Gift Card Transaction Complete

10. Press **[Y]**, **Yes**, to print the receipt and complete the sale transaction.

## Coupon Tenders

Coupons used as a tender are processed through the Tender list. The Tender list may show coupons with a designated monetary discount amount as Coupon Amount, and coupons with a percentage discount may appear as Coupon Percent. These coupons, and their values, are determined by the home office.

1. Enter the Tender Mode of the tender process.
2. In the Tender list, use either the arrow keys or the keyboard to select the tender type. Select Coupon Amount or Coupon Percent. The focus bar prompts for the Coupon number.

Figure 8-69: Focus Bar Coupon Number

3. Scan, or key in the coupon number and press **[ENTER]**. The focus bar that displays will be for the appropriate coupon type.
  - If the tender type is Coupon Amount, enter the dollar-value of the coupon and press **[ENTER]**.

Figure 8-70: Focus Bar Coupon Amount

- If the tender type is Coupon Percent, enter the percentage of the coupon and press **[ENTER]**.

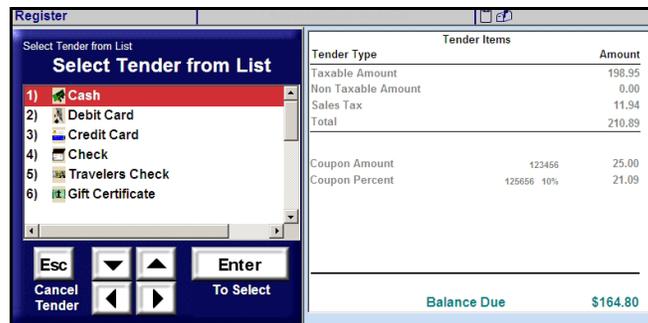


Figure 8-71: Focus Bar -Coupon Percent



Enter only numbers - not the '%' symbol.

4. The Tender screen shows **Coupon Amount or Coupon Percent** as the tender, and the amount of tender on the right side of the screen.



Tender Type	Amount
Taxable Amount	198.95
Non Taxable Amount	0.00
Sales Tax	11.94
Total	210.89
Coupon Amount	123456 25.00
Coupon Percent	125656 10% 21.09

Balance Due \$164.80

Figure 8-72: Tender Screen with Coupon Amount and Coupon Percent Discount

5. As long as the Balance Due is greater than \$0.00, the Tender list displays again. Repeat the tender process until the Sale Complete message displays.
6. At the Sale Complete message, press **[Y]**, **Yes**, to print the receipt. A receipt prints and the sale is complete.

## Finance Company

The Finance Company tender is used with a secondary credit lender.

1. Enter the Tender Mode of the tender process.
2. In the Tender list, use either the arrow keys or the keyboard to select Finance Company as the tender type. The focus bar prompts for the Company Code.

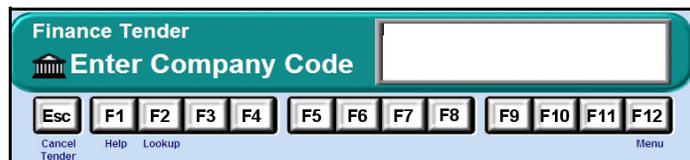


Figure 8-73: Focus Bar Finance Company Code

3. Key in the Company Code, or press **[F2], Lookup**, to display the Finance Company list.

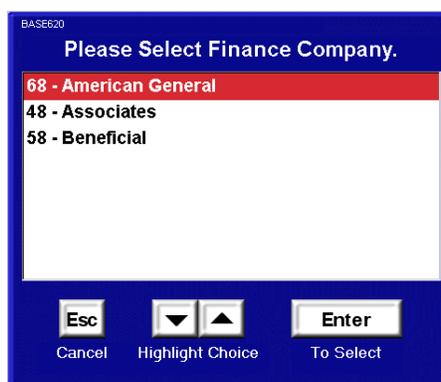


Figure 8-74: Finance Company List

4. Highlight the appropriate finance company and press **[ENTER]**.
5. The focus bar prompts for the finance amount.



Figure 8-75: Focus Bar Finance Amount

6. Key in the amount and press **<Bold>[ENTER]<Bold>**. The Tender screen shows **Finance Company** as the tender, the finance company's code name, and the amount of tender on the right side of the screen. The Sale Complete message or the Tender list displays.

- If the Balance Due is \$0.00, the Sale Complete confirmation message displays.

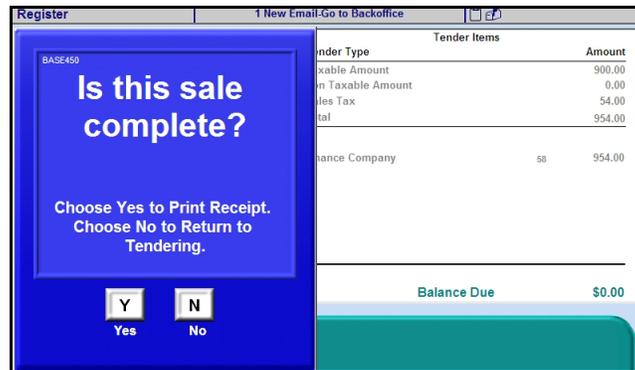


Figure 8-76: Store Credit - Transaction Complete

- If the Balance Due is greater than \$0.00, the Tender list displays again. Repeat the tender process until the Sale Complete message displays.
7. Press **[Y]**, **Yes**, to print the receipt; a receipt prints.
  8. Remove the receipt from the printer and press **<Bold>**[ENTER]**<Bold>**.

## Foreign Currency

Store21 supports foreign currency in both Cash and Travelers' Checks. The system processes the cash values the same for both, but the home office may have additional requirements for Traveler's Checks.

### Foreign Cash

1. Enter the Tender Mode of the tender process. See ["Basic Tender Process - Tender Mode" on page 136](#), for more information.
2. In the Tender list, use either the arrow keys or the keyboard to select **Foreign Currency** as the tender type, then press **[ENTER]**. The list changes to show the available currency types and their current exchange rates.

The screenshot shows the 'Register' window with a 'Select Tender from List' dialog box open. The dialog box contains a table with the following data:

Currency	Exchange Rate
1. Canadian	1.545000
2. Euro	1.100000

Below the table are navigation buttons: Esc (Cancel Tender), arrow keys (To Select), and Enter (To Select). A green banner at the bottom of the dialog says 'Enter Tender' and 'Select Foreign Currency Exchange Rate'. The background window shows a 'Tender Items' table with the following data:

Tender Type	Amount
axable Amount	900.00
on Taxable Amount	0.00
ales Tax	54.00
total	954.00

The 'Balance Due' is \$954.00. At the bottom of the window are function keys: Esc (Cancel Tender), F1 (Help), F2-F4, F5-F8, F9-F12, and Menu.

Figure 8-77: Tender Screen with Foreign Currency



**TIP**

The foreign currencies accepted are determined by the home office.

- Use the arrow keys to highlight the foreign currency type, then press **[ENTER]**. The list now shows the foreign tender descriptions.

The screenshot shows the 'Register' window with a 'Select Tender from List' dialog box. The dialog lists two options: '1) Cash' and '2) Travelers Check'. Below the list are navigation buttons: 'Esc Cancel Tender', 'Up Arrow', 'Down Arrow', and 'Enter To Select'. To the right, the 'Tender Items' table is visible:

Tender Type	Amount
Taxable Amount	900.00
Non Taxable Amount	0.00
Sales Tax	54.00
Total	954.00

At the bottom right, the 'Balance Due' is \$954.00.

Figure 8-78: Tender Screen - Foreign Tender Types

- Use the arrow keys to highlight **Cash** and press **[ENTER]**.
- The focus bar shows the amount due after the conversion rate is applied and prompts for the cash amount from the customer.

The screenshot shows the 'Register' window with the 'Item List' table and the 'Tender Items' table. The 'Item List' table has one row:

Type	Description	Amount Due
	14KT YG ONYX DIA	900.00

The 'Tender Items' table is the same as in Figure 8-78. At the bottom, a green bar displays 'Balance Due 1,473.93 in Canadian' and a large input field with the value '150000'.

Figure 8-79: Tender Screen - Enter Foreign Currency Amount



Enter only whole dollar amounts from the customer. The last two digits (the "cents") must always be "00".

6. Key in the Cash amount from the customer and press **[ENTER]**. The Sale Complete confirmation message displays. The Amount Due Customer, if applicable, displays in red.

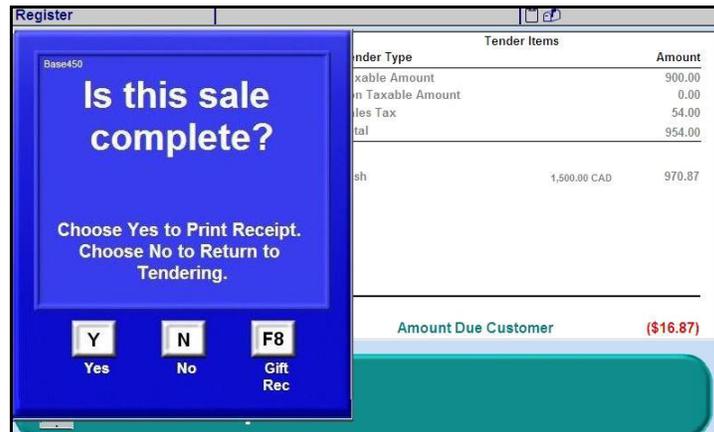


Figure 8-80: Tender Screen - Sale Complete Confirmation

This amount shown is US Currency, but this is configurable by the home office.

7. Press **[Y]**, **Yes**, to complete the transaction or **[N]**, **No**, to return to the Tender screen.

### Foreign Travelers' Checks

If multiple Travelers' Checks are being tendered, tender each check separately.

1. Enter the Tender Mode of the tender process.
2. In the Tender list, use either the arrow keys or the keyboard to select Foreign Currency as the tender type. The list changes to show the available currency types and their current exchange rates.



Figure 8-81: Tender Screen - Foreign Tender Type List

3. Select the currency type and press **[ENTER]**. The list now shows the foreign tender descriptions.

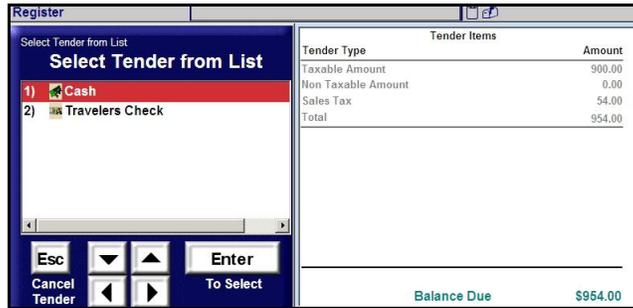


Figure 8-82: Tender Screen - Foreign Tender Type List

4. Select **Travelers Check** and press **[ENTER]**.
5. The focus bar shows the amount due after the conversion rate is applied.
6. The focus bar prompts for the check amount from the customer.

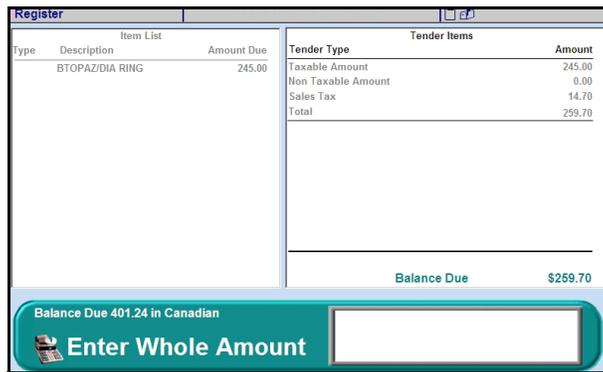


Figure 8-83: Tender Screen - Foreign Conversion Balance Due

7. Key in the face-value of the Travelers' Check and press **[ENTER]**.

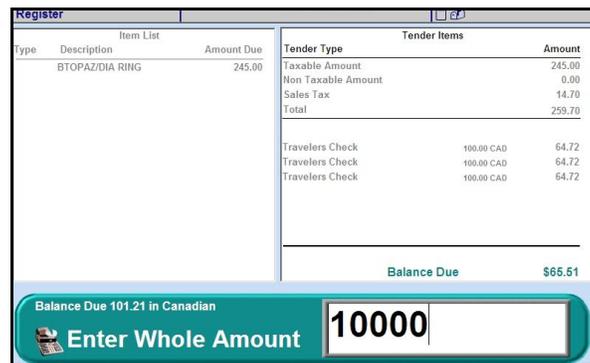


Figure 8-84: Tender Screen - Travelers' Check Amount

8. The Tender screen shows **Travelers Check** as the tender, and the amount of tender on the right side of the screen.

- Since Travelers' Checks are issued in set denominations, it may be necessary to enter multiple checks to total the sale amount. Store21 validates the check denomination you enter against the valid amounts. If the amount is not a valid amount, the system will display an error message. Repeat Steps 2-4, to enter enough Travelers' Checks to satisfy the amount due.

The screenshot shows a 'Register' window with a blue dialog box on the left asking 'Is this sale complete?' and 'Choose Yes to Print Receipt. Choose No to Return to Tendering.' with 'Y Yes' and 'N No' buttons. On the right, a 'Tender Items' table is visible:

Tender Type	Amount
taxable Amount	245.00
in Taxable Amount	0.00
less Tax	14.70
total	259.70
Travelers Check	100.00 CAD 64.72
cash	10.00 CAD 6.47

At the bottom right, it shows 'Amount Due Customer (\$5.69)'.

Figure 8-85: Tender Screen - Travelers' Check Sale Complete

- Press **[Y]**, **Yes**, to complete the transaction.
- Follow the prompts on the screen to frank each of the Travelers' Checks. Insert the checks into the receipt printer. The printer franks the back.

## Payroll Deduction

Employees may elect to pay for a purchase through payroll deduction. The use of Payroll Deduction tender is configurable by the home office.

- Enter the Tender Mode of the tender process. See ["Basic Tender Process - Tender Mode" on page 136](#), for more information.
- In the Tender list, use either the arrow keys or the keyboard to select Payroll Deduction as the tender type. The focus bar prompts for the amount.

The screenshot shows a green focus bar with the text 'Payroll Deduction Tender' and 'Enter Amount' next to an empty input field.

Figure 8-86: Focus Bar Payroll Deduction Amount

- Key in the amount and press **[ENTER]**. The Employee Information input form displays.

The screenshot shows a form titled 'Enter Payroll Deduction Employee Information' with the following fields:

- \*Last Name:
- \*First Name:
- \*Employee ID:
- \*Store Number:

A red asterisk indicates that the first three fields are required. At the bottom, there are four buttons: 'Esc Cancel', 'F2 Save', 'F8 To Move To Next Item', and 'Enter'.

Figure 8-87: Employee Information Data Entry Form

4. Key information into all fields. The default data for Store Number is the store number of the current location. Press **[ENTER]** to move between the fields. Press **[F8], Save**. The Tender screen shows **Payroll Deduction** as the tender, and the amount of tender on the right side of the screen.

Register			Tender Items	
Type	Description	Amount Due	Tender Type	Amount
	BTOPAZ/DIA RING	245.00	Taxable Amount	245.00
			Non Taxable Amount	0.00
			Sales Tax	14.70
			Total	259.70
			Payroll Deduction	259.70
<b>Balance Due</b>				<b>\$0.00</b>

Figure 8-88: Register Screen - Payroll Deduction

5. The Sale Complete message or the Tender list displays.
- If the Balance Due is \$0.00, the Sale Complete confirmation message displays.
  - If the Balance Due is greater than \$0.00, the Tender list displays again. Repeat the tender process until the Sale Complete message displays.
6. Press **[Y], Yes**, to print the receipt. Remove the receipt from the printer and press **<Bold>[ENTER]<Bold>**.

## House Account

Your store may offer some customers the option to open a house account with which to purchase merchandise. Customers have the ability to make payments to their house account at the register in pre-designated stores. Unlike Accounts Receivable (A/R) Accounts, House Account lookups are performed in a store's local database, not the central database.

1. Enter the Tender Mode of the tender process. See "[Basic Tender Process - Tender Mode](#)" on page 136, for more information.
2. In the Tender list, use either the arrow keys or the keyboard to select House Account as the tender type.

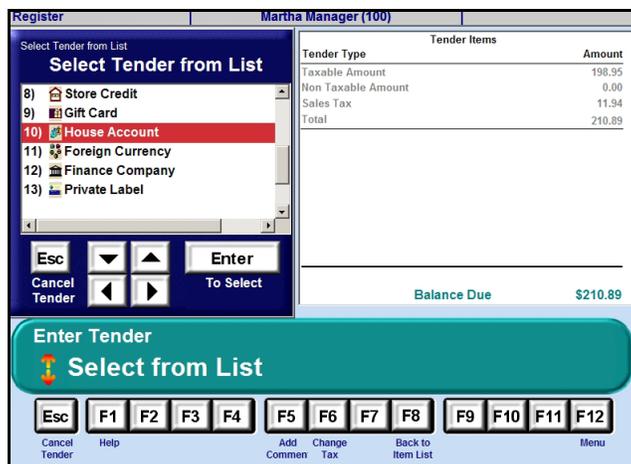


Figure 8-89: Tender Screen - House Account

3. Highlight House Account and press **[ENTER]**. The focus bar prompts for the account number.



Figure 8-90: Focus Bar - House Account Number

4. Key in the account number and press **[ENTER]**. The system accepts the number as entered. The focus bar prompts for the amount.



Figure 8-91: Focus Bar - House Account Amount

5. Key in the amount of the transaction and press **[ENTER]**.

---

**Note:** The system may be configured to require the tender amount to be equal to the amount due, allow the tender amount to be more than amount due, or it may allow split tenders. See "[Split a Tender](#)" on page 140.

---

6. The configuration of Store21 may or may not require the customer to be assigned to the House Account sale.

IF...	THEN...
the customer is not assigned at the beginning of the sale, and Store21 is configured to process the sale without the customer's ID,	the tendering process continues without interruption.

- a. If the Balance Due is \$0.00, the Sale Complete confirmation message displays. If the Balance Due is greater than \$0.00, the Tender list displays again. Repeat the tender process until the Sale Complete message displays.

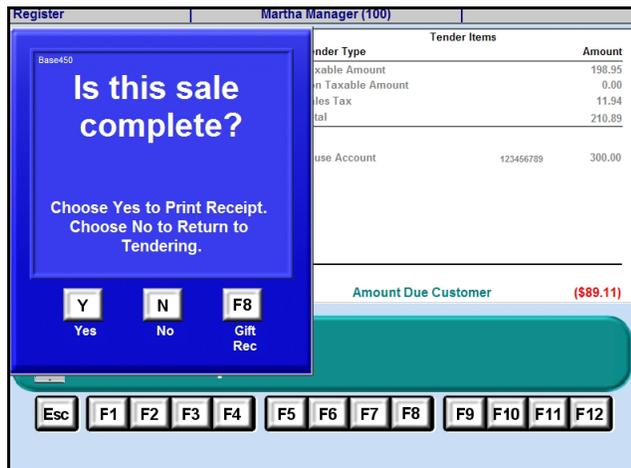


Figure 8-92: Sale Complete Prompt - House Account

- b. Press **[Y]**, **Yes**, or **[F8]**, **Gift Receipt**, to print the receipt. Remove the receipt(s) from the printer and press **<Bold>[ENTER]<Bold>**.

<p><b>IF...</b></p> <p>the customer is not assigned at the beginning of the sale, and Store21 is configured to require the customer's ID,</p>	<p><b>THEN...</b></p> <p>Store21 prompts for the House Account Information.</p>
---	---

- a. A blank House Account data entry form displays.

Figure 8-93: House Account Data Entry Form

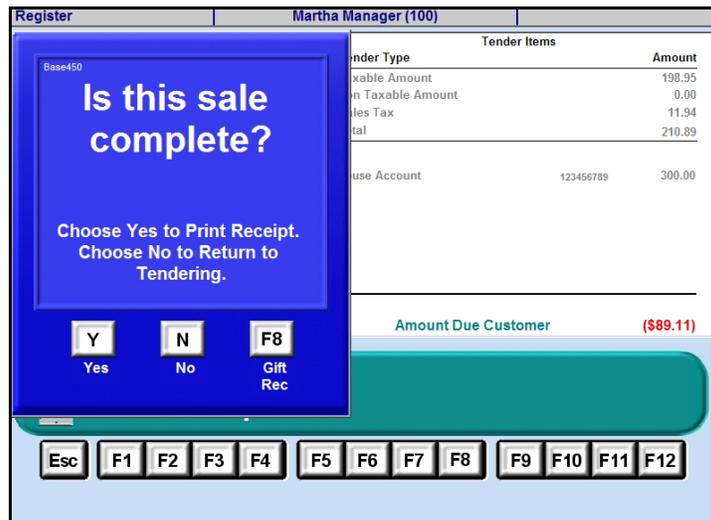
- b. Key appropriate information into all fields, pressing **[ENTER]** after each entry. Fields marked with an asterisk (\*) are required.
- c. The State field is a lookup field. With the cursor in the State field, press **[F2], Lookup**, to display the State list.

Figure 8-94: State Lookup List

- d. Highlight the appropriate state name and press **[ENTER]**. The House Account data entry form displays with the state chosen.
- e. Press **[F8], Save**. The customer and the account number are assigned to the sale transaction.

IF...	THEN...
the customer is assigned at the beginning of the sale, and Store21 is configured to require the customer's ID,	Store21 displays the customer's information.
<p><b>a.</b> The House Account data entry form displays with the customer's information from the customer maintenance file. Fields marked with an asterisk (*) are required.</p> <div data-bbox="716 478 1162 919" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p style="text-align: center;"><b>Enter House Account Information</b></p> <p>*Company Name: MICROS</p> <p>*Last Name: Findlay</p> <p>*First Name: Rebecca</p> <p>*Address: 30500 Bruce</p> <p>*City: Solon</p> <p>*State: OH</p> <p>*Postal Code: 44139-</p> <p>Phone: ( ) -</p> <p>Country: US</p> <p><small>*Required Field</small></p> <p style="text-align: center;"> <input type="button" value="Esc"/> <input type="button" value="F2"/> <input type="button" value="F8"/> <input type="button" value="Enter"/> </p> <p style="text-align: center; font-size: small;">                 Cancel                      Save                      To Move To Next Item             </p> </div> <p style="text-align: center;"><i>Figure 8-95: House Account Data Entry Form</i></p> <p><b>b.</b> Modify the information as appropriate and press <b>[F8], Save</b>. The customer and the account number are assigned to the sale transaction.</p>	

**7.** The Sale Complete confirmation message displays.



*Figure 8-96: Register Screen House Account Sale Complete*

**8.** If the Balance Due is \$0.00, the Sale Complete confirmation message displays. If the Balance Due is greater than \$0.00, the Tender list displays again. Repeat the tender process until the Sale Complete message displays.

9. Press **[Y]**, **Yes**, or **[F8]**, **Gift Receipt**, to print the receipt. Remove the receipt(s) from the printer and press **<Bold>[ENTER]<Bold>**.

## Accounts Receivable Account

Your company may offer some customers Accounts Receivable (A/R) Accounts with which to purchase merchandise. Customers have the ability to make payments to their A/R Account at a register in any store in the chain. Unlike House Accounts, A/R Account lookups are performed by connecting to the central database for the chain, not a store's local database.

1. Enter the Tender Mode of the tender process. See ["Basic Tender Process - Tender Mode" on page 136](#), for more information.
2. In the Tender list, use either the arrow keys or the keyboard to select **A/R Account**. Press **[ENTER]**.

The screenshot shows the 'Register' interface for 'Bruce (100)'. On the left, a 'Select Tender from List' menu is open, listing various tender options: 1) Cash, 2) Credit Card, 3) Debit Card, 4) Check, 5) Travelers Check, 6) Gift Certificate, and 7) A/R Account (highlighted in red). Below the list are navigation buttons: Esc (Cancel Tender), arrow keys (To Select), and Enter (To Select). On the right, a 'Tender Items' table displays the following data:

Tender Type	Amount
Taxable Amount	39.93
Non Taxable Amount	0.00
Sales Tax	5.20
Total	45.13

At the bottom right, the 'Balance Due' is shown as \$45.13. Below the tender list is a large green button labeled 'Enter Tender Select from List'. At the very bottom, a row of function keys (F1-F12) is visible with their respective actions: F1 (Cancel Tender), F2 (Help), F3-F4 (Change Tax), F5-F8 (Back to Item List), F9-F12 (Menu).

Figure 8-97: Tender Screen - A/R Account



*Store21 requires a customer to be assigned to the sale transaction. At some time during the sale transaction but before the entering the Tender Mode, press **[F10]**, **Cust Search**. See ["Access the Customer Search Form" on page 184](#).*

3. If a customer was not assigned to the sale at the beginning of the transaction, an error message displays.



Figure 8-98: A/R Account Error

4. Press **[ENTER]** to continue.
5. With the Register screen in Tender Mode still visible, press **[F8], Back to Item List**. This toggles the Register screen into Register Mode.
6. Press **[F10], Cust Search**, to assign the customer to the sale. See ["Access the Customer Search Form" on page 184](#).

---

**Note:** The customer's A/R account-related information including credit limit, account balance, available credit, and current status is available for reference. See ["View A/R Account Customer Information" on page 193](#).

---

7. With the customer assigned to the sale, the A/R Ship To Address form displays and contains the customer's information that is saved in the system.

Type	Description	Amount Due	Tender Type	Tender Items	Amount
	NOZZLE #6 M				39.93
					0.00
					5.20
					45.13
				118	45.13
					\$0.00

Figure 8-99: Register Screen - A/R Ship To Address

- a. If the items being purchased on the A/R Account are to be shipped, complete all required fields that are marked with an asterisk ("\*"), overriding the auto-populated data as necessary. Press **[F8], Save**, to save the ship-to address.
  - b. If the items being purchased are NOT to be shipped, press **[ESC], Cancel**.
8. The Register screen displays the Sale Complete confirmation message.

Tender Type	Tender Items	Amount
taxable Amount		39.93
n Taxable Amount		0.00
les Tax		5.20
tal		45.13
R Account	058118	45.13
		Balance Due
		\$0.00

Figure 8-100: Register Screen - Sale Complete

**Note:** The Balance Due is always \$0.00 because Store21 does will not allow a split tender for an A/R Account transaction.

9. Press **[Y], Yes**, or **[F8], Gift Receipt**, to print the receipt.

10. Remove the receipt(s) from the printer and press <Bold>[ENTER]<Bold>.

**Notes:**

- If an attempt is made to first select a different tender, such as Cash, for a lesser amount than the total due, then to select A/R Account for the balance, an error message displays.

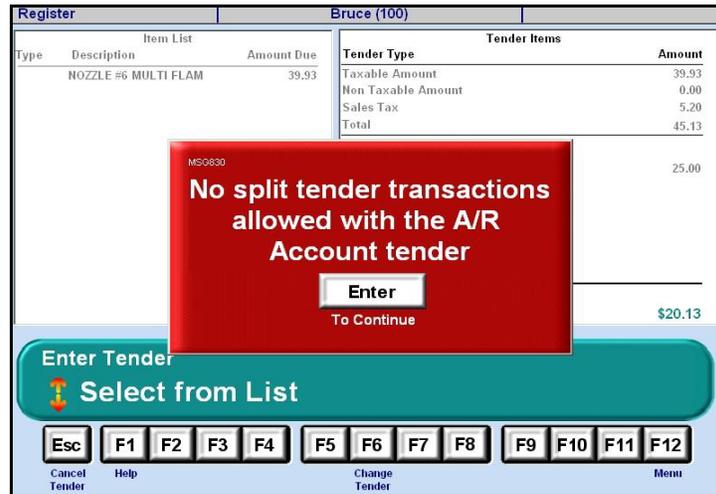


Figure 8-101: A/R Account Split Tender Error

- Press **[ENTER]** to continue, then press **[F6], Change Tender**, to select a tender other than A/R Account.

**CHAPTER 9*****Customer Information*****Overview**

Employees can access customers' records to add new customers to the database, edit existing customer information, and assign customers to transactions. These functions are available from the Register screen when entering a sale transaction, or from the Back Office Menu when performing Customer Maintenance.

Customer Information includes these functions:

- Access the Customer Search Form
- Add New Customer
- Edit Existing Customer
- View A/R Account Customer
- Maintain Customer Profile
- Ask Exit Questions

See the *Store21 Manager's Guide* for more information on managing customer records.

## Access the Customer Search Form

The Customer Search form can appear automatically when the system calls it, or you can open it manually. At the beginning of each transaction, the Customer Search form may display automatically to capture the Customer ID. It may also appear automatically at other points during a transaction when the type of transaction requires the customer information that is not already assigned, such as a Return or a Send Sale transaction. The Customer Search form is also available from the Back Office Menu.

### Open Manually During a Sale

The Customer Search form is always available from the Register screen.

Figure 9-1: Register Screen with Customer Search Form

1. Press the **[F10]**, **Cust Search** function button.
2. Use the function buttons on the Search form to location the appropriate customer record. See ["Using the Customer Search Form" on page 187](#) for instructions.

## Open Manually From Back Office

- From either the Employee Selection screen or the Register screen, press **[F12], Menu** to access the Back Office Top of Menu.



Figure 9-2: Employee Selection Screen (left) - Register Screen (right)

Store21 prompts for the employee ID and password.

IF...	THEN...
accessing <b>[F12], Menu</b> , from the Employee Selection screen	<ol style="list-style-type: none"> <li>The color of the focus bar changes to blue and prompts for the Employee ID.                             <div data-bbox="773 1045 1325 1121" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <span>Employee ID for Menu</span> <input type="text" value="100"/> </div> <p>Figure 9-3: Focus Bar Prompt for Employee ID</p> </li> <li>Enter your Employee ID and press <b>[ENTER]</b>. The focus bar prompts for the Password.                             <div data-bbox="773 1329 1325 1404" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <span>Employee ID for Menu</span> <input type="text" value="*"/> </div> <p>Figure 9-4: Focus Bar Prompt for Password</p> </li> <li>Enter your password and press <b>[ENTER]</b></li> </ol>

IF...	THEN...
accessing <b>[F12], Menu,</b> from the Register screen	<ol style="list-style-type: none"> <li>a. The System Security input form displays.                             <div data-bbox="846 310 1252 625" style="text-align: center;">  </div> </li> <li>b. Key in the Employee ID and Password and press <b>[ENTER]</b>.</li> </ol>

Figure 9-5: System Security Input

2. The Top of Menu displays.



Figure 9-6: Customer Maintenance List

3. Highlight **Customer Information** and press **[ENTER]**. The Customer Information menu displays.

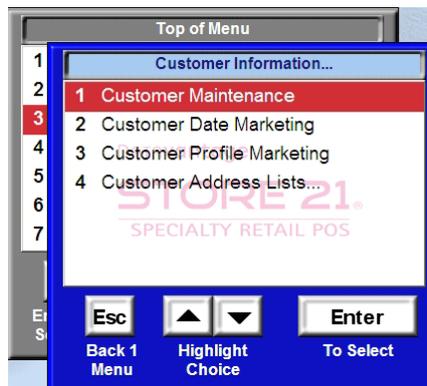


Figure 9-7: Customer Maintenance Menu

---

**Note:** The list of options in the Customer Information list is determined by the home office.

---

4. Highlight '**Customer Maintenance**' and press **[ENTER]**. The Customer Search form displays (Figure 9-8).
5. Use the function buttons on the Search form to locate the appropriate customer record. See "[Using the Customer Search Form](#)" on page 187 for instructions.

## Using the Customer Search Form

The Customer Search form will locate a customer's information using a variety of search criteria.

1. Using one of the methods explained above, navigate to the Customer Search form.



Figure 9-8: Customer Search Form

2. Do one of the following to retrieve a list of customers:
  - To display all customers without using search criteria, press **[F7], List All**.
  - To search for customers that match certain criteria, key data into one or more of the search fields and press **[F8], Execute Search**.

---

**Note:** The "%" key acts as a wildcard and can be used alone or combined with other characters as search criteria. (i.e. "Fin%" keyed into the last name field will display all customers whose last names begin with "Fin": Find, Findley, Finn, Finnigan, etc.)

---

- The system displays a list with the customer records that match the search criteria entered (if any).

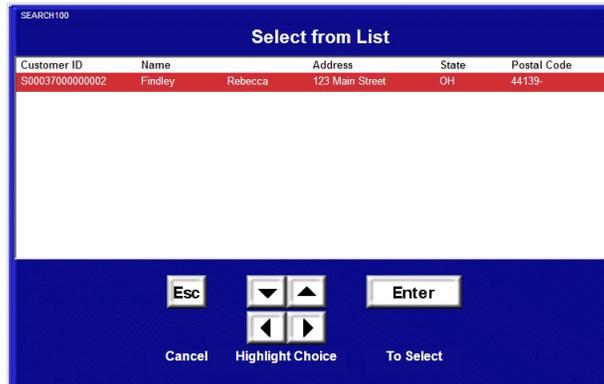


Figure 9-9: Customer Search Results List

- Highlight the appropriate customer record and press **[ENTER]**.
- The customer’s information displays.

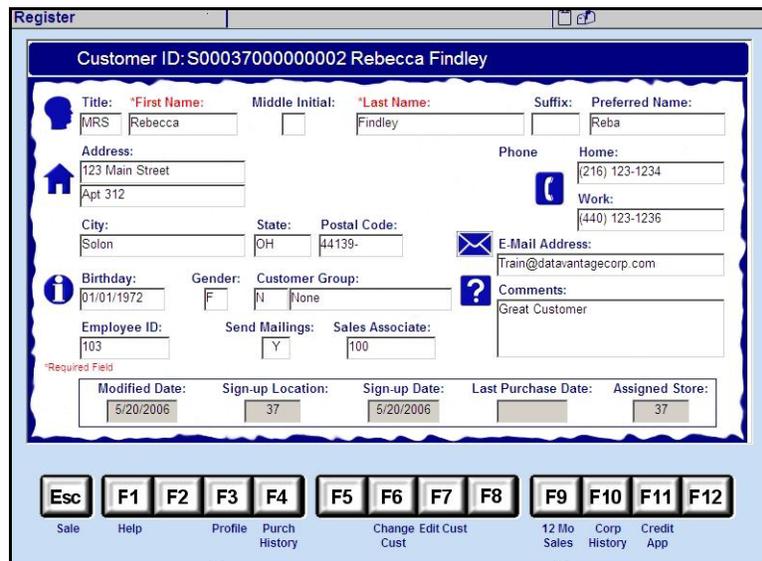


Figure 9-10: Customer Maintenance Screen

Register

Customer ID: S00037000000003 Steve Smith

Title: \*First Name: Middle Initial: \*Last Name: Suffix: Preferred Name:

Steve Smith

Address: City: State: Postal Code: Phone Home Phone:

1234 north street Coden AL 36523- ( ) -

Work Phone: ( ) -

Birthdate: Gender: Customer Group: E-Mail Address:

00/00/0000

Employee ID: Send Mailings: Sales Associate: ?

Comments:

Loyalty Points: Escrow Points:

\*Required Field 200

Modified Date:	Sign-up Location:	Sign-up Date:	Last Purchase Date:	Assigned Store:
7/9/2007	37	7/2/2007	3/20/2008	37

Esc F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12

Sale Help Dash Board Profile Purch History Change Edit Cust Loyalty Signup 12 Mo Sales Corp History

Register 1 hello 3/25/2008 11:02 am

Figure 9-11: Customer Maintenance Screen with Loyalty Program

- Use the function buttons on this Customer Information screen to perform customer maintenance on the displayed customer's data. See ["Edit Existing Customer" on page 192](#).

## Customer Maintenance

Add new customer records or edit existing customers' personal information in Store21. In addition to fields such as name and address, Store21 allows you to create a personal profile for each customer that records his/her personal preferences such as favorite color or shoe size.

### Add New Customer

At the beginning of a sale, Store21 displays the Customer Search form to assign a customer to the sale. If, after searching, the customer is not found in the database, add the new customer from the search screen.

You can also add a new customer through the Customer Search form accessed from the BackOffice.

To add a new customer to the system, do the following:

1. Navigate to the Customer Search form.  
See ["Access the Customer Search Form" on page 184](#) for more information.
2. At the Customer Search form, press **[F5]**, **Add Cust.**
3. The blank Customer Maintenance screen displays.

Figure 9-12: Blank Customer Maintenance Screen

Figure 9-13: Blank Customer Maintenance Screen with Loyalty Program

4. Key in the customer's first name, last name, and other data. Fields with red labels must contain data or the record will not be saved.
5. Key in the appropriate information for the customer, pressing **[ENTER]** to move between the fields with white backgrounds. Entry into the Zip Code field auto-populates the City and State fields. The fields with shaded backgrounds are system fields and cannot be edited.
6. To change customer preferences, press **[F3]**, **Profile**.  
See ["Customer Profile Maintenance" on page 197](#) for more information.

7. Press **[F8]**, **Save**.
8. If the system is configured to include a Loyalty Program, Store21 prompts whether to add the customer to the Loyalty Program.



*Figure 9-14: Add Customer to Loyalty Program Prompt*

Do one of the following:

- Press **[Y]**, **Yes**, to add the customer to the Loyalty Program. See [“Add a Loyalty Account” on page 198](#).
  - Press **[N]**, **No**, to continue without adding the customer to the Loyalty Program.
9. Store21 assigns the Customer ID and auto-populates the shaded fields with the appropriate information; they will be updated based upon the customer’s sales history. The information is stored on the local database and will be uploaded to the home office during polling.
  10. Press **[ESC]** or **[F8]**, **Save**, to return to the Customer Maintenance screen.
  11. Press **[ESC]** to exit Customer Maintenance.

If Customer Maintenance was accessed from a sale transaction, the customer is assigned the current sale transaction.

## Edit Existing Customer

Edit a customer's information from the beginning of a sale transaction or from the Back Office Menu. In addition to the standard customer data, Store21 collects customer preferences through a customer profile screen.

At the beginning of a sale, Store21 displays the Customer Search form to assign a customer to the sale.

1. Navigate to the Customer Search form.

See ["Access the Customer Search Form" on page 184](#) for more information.

The screenshot shows a 'Register' window titled 'Customer ID: S0003700000002 Rebecca Findley'. The form contains the following fields:

- Title:** \*First Name: MRS, Middle Initial: , \*Last Name: Findley, Suffix: , Preferred Name: Reba
- Address:** 123 Main Street, Apt. 312, City: Solon, State: OH, Postal Code: 44139-
- Phone:** Home: (216) 123-1234, Work: (440) 123-1236
- E-Mail Address:** Train@datavantagecorp.com
- Birthdate:** 01/01/1972, Gender: F, Customer Group: None
- Employee ID:** 103, Send Mailings: Y, Sales Associate: 100
- Comments:** Great Customer
- Summary Row:** Modified Date: 5/20/2006, Sign-up Location: 37, Sign-up Date: 5/20/2006, Last Purchase Date: , Assigned Store: 37

At the bottom, a keyboard shortcut bar includes: Esc (Sale), F1 (Help), F2 (Profile), F3 (Purch History), F4 (Change Edit Cust), F5 (Cust), F6 (12 Mo Sales), F7 (Corp History), F8 (Credit App), F9, F10, F11, F12.

Figure 9-15: Customer Maintenance Screen

2. Press **[F7]**, **Edit Cust**, to make changes to the information. The cursor appears in the Title field.
3. Edit the information as needed, pressing **[ENTER]** or **[TAB]** to move between fields. Press **[SHIFT]+[TAB]** to return to a previous field.
4. To change customer preferences, press **[F3]**, **Profile**.  
See ["Customer Profile Maintenance" on page 197](#) for more information.
5. Press **[F8]**, **Save**. The Modified Date is now the current date, and the information is saved to the local store database. It will be uploaded to the home office during polling.
6. Press **[ESC]** to return to the previous screen.

## View A/R Account Customer Information

The A/R Account is an accounts receivable tender type. The home office determines whether or not to activate this tender type; it requires an appropriate accounting process to support it. While the customer information record contains the A/R Account number, Store21 also provides a lookup function to access real-time account-related information including credit limit, account balance, available credit, and current status. The A/R Account lookup function connects to a central database (at the home office) to save and retrieve the customer account information.

At the beginning of a sale, Store21 may display the Customer Search form to assign the Accounts Receivable customer to the sale. This search form is also available from the Back Office Menu.

1. Navigate to the Customer Search form.

See ["Access the Customer Search Form" on page 184](#) for more information.

The screenshot shows the 'Customer Search' form within the 'Register' application. The form has the following fields:

- A/R Account :
- Last Name :
- First Name :
- City :
- Postal Code :
- Phone Number : ( ) -

Below the form is a keyboard shortcut bar with the following keys and actions:

- Esc: Cancel Search
- F1: Help
- F2: Layaway
- F3: Send Sale
- F4: Return
- F5: Add Discount
- F6: Change Line
- F7: Balance Inquiry
- F8: Non Mdse
- F9: Item Search
- F10: Cust Search
- F11: Suspend
- F12: Menu

Figure 9-16: Customer Search Form

2. Enter the appropriate search criteria, and execute the search.

3. Store21 initiates the search, either through a local lookup or a central lookup (at the home office).



Figure 9-17: Customer Search - Processing Message

4. The results display on the screen.

IF...	THEN...
the customer information record is not located in the database,	A confirmation message prompt displays. <div data-bbox="824 932 1274 1142" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;">                         HOST10010  <b>No matching records were found.</b>  <div style="border: 1px solid black; padding: 2px; display: inline-block; margin: 5px;">Enter</div>                          To Continue                     </div> <p style="text-align: center;"><i>Figure 9-18: Record Not Found Message</i></p> Press <b>[ENTER]</b> to return to the Customer Search form.

IF...	THEN...
<p>the customer information record is located in the database, but the customer does not possess an A/R Account,</p>	<p>The customer list displays, but the field for the A/R account number is blank.</p>  <p style="text-align: center;"><i>Figure 9-19: Customer List Without A/R Accounts</i></p> <p>Press <b>[ENTER]</b> to return to the Customer Search form.</p>
<p>the customer has an A/R Account,</p>	<p>The customer list displays. The A/R Account number matches the customer ID number.</p>  <p style="text-align: center;"><i>Figure 9-20: Customer List with A/R Account</i></p> <ol style="list-style-type: none"> <li>a. Highlight the appropriate customer record and press <b>[ENTER]</b>.</li> <li>b. The Customer Maintenance screen displays with the selected customer record. Continue with step 5.</li> </ol>

5. If the customer has an A/R Account, the **[F11]**, **A/R Account** key is enabled. Do the following:

- a. Press **[F11]**, **A/R Account**, to display the customer's account-related information.

The screenshot displays the 'Customer Maintenance' window with a central 'Customer A/R Account Information' form. The background form contains fields for Customer ID, First Name, Address, Postal Code, Send Mailings, Team Member, and Modified Date. The foreground form displays the following data:

Customer A/R Account Information	
A/R Account #:	058118
Credit Limit:	\$3,500.00
Account Balance:	\$0.00
Available Credit:	\$3,500.00
Date/Time Last Updated:	25/08/2006 09:43:54

At the bottom of the foreground form is an 'Esc' button labeled 'Back 1 Screen'. The main window has a footer with 'Register 2', 'Help create an environment of teamwork.', and '03/04/2007 4:56 pm'. Navigation buttons for F10, F11, and F12 are visible at the bottom right.

Figure 9-21: Customer Maintenance Screen with A/R Account Information

**Note:** If the customer does not have an A/R Account, the **[F11]** key will open the credit application instead of the A/R Account form.

- b. Press **[ESC]** to close the A/R Account Information form.
6. Press **[ESC]** again to close the Customer Maintenance screen return to the previous screen.

## Customer Profile Maintenance

Customer preferences and other marketing information can be collected and passed to the home office by the Customer Profile function of Store21. While adding or editing a customer's data sheet, employees can survey the customers and populate a profile form with their answers. Store21 provides lookup lists for each of the fields and uses the information for reports. Customers' responses to these questions is voluntary.

1. From the Customer Maintenance screen, press **[F3]**, **Profile**. The Profile Data Entry form displays.

Figure 9-22: Customer Profile Data Entry Form

**Note:** The profile questions and answers list is configurable by the home office.

2. Press **[TAB]** to move to the field for which information is being entered.
3. Press **[F2]**, **Lookup**. A list displays with the appropriate answers to choose. Only the items listed are acceptable answers.

Figure 9-23: Customer Profile Answer List

4. Highlight the selection that matches the customer’s answer and press **[ENTER]**. The number of the answer displays on the Profile screen.



Figure 9-24: Customer Profile Answer

5. Repeat Steps 2 through 4 to ask all questions and record all of the customer’s responses.
6. Press **[F8]**, **Save**, to return to the Customer Maintenance screen.

## Add a Loyalty Account

If your Store21 system is configured to include a Loyalty Program, you can assign Loyalty Accounts to customers. To add a Loyalty Account to a customer record, do the following:

1. If you are editing a customer record in Customer Maintenance, press **[F8]**, **Add Loyalty Account**.

If you are creating a new customer record, press **[Y]**, **Yes** when prompted whether to add the customer to the Loyalty Program.

2. If your store has loyalty cards on hand, Store21 prompts for a Loyalty Card Number. Using the loyalty card being issued to the customer, scan the loyalty card, swipe the loyalty card, or enter the Loyalty Card Number manually.



Figure 9-25: Loyalty Card Number Prompt

3. If loyalty cards are generated, Store21 sends a message to the corporate system to generate a loyalty card. A receipt prints for the customer, showing the new loyalty card number.



Figure 9-26: Loyalty Account Number Receipt

4. Store21 returns to the Customer Information Screen.

## Customer User Exits

The User Exit function utilizes the Customer Information Capture form to request additional personal information from the customer, generally for marketing purposes. This form may appear before tendering a sale transaction or at other preset intervals.

The screenshot shows the Register screen with a 'Customer Information Capture' dialog box overlaid. The dialog box contains the following fields:

- What is your First Name?
- What is your Last Name?
- What is your Zip Code?
- What is your Email Address?
- How Old Are You?

At the bottom of the dialog box, there are two buttons: 'Esc Cancel' and 'F8 Save'. The background screen shows a table with columns for Type, Description, Amount Due, Tender Type, and Amount. The total amount due is \$20.67.

Figure 9-27: Customer Information Capture

**Note:** Use of the Customer Information form and its contents is determined by the home office.

1. Begin to process a sale transaction. See ["The Basic Transaction" on page 38](#), for more information.
2. When the employee presses **[ENTER]** to tender the transaction, the Customer Information Capture form displays.
  - a. Press **[ESC]**, **Cancel**, to exit the screen without capturing the data.
  - b. Ask the questions of the customer, pressing **[TAB]** or **[ENTER]** to move from one field to the next.

**Note:** All fields are free-form entry (i.e. they do not have lookup lists associated with them), and responses are not required to continue the transaction.

3. Press **[F8]**, **Save**, and continue to the Tender screen.



## CHAPTER 10

## *Layaways*

### Overview

A layaway item is entered from the Register screen as a new sale transaction, or it can be combined with any other transaction type such as Sale, Send Sale, or Return. The customer pays a deposit for the merchandise which is held by the store for a period of time. The merchandise is released to the customer when he/she pays in full for the merchandise.

- Basic Layaway Sale Transaction
- Access Layaway Maintenance
- Display Layaway Sale Information
- Process a Layaway Payment
- Process a Layaway Pick Up
- Process a Partial Layaway Pick Up
- Cancel a Layaway Item
- Reinstate a Cancelled Item
- Add Items to a Layaway Sale
- Add Discounts to Layaway Items
- Modify Layaway Sale Information
- View a Closed Layaway Record

## Basic Layaway Sale Transaction

Enter a layaway sale item from a new sale transaction or from any other type of register transaction. See [“The Basic Transaction” on page 38](#), to begin a new sale transaction.

1. Press **[F2]**, **Layaway**, to add layaway items to a sale from the Register screen.
2. If the customer is not already assigned to the sale, the Customer Search form displays.
  - a. Search for the customer or add the customer to the database. See [“Add New Customer” on page 190](#), for more information.
  - b. Press **[ESC]**, **Sale**, from the customer form to assign the customer to the layaway transaction and to return to the Register screen.
3. The Register screen displays in Layaway mode and displays the customer’s name.

#	Type	Item ID	Description	Qty	Price Tax	Amount Due

Rebecca Findley

Sale \$0.00 Tax \$0.00 Item Count 0 Total \$0.00

Layaway Press Enter to tender

Scan or Key Item

Esc F1 F2 F3 F4 F5 F6 F7 F8 F9 F10 F11 F12

Employee Selection Help Sale Send Return Add Locate Balance Non Item Cust Resume Menu  
Selection Sale Sale Sale Discount Order Inquiry Mdse Search Maint

Figure 10-1: Register Screen with Customer Name

4. The color of the focus bar changes to purple and prompts for the item number.
5. Scan the item UPC; or key the item number into the focus bar and press **[ENTER]**.

6. The item number and associated information display on the Register screen, and the word 'Layaway' appears as the Item Type.

#	Type	Item ID	Description	Qty	Price Tax	Amount Due
1	Layaway	202	TAN Oscar Blazer	1	198.95 R	0.00
2	Layaway	204	BLK Givenchy Slack	1	59.95 R	0.00

Rebecca Findley Item Count 2

Sale \$0.00 Tax \$0.00 Total \$0.00

**Layaway** Press Enter to tender

**Scan or Key Item**

[Esc] [F1] [F2] [F3] [F4] [F5] [F6] [F7] [F8] [F9] [F10] [F11] [F12]  
 Cancel Help Sale Send Add Change Balance Non Item Cust Suspend Menu  
 Sale Sale Sale Discount Line Inquiry Mdse Search Maint

Figure 10-2: Register Screen with Layaway Items

7. Repeat step 5 to add all layaway items to the sale.
8. Continue processing the sale transaction:
- Press **[F2]**, **Sale**, to return to the standard Register screen to perform other sale transaction functions, or press other function keys that are enabled.
  - Press **[ENTER]** to tender the sale.

---

**Note:** **[F2]** is a toggle between Sale mode and Layaway mode.

---

- The Layaway Information form appears, displaying the Extended Amount, Tax Amount, and Total Amount. The focus bar suggests the minimum deposit amount from the customer, and prompts for the Deposit Amount.



Figure 10-3: Register Screen with Layaway Information

**Note:** The home office determines the method for calculating the suggested deposit.

- Key in the deposit amount and press **[ENTER]**. The Tender screen displays the layaway item, the deposit, and the Tender List.

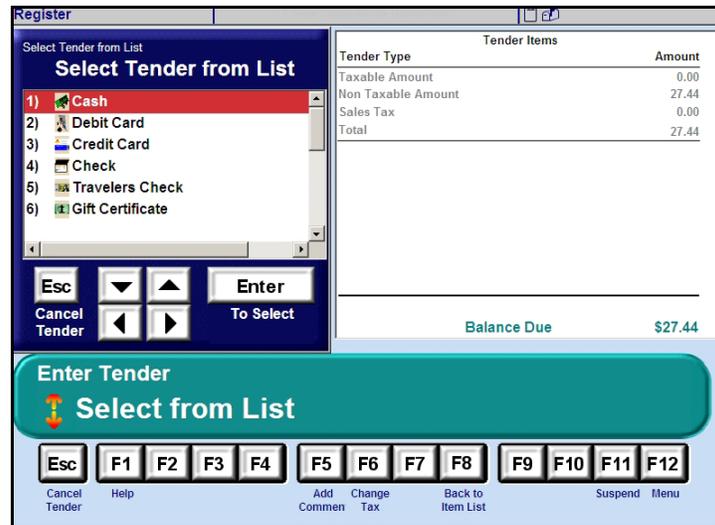


Figure 10-4: Register Screen with Tender List

**Notes:**

- Once the deposit is entered, it can not be deleted; delete the layaway line item, and the deposit will be removed. See [“Delete Items” on page 71](#), for more information.
  - Usually the Deposit Amount must be greater than or equal to the Suggested Deposit. If a lesser amount is permitted by the home office, Store21 may require an employee with an appropriate level of security to log in at the System Security input form.
11. Highlight the appropriate tender type from the list and press **[ENTER]** to display the Tender screen. (This example uses Cash as the tender). The focus bar prompts for the amount.
  12. Key in the amount of cash from the customer and press **[ENTER]**. See [“Basic Tender Process - Tender Mode” on page 136](#), for instructions to enter other tender types. The Sale Complete confirmation prompt displays. Press **[Y]**, **Yes**.

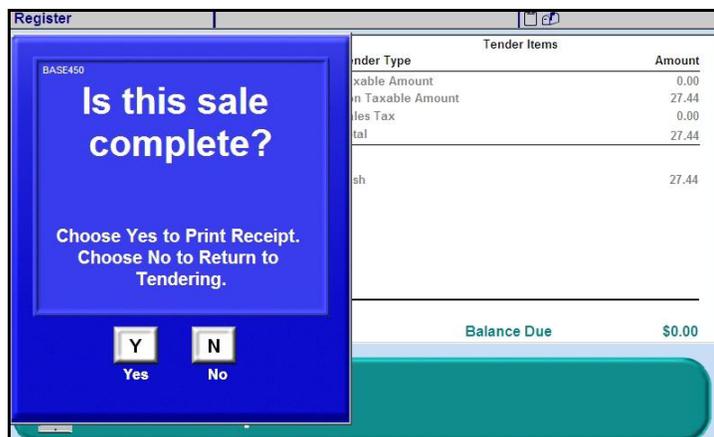


Figure 10-5: Register Screen - Layaway Sale Complete

## Layaway Maintenance

Layaway Maintenance involves all processing functions associated with the layaway item except the initial sale. The functions include processing payments, full and partial pick ups, cancellations, reinstatement, adding/removing discounts, and adding line items. For all of these functions, employees with the approved level of security will access the Layaway Maintenance screen from the Back Office Menu.

### Access Layaway Maintenance

Layaway Maintenance is an option on the Top of Menu. It requires store employees with the approved level of security to open the Menu screen from the Employee Selection screen or from any other screen where the **[F12], Menu,** function button is enabled.

1. From either the Employee Selection screen or the Register screen, press **[F12], Menu,** to access the Back Office Top of Menu.

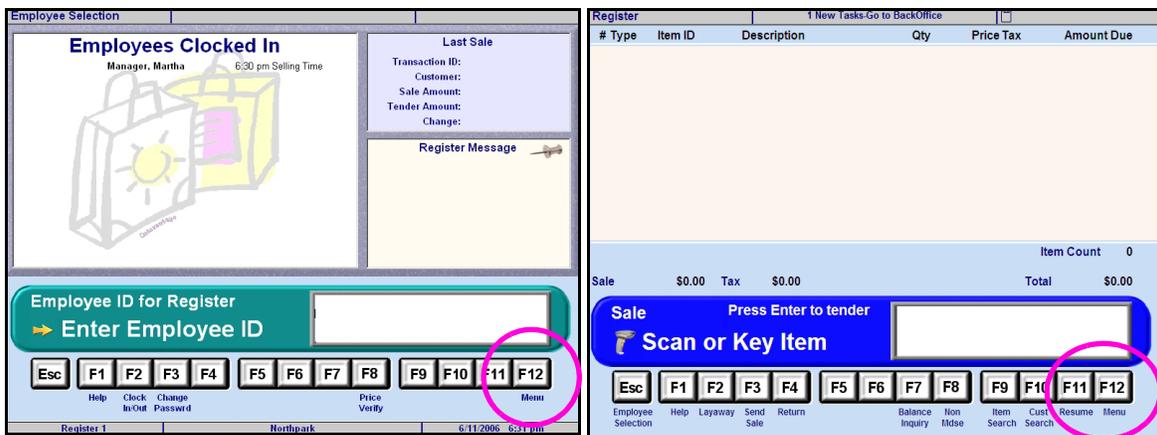


Figure 10-6: Employee Selection Screen (left) - Register Screen (right)

2. Store21 prompts for the employee ID and password.

IF...	THEN...
<p>accessing <b>[F12], Menu</b>, from the Employee Selection screen</p>	<p><b>a.</b> The color of the focus bar changes to blue and prompts for the Employee ID.</p>  <p><i>Figure 10-7: Focus Bar Prompt for Employee ID</i></p> <p><b>b.</b> Enter your Employee ID and press <b>[ENTER]</b>. The focus bar prompts for the Password.</p>  <p><i>Figure 10-8: Focus Bar Prompt for Password</i></p> <p><b>c.</b> Enter your password and press <b>[ENTER]</b></p>
<p>accessing <b>[F12], Menu</b>, from the Register screen</p>	<p><b>a.</b> The System Security input form displays.</p>  <p><i>Figure 10-9: System Security Input</i></p> <p><b>b.</b> Key in the Employee ID and Password and press <b>[ENTER]</b>.</p>

3. The Top of Menu displays.



Figure 10-10: Top of Menu - Layaway Maintenance

4. Highlight '**Layaway Maintenance**' and press **[ENTER]**. The Layaway Maintenance screen displays with the Layaway Search form.



Figure 10-11: Layaway Maintenance Search Screen

5. Use the Layaway Search form to locate the appropriate layaway record.

6. The selected Layaway record displays on the Layaway Maintenance screen, and is divided into 4 functional parts.

The screenshot shows the 'Layaway Maintenance' screen with the following data:

**A - Customer Header:** Customer: S00037000000002 / Findley Rebecca, Layaway ID: 0003700004

Item ID	Item Description	Qty	Price	Tax	Sale Amount	Status	Trans	Sales Associate
1 202	TAN Oscar Blazer	1	198.95	11.94	210.89	Open	251	100
2 204	BLK Givenchy Slack	1	59.95	3.60	63.55	Open	251	100

**C - Payments:**

Payments:	Date	Type	Amount	Trans
1	5/20/2006	Deposit	\$27.44	251

**D - Totals:** Open Items: Sale Amount: \$274.44, Balance Due: \$247.00

**Layaway Selection**  
Select an Action

Function keys: Esc (Exit), F1 (Help), F2 (Item Maint), F3 (Add Discount), F4 (Payment/Refund), F5-F8, F9-F12.

Figure 10-12: Layaway Maintenance

- **A - Customer Header** - displays Customer ID, Name, and Layaway ID
- **B - Layaway Items** - displays the Item number, Item ID, Item Description, Quantity, Price, Tax, Sale Amount, Status, Transaction ID, and Sales Associate
- **C - Payments** - displays the Payment Number, Date, Type, Amount, and Transaction ID
- **D - Totals** - displays the Open Items, Sale Amount, and Balance Due

## Display Layaway Sale Information

Locate the Layaway Sale to modify by either by searching through all Layaway sales or by filtering them using the customer's name as search criteria.

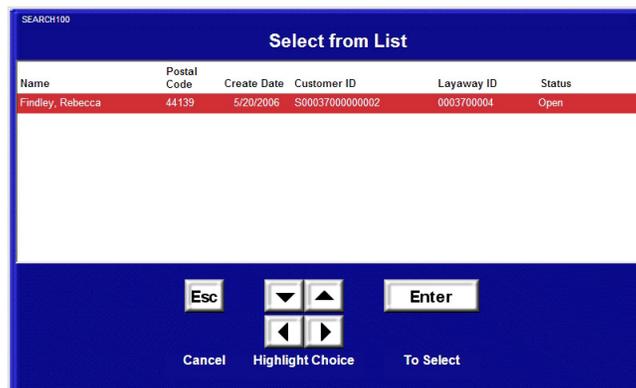
**See also:** ["Access Layaway Maintenance" on page 206](#)

1. Access the Layaway Maintenance screen and display the Layaway Search form.



Figure 10-13: Layaway Search Form

1. Use the search form to find the appropriate layaway record by doing one of the following:
  - Key in the Layaway ID number, or put the cursor in the customer's first or last name fields and press **[F8], Execute Search**. When searching using the customer's name, a list displays if the customer has multiple open layaways.
  - To show all Layaways, put the cursor in any field and press **[F7], List All**.
2. The layaway list displays. Highlight the appropriate item and press **[ENTER]**.



Name	Postal Code	Create Date	Customer ID	Layaway ID	Status
Findley, Rebecca	44139	5/20/2006	S00037000000002	0003700004	Open

Figure 10-14: Layaway List Lookup

### 3. The Layaway Maintenance screen Displays.

**Layaway maintenance**

Customer: S00037000000002 / Findley Rebecca      Layaway ID: 0003700004

Item ID	Item Description	Qty	Price	Tax	Sale Amount	Status	Trans	Sales Associate
1 202	TAN Oscar Blazer	1	198.95	11.94	210.89	Open	251	100
2 204	BLK Givenchy Slack	1	59.95	3.60	63.55	Open	251	100

Payments:	Date	Type	Amount	Trans
1	5/20/2006	Deposit	\$27.44	251

Totals:    Open Items:    Sale Amount: \$274.44    Balance Due:    \$247.00

**Layaway Selection**  
Select an Action

Esc	F1	F2	F3	F4	F5	F6	F7	F8	F9	F10	F11	F12
Exit	Help			Item Maint	Add Discount			Payment/Refund				

Figure 10-15: Layaway Maintenance Screen

## Process a Layaway Payment

Customers may make one or more layaway payments.

**See also:** ["Display Layaway Sale Information" on page 210](#)

1. Search for and display the appropriate layaway sale. The Layaway Maintenance screen displays, and shows the Balance Due.
2. Press **[F8]**, **Payment/Refund**. The focus bar prompts for a payment amount.

Layaway Payment:  
Enter Amount      5000

Figure 10-16: Layaway Payment Amount Focus Bar

3. Key in the Layaway Payment Amount and press **[ENTER]**.
  - If the Layaway Payment Amount is less than the Balance Due amount, Store21 displays the Tender screen.
  - If the Layaway Payment Amount is equal to or greater than the Balance Due amount, a message displays and advises that the customer should pick up all items on this layaway sale.

LAY350

**Balance due is less than or equal to payment. Please pick up all items.**

Enter  
To Continue

Figure 10-17: Layaway Message

- 1) Press **[ENTER]**.

- 2) Store21 returns to the Layaway Maintenance screen and again prompts for a payment amount. Re-enter a lower payment amount, or press **[ESC]**, **Cancel**, and see ["Process a Layaway Pickup" on page 213](#).
4. The Tender screen shows the Layaway Account Balance, the Layaway Payment Amount, and the Tender list.

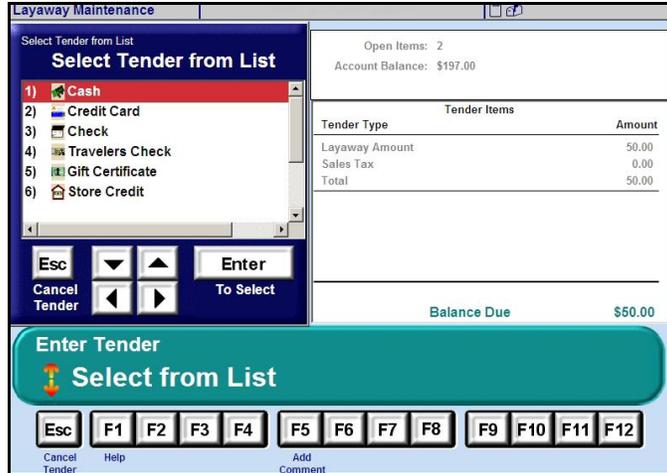


Figure 10-18: Register Screen with Tender List

5. Highlight the appropriate tender type from the list and press **[ENTER]**. (This example uses Cash as the tender.) The focus bar prompts for the amount.
6. Key in the amount of cash from the customer and press **[ENTER]**. See ["Basic Tender Process - Tender Mode" on page 136](#), for instructions to enter other tender types. The Sale Complete prompt displays.

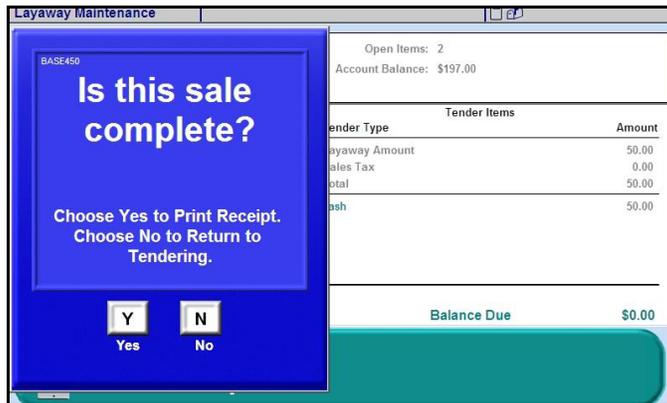


Figure 10-19: Register Screen - Layaway Payment Complete

7. Press **[Y]**, **Yes**. The system displays the Register screen for the next transaction.

- To view the customer's payment, reopen the layaway sale information on the Layaway Maintenance screen. The payment appears in the Payments area.

Layaway Maintenance									
Customer: S00037000000002 / Findley Rebecca						Layaway ID: 0003700004			
Item ID	Item Description	Qty	Price	Tax	Sale Amount	Status	Trans	Sales Associate	
1 202	TAN Oscar Blazer	1	198.95	11.94	210.89	Open	251	100	
2 204	BLK Givenchy Slack	1	59.95	3.60	63.55	Open	251	100	
Payments:		Date	Type	Amount	Trans				
1		6/20/2006	Payment	\$50.00	255				
2		5/20/2006	Deposit	\$27.44	251				
Totals:		Open Items:	Sale Amount: \$274.44		Balance Due:		\$197.00		

Figure 10-20: Layaway Maintenance Screen with Payments

Customers pay the Layaway Balance Due and pick up the layaway sale item(s).

## Process a Layaway Pickup

**See also:** ["Display Layaway Sale Information" on page 210](#)

- Search for and display the appropriate layaway sale.

Layaway Maintenance									
Customer: S00037000000002 / Findley Rebecca						Layaway ID: 0003700004			
Item ID	Item Description	Qty	Price	Tax	Sale Amount	Status	Trans	Sales Associate	
1 202	TAN Oscar Blazer	1	198.95	11.94	210.89	Open	251	100	
2 204	BLK Givenchy Slack	1	59.95	3.60	63.55	Open	251	100	
Payments:		Date	Type	Amount	Trans				
1		6/20/2006	Payment	\$50.00	255				
2		5/20/2006	Deposit	\$27.44	251				
Totals:		Open Items:	Sale Amount: \$274.44		Balance Due:		\$197.00		
<b>Layaway Selection</b> <b>Select an Action</b>									
Esc	F1	F2	F3	F4	F5	F6	F7	F8	F9 F10 F11 F12
Exit	Help	Pick Up	Pick Up All	Cancel Item	Add Discount	Change Reinst	Add Item	Cancel All	Payment/ Refund

Figure 10-21: Layaway Maintenance Screen

- With the layaway record displayed on the Layaway Maintenance screen, press **[F4]**, **Item Maint**. The function key descriptions change.

Layaway Selection									
<b>Select an Action</b>									
Esc	F1	F2	F3	F4	F5	F6	F7	F8	F9 F10 F11 F12
Done	Help	Pick Up	Pick Up All	Cancel Item	Change Reinst	Reinst	Add Item	Cancel All	

Figure 10-22: Layaway Item Maintenance Functions

3. Press **[F3], Pick Up All**.
4. A message appears, asking for confirmation that all items are being picked up.



Figure 10-23: Layaway Pick Up Confirmation

5. Press **[Y], Yes**. The Layaway Maintenance screen changes to show 'Picked' in the Status column for all items; '0' for the quantity of Open Items, \$0.00 for the Sale Amount, and the unpaid amount for the Balance Due.

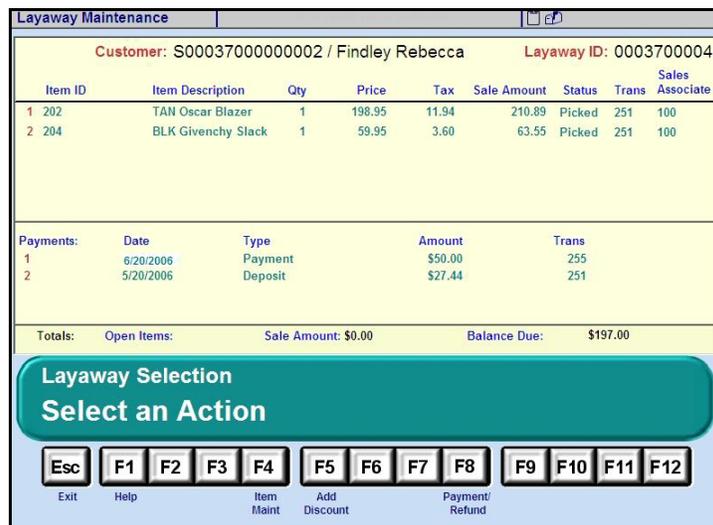


Figure 10-24: Layaway Maintenance Screen with Picked Status

6. Press **[F8], Payment/Refund**. The focus bar displays the Suggested Payment Amount, which is the unpaid amount for the layaway.



Figure 10-25: Focus Bar Suggested Layaway Payment

7. Key in the Payment Amount and press **[ENTER]**.

---

**Note:** The payment amount must be greater than or equal to the Suggested Amount to pick-up the layaway items, or an error message will display.

---

8. The Tender screen displays. See ["Basic Tender Process - Tender Mode" on page 136](#) to complete the sale.
-

## Process a Partial Layaway Pick Up

Customers may pick up some of the layaway sale item(s).

**See also:** [“Display Layaway Sale Information” on page 210](#)

1. Search for and display the appropriate layaway sale.

**Layaway Maintenance**

Customer: S00037000000002 / Findley Rebecca      Layaway ID: 0003700004

Item ID	Item Description	Qty	Price	Tax	Sale Amount	Status	Trans	Sales Associate
1 202	TAN Oscar Blazer	1	198.95	11.94	210.89	Open	251	100
2 204	BLK Givenchy Slack	1	59.95	3.60	63.55	Open	251	100

Payments:

	Date	Type	Amount	Trans
1	6/20/2006	Payment	\$50.00	255
2	5/20/2006	Deposit	\$27.44	251

Totals:    Open Items:                      Sale Amount: \$274.44                      Balance Due:    \$197.00

**Layaway Selection**  
**Select an Action**

Esc	F1	F2	F3	F4	F5	F6	F7	F8	F9	F10	F11	F12
Exit	Help			Item Maint	Add Discount			Payment/Refund				

Figure 10-26: Layaway Maintenance Screen

2. With the layaway record displayed on the Layaway Maintenance screen, press **[F4]**, **Item Maint**.
3. The function key descriptions change.

**Layaway Selection**  
**Select an Action**

Esc	F1	F2	F3	F4	F5	F6	F7	F8	F9	F10	F11	F12
Done	Help	Pick Up	Pick Up All	Cancel Item	Change Item	Reinstate Item	Add Item	Cancel All				

Figure 10-27: Layaway Function Key Descriptions

4. Press **[F2]**, **Pick Up**.

- The focus bar prompts to highlight the item to be picked up.

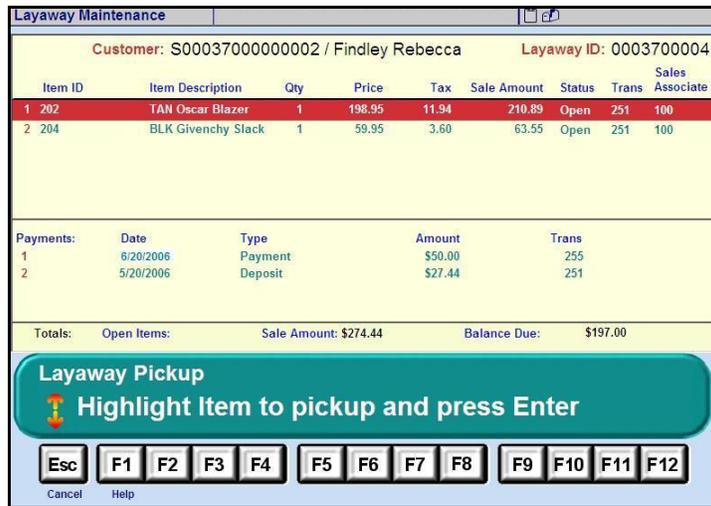


Figure 10-28: Focus Bar Prompt Highlight Item to Pick-up

- Highlight the pick-up item and press **[ENTER]**. 'Picked' displays in the status column of the item.

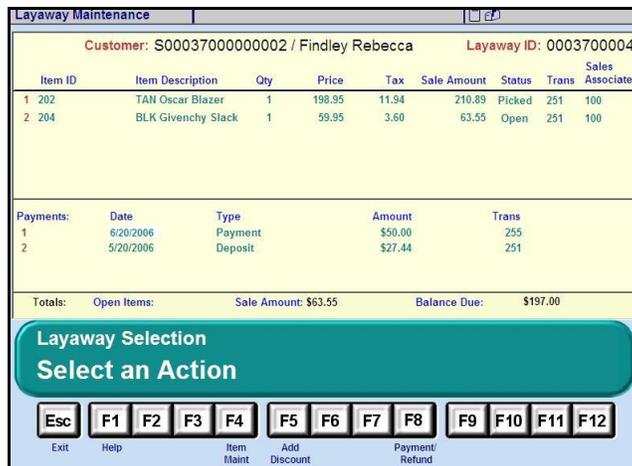


Figure 10-29: Layaway Maintenance Screen Item Picked

- Press **[F8]**, **Payment/Refund**. The focus bar displays the Suggested Payment.



Figure 10-30: Focus Bar Suggested Payment

- Key in the Payment Amount and press **[ENTER]**.



- b. Highlight the appropriate item and press **[ENTER]**.
- 4. 'Cancelled' displays in the Status column of the Layaway Maintenance screen for the item.

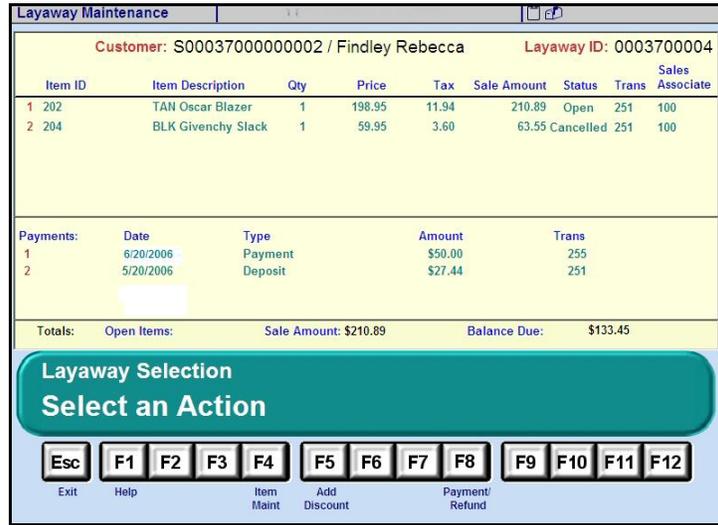


Figure 10-34: Layaway Maintenance Screen - Cancelled Item

**Note:** The home office determines the method of refund, if any, to customers of cancelled layaway sales.

- 5. Repeat Steps 3-4 until all of the items to be cancelled are marked 'Cancelled'.
- 6. If the entire layaway sale is to be cancelled, press **[F8]**, **Cancel All**, to cancel all of the items from the Layaway. A confirmation message displays.



Figure 10-35: Layaway Cancellation of All Items Message

- Press **[N]**, **No**, to return to the Layaway Maintenance screen.
- Press **[Y]**, **Yes**, to process the layaway cancellation. The Layaway Maintenance screen displays the layaway record with 'Cancelled' in the Status column of each item.

7. Press **[F8]**, **Payment/Refund**. A confirmation message prompt displays.



Figure 10-36: Layaway Cancellation Prompt

**Note:** This process may be used to cancel layaways that are expired.

8. Respond to the message prompt.

IF...	THEN...
the customer is present during the layaway cancellation,	press [Y], Yes. The focus bar displays the Suggested Refund for the cancelled items.



Figure 10-37: Focus Bar - Refund Amount

- a. If no additional layaway payments are due, the customer can choose to make an additional payment or continue with the cancellation.
  - 1) Key in the refund or payment amount due and press **[ENTER]**.
  - 2) If the customer does not wish to also make a payment at this time, leave the focus bar blank and press **[ENTER]**.
- b. When the Sale Complete confirmation prompt displays, press **[Y], Yes**.
- c. The Tender screen displays. Process the refund or tender. See ["Basic Tender Process - Tender Mode" on page 136](#).

IF...	THEN...
the customer is not present during the layaway cancellation,	press [N], No. Store21 displays a message that a refund will not be processed.



Figure 10-38: Cancelled Layaway Prompt

- a. Press **[ENTER]**. The Sale Complete confirmation prompt displays.

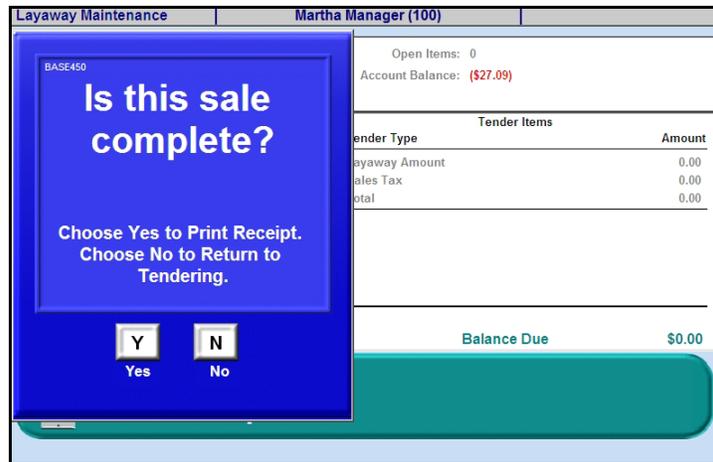


Figure 10-39: Layaway Maintenance Sale Complete

- Press **[N], No**, to return to the Layaway Maintenance screen.
- Press **[Y], Yes**, to print the receipt showing a negative account balance (Credit) for the amount of the refund due.

## Process Refund for Cancelled Layaway Sale

A Layaway sale may need to be cancelled when the customer is not present; for example, if the pick-up date has expired. Since a refund cannot be generated without the customer present, Store21 provides a method to issue the refund at a later time. This might be necessary if the customer comes to the store for the refund, or if the refund will be mailed to the customer.

**See also:** [“Display Layaway Sale Information” on page 210](#)

1. Use the Layaway Search form to display the appropriate cancelled layaway sale.

**Layaway Maintenance** Martha Manager (100)

Customer: S0003700000012 / Van Buren Hannah Layaway ID: 0003700010

Item ID	Item Description	Qty	Price	Tax	Sale Amount	Status	Trans	Sales Associate
1	281 NVY Oscar Blazer	1	198.95	11.94	210.89	Cancelled	233	100
2	FORCESKU RAINCOAT	1	59.99	0.00	59.99	Cancelled	254	100

Payments:	Date	Type	Amount	Trans
1	3/13/2007	Payment	\$6.00	254
2	3/12/2007	Deposit	\$21.09	233

Totals: Open Items: Sale Amount: \$0.00 Credit Due: (\$27.09)

**Layaway Selection**  
Select an Action

Esc	F1	F2	F3	F4	F5	F6	F7	F8	F9	F10	F11	F12
Exit	Help		Item Maint		Add Discount			Payment/Refund				

Figure 10-40: Layaway Maintenance Screen

2. Press **[F8]**, **Payment/Refund**. The tender list displays with the appropriate tenders available for the refund.

**Layaway Maintenance** Martha Manager (100)

Select Tender from List

Open Items: 0  
Account Balance: \$0.00

**Select Tender from List**

- 1) Issue Store Credit
- 2) Issue Merchandise Credit Card
- 3) Store Check

Tender Type	Tender Items	Amount
Layaway Amount		(27.09)
Sales Tax		0.00
Total		(27.09)

Amount Due Customer (\$27.09)

**Enter Tender**  
Select from List

Esc	F1	F2	F3	F4	F5	F6	F7	F8	F9	F10	F11	F12
Cancel Tender	Help				Add Comment							

Figure 10-41: Layaway Maintenance - Refund Tenders

3. Highlight the appropriate refund tender and press **[ENTER]**.
4. Process the refund tender. See [“Basic Tender Process - Tender Mode” on page 136](#).



- Key in the payment amount and press **[ENTER]**.
7. The Tender screen displays. Process the tender. See [“Basic Tender Process - Tender Mode” on page 136.](#)

## Add Items to a Layaway Sale

Customers can add items to an existing layaway sale that is open and already set up in the system.

**See also:** [“Display Layaway Sale Information” on page 210.](#)

1. Search for and display the appropriate layaway sale.

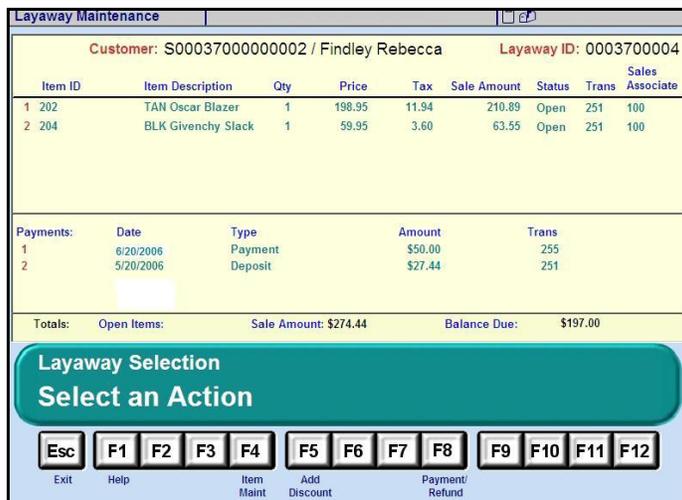


Figure 10-45: Layaway Maintenance Screen

2. With the layaway record displayed on the Layaway Maintenance screen, press **[F4]**, **Item Maint**. The function keys' descriptions change.

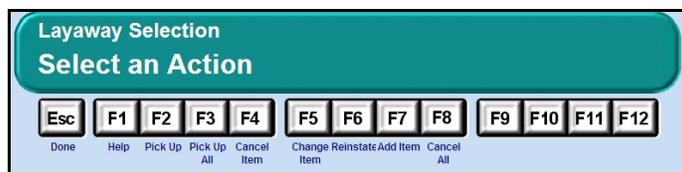


Figure 10-46: Layaway Maintenance Screen - Item Maintenance Functions

3. Press **[F7]**, **Add Item**. The focus bar changes to blue and prompts for the item.



Figure 10-47: Focus Bar Add a Layaway Item

4. Scan the item UPC; or key the item number into the focus bar and press **[ENTER]**. The item appears on the Layaway Maintenance screen.
5. Continue keying in additional items, as necessary.

- Press **[ESC]**, **Done**, twice. The focus bar changes to Select an Action.

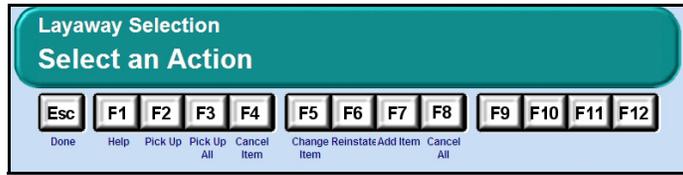


Figure 10-48: Layaway Maintenance Screen - Item Maintenance Functions

- Press **[F8]**, **Payment/Refund**. The focus bar displays the Suggested Payment.
- Key in the payment amount and press **[ENTER]**. The Tender screen displays.
- Process the tender. See ["Basic Tender Process - Tender Mode" on page 136](#).

**Notes:**

- The payment amount entered usually must be greater than or equal to the suggested payment - this is determined by the home office.
- If the customer wishes not to pay on the layaway, enter '0'.

## Add Discounts to Layaway Items

Apply the same types of discounts to a layaway sale as are configured for a standard sale. Add the Line-Item Discounts after a sale item is entered as a layaway item.

**See also:** ["Display Layaway Sale Information" on page 210](#)

- Begin with the layaway record on the Layaway Maintenance screen.

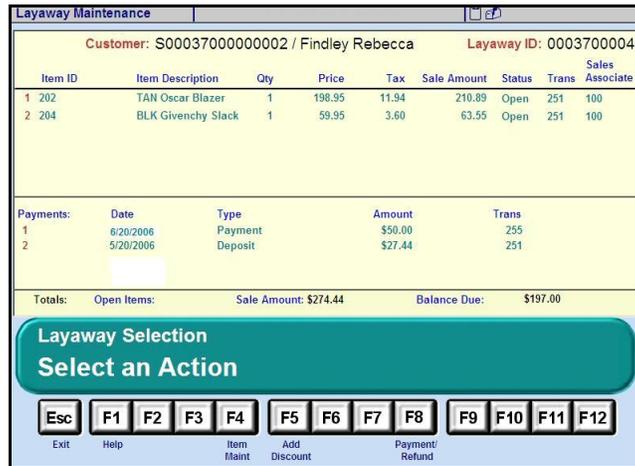


Figure 10-49: Layaway Maintenance Screen

- Press **[F5]**, **Add Discount**. The focus bar prompts to highlight the item.

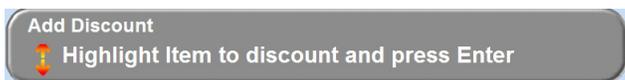


Figure 10-50: Focus Bar Add Discount

- Highlight the item and press **[ENTER]**.
- The Discount list displays.

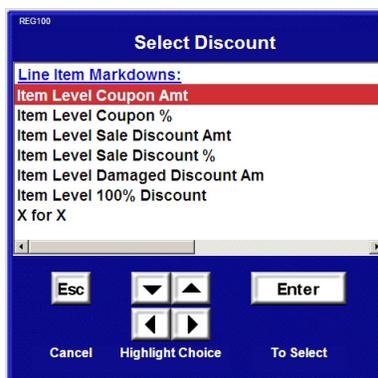


Figure 10-51: Discount List

**Note:** The types of available discounts are determined by the home office.

- Highlight the appropriate line-item discount type and press **[ENTER]**. See "Discount Items and Transactions" on page 72, for details about the discount types.
- The discount type and amount appears on the Layaway Maintenance screen.

Layaway Maintenance									
Customer: S00037000000002 / Findley Rebecca						Layaway ID: 0003700004			
Item ID	Item Description	Qty	Price	Tax	Sale Amount	Status	Trans	Sales Associate	
1	202 TAN Oscar Blazer	1	198.95	11.94	210.89	Open	251	100	
2	204 BLK Givenchy Slack	1	59.95	3.24	57.19	Open	251	100	
	Item Level Coupon 10%		6.00						
Payments:		Date	Type	Amount	Trans				
1		6/20/2006	Payment	\$50.00	255				
2		5/20/2006	Deposit	\$27.44	251				
Totals:		Open Items:	Sale Amount: \$268.08		Balance Due: \$190.64				

Figure 10-52: Layaway Maintenance Screen with Discount Item

- Continue to process layaway item maintenance functions or press **[F8]**, **Payment/Refund**, to complete the sale.

## Modify Layaway Sale Information

Modify line items of the layaway sale information from the Layaway Maintenance screen. Delete previously-applied discounts, change sales associate, change prices, or change taxes.

**See also:** [“Display Layaway Sale Information” on page 210](#)

1. Search for and display the appropriate layaway sale.

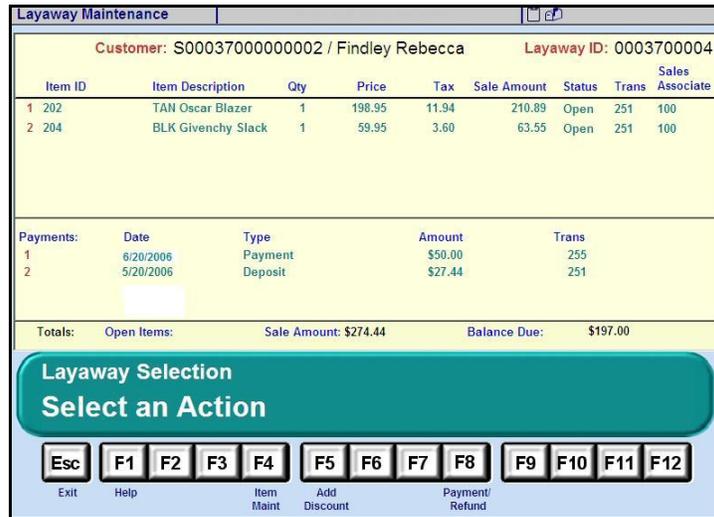


Figure 10-53: Layaway Maintenance Screen

2. With the layaway record on the Layaway Maintenance screen, press **[F4], Item Maint**. The function button descriptions change.

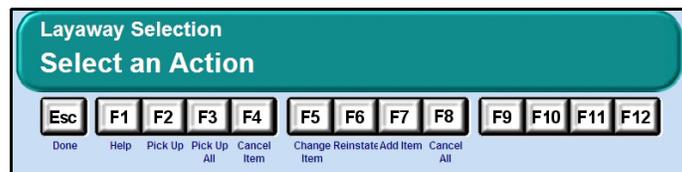


Figure 10-54: New Button Descriptions

3. Press **[F5], Change Item**. The focus bar prompts to highlight the item to change.



Figure 10-55: Focus Bar Change a Layaway Item

4. Highlight the appropriate line item to change and press a function button:
  - Press **[F3], Delete Discount** - removes discount line.
  - Press **[F4], Change Assoc** - change associate to be credited with the sale.

- Press **[F6], Change Price** - override the price to be charged.
  - Press **[F7], Change Tax** - apply different tax code or exemption. See ["Modify Lines" on page 60](#), for details about the types of changes.
5. Press **[ESC], Finish Change**. The focus bar prompts to select an action.
  6. Press **[ESC], Done**. Layaway Maintenance screen displays the appropriate change.

Continue to process layaway item maintenance functions or press **[F8], Payment/Refund**, to complete the sale.

## View a Closed Layaway Record

A closed layaway record remains in the system and can be viewed on the Layaway Maintenance screen.

**See also:** ["Access Layaway Maintenance" on page 206](#)



Figure 10-56: Layaway Maintenance Search Screen

1. Use the Layaway Search form to locate the appropriate layaway record. In the results list, the transaction status column depicts closed records as 'CLOSED'.



Figure 10-57: Layaway Transaction List - Closed Status

2. Highlight the appropriate closed layaway record and press [ENTER].
3. The Layaway Maintenance screen displays the closed record that can be used for reference only. Closed records cannot be modified.

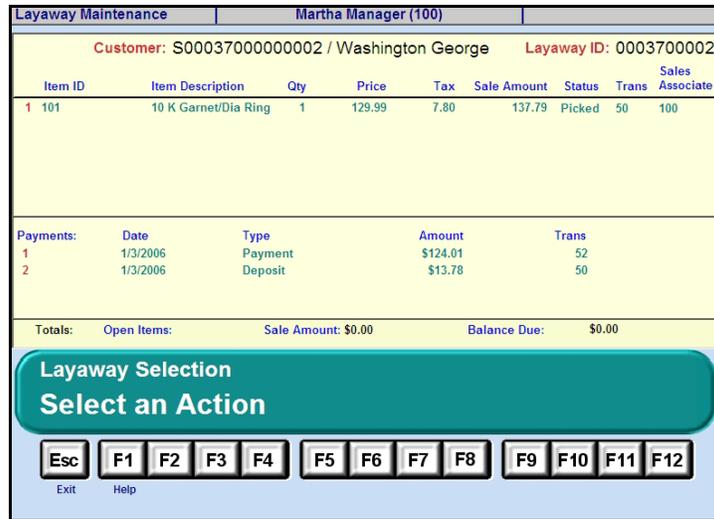


Figure 10-58: Layaway Maintenance Screen of Closed Transaction

4. Press [ESC] and return to the Layaway Search form. Press [ESC] again to return to the Top of Menu.

# CHAPTER 11

## Send Sales

### Overview

A Send Sale is created when a customer requests that a purchased item be shipped from the store to an address. The item(s) in a Send Sale are then purchased by the customer and the store ships the item(s) to the requested address.

This chapter describes the procedure for creating a Send Sale in Store21.

### Create a Send Sale

Send Sale items that you enter at the Register screen can be combined with regular sales items and return items in a single transaction.

1. Begin a sale transaction.
2. Use the Customer Search form to assign the sale to a customer. See ["Access the Customer Search Form" on page 184](#) for more information.
  - To view the Customer Search form at the Register screen, press **[F10]**.
  - The Send Sale transaction can force the capture of more information than is required for a normal sale.

**Note:** A Send Sale may require a shipping fee. See ["Enter Non-Merchandise Items" on page 51](#) for more information.

3. At the Register screen, press **[F3]**, **Send Sale**. The focus bar turns navy blue and prompts for the Send Sale item number.



Figure 11-1: Send Sale Focus Bar

**Note:** Send Sale items cannot be sold in the same transaction with non-Send Sale items. Once a Send Sale item has been entered into a transaction, all items entered in the transaction are Send Sale items. Likewise, once a non-Send Sale item has been entered into a transaction, Send Sale items cannot be added to the transaction.

- Key in, scan, or search for the item number and press **[ENTER]**. The Send Sale information form appears. If a customer is already assigned to the sale, the customer's information displays by default.

**Enter Information for Send Sale**

\* Last Name:

\* First Name:

\* Address:

\* City:

\* State:

\* Zip Code:

Phone:

Country:

\* Required Field

Esc  
Cancel  
Send

F8  
Save

Enter  
To move to next  
item

Figure 11-2: Send Sale Data Entry Screen

- Edit or key in the customer's information as necessary, pressing **[ENTER]** to move between the fields.
- Press **[F8]**, **Save**, to save the information. The send sale item is listed on the Register screen. "SEND" appears in the Type column.

Register		Martha Manager (100)			18		
#	Type	SKU	Description	Qty	Price	Tax	Amount Due
5	Send	1000259	14KT YG ONYX DIA	1	900.00	SENDSALE	900.00

Figure 11-3: Send Sale Register Screen Entry

- If necessary, repeat steps 4-6 for each item being entered into the Send Sale.
- When all items have been entered into the Send Sale transaction, press **[ENTER]**.
- Tender the transaction as normal. See [Chapter 8, "Tenders"](#) for more information.

# CHAPTER 12

## Distributed Orders

### Overview

Store21 provides the ability to fill an order through any store in the chain. By providing chain-wide visibility for each store's inventory, an item that is not in stock in one store can be found at another store. The item, once found, can be picked up at the store that has the item in stock, or the item can be shipped to an address specified by the customer.

This chapter describes the creation and setup of a Distributed Order. For all other functions related to Distributed Orders, see the *Store21 Manager's Guide* for more information.

### Distributed Order Setup

A Distributed Order transaction is set up from a new sale transaction. The Distributed Order option must be selected before any items are added to the transaction.

1. Begin a Sale transaction.  
See ["The Basic Transaction" on page 38](#) to create a new sale transaction.
2. Press **[F6]**, **Locate/Order** to set up a Distributed Order.
3. The Select Fulfillment Location window opens, prompting you to select the method for fulfilling the Distributed Order. Select the method, then press **[ENTER]**.

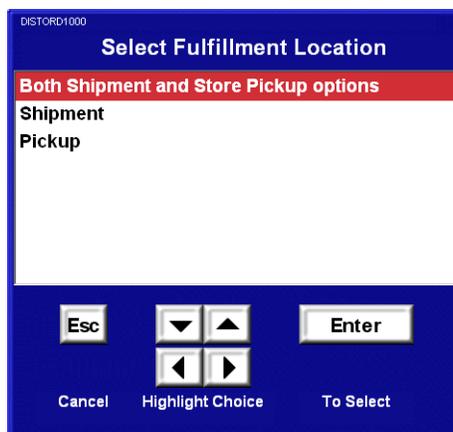


Figure 12-1: Select Fulfillment Location

- Select **Pickup** if the customer will pick up the item(s) at one of the stores in the chain.
- Select **Shipment** if the item(s) will be shipped to the customer.
- Select **Both Shipment and Store Pickup options** if the item(s) may be shipped or picked up.

- If you selected **Pickup** or **Both Shipment and Store Pickup options** for the fulfillment location, Store21 prompts for the search radius to use for pickup locations. Enter the search radius, then press **[ENTER]**.



Figure 12-2: Enter Search Radius

The search radius is in miles or kilometers, depending on the configuration of your system.

- The focus bar changes color to dark green, indicating that the items entered are added to the Distributed Order transaction.



Figure 12-3: Distributed Order Item Entry

**!** If you change the transaction to a different transaction type (e.g. Sale, Layaway, or Return) the Distributed Order is cancelled. Distributed Orders cannot co-exist on the same transaction with other transaction types. However, non-merchandise items can be added to the transaction, but they will not be listed as part of the distributed order.

- Enter the items as for a regular transaction. The items appear on the item list as they are entered.

#	Type	Item ID	Description	Qty	Price Tax	Amount Due
1	Order	503	Crepe Jacket	1	120.00 R	120.00
2	Order	607	Face Plate	1	19.99 R	19.99
3	Order	104	OnyxGold Earr-Drop	1	350.00 R	350.00

Sale	\$489.99	Tax	\$29.40	Item Count	3
				Total	\$519.39

Figure 12-4: Distributed Order Items Entered

7. If necessary, make changes to the item(s), using the **Add Discount**, **Change Line**, or **Change Assoc** buttons.
8. When you are finished adding items to the transaction, press **[ENTER]** for Store21 to locate the item(s).
  - If the item cannot be located using the specified search criteria, Store21 displays a message indicating this. Press **[ENTER]** to acknowledge the message. Return to step 6.
  - If the item is located, Store21 displays the pickup or shipment options available.



Figure 12-5: Fulfillment Location/Method Options

9. Select the fulfillment location/method to use for the Distributed Order:
  - If the item(s) are being shipped to an address (and Shipment was selected as a fulfillment option), use the arrow keys to highlight **Ship Order to Specified Address**, then press **[ENTER]**.
  - If the item(s) are being picked up at a store (and Pickup was selected as a fulfillment option), use the arrow keys to highlight the store where the customer is picking up the item(s), then press **[ENTER]**.

The stores are listed in order of distance from the store where the Distributed Order is being created.

10. When the fulfillment location/method is selected, a confirmation message displays.



Figure 12-6: Confirmation Message

- Select **Y, Yes** to continue.
  - Select **N, No** to return to step 6.
11. If a customer has not been added to the transaction, a Customer Search window opens. Perform a customer search to assign a customer to the transaction. See [Chapter 9, "Customer Information"](#) for more information.
12. If the item(s) is being shipped, do the following:
- a. A Delivery Address Information window opens. Make any required changes to the address in this window. Only one delivery address can be used for each Distributed Order.

 A light brown dialog box titled 'Enter Delivery Address Information'. It contains several input fields with red asterisks indicating required fields:
 

- \*Attention: Cathy Customer
- \*Address: 123 Customer Court
- \*City: Cuyahoga Falls
- \*State: OH
- \*Postal Code: 44222-
- Day Phone: ( ) -
- Evening Phone: ( ) -
- Email:

 At the bottom, there is a legend: '\*Required Field'. Below the legend are four buttons: 'Esc' (Cancel Order), 'F2' (Save), 'F8' (Save), and 'Enter' (To Move To Next Item).

Figure 12-7: Delivery Address Information

The fields are pre-populated with address information from the associated customer record.

- b. Depending on the configuration of your system, you may be prompted to select the shipping fee to assign to the shipment.
13. Tender and complete the transaction as normal. See [Chapter 8, "Tenders"](#) for more information about tenders.

## CHAPTER 13

## *Repair/Alterations*

### Overview

Repair/Alteration items are non-merchandise items that are entered on the Register screen and can be part of the same transaction with other sale items or returns. Store21 provides the ability to record the sale as an in-store or an out-of-store alteration or repair, as well as to track shipping and receiving the repair item. Authorized employees can access the Back Office Menu to modify the alteration/repair item details. Each Repair/Alteration involves a transaction to initiate the repair, and another one to pick up the item after it is repaired/ altered.

The functionality of Repair/Alteration includes:

- Enter Repair/Alteration Sale Item
- In-Store Repair/Alteration
- Out-of-Store Repair/Alteration
- Repair/Alteration Order Maintenance
- Access the Repair/Alteration Functions
- Ship Repair/Alteration Items
- Receive a Repair/Alteration Item
- Process a Pick Up Repair/Alteration Item

For more information about Repair/Alteration functions, see the *Store21 Manager's Guide*.

## Enter Repair/Alteration Sale Item

Enter Repair/Alteration sale items into a sale transaction from the Register screen either as a separate sale or in a sale transaction with other items. Both in-store and out-of-store alteration/repair item entries begin the same way.

1. Begin a basic sale transaction, and assign a customer to the sale. See [“The Basic Transaction” on page 38.](#)



Figure 13-1: Register Screen with Customer’s Name

2. Press **[F8], Non Mdse**. The Non-Merchandise list appears.



Figure 13-2: Non-Merchandise List

**Note:** The home office defines the non-merchandise selections.

## In-Store Repair/Alteration

1. Open the Non-Merchandise menu.
2. Highlight **In-Store Repair/Alter** and press **[ENTER]**. The focus bar on the Register screen prompts for a price.



Figure 13-3: Focus Bar - Enter Price

3. Key in the price and press **[ENTER]**. The item description "IN-STORE REPAIR/ALTER" and the price appear on the Register screen as a sale item.
4. Continue to enter items or tender the sale. See "[Basic Tender Process - Tender Mode](#)" on [page 136](#).

## Out-of-Store Repair/Alteration

1. Open the Non-Merchandise menu.
2. Highlight **New Repair/Alteration Setup** and press **[ENTER]**. The Repair/Alteration data entry form appears.

Figure 13-4: Repair/Alteration Data Entry Form

**Note:** Field names marked with an asterisk (\*) require information. The structure of the repair/alteration form is determined by the home office.

3. Key data into all of the unshaded fields; the shaded fields are populated by the system. Press **[ENTER]** or **[TAB]** to move to the next field or **[SHIFT]+[TAB]** to move to a previous field.

4. Put the cursor in the Alteration Type field. Press **[F2], Lookup**, to open the Alteration type list for available choices.



Figure 13-5: Alteration Types

**Note:** The home office defines the repair/alteration selections.

5. Highlight the appropriate alteration type and press **[ENTER]**. The alteration type appears in the field.

**Note:** The contents of the Operations Details list and the accompanying charge is contingent upon the Alteration Type selected.

6. Press **[ENTER]** to move to the Ticket Number field. Enter a unique ticket number in one of two ways:
  - Key in the ticket number from the preprinted ticket form and press **[ENTER]**.
  - If the home office configured Store21 to assign ticket numbers, the number appears in the Ticket Number field automatically.
7. Accept the default date in the Promise Date field, or key in a new date. Press **[ENTER]**.
8. Key in the Item Valuation and press **[ENTER]**.
9. Depending upon the Alteration Type selected, complete other data fields as required:
  - If Repair/Alter type is REDO, press **[F2], Lookup**, in the Original Number field to look up the valid ticket number, and key in the appropriate date in the Original Alteration Date field.
  - If Repair/Alter type is WARRANTY, key in the appropriate date in the Original Purchase Date field.
10. Key in a meaningful description of the item and press **[ENTER]**.
11. Key in the Item ID of the sale item being repaired/altered - located in the first column on the Register screen.

- Highlight the appropriate Operation type from the list that appears in the Operation Details section. Press **[SPACEBAR]** to select the item. An 'X' appears in the list, and the Alterations Instructions input form displays.

Alteration Instructions:  
add barrel mount

Esc Cancel      F8 Save

Figure 13-6: Repair/Alteration Instructions

- Key in the specific instructions for the selected operation, or leave blank. Press **[F8]**, **Save**. The instructions display on the details section next to the charge for the operation.

Operation	Charge	Instructions
<input type="checkbox"/> Addt1 Prongs (\$12 ea)	\$0.00	
<input type="checkbox"/> Arthritic Balls: 2 inside ring	\$38.00	
<input checked="" type="checkbox"/> Barrel Clasp - 2.5 mm	\$40.00	Add barrel mount
<input type="checkbox"/> Barrel Clasp - 3.0 mm	\$48.00	
<input type="checkbox"/> Barrel Clasp - 4.0 mm	\$55.00	

Figure 13-7: Repair Setup Screen

\* Alteration Type: CHARGE  
\* Ticket Number: 321  
\* Promise Date: 08/02/2006      Alteration Status: NEW  
Item Valuation: \$2,500.00      Total Charge: \$40.00  
Original #:      Alteration Type: Charge  
Orig Alteration Date: 00/00/0000      Sold By: 100  
Orig Purch Date: 00/00/0000      Sku #:   
Description: White gold ring with diamond

Operation	Charge	Instructions
<input type="checkbox"/> Addt1 Prongs (\$12 ea)	\$0.00	
<input type="checkbox"/> Arthritic Balls: 2 inside ring	\$38.00	
<input checked="" type="checkbox"/> Barrel Clasp - 2.5 mm	\$40.00	Add barrel mount
<input type="checkbox"/> Barrel Clasp - 3.0 mm	\$48.00	
<input type="checkbox"/> Barrel Clasp - 4.0 mm	\$55.00	

Esc    ▼    ▲    Space Bar    F2    F5    F6    F8  
To Cancel    Highlight Choice    To Select/Unselect    Edit Instructs    Change Charge    Save

Figure 13-8: Repair/Alteration Data Entry Form Complete

**Notes:**

- Press the spacebar again to deselect a highlighted operation. The 'X' in the check box and the instructions for that operation disappear.
- Select as many Operation types as required for a single repair/alteration.

**14.** When all Operation types are selected, press **[F8]**, **Save**. A confirmation message displays.



*Figure 13-9: Repair/Alteration Complete Confirmation Message*

**15.** Respond to the message:

- Press **[Y]** to add another Repair/Alteration type to this ticket. A blank Repair/Alteration data entry form displays and is ready for the next repair type. Notice that the Ticket Number is still the same. Repeat steps 3-14 to enter the Repair/Alteration information.

* Alteration Type:		Alteration Status:	NEW
* Ticket Number:	321	Total Charge:	\$40.00
* Promise Date:	12/15/2006	Alteration Type:	Charge
Item Valuation:	\$2,500.00	Sold By:	100
Original #:		Sk#:	
Orig Alteration Date:	00/00/0000	Description: White gold ring with diamond	
Orig Purch Date:	00/00/0000		

*Figure 13-10: Repair/Alteration Data Entry Form*

- Press **[N]** Return to the Register screen and complete the sale item. The Repair/Alteration item appears on the Register screen.

Register		Martha Manager (100)			18		
#	Type	SKU	Description	Qty	Price	Tax	Amount Due
1	Alteration	321	Repair / Alteration Setup	1	0.00	R	0.00

Figure 13-11: Register Screen with Repair/Alteration Setup Item



The Register screen displays the amount of the Repair/Alteration as \$0.00. If the home office allows pre-payment, perform a price change for the amount of the Repair/Alteration and tender it accordingly. See Chapter 5 - "Changing Prices," page 63, for more information.

## Edit Operation Instructions and/or Charges

Before saving and closing the Repair/Alteration data entry form (Figure 13-10), you can edit the operation instructions and/or the applicable charges.

1. With the cursor in the Operation/Charge form, highlight the operation to edit.

\* Alteration Type: CHARGE  
 \* Ticket Number: 821  
 \* Promise Date: 08/02/2006  
 Item Valuation: \$2,500.00  
 Original #:   
 Orig Alteration Date: 00/00/0000  
 Orig Purch Date: 00/00/0000  
 Description: White gold ring with diamond  
 Alteration Status: NEW  
 Total Charge: \$40.00  
 Alteration Type: Charge  
 Sold By: 100  
 Sku #:   

Operation	Charge Instructions
<input type="checkbox"/> Addt1 Prongs (\$12 ea)	\$0.00
<input type="checkbox"/> Arthritic Balls: 2 inside ring	\$38.00
<input checked="" type="checkbox"/> Barrel Clasp - 2.5 mm	\$40.00 Add barrel mount
<input type="checkbox"/> Barrel Clasp - 3.0 mm	\$48.00
<input type="checkbox"/> Barrel Clasp - 4.0 mm	\$55.00

 Esc    ▼ ▲    Space Bar    F2    F5    F6    F8  
 To Cancel    Highlight Choice    To Select/Unselect    Edit Instructs    Change Charge    Save

Figure 13-12: Edit Operation to Change

- Press **[F5], Edit Instru**. The Repair/Alteration Instructions data entry form reappears. Edit the instructions and press **[F8], Save**.

Alteration Instructions:  
 add barrel mount  
 Esc Cancel    F8 Save

Figure 13-13: Alterations Instructions

- Press **[F6], Change Charge**. The Charge Amount input form displays. Key in the revised amount of the repair/alteration. Press **[ENTER]**.

Figure 13-14: Repair/Alteration Input Form

2. The Repair/Alteration data input form displays with the new operation instruction and/or the revised charges. The system updates the Total Charge field.

The information in the Alteration/Repair data entry form is printed on receipts and/or franked on preprinted ticket forms.

## Repair/Alteration Order Maintenance

Once a repair/alteration non-merchandise sale item is in the system, generate the modifications, including shipping and receiving dates, to the repair ticket's information through Repair/Alteration Functions on the Top of Menu of the Back Office Menu.

## Access the Repair/Alteration Functions

The Back Office functions require store employees to open the Menu screen which is where the Top of Menu is located. It is accessible from the Employee Selection screen.

Figure 13-15: Employee Selection Screen

1. Press **[F12]**, **Menu**. The color of the focus bar changes to blue.



Figure 13-16: Employee ID for Menu Focus Bar

2. Enter your employee id. The Password focus bar displays.



Figure 13-17: Password for Menu Focus Bar

3. Enter your password. The Top of Menu screen displays.



Figure 13-18: Top of Menu - Repair/Alteration Functions

4. Highlight Repair/Alteration Functions. Press **[ENTER]**. The Repair/Alteration Functions menu displays.

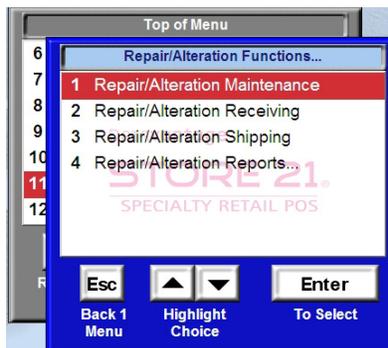


Figure 13-19: Repair/Alteration Functions Menu

## Repair/Alteration Maintenance

Modify repair/alteration ticket information such as the Alteration Type, Operation, Instructions, Promise Date, or Charge. The ticket information items that are available for modification are dependent upon the current status of the ticket (i.e. New, At Jeweler, Ready for Pickup, etc.). Access each ticket individually to modify the data.

Locate the Repair/Alteration ticket to modify either by searching through all tickets or by filtering the tickets for specific search criteria.

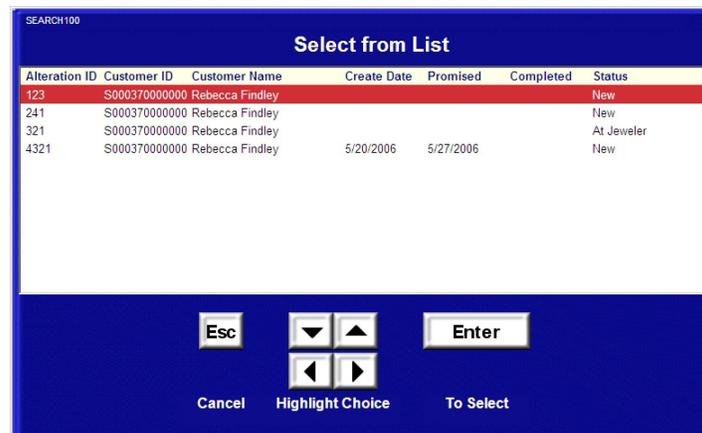
### List All Repair/Alteration Tickets

- From the Repair/Alteration Functions menu, highlight Repair/Alteration Maintenance. Press **[ENTER]**. The Alteration Search form displays.



Figure 13-20: Alteration Search

- Use the search form to show all Repair/Alteration Tickets. Put the cursor in the Ticket Number field and press **[F7]**, **List All**. The active repair/alteration list displays.



Alteration ID	Customer ID	Customer Name	Create Date	Promised	Completed	Status
123	S000370000000	Rebecca Findley				New
241	S000370000000	Rebecca Findley				New
321	S000370000000	Rebecca Findley				At Jeweler
4321	S000370000000	Rebecca Findley	5/20/2006	5/27/2006		New

Figure 13-21: Repair/Alteration List - All

- To make a selection, highlight the appropriate repair ticket and press **[ENTER]**.

## Search for Repair/Alteration by Ticket Number

1. Use the search form to find the appropriate repair/alteration record. Key in the ticket number, customer name, or promise date, or put the cursor in the Status or Follow-up Status fields and press **[F2]**, **Lookup**, to display the lookup lists.

Figure 13-22: Repair/Alteration Search

2. Press **[F8]**, **Execute Search**. The Alteration Type to Edit list displays.

Alteration ID	Order	Alteration Type
4321	1	Charge Charge

Figure 13-23: Alteration Type to Edit List

**Note:** A single Repair/Alteration ticket may have multiple types of alterations listed. Also, there can be multiple operations for each Alteration/Repair type.

3. The form lists all of the Alteration/Repair types on the selected ticket. Highlight the Alteration/Repair type to edit and press **[ENTER]**. The repair/alteration ticket information appears on the Repair/Alteration screen.

**Repair/Alteration** | 1 New Email-Go to Backoffice

Alteration ID: 4323      Sold By: 100  
 Total Charge: \$9.00      Complete Date:      Follow-Up Status: N  
 Customer: Joe Trainer      Pickup Date:      Received Date: 5/20/2006  
 Phone: ( ) -      Original Alteration Date:      Original Purchase:  
 Promise Date: 05/27/2006      Original Alteration Status:  
 Alteration Status: Ready to Pickup      Item ID:  
 Item Valuation:      Description: Sleeves too long  
 Alteration Vendor: 15890  
 Associated Tailoring

Alteration Type: Alteration CHARGE

Operation	Charge	Instructions
<input checked="" type="checkbox"/> Sleeves	\$9.00	Shorten sleeves 1"

Total      \$9.00

Cancel    Help    Print    Add Type    Delete Type    Add Op    Delete Op    Edit Date    Edit Instruc    Change Price    Register Price

Figure 13-24: Repair/Alteration Edit Screen

## Modify the Repair/Alteration Ticket Item

After locating the appropriate ticket to be modified, use the function buttons to make necessary changes to the ticket's information. Press the appropriate function key to edit the selected repair/alteration ticket item:

- Press **[F2], Print**, to print the item on the receipt printer.
- Press **[F3], Add Type**, to add another repair/alteration type to the ticket.
- Press **[F4], Delete Type**, to delete the line item from the ticket.
- Press **[F5], Add Op**, to add an operation to the item.
- Press **[F6], Delete Op**, to delete an operation from the item.
- Press **[F7], Edit Date**, to change the Promise Date.
- Press **[F8], Edit Instru**, to change the Alteration Instructions.
- Press **[F11], Change Price**, to change the price of the selected repair/alteration item.

## Add a Repair/Alteration Type

1. With the repair/alteration ticket information displayed on the Repair/Alteration Maintenance screen, press **[F3], Add Type**. The Repair/Alteration Type list appears.



Figure 13-25: Alteration Type to Add

**Note:** The Alteration Type and Operation list options are determined by the home office.

2. Highlight the appropriate Alteration Type and press **[ENTER]**. The Repair/Alteration Operation to Add list displays.



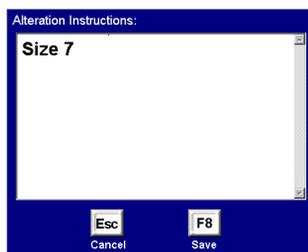
Figure 13-26: Alteration Operation to Add List

3. Highlight the appropriate Alteration Operation and press **[ENTER]**. A confirmation message prompt displays.



Figure 13-27: Alteration Operation Confirmation

- Press **[Y]**, **Yes**. The Alteration Instructions input form displays.



Alteration Instructions:

Size 7

Esc Cancel F8 Save

Figure 13-28: Alteration Instructions Input Form

- Key in the specific instructions and press **[F8]**, **Save**. Store21 adds the Repair/Alteration Type, updates the Total Charge field, and returns to the Repair/Alteration Maintenance screen
- Continue editing the Repair/Alteration ticket information or press **[ESC]** to save the ticket information and return to the Alteration Search form.

## Delete a Repair/Alteration Type

- With the repair/alteration ticket information displayed on the Repair/Alteration Maintenance screen, press **[F4]**, **Delete Type**. A confirmation prompt displays.



ALTR740

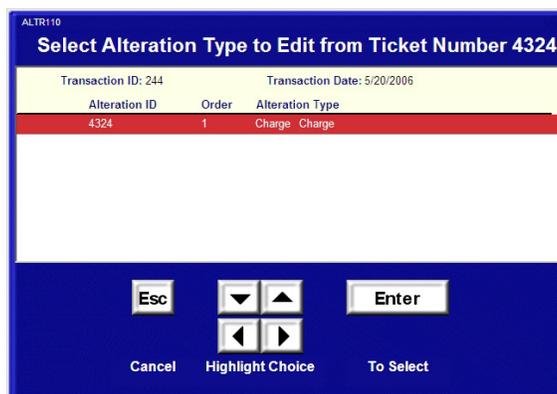
Are you sure that you want to Delete the current Repair type for this ticket?

Y N

Yes No

Figure 13-29: Repair/Alteration Delete Type Prompt

- Press **[Y]**, **Yes**. A list displays with all Alteration Types listed for the ticket.



ALTR110

Select Alteration Type to Edit from Ticket Number 4324

Transaction ID: 244 Transaction Date: 5/20/2006

Alteration ID	Order	Alteration Type
4324	1	Charge Charge

Esc Cancel Highlight Choice To Select Enter

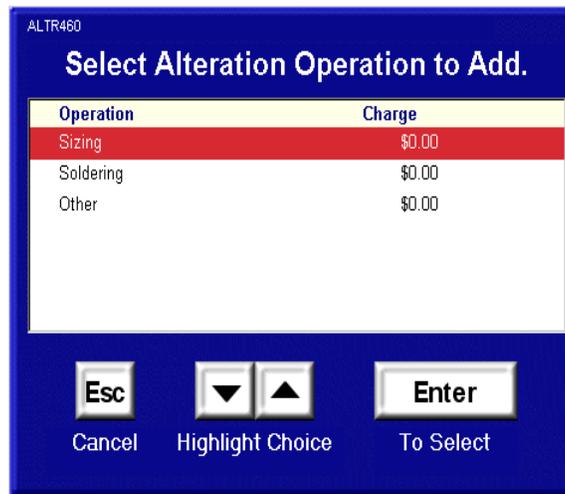
Figure 13-30: Alteration Type to Edit From Ticket List

3. Highlight the appropriate Alteration Type to delete. Press **[ENTER]**. Store21 deletes the Repair/Alteration Type and all associated Operations, updates the Total Charge field, and returns to the Repair/Alteration Maintenance screen.
4. Continue editing the Repair/Alteration ticket information, or press **[ESC]** to save the ticket information and return to the Alteration Search form.

## Add a Repair/Alteration Operation

Each Repair/Alteration Type on a repair/alteration ticket can have one or more Operations associated with it.

1. With the appropriate Repair/Alteration Type displayed on the Repair/Alteration Maintenance screen, press **[F5], Add Op.** The Alteration Operation to Add list displays.



Operation	Charge
Sizing	\$0.00
Soldering	\$0.00
Other	\$0.00

Figure 13-31: Alteration Operation to Add List

2. Highlight the appropriate operation and press **[ENTER]**. A confirmation message displays.



Figure 13-32: Operation Confirmation Message

- Press **[Y]**, **Yes**. The Alteration Instructions input form displays.

Figure 13-33: Alteration Instructions Input Box

- Key in the specific instructions and press **[F8]**, **Save**. Store21 adds the Repair/Alteration Type, updates the Total Charge field, and returns to the Repair/Alteration Maintenance screen.
- Continue editing the Repair/Alteration ticket information, or press **[ESC]** to save the ticket information and return to the Alteration Search form.

## Delete a Repair/Alteration Operation

Each Repair/Alteration Type on a repair/alteration ticket can have one or more Operations associated with it, and any of them can be deleted from the ticket.

- With the appropriate Repair/Alteration Type displayed on the Repair/Alteration Maintenance screen, press **[F6]**, **Delete Op**. The Alteration Operation to Delete list form displays.

Operation	Charge
Replace Stone	\$0.00
Replace Prong	\$0.00

Figure 13-34: Alteration Operation to Delete List

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**Note:** The operations listed are only those that are current selections for this ticket.

---

- Highlight the appropriate operation to delete and press **[ENTER]**. A confirmation prompt displays.



Figure 13-35: Operation Confirmation Message

- Press **[Y]**, **Yes**. Store21 deletes the Repair/Alteration Operation, updates the Total Charge field, and returns to the Repair/Alteration Maintenance screen.
- Press **[ESC]** to save the ticket information and return to the Alteration Search form.

## Change the Repair/Alteration Promise Date

- With the appropriate Repair/Alteration Type displayed on the Repair/Alteration Maintenance screen, press **[F7]**, **Edit Date**. The cursor moves to the Promise Date field, and the existing date is highlighted, and the name of the function buttons changes.

Alteration Maintenance	Martha Manager (100)	18
Alteration Id: 4321	Sold By: 100	
Total Charge: \$0.00	Complete Date:	Followup Status: N
Customer: Rebecca T Findley	Pickup Date:	Rcvd Date:
Phone: (216) 123-1234	Org Alteration Date:	Org Purch:
Promise Date: 12/15/2006	Org Alteration Status:	
Alteration Status: NEW	Sk#:	
Valuation: \$2,500.00	Description: White gold ring with diamond	
Alteration Assc:		

Figure 13-36: Repair/Alteration Maintenance Screen

- Key in a new date and press **[F8]**, **Save**.
- Press **[ESC]** to return to the Alteration Search form.

## Edit the Repair/Alteration Instructions

- With the appropriate Repair/Alteration Type displayed on the Repair/Alteration Maintenance screen, press **[F8]**, **Edit Instru**. The Alteration Instructions list displays.

Alteration Instructions:

Size 7

Esc  
Cancel
F8  
Save

Figure 13-37: Alteration Instructions Input Box

2. Key in the instructions and press **[F8]**, **Save**. The system returns to the Repair Maintenance screen and shows the new instructions or press **[ESC]** to return to the Alteration Search form.

## Change the Repair/Alteration Type Price

1. With the appropriate Repair/Alteration Type displayed on the Repair/Alteration Maintenance screen, highlight the appropriate operation to change the price. Press **[F11]**, **Change Price**. The Charge Amount input form displays.



Figure 13-38: Alteration Charge Amount Input Form

2. Key in the new amount and press **[ENTER]**. The system returns to the Repair Maintenance screen, shows the new price for the Operation, and updates the Total Charge for the ticket.

## Ship Repair/Alteration Items

All out-of-store repair/alteration sale items are to be shipped to the appropriate vendor for repair or alteration. Shipping a ticket item changes the status of the repair/alteration status to 'At Jeweler' (or at the Alteration/Repair vendor). Process one or more items to be shipped in the same Back Office Menu session.

**See also:** ["Access the Repair/Alteration Functions" on page 243](#)

1. From the Repair/Alteration Functions menu, highlight Repair/Alteration Shipping and press **[ENTER]**.

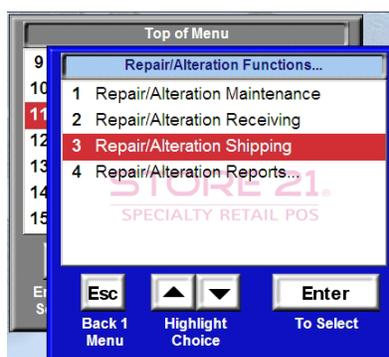
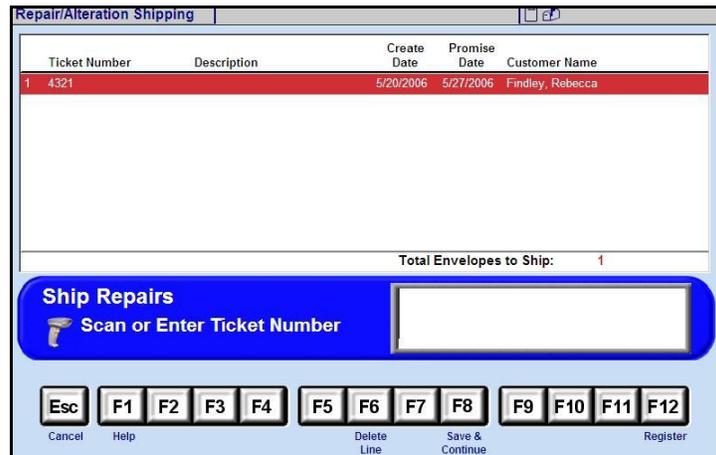


Figure 13-39: Repair/Alteration Functions Menu

- The Repair/Alteration Shipping screen displays, and the focus bar prompts for the ticket number.



Ticket Number	Description	Create Date	Promise Date	Customer Name	
1	4321		5/20/2006	5/27/2006	Findley, Rebecca

Total Envelopes to Ship: 1

Ship Repairs  
Scan or Enter Ticket Number

Esc Cancel F1 Help F2 F3 F4 F5 Delete Line F6 F7 F8 Save & Continue F9 F10 F11 F12 Register

Figure 13-40: Repair/Alteration Shipping Screen

- Scan the ticket number, or key in the ticket number and press **[ENTER]**. The item to be shipped to a vendor appears on the screen. The focus bar is ready to accept another ticket number to be shipped.
- Repeat Step 3 until all of the Repair/Alteration tickets to be shipped are entered. To change a line, press **[F6], Delete Line**, (line items cannot be changed - they must be deleted and re-entered) and re-select the line.
- When all tickets are entered, press **[F8], Save & Continue**. A confirmation prompt displays with the number of tickets shown.



ALTR180

You have entered 1 tickets.  
Do you want to continue?

Y N  
Yes No

Figure 13-41: Repair/Alteration Shipping Confirmation Message

- Press **[Y], Yes**. The Shipping Information data entry form displays once for each ticket.

7. Populate the required fields, pressing **[ENTER]** to move from one field to the next.

Figure 13-42: Shipping Data Entry

8. With the cursor in the Repair Shop ID field, press **[F2], Lookup**. The Vendor lookup list displays.
9. Highlight the appropriate Vendor Name and press **[ENTER]**. The Vendor ID number appears in the Repair Shop ID field of the Shipping Info form.
10. The Ship Date field contains a default date. Edit the date, if necessary.
11. With the cursor in the Ship Via field, press **[F2], Lookup**. The Shipping lookup list displays.
12. Highlight the appropriate shipping method and press **[ENTER]**. The shipping method appears in the Shipping Via field of the Shipping Info form.
13. Key in the appropriate information into the Ship Track (tracking ID) and Ship Instructions fields.

Figure 13-43: Repair/Alterations Shipping Document Information Form

14. Press **[F8], Save**. A receipt prints, and the next Shipping Info data entry form displays, if applicable. Repeat these steps for each ticket.
15. When all shipping tickets are entered and saved, the system returns to the Repair/Alteration Functions menu.

## Receive a Repair/Alteration Item

All Repair/Alteration items set up as out-of-store repair/alterations and shipped out must be 'received' so there is a tracking record of movement. The process also aids in monitoring the status of open repair/alteration tickets. Repair/Alteration ticket items with the status "At Jeweler" (or at the Alteration/Repair vendor) can be received, and the status will change to 'Ready\_to\_Pickup'. Process one or more items to be received in the same Back Office Menu session.

**See also:** ["Access the Repair/Alteration Functions" on page 243](#)

1. From the Repair/Alteration Functions menu, highlight Repair/Alteration Receiving and press **[ENTER]**.

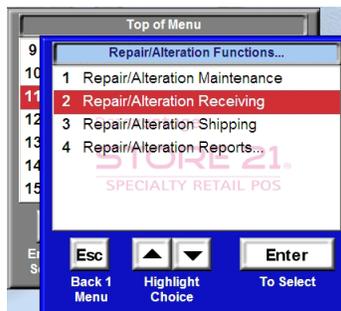


Figure 13-44: Repair/Alteration Functions Menu

2. The Repair/Alteration Receiving screen displays, and the focus bar prompts for the ticket number.

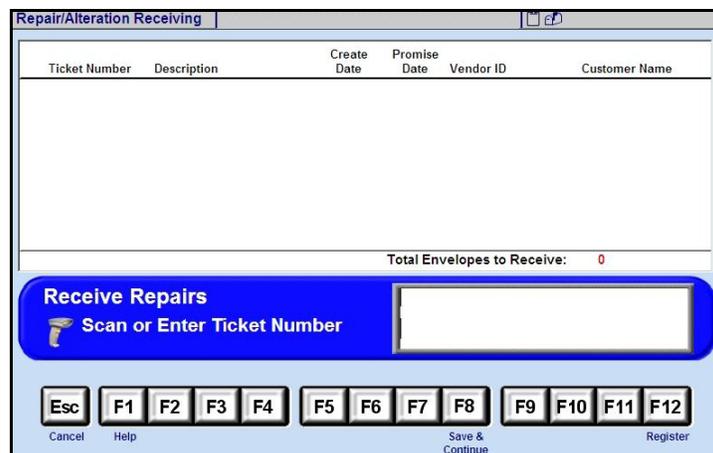


Figure 13-45: Repair/Alteration Receiving Screen

3. Scan the ticket number, or key in the ticket number and press **[ENTER]**. The item to be received from a vendor appears on the screen. The focus bar is ready to accept another ticket number to be received.
4. Repeat step 3 until all of the Repair/Alteration tickets to be received are entered. To change a line, press **[F6]**, **Delete Line**, to delete it.

- When all tickets are entered, press **[F8], Save & Continue**. A confirmation message displays with the number of tickets shown.



Figure 13-46: Repair/Alteration Receiving Confirmation Message Box

- Press **[Y], Yes**. Store21 returns to the Repair/Alteration Functions menu.

## Process a Pick Up Repair/Alteration Item

Once a Repair/Alteration ticket item is received, an employee can process the pick up for a customer from the Register screen either as a separate sale or in a sale transaction with other items.

- Begin a basic sale transaction, and assign a customer to the sale. See ["The Basic Transaction" on page 38](#) and/or see ["Access the Customer Search Form" on page 184](#).

#	Type	Item ID	Description	Qty	Price Tax	Amount Due
1		102	14K Amethyst Ring	1	189.99 R	189.99

Rebecca Findley Item Count 1

Sale \$189.99 Tax \$11.40 Total \$201.39

**Sale** Press Enter to tender

**Scan or Key Item**

[Esc] [F1] [F2] [F3] [F4] [F5] [F6] [F7] [F8] [F9] [F10] [F11] [F12]  
 Cancel Help Layaway Send Return Add Change Balance Non Item Cust Suspend Menu  
 Sale Sale Sale Sale Disc Line Inq Mdse Search Maint

Figure 13-47: Register Screen with Customer's Name

- Press **[F8], Non Mdse**.

- The Non-Merchandise list appears.



Figure 13-48: Non-Merchandise List

---

**Note:** The home office defines the non-merchandise selections.

---

- Open the Non-Merchandise list.
- Highlight **Repair/Alteration Pickup** and press **[ENTER]**. An input form appears.



Figure 13-49: Alteration Ticket Input

- Enter the ticket number:
  - Key in the Repair/Alteration Ticket number and press **[ENTER]** or scan the ticket's bar code.

- Press **[F2]**, **List All**, to display the Alteration Pickup lookup list to show all ticket numbers marked as 'Ready\_to\_Pickup' that are for the customer who is assigned to this sale. Highlight the appropriate item and press **[ENTER]**.



Figure 13-50: Alteration Ticket Pickup List

- The system returns to the Register screen, with the description Repair/Alteration Pickup item listed on the screen.



Figure 13-51: Register Screen with Repair/Alteration Pickup

- Continue to enter items or tender the sale. See ["Basic Tender Process - Tender Mode" on page 136](#).



# CHAPTER 14

## Miscellaneous Register Functions

### Overview

There are several basic register functions that a cashier is often called upon to perform during normal daily activities, but are not specifically related to a certain type of transaction. These basic functions include:

- Access the Menu Screen
- Price Verify
- Suspend Transaction
- Resume Transaction
- Cancel a Sale
- Gift Card Balance Inquiry
- Print Gift Receipt
- Reprint Transaction Receipt
- Calculator
- Change Employee Password

### Price Verify

Simple price verification can be processed when the function key **[F8]**, **Price Verify**, is visible - from the Employee Selection screen or from the Menu screen.

1. Go to the Employee Selection screen.



Figure 14-1: Employee Selection Screen

2. Press **[F8]**, **Price Verify**. The Price Verification screen with input box displays. Scan, or key in the Item's ID, Style ID, or Bar Code then press **[ENTER]**.



Figure 14-2: Price Verification Item List



Store employees can process Price Verifications from any open register.

3. The item number, description, and price are listed for all items that match the inquiry.
4. Press **[ESC]** to return to the previous screen.
5. If Store21 cannot identify the item entered, an error message displays.



Figure 14-3: Price Verification Error Message

6. Press **[ENTER]**, **To Continue**. The Price Verification input box is ready for the next item.

## Suspend Transaction

Suspending a transaction allows you to put it on hold while a customer selects another item or browses the store a little while longer.

1. From the Register screen with a sale in progress, press **[F11]**, **Suspend**, to suspend the current sales transaction.

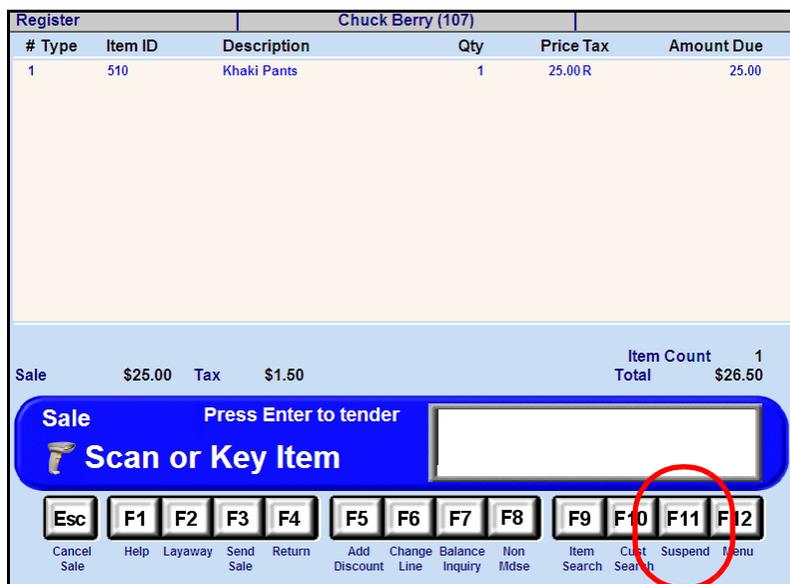


Figure 14-4: Register Screen

2. A confirmation prompt displays.



Figure 14-5: Suspend Transaction Message

- a. Press **[N]**, **No**, to cancel the action.
- b. Press **[Y]**, **Yes**, to continue.

3. The system returns to the Register screen.

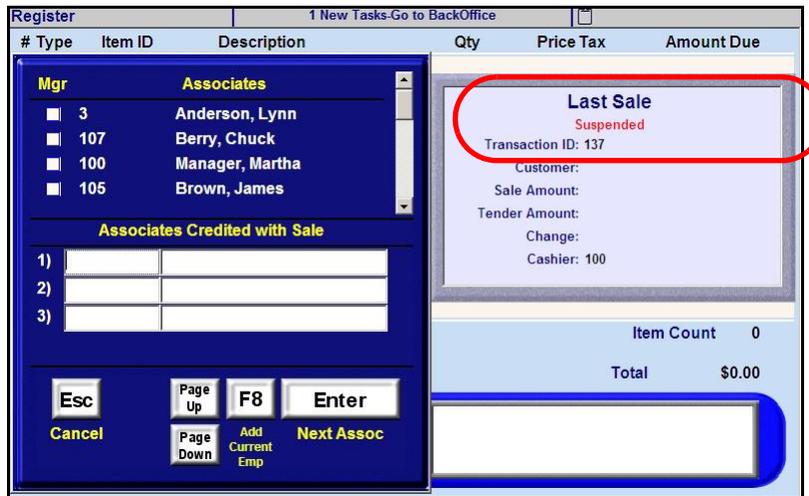


Figure 14-6: Register Screen - Last Sale Suspended

The Last Sale shows the suspended sale, and the register is ready to begin the next transaction. The Last Sale remains on the Register screen until you ring another transaction. Continue ringing transactions until the customer is ready to complete the suspended transaction.

#### Notes:

- You can suspend a transaction at any time prior to entering a tender.
- Multiple transactions can be suspended.
- During Closing, a message prompts you to cancel remaining suspended transactions since they are incomplete.

## Resume Suspended Transaction

Resume a suspended transaction when the customer returns to complete the suspended sale. Begin the transaction as though it were a new sale.

**Note:** If one or more suspended transactions exists, the name of the [F11] function key on the Register screen changes from **Suspend** to **Resume**.

1. Navigate to the Register screen for a new transaction.

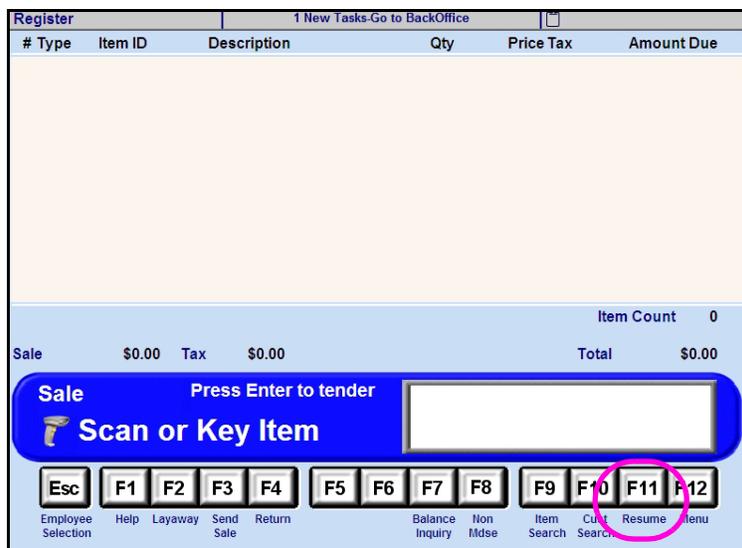


Figure 14-7: Register Screen

2. Press [F11], **Resume**. The Choose Transaction to Resume list displays.



Figure 14-8: List of Suspended Transactions

3. Highlight the appropriate transaction. Press **[ENTER]**. The Register screen displays the transaction that was suspended.

The screenshot shows the Register screen with the following data:

#	Type	Item ID	Description	Qty	Price Tax	Amount Due
1		201	NVY Oscar Blazer	1	198.95 R	198.95

Summary information:

Sale	\$198.95	Tax	\$11.94	Total	\$210.89	
					Item Count	1

Buttons and labels at the bottom:

- Esc: Cancel Sale
- F1: Help
- F2: Layaway
- F3: Send Sale
- F4: Return
- F5: Add Discount
- F6: Change Line
- F7: Balance Inquiry
- F8: Item Mdse
- F9: Item Search
- F10: Cust Search
- F11: Suspend
- F12: Menu

Figure 14-9: Resumed Transaction

4. Scan or key the next item into the focus bar or press **[ENTER]** to tender the sale.

## Cancel a Sale

Cancel a sale in progress at any time, prior to confirming the completion of the sale.

1. Navigate to the Register screen with a sale in progress.

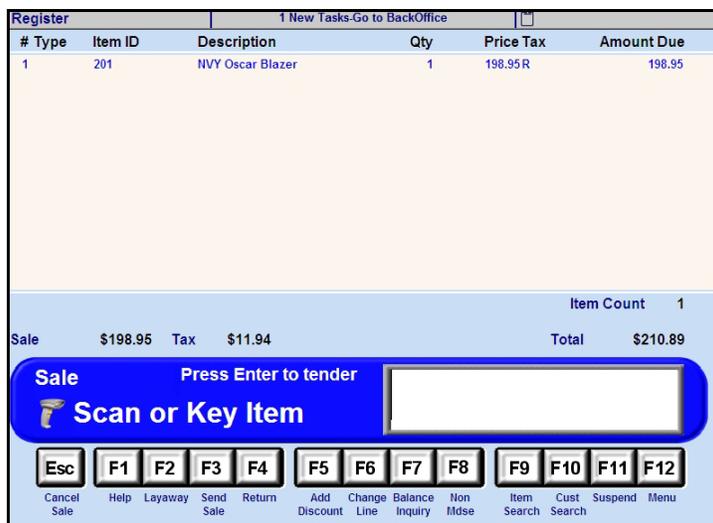


Figure 14-10: Register Screen with Sale in Progress

2. Press **[ESC]**, **Cancel Sale**. A message prompt displays to confirm the cancellation.



Figure 14-11: Cancel Sale Confirmation Message Box

- a. Press **[Y]**, **Yes**. The system returns to the Register screen, and is ready to ring a new sale.
- b. Press **[N]**, **No**, to return to the sale in progress.

## Gift Card Balance Inquiry

A gift card balance inquire can be performed at any time during a sales transaction from the Register screen.



Figure 14-12: Register Screen

1. From the Register screen, press **[F7]**, **Balance Inquiry**.
  - a. If the security level of the employee who is requesting the Balance Inquiry is less than the security level assigned to this function, the System Security will prompt for an employee with the appropriate security level to key in his/her employee ID and password to continue.



Figure 14-13: System Security Prompt

- b. Key in the employee ID, password and press **[ENTER]**.

- An input box displays for the gift card number.



Figure 14-14: Gift Card Input Box

- Swipe the gift card through the card reader, scan the barcode, or key the gift card number at the keyboard and press **[ENTER]**. It is not necessary to press **[ENTER]** if the card is swiped.
  - If an attempt is made to swipe the card, and the card reader fails to recognize it, an error message displays. Press **[ENTER]** to continue.



Figure 14-15: Gift Card Swipe Error

- If an attempt is made to key the card's barcode number, and the system fails to recognize it, an error message displays. Press **[ENTER]** to continue.



Figure 14-16: Gift Card Account Number Error

- After responding to the error message, the Gift Card input box reappears.
- Reattempt to enter the gift card information or press **[ESC]** to cancel the Balance Inquiry function and return to the previous screen.



Figure 14-17: Gift Card Input Box

4. Store21 submits the request to the outside authorization service provider for the balance on the card.



Figure 14-18: Authorization in Process

5. Store21 receives a response from the authorization service.
  - a. If the Gift Card has available funds, the following message displays.



Figure 14-19: Gift Card Balance Inquiry Message

- b. If the Gift Card no longer has available funds, a message similar to the following displays.



Figure 14-20: Gift Card Balance Inquiry Message

6. Press **[ENTER], To Continue**. A Balance Inquiry receipt prints with the available amount shown.

## Print Gift Receipt

The print gift receipt function allows the employee to print one or more gift receipts at the completion of a sale transaction or at a later time. Each item selected will have a separate receipt.

1. To print the gift receipt after the conclusion of the sale transaction, navigate to the Menu screen, Top of Menu.



Figure 14-21: Top of Menu

2. Highlight **Administrative** and press **[ENTER]**.
3. The Administrative menu displays.

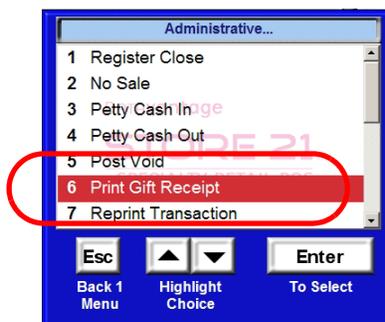


Figure 14-22: Gift Receipt Option of Administrative Menu

4. Highlight **Print Gift Receipt**. An input box displays.



Figure 14-23: Transaction ID for Gift Receipt Input Box

5. By default, the number that appears in the input box is the transaction number from the most recent sale transaction.

6. Press **[ENTER]** to accept the default transaction number , key in the transaction number (see the cash register receipt already printed) and press **[ENTER]**.
7. The Gift Receipt screen displays, listing all of the items from the transaction.

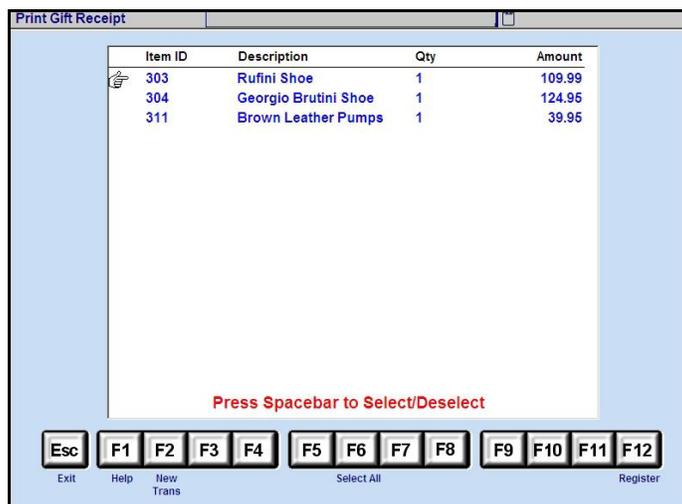


Figure 14-24: Print Gift Receipt Screen

8. Use the up/down arrow keys on the keyboard to select one or more items, pressing the spacebar to highlight each of them; or press **[F6], Select All**, to select all items.
9. Press **[F7], Print**, to print the items on individual gift receipts.
10. The system displays only the remaining items on that receipt that are eligible for a gift receipt. This completes this printing activity.

#### Notes:

- Only items eligible for gift receipts appear on the list.
  - Only highlighted items print on gift receipts.
  - Only one gift receipt will print for each item of the transaction.
11. Continue printing gift receipts or exit this function.
    - a. Press **[ESC], Exit**, to return to the Menu screen.
    - b. Press **[F2], New Trans**, to enter another transaction number for additional gift receipts.
    - c. Press **[F12], Register**, to toggle to the Register screen.

## Reprint Transaction Receipt

A sale transaction receipt can be reprinted. All of the items from the original sale transaction are included on the reprint, and the word "Reprint" prints on the new copy.

1. Navigate to the Menu screen, Top of Menu.



Figure 14-25: Top of Menu

2. Highlight **Administrative** and press **[ENTER]**. The Administrative menu displays.

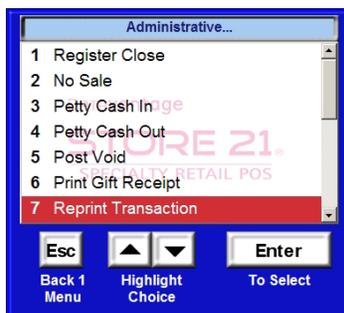


Figure 14-26: Reprint Transaction Option of Administrative Menu

3. Highlight **Reprint Transaction** and press **[ENTER]**. An input box displays.



Figure 14-27: Transaction ID for Gift Receipt Input Box

4. Key in the transaction number and press **[ENTER]**. The transaction information displays.

Type	Description	Item List	Amount Due
	Rufini Shoe		109.99
	Georgio Brutini Shoe		124.95
	Brown Leather Pumps		39.95

Register	1	Date	5/18/2006
Cashier	100	Time	8:37:11 AM
Transaction	140	Store	37
Customer			
Sales Associates	100		

Tender Type	Tender Items	Amount
Taxable Amount		274.89
Non Taxable Amount		0.00
Sales Tax		16.49
Total		291.38
Cash		291.38

**Balance Due** \$0.00

Figure 14-28: Reprint Transaction Screen

5. Press **[F7]**, **Print**, to print the receipt. This completes this reprint activity.
6. Continue reprinting receipts or exit this function.
- a. Press **[ESC]**, **Exit**, to return to the Menu screen.
  - b. Press **[F2]**, **New Trans**, to enter other transaction numbers for additional reprints.

## Calculator

The Store21 Calculator is available from any screen location at all registers. The Employee Selection screen is used for this example. This is a four-function calculator: add, subtract, multiply, and divide.

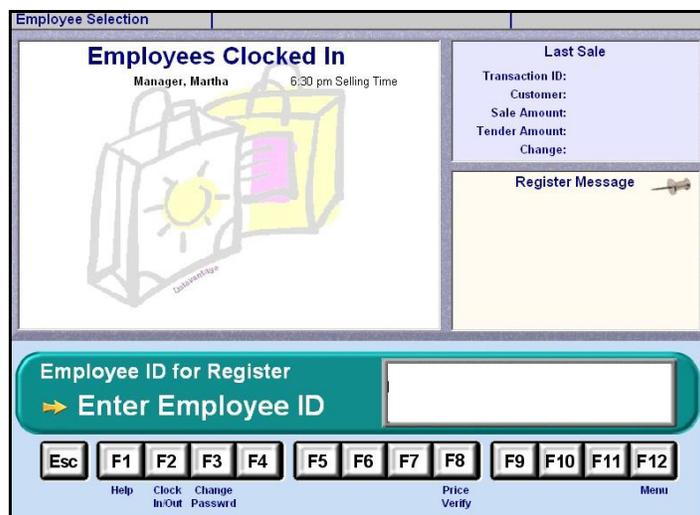


Figure 14-29: Employee Selection Screen

1. From the Employee Selection screen, press **[ALT]+[F12]**. The Store21 Calculator displays.
2. Press **[Num Lock]** to put the keypad in numeric mode.



Figure 14-30: Store21 Calculator

3. Key in the numbers then the functions from the register's keypad.
4. Press **[ENTER]** to display the total.
5. Press **[ESC], Done**, to return to the previous screen.

## Change Employee Password

Employees have the ability to change their own passwords at any time while the system is open, using one of three methods:

- In response to the prompts from the clock-in procedure for expiring or expired passwords.
- Upon demand through the Back Office menus.
- Upon demand at any time by pressing **[F3]**, **Change Password**, function from the Employee Selection screen.

1. Go to the Employee Selection screen.



Figure 14-31: Employee Selection Screen

2. Press **[F3]**, **Change Password**. The focus bar turns purple and prompts for the employee ID.



Figure 14-32: Focus Bar Change Password Enter Employee ID



*The system and corporate passwords cannot be assigned or changed.*

3. Key in the ID and press **[ENTER]**.

- The system prompts for the old password.

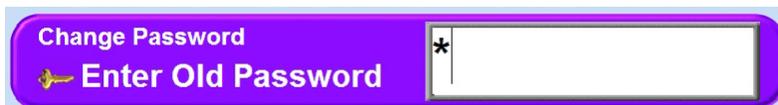


Figure 14-33: Focus Bar Enter Old Password

- Key in the old password and press **[ENTER]**. The system prompts for the new password.



Figure 14-34: Focus Bar Enter New Password

- Key in the new password and press **[ENTER]**.

---

**Notes:** Passwords are case-sensitive and must conform to the password security rules established by the home office. They may be restricted by some or all of the following requirements:

- Contain a minimum of characters
  - Contain a set quantity of letters and/or numbers
  - A password may not be reused (for a specific number of password changes) by the same employee.
- 
- If the new password does not conform to the required format, a message displays with a description of the acceptable password criteria.



Figure 14-35: New Password Invalid Message

- 1) Press **[ENTER]**, **To Continue**.
- 2) Store21 displays the password-creation prompts on the focus bar ([Figure 14-32](#)). Follow the prompts to create the password.

- If the system accepts the new password, the focus bar prompts to reenter the new password for verification.



Figure 14-36: Focus Bar Reenter New Password

- Re-key the new password and press **[ENTER]**. The new password is saved in an encrypted format.
- The system displays a password confirmation message.



Figure 14-37: Password Assigned Confirmation

- Press **[ENTER], To Continue**. The system returns to the screen that invoked the password change.

---

#### Notes:

- Employees must know their current password to change it. The system displays an error message if the password entered in Step 4 is incorrect.
  - Store21 saves employees' passwords in an encrypted format. The store manager, therefore, cannot retrieve the employees' passwords from the system.
  - If the employee does not know his/her password, he/she must contact the store manager or the Help Desk.
-

# CHAPTER 15

## *Register Close*

### Overview

At the end of the day, registers should be closed so that tills can be counted and reconciled. This requires cashiers to properly close their registers and exit the system.

This chapter covers these topics:

- End Count and Remove the Cash Drawer
- Clock Out

---

**Note:** Store21 has the capability of presenting the tenders on the counting screens in two different ways: by denominations or by slip count, but not both. When slip counting is being used, only the total amount of the tender type is to be entered - not individually by line item. The instructions in this chapter define behavior for counting by denominations which requires the most information to be entered. The home office determines which method is to be used.

---

## End Count and Remove the Cash Drawer

The cash drawer needs to be End Counted before it can be closed and removed from the register. This can occur at any time during the business day. However, once the drawer has been removed, the system will allow only non-tender functionality on the register. The system will not allow the register to reopen with a new drawer to ring sale/return transactions. The system will need to be shut down for the current business day before a new cash drawer can be attached.

1. From the Back Office Top of Menu, highlight **Cash Drawer Management...** and press <Bold>[ENTER]<Bold>. The Cash Drawer Management menu displays.



Figure 15-1: Cash Drawer Management Menu

2. Highlight **Count Cash Drawer**. Press [ENTER]. Store21 calculates the expected cash totals.
3. If cash pickups were conducted during the day, Store21 deducts the total picked up from the expected total, so it is not necessary to add the amount of the Cash Pickup Slip to the actual cash count. Store21 displays a message to advise the cashier of the pickup.

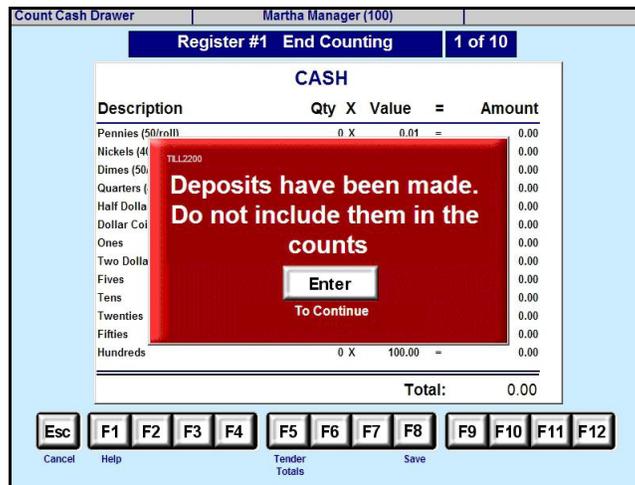


Figure 15-2: Cash Pickup Made Message

**Note:** The tenders accepted and counted are based on company policy and configured by the home office. This includes currency types (i.e. foreign currency, credit cards, checks, etc.) and cash denominations.

4. Press **[ENTER]**, **To Continue**. The first End Counting screen displays.

Description	Qty X Value	=	Amount
Pennies (50/roll)	0 X 0.01	=	0.00
Nickels (40/roll)	0 X 0.05	=	0.00
Dimes (50/roll)	0 X 0.10	=	0.00
Quarters (40/roll)	0 X 0.25	=	0.00
Half Dollars	0 X 0.50	=	0.00
Dollar Coin	0 X 1.00	=	0.00
Ones	0 X 1.00	=	0.00
Two Dollar	0 X 2.00	=	0.00
Fives	0 X 5.00	=	0.00
Tens	0 X 10.00	=	0.00
Twenties	0 X 20.00	=	0.00
Fifties	0 X 50.00	=	0.00
Hundreds	0 X 100.00	=	0.00
<b>Total:</b>			0.00

Figure 15-3: End Counting Screen

5. Key in the quantities, not the dollar amounts, of the appropriate cash denominations, pressing **<Bold>[ENTER]<Bold>** to move between the rows. Press **[F8]**, **Save**, to save the count. The next cash drawer End Counting screen (ex: Canadian cash) displays.

Description	Qty X VALUE	=	Amount
Pennies (50/roll)	0 X 0.01	=	0.00
Nickels (40/roll)	0 X 0.05	=	0.00
Dimes (50/roll)	0 X 0.10	=	0.00
Quarters (40/roll)	0 X 0.25	=	0.00
Loonies	7 X 1.00	=	7.00
Toonies	0 X 2.00	=	0.00
Fives	0 X 5.00	=	0.00
Tens	9 X 10.00	=	90.00
Twenties	0 X 20.00	=	0.00
Fifties	0 X 50.00	=	0.00
Hundreds	0 X 100.00	=	0.00
Thousands	0 X 1,000.00	=	0.00
<b>TOTAL:</b>			97.09

Figure 15-4: End Counting Screen Canadian Cash

6. Key in the quantities, not the dollar amounts, of the appropriate cash denominations, pressing **[ENTER]** to move between the fields.
- Press **[F8]**, **Save**, to save the count.
  - Repeat this step for each type of currency screen that displays. The End Counting screen Credit Card displays.

**Note:** The credit card types are configured by the home office.

Register #1 End Counting		5 of 11
<b>CREDIT CARD</b>		
Description	Amount	
Credit Card	1055.00	
Debit Card	0.00	
Private Label	0.00	

Figure 15-5: Counting Screen Credit Card

7. Key in the total amount of each credit card type, pressing **[ENTER]** to move between the rows.
  - a. Press **[F8]**, **Save**, to save the count.
  - b. The next End Counting screen (ex: Checks) displays.



Pressing **[F5]**, **Tender Totals**, from the Check count screen will return you to the End Count Totals Screen.

Register #1 End Counting		6 of 11
<b>CHECK</b>		
<b>TOTAL:</b>		875.00
	Amount	Sequence Number
1	875.00	123

Figure 15-6: Counting Screen Checks

8. Enter checks individually. Locate the first check and key in the check amount then press **[ENTER]**. The cursor moves to the sequence number field.

Register #1 End Counting		6 of 11
<b>CHECK</b>		
<b>TOTAL:</b>		875.00
	Amount	Sequence Number
1	875.00	

Figure 15-7: Counting Screen Checks

- a. Key in the sequence number of the first check. Press **[ENTER]**. The Total field is calculated, and the system prompts for the second check amount.

Register #1 End Counting		6 of 11
<b>CHECK</b>		
<b>TOTAL:</b>		875.00
	<b>Amount</b>	<b>Sequence Number</b>
1	875.00	123
2	<input type="text"/>	

Figure 15-8: Counting Screen Checks

- b. Continue entering check amounts and sequence numbers until all of the checks are entered.
- c. To delete a row of check information, highlight it and press **[F6]**, **Delete Row**. The row is removed.
- d. Press **[F8]**, **Save**, to save the count. The next End Counting screen (ex: Non-Currency) displays.

Register #1 End Counting		7 of 11
<b>NON-CURRENCY</b>		
<b>DESCRIPTION</b>	<b>AMOUNT</b>	
Mall Certificate	0.00	
Store Credit	<input type="text" value="5014.00"/>	
Coupon Amt	0.00	
Issue Store Credit	0.00	
Coupon Pct	0.00	
Gift Certificate	0.00	
<b>Total:</b>		0.00

Figure 15-9: Counting Screen Non-Currency

9. Key in the non-currency dollar amounts, pressing <Bold>[ENTER]<Bold> to move between the rows. Press **[F8]**, **Save**, to save the amounts. The next End Counting screen (ex: Traveler Checks, US) displays.

Register #1 End Counting		8 of 11	
TRAVELCHECK			
DESCRIPTION	QTY X	VALUE =	AMOUNT
Tens	0 X	10.00 =	0.00
Twenties	0 X	20.00 =	0.00
Fifties	0 X	50.00 =	0.00
Hundreds	<input type="text" value="1"/> X	100.00 =	100.00
<b>Total:</b>			100.00

Figure 15-10: End Counting Traveler Checks US

10. Key in the total quantity of each denomination of the travelers checks. Press **[F8]**, **Save**, to save the count. The next End Counting screen (ex: Traveler Checks, Canadian) displays.

Register #1 End Counting		9 of 11	
CAD-CANADIAN TRAVELCHECK			
DESCRIPTION	AMOUNT		
Travelers Check	<input type="text" value=""/>		
<b>Total:</b>			0.00

Figure 15-11: End Counting Traveler Checks Canadian

11. Key in the total foreign currency dollar amount, pressing <Bold>[ENTER]<Bold> to move between the rows.
  - a. Press **[F8]**, **Save**, to save the amount.
  - b. Press **[F8]** again and repeat step 10 for each set of foreign Travelers Checks, if applicable.
12. Press **[F5]**, **Tender Totals**. The End Counting Totals screen displays. The system displays the entered amount (Declared Amt) and the system-generated amount (System Drawer Totals) for each currency type. The last column displays the Over/Short amount which is the difference between the amounts Store21 tracked and the counts you just entered.

**Note:** If foreign currencies are accepted as tender, the exchange rates are set and updated by the home office.

Register #1 End Counting				Totals	
Count Group	Foreign Amt	Exchange Rate	Declared Amt	System Drawer Totals	Over/ (Short)
Cash			855.00	855.50	-0.50
CAD Cash	97.09	1.54500	62.84	97.09	-34.25
EUR Cash	0.00	1.10000	0.00	0.00	0.00
YEN Cash	0.00	119.900	0.00	0.00	0.00
Credit Card			1,055.00	1,055.00	0.00
Check			875.00	875.00	0.00
Non-Currency			5,014.00	5,014.00	0.00
TravelCheck			100.00	100.00	0.00
CAD TravelCheck	0.00	1.54500	0.00	0.00	0.00
EUR TravelCheck	0.00	1.10000	0.00	0.00	0.00
YEN TravelCheck	0.00	119.900	0.00	0.00	0.00
<b>Total</b>			<b>7,961.84</b>	<b>7,996.59</b>	<b>-34.75</b>

Esc	F1	F2	F3	F4	F5	F6	F7	F8	F9	F10	F11	F12
Cancel	Help			Edit Counts				Save				

Figure 15-12: End Count Tender Totals

**Note:** If you need to correct a tender count, highlight it and press **[F7], Edit Counts**. The system returns to the appropriate tender data entry form. Key in the correct information. Press **[F8], Save**, to save the data. Press **[F5], Tender Totals**, to return to the End Counting Totals screen.

13. When each tender's entered amounts are correct, press **[F8], Save**, to save the tender entries.
  - a. If any tender total has an Over/Short amount that is not '0.00', an Over/Short incidence occurs. See ["Over/Short Amount" on page 288](#) for information.
  - b. The Default Starting Cash input form displays.

**Note:** The home office sets the default amount for the Next Open. If the amount of cash in the drawer is not more than or equal to the default starting cash amount, the system displays the actual amount of cash in the drawer. The amount entered becomes the next business day's Expected Amount.



Figure 15-13: System Default Starting Cash

14. Respond to the prompt.
- Press **[ESC], Cancel**, to return to the End Counting Totals screen.
  - Accept the default starting cash amount or key in the correct amount. Press **[ENTER], To Continue**. The deposit amounts confirmation prompt displays.

**Note:** The amount entered in the starting cash field cannot be more than the amount in the cash drawer. The system at the next close will, if available, move the starting cash amount back up to the default starting cash amount.

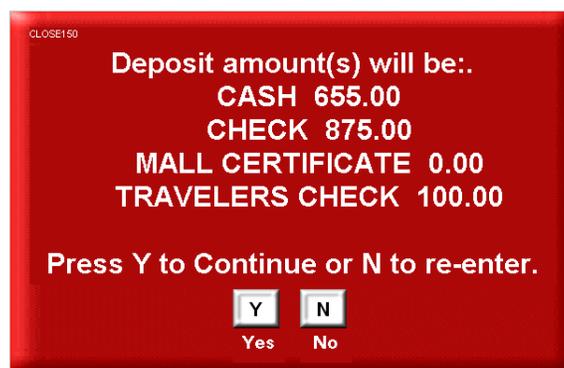


Figure 15-14: Cash Drawer Deposit Amounts Message

**Note:** The listed deposit amounts are for the current cash drawer only.

15. Respond to the prompt.
  - a. Press **[N]**, **No**, to return to the End Counting Totals screen to re-enter the tenders.
  - a. Press **[Y]**, **Yes**, to continue. The Deposit Slip receipt and the Cash Drawer Reconciliation receipt print. The Count Complete message displays.



Figure 15-15: Register Counting Complete

16. Press **[ENTER]** to continue. The Cash Drawer Management menu displays again.



Figure 15-16: Count Cash Drawer Menu Screen

17. Press **[ESC]** to return to the Top of Menu. The cash drawer is now end-counted for this register, and the register can be closed.



*Registers that have been End-Counted for the day cannot be re-opened with a new cash drawer until the store has been closed for the day.*

## End Count Error

If you try to ring a transaction or perform a count a register drawer that has already been End-Counted for the day, the system will display the following error message.



Figure 15-17: End Count Error Message

Press **[ENTER]** and attempt the transaction or end count on a different register.

## Over/Short Amount

The Over/Short amount displays on the End Counting Totals screen after the user presses **[F5]**, **Tender Totals** from the End Counting tender screen (Figure 15-3). The Over/Short amount represents the difference between what Store21 tracked and the tender counts entered during the end counting of the cash drawer. The home office may require additional information regarding the reason for the variance.

Count Cash Drawer		Martha Manager (100)			
Register #1 End Counting			Totals		
Count Group	Foreign Amount	Exchange Rate	Declared Amount	System Drawer Totals	Over/ (Short)
Cash			0.00	201.55	(201.55)
CAD Cash	0.00	1.54500	0.00	0.00	0.00
EUR Cash	0.00	1.10000	0.00	0.00	0.00
Credit Card			0.00	227.18	(227.18)
Check			0.00	42.35	(42.35)
Non-Currency			0.00	25.00	(25.00)
TravelCheck			0.00	40.00	(40.00)
CAD TravelCheck	0.00	1.54500	0.00	0.00	0.00
EUR TravelCheck	0.00	1.10000	0.00	0.00	0.00
			0.00	0.00	0.00
<b>Total</b>			<b>0.00</b>	<b>536.08</b>	<b>(536.08)</b>

Esc	F1	F2	F3	F4	F5	F6	F7	F8	F9	F10	F11	F12
Cancel	Help				Edit Counts			Save				

Figure 15-18: Over/Short Amounts

1. If the entered amounts are correct, press **[F8]**, **Save**, to save the tender entries.

2. If the Over/Short amount for a tender type and/or the Total amount is not '0.00', the Reason Code list displays. This list provides the ability to classify Over/Short reasons. The actual list of reasons may vary.



Figure 15-19: Over/Short Reason Codes

3. Select the appropriate Over/Short reason and press **[ENTER]**. Depending upon which reason code was selected, a Comments form may display.



Figure 15-20: Over/Short Comment Input Form

4. Key in a description of why or how the overage or shortage occurred.
  - a. If the reason code you selected from the list requires you to enter a comment, and you press **[ESC]**, **Cancel**, without entering it, an error message displays.



Figure 15-21: Over/Short Comments Message

- b. Press **[ENTER]**, to return to the Comments input form and enter a comment.
5. Press **[F8]**, **Save**. The Cash Drawer Reconciliation receipt prints. The reason code and comment you just entered may be shown on it, if required by the home office.

## Clock Out

At the end of a shift, employees can easily clock out. The procedure is very similar to the process for clocking in, as described in “Clock In” on page 28.

1. Go to the Employee Selection screen.



Figure 15-22: Employee Selection Screen

2. Press **[F2], Clock In/Out**, to clock out. The focus bar turns yellow and prompts for employee ID.
3. Key in the ID, then press **[ENTER]**. The focus bar prompts for a password.
4. Key in the appropriate password, then press **[ENTER]**. A prompt displays.

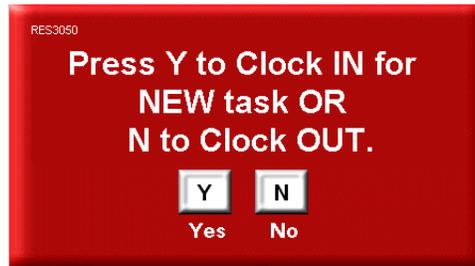


Figure 15-23: Clock In/Out Prompt

5. Press **[N], No**, to clock out. The employee is clocked out of the system and his/her name is removed from the Clocked In portion of the Employee Selection screen.



*Employees who are clocked out cannot perform any type of transaction.*