



Retail Pro[®] 9.20.768.479 (R5)

What's New in this Release

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About this Guide

This document describes the features included in Retail Pro® 9.20,768.479 (r5) release.

If you believe the information presented here is incomplete or inaccurate, we encourage you to contact us at emanuals@retailpro.com.

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Introduction

This document describes new features and functionality added to this release of Retail Pro 9.20.768.479 (R5), released August 25, 2014.

Receipts

Customizing Credit Card Tender Dialog

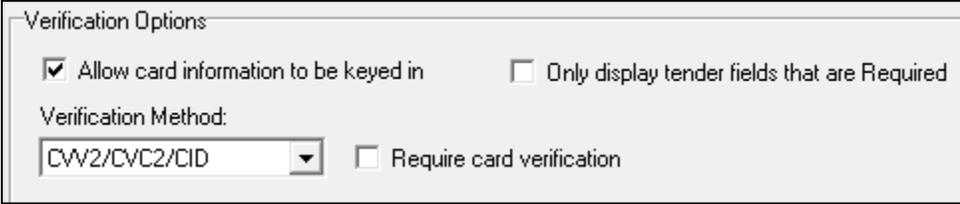
DevTrack ID#30998

This release includes a new preference that enables retailers to customize the Credit Card tender dialog to only display required fields for the credit card tender. Previously, there was no way to customize the credit card tender dialog. This change eliminates confusion and prevents incorrect card numbers (or other incorrect information) from being keyed in (slowing down transaction times).

This preference is for retailers who take credit cards as payment but don't use one of Retail Pro's supported EFT processors. If the "Only display tender fields that are required" option is selected AND there is NO credit card EFT processor specified, then ONLY the fields that are marked as required for credit cards in preferences (plus Taken Amount) will be displayed in the tender dialog.

This new preference is located in System Preferences > Local Preferences > Point of Sale > Tenders > Credit Cards and is disabled by default.

If the "Only display tender fields that are Required" check box is selected, the



Verification Options

Allow card information to be keyed in Only display tender fields that are Required

Verification Method:

 Require card verification

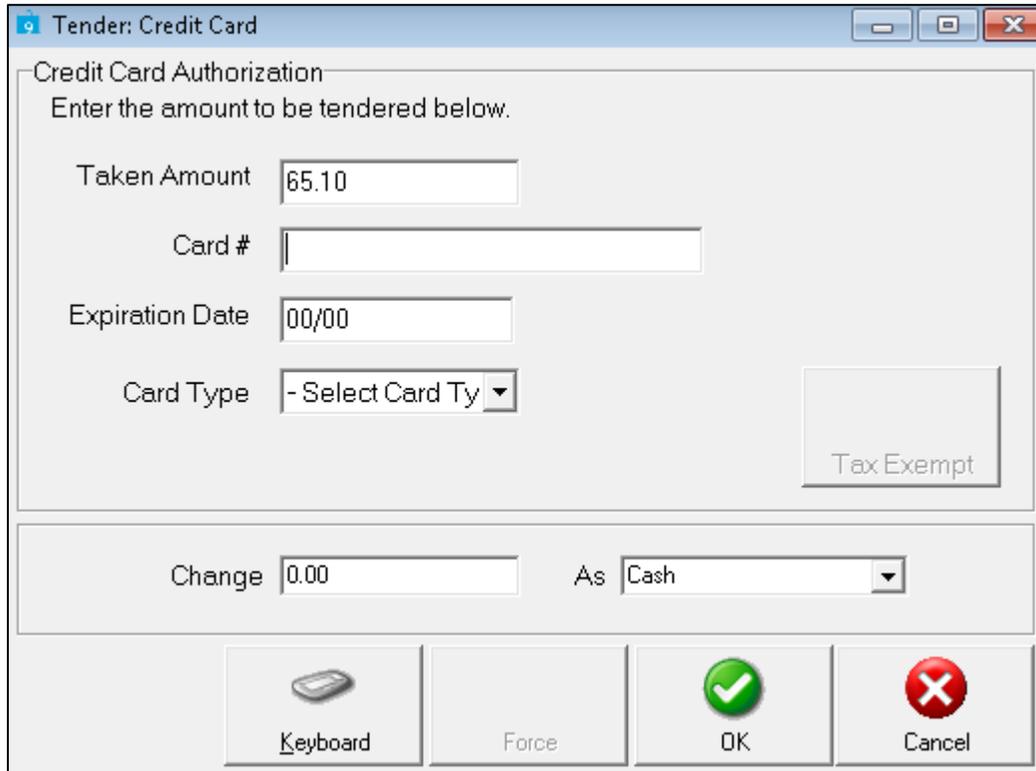
Defining Required Fields for Credit Cards

Required fields for credit cards and other tenders are defined in System Preferences > Local Preferences > Point of Sale > Tenders > Requirements. Highlight the tender type (i.e. Credit Card) and a list of possible required fields for sales/returns is displayed. Select the check box for each field that will require an entry.

Name	Sale	Change	Return
Cash	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Check	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Credit Card	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
COD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Charge	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Store Credit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Deposit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gift Certificate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Gift Card	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Debit Card	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Required Field: Credit Card		
Customer Fields	Sale	Return
Company	<input type="checkbox"/>	<input checked="" type="checkbox"/>
First Name	<input type="checkbox"/>	<input type="checkbox"/>
Last Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Address 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Address 2	<input type="checkbox"/>	<input type="checkbox"/>
Address 3	<input type="checkbox"/>	<input type="checkbox"/>
Zip Code	<input type="checkbox"/>	<input type="checkbox"/>
Phone 1	<input type="checkbox"/>	<input type="checkbox"/>
Phone 2	<input type="checkbox"/>	<input type="checkbox"/>
Info 1	<input type="checkbox"/>	<input type="checkbox"/>
Info 2	<input type="checkbox"/>	<input type="checkbox"/>
Alternate ID1	<input type="checkbox"/>	<input type="checkbox"/>
Alternate ID2	<input type="checkbox"/>	<input type="checkbox"/>
Card Type	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Expiration Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authorization No	<input type="checkbox"/>	<input type="checkbox"/>
Credit Card No	<input checked="" type="checkbox"/>	<input type="checkbox"/>

In the preferences displayed on the preceding page, only Card Type, Expiration Date and Credit Card No are displayed. With those fields selected, the following shows the credit card tender dialog that will be displayed.



Tender: Credit Card

Credit Card Authorization
Enter the amount to be tendered below.

Taken Amount 65.10

Card #

Expiration Date 00/00

Card Type - Select Card Ty

Tax Exempt

Change 0.00 As Cash

Keyboard Force OK Cancel

Reference: See Appendix B. Preferences of the *Retail Pro 9 User's Guide* for more information.

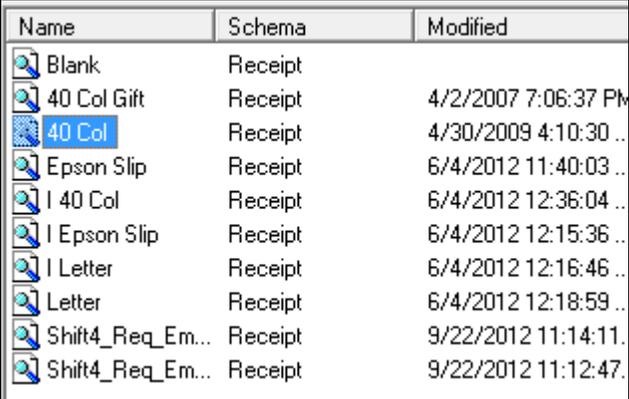
Central Gift Card Balance

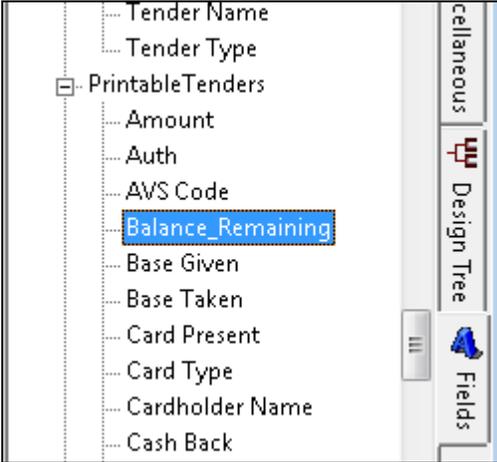
DevTrack ID #27674

Beginning with this release, retailers can include the remaining gift card balance (for central gift cards) on printed receipts.

To include the remaining gift card balance on printed docs, edit the appropriate designs to include the Balance_Remaining field. Including the Balance_Remaining field enables the customer (and retailer) to easily see the current card balance simply by looking at the printed receipt. Previously, to have a printed document that showed the remaining balance on a central gift card, the user had to perform a separate "Balance Inquiry" in Retail Pro and print out the results.

To add the Balance_Remaining field to printed doc designs:

Steps	Instructions	Screen Elements
1.	Launch DocDesigner.exe and log in (located in the ... \RetailPro9 folder).	
2.	Select the Receipts tab.	
3.	Double-click the desired design.	

Steps	Instructions	Screen Elements
4.	Select the Fields tab.	
5.	<p>Scroll down to the Printable Tenders node and expand it.</p> <p>Select the Balance_Remaining field and drag/drop it onto the desired area of the screen design.</p> <p>Resize and reposition as needed.</p>	
6.	Click the Save button (File > Save)	

Reference: See the *Retail Pro 9 Doc Designer* document for more information.

Changing Associate on Return Receipt

DevTrack ID#30138

This release includes changes to how Retail Pro 9 handles Associates on returns that reference an original receipt.

Now, when a return references the original sales receipt, Retail Pro 9 will enter the following information:

- The current logged-in user in the Associate field in the receipt header
- The Associate(s) from the original sales receipt in the Associate 1 – 5 fields for each item being returned

Previously, an item's associates, whether taken from the current logged-in user or manually assigned, remained unchanged when the item was changed to a return; even when the return was linked to an original receipt. Now, any returned items linked to a receipt will acquire the associates and commissions from the original sale.

This change helps ensure that sales commissions are calculated correctly.

Changing Document Associate

Changing the Associate in the Receipt header will not affect Associates of return items (whether or not the item is linked to an original receipt).

Recalculating Commission Amount

Associates 1-5 from the original receipt item are brought to the new receipt item and the commission amount is recalculated based on the original receipt's commission amount and the quantity being returned:

Recalculating Associate Activity Percentage (Using Centrals)

The activity percentage determines how much of the sale is assigned to each Associate for purposes of calculating commissions. If you are using the Central Returns feature, then it is possible that an Associate listed on the original receipt does not exist on the local install where the return is being performed. In that case, Retail Pro will leave the commission amount and percentage assigned to the employees who do exist on the local install but will adjust the activity percentage.

Activity Percentage Example – Employee Not on Local Install where Return is Performed

This example shows how Retail Pro 9 adjusts the activity percentage if an employee does not exist on the local install where the return is being performed.

The original receipt information for Associate A and Associate B is shown in the following table:

<i>Price</i>	<i>Qty</i>	<i>Comm%</i> <i>(Assoc. A)</i>	<i>Activity %</i> <i>(Assoc. A)</i>	<i>Comm Amt</i> <i>(Assoc. A)</i>	<i>Comm %</i> <i>(Assoc. B)</i>	<i>Activity %</i> <i>(Assoc. B)</i>	<i>Comm Amt</i> <i>(Assoc. B)</i>
\$100	5	10%	60%	\$-30	20%	40%	\$80

In our example, Associate B doesn't exist at the local install where the return is being performed and therefore won't be included in the return. The new receipt for the return has the following information:

<i>Price</i>	<i>Qty</i>	<i>Comm%</i> <i>(Assoc. A)</i>	<i>Activity %</i> <i>(Assoc. A)</i>	<i>Comm Amt</i> <i>(Assoc. A)</i>	<i>Comm %</i> <i>(Assoc. B)</i>	<i>Activity %</i> <i>(Assoc. B)</i>	<i>Comm Amt</i> <i>(Assoc. B)</i>
\$100	5	10%	100%	\$-30	0%	0%	0%

Reference: See Chapter 10. Sales and Returns of the *Retail Pro 9 User's Guide* for more information.

Applying Proposed SO Deposit as Receipt Tender

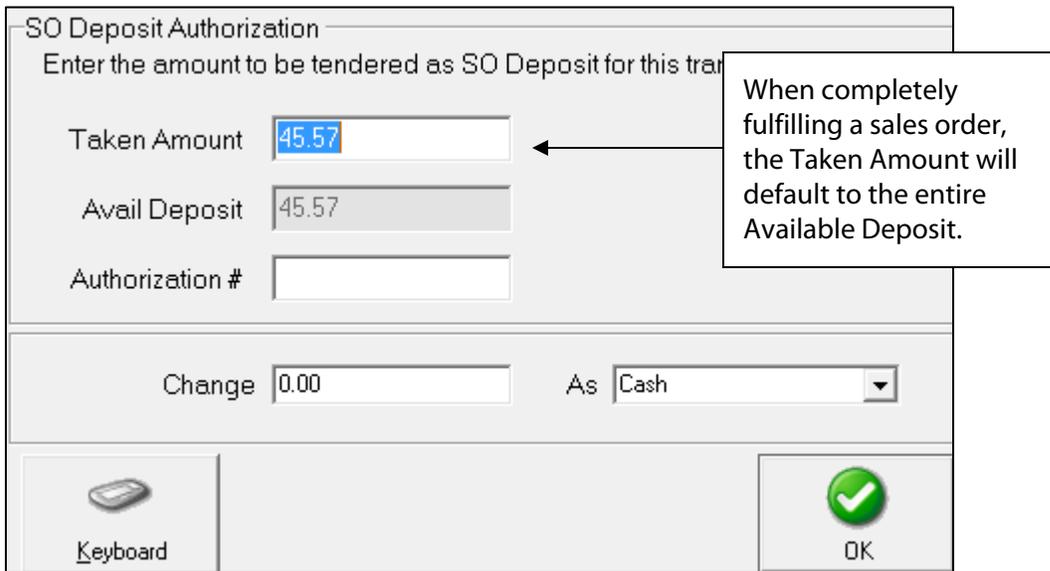
DevTrack ID #31029

Beginning with this release, when a user fulfills a sales order, the calculation of the proposed deposit will distinguish between a partial and a complete fulfillment.

When tendering a receipt linked to a sales order with a deposit, Retail Pro proposes a deposit amount that can be used as payment toward the receipt balance.

Beginning with this release, the calculation of this proposed deposit has been refined to distinguish between a partial and a complete fulfillment. Now, when completely fulfilling a sales order, the proposed amount will be the full remaining deposit (not exceeding the receipt amount due). This will avoid the potential of inadvertently leaving some portion of a deposit unused when the customer wishes to use the full deposit.

When tendering a partial sales order fulfillment, the proposed deposit will continue to be proportional to the item price.



SO Deposit Authorization

Enter the amount to be tendered as SO Deposit for this transaction

Taken Amount

Avail Deposit

Authorization #

Change As

 Keyboard  OK

When completely fulfilling a sales order, the Taken Amount will default to the entire Available Deposit.

Reference: See Chapter 11. Sales Orders of the *Retail Pro 9 User's Guide*.

X/Z-Out

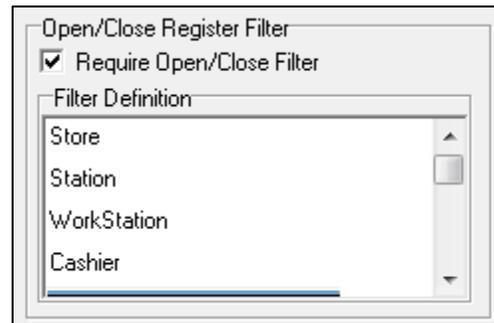
Require Open/Close Register Filter

DevTrack ID#30620

Beginning with this release, a new preference gives retailers the option of requiring an entry in any or all register filter fields. The new “Require Open/Close Filter” preference is located in System Preferences > Local Preferences > Point of Sale > X/Z-Out > General.

If the “Require Open/Close Filter” preference is selected, then all fields above the divider line will require an entry when a user starts a Z-Out report.

This new preference eliminates the possibility of having a null entry in register filter fields. Previously, users were able to create Z-Out reports with a null entry in a filter field (e.g. no Store entered), making it difficult for users reviewing the reports to determine the scope of the report.



If the “Require Open/Close Filter” checkbox is not selected, then null entries are allowed in the filter fields when running a Z-Out report.

Unstructured Mode Only

Please note that this preference is only available in unstructured mode. If you have selected the “Require Register Level Z-Out” and “Count Open and Close Amounts” checkboxes, then the Open/Close Register Filter preference is disabled.

Editing Values in Filter Fields

When a register filter is required and a user runs a Z-Out report, Retail Pro 9 automatically populates the required fields, based on the information for the current logged-in user. The fields can be edited by users with the required security permission (X-Out Z-Out > Edit Filter) but an entry is required. If a required field lacks an entry and a user clicks Next to proceed, an error message is displayed.



Reference: See Chapter 11. End of Day of the *Retail Pro 9 User's Guide* for more information.

ASNs

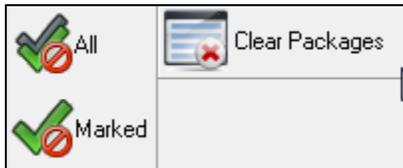
Clearing Packages before a Rescan

DevTrack ID #30798

This release includes a new feature in the ASNs > Batch Receiving area that makes it easier to resume the scanning process if a user accidentally marks all packages. Using the new “Clear Packages” button, a user can clear the Received flag for either all scanned packages or all marked packages.

This feature is especially usefully when an employee, while scanning individual packages, accidentally clicks the “Mark All” button (marking all unscanned packages). Previously in this type of situation, the employee would click the Unmark All button to try to undo the mistake and then rescan, only to be greeted with a “Package # XXXXXX already scanned” message. This message was displayed because unmarking the packages did not clear the “Received” flag (the “Received” flag is selected when a user scans/adds package # to an ASN using the “Package No” dialog and it prevents users from scanning the same package multiple times).

Now, if a user marks packages by mistake, the new Clear Packages button enables the user to easily undo the mistake.



Refer to the following table for a description of the options available for the Clear Packages button:

<i>Option</i>	<i>Description</i>
Clear All	Clears the Received flag (sets to false) for all ASNs.
Clear Marked	Clears the Received flag for all marked ASNs.

Reference: See Chapter 7. Receiving of the *Retail Pro 9 User's Guide* for more information.

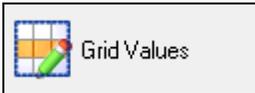
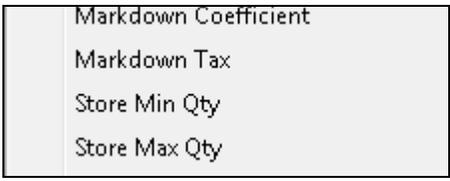
Inventory

Str Min Qty, Str Max Qty in Grid Values Menu

DevTrack ID #30713

Beginning with this release, retailers can display Store Min Qty or Store Max Qty values in the style grid in Style View. This change makes it easier to view Min/Max values for styles at any or all of the company's stores and optionally edit the values.

To display Store Min Qty or Store Max Qty in the style grid:

Steps	Instructions	Screen Elements
1.	Select Merchandise > Inventory from the home screen.	
2.	Find and select an item in the style and then touch or click the Style View button.	
3.	Touch or click the Style Grid button.	
4.	Touch or click the Grid Values button.	
5.	Right-click in the grid. A pop-up menu displays the values that can be displayed in the grid. Select Store Min Qty or Store Max Qty.	

Editing Store Min Qty/Store Max Qty

Users can enter value in "Store Min Qty" mode and there are possibilities that end-user doesn't enter any value in Quantity mode but "Store Min Qty" so in this case, the process will work similar to existing but Adjustment Memo WILL NOT be generated. However if the end-user wishes to enter values in "mixed mode" like first enter values in Quantity and then enters values in Store Min Qty modes and so on, the process will generate the adjustment memo wherever necessary while saving/posting the changes.

Reference: See Chapter 4. Inventory of the *Retail Pro 9 User's Guide* for more information.

System

Security Permissions for Editing Inventory

DevTrack ID#30420

This release includes new security permissions that enable retailers to separately control the editing of most inventory descriptive fields and the editing of Min/Max fields. Previously, to allow edits to Min/Max Price and Price w/Tax required allowing edits to descriptions. This change is especially useful for franchise operations in which the head office manages quantity and item descriptions, while the individual franchises manage Min/Max values.

Edit Min/Max Permission

This permission controls editing of the following inventory fields: Store Min Qty, Store Max Qty, Cmp Min Qty, Cmp Max Qty, New Min Qty, New Max Qty, MM StartDate and MM EndDate

Edit Other Fields Permission

The "Edit Other Fields" permission controls fields not already controlled by security. The following table lists many of these other fields.

Attr	Size	Foreign Order Cost	Discontinued Date
Qty per Case	Min Order Qty	Vendor Lead Time	Vendor List Cost
TradeDiscPerc	UDF Date	UDF Name	Committed
Regional Item	VendCompany	Tax Code	Currency
Scale	Cmp Transfer In Qty	Cmp Transfer Out Qty	Str Sold Rcvd
OnOrder Qtys	Gift flag	Cmp Sold, Rcvd and OnOrder Qtys	Sellable, Orderable Dates
Commission Code	Range and Group	Item Note	Ship Weight 1-2
Oversized Item	Text 1 – Text 10	Ship Method Lookup	Width, Length, Height, Weight, Dim Units
Loyalty Earned and Redemption	Force Orig Tax	ALU	DCS Code
Description3	Description4	PromoPricingNo	KitType

MaxDiscPerc1	MaxDiscPerc2	PrintTag	Unorderable
Corp	Active	Item No	NonInventory
SerialNoType	UseQtyDecimals	ECommerce	DocDesign
UDFValue	LotNoType	ItemSublocation	

Reference: See Chapter 5. Auto Utilities and Chapter 14. Employee Management.

Improved Handling of Regional (Arabic) Date/Times

DevTrack ID #30999

This release includes enhancements to the handling of regional date/time settings. These changes enable retailers to see the correct date/time when creating/viewing documents in languages such as Arabic that use a right-to-left alphabet.

Changes for this Issue

- 1) Now when Retail Pro sees a string with the "am/pm" mark coming from a client, it will switch the format from 12-hour to 24-hour. This change helps the system avoid ambiguity between language-specific and language-independent meridian marks.
- 2) When navigating between edit boxes in date/time range filters, left/right arrow keys only move the cursor within the text box. Previously, the left/right arrow keys could also move focus away from the edit boxes. Now, to move forward use TAB or ENTER; to move backward, use Shift-TAB.
- 3) If the current locale for Rpro9Reports uses code page 1255 (Hebrew) or 1256 (Arabic) and the date/time range filter includes non-Latin characters, then RPro9Reports.exe will insert a special RLM (right-to-left mark) character to the filter value string to ensure that the first numerals are displayed at the right side (the beginning of the string), instead of the left.

Restrictions and Limitations for displaying Reports in Arabic:

- 1) To run reports in Arabic, you must set your SYSTEM locale to Arabic and set the language in RPro9Reports.exe to NATIVE.
- 2) To enter the time part of a long date range filter in a format that requires the am/pm mark, use LATIN characters, i.e. AM or PM (upper or lower case). Do not try to enter AM or PM in Arabic. Rpro9Reports.exe will convert AM/PM to your locale-specific meridian marks automatically once you move selection away from the filter line.
- 3) Since you will be selecting Native language in RPro9Reports.exe, your regional formats for dates and times will come from the user locale in Windows regional settings. As a result, you can override date and time formats to suit your needs using the Regional Settings applet in the Control Panel ("Customize" button in XP/2003 or "Advanced Settings" button in Windows 7). The report filters will follow the date and time formats set in that area.
- 4) DO NOT try to set short date to use month NAME in short date format in regional settings.

Reference: See the *Retail Pro 9 Localization Guide* for more information.

Hardware

Workstation-Specific Folders for Uploads

DevTrack ID #29161

This release includes changes to ensure that when two workstations try to simultaneously upload different items from a Palm scanner, all items will be successfully uploaded to separate workstation folders. Previously, scans were uploaded to a single folder. This change eliminates the potential of having two workstations simultaneously attempt to upload different items from a Palm scanner to a document and having one item added and one item fail.

Now, when uploading items from a scanner, RP9 will check if the user is using the Palm Plugin. If the user is using the Palm Plugin, then the separate workstation folders will be created.

Example:

C:\Retailpro9\Palm\<workstation number>

If the user is not using the Palm Plugin, then all uploads will continue to be loaded to a single folder.

This change requires that users update the following files:

... \RetailPro9\Rpro9.exe

... \RetailPro9\palmexchange.exe

... \RetailPro9\plugins\PalmInvnScanner.dll

Reference: See the *Retail Pro 9 Palm Scanner* document for more information.

Promotions

"/UpdatePluginData" Parameter

DevTrack ID #30981

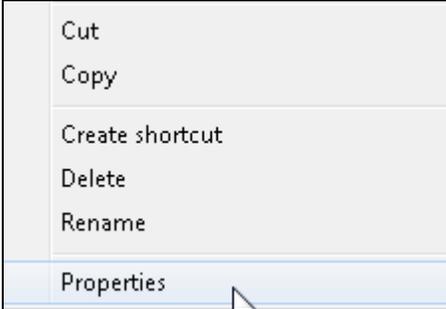
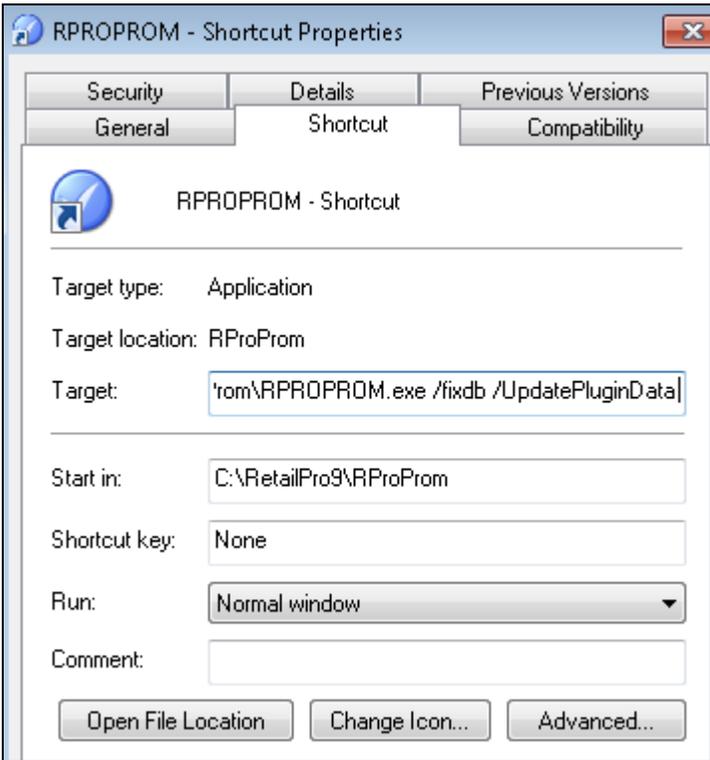
The Retail Pro 9 Promotions Plugin is a powerful tool for creating a variety of price discounts that are saved to a Microsoft Access database (.mdb) and then automatically applied at POS. This release includes a new command line parameter ("/UpdatePluginData") that when run, will copy promotions from the Plugin's Microsoft Access database to the RP9 Oracle database. From the Oracle database, the promotions are then automatically sent to the Prism server and applied on Prism transactions.

Previously, Promotions created using the Promotions Plugin were not available in Prism.

Note: The /UpdatePluginData parameter can be run together with the existing /Fixdb parameter (which updates the Plugin's .mdb schema).

Important! IF you are an existing user of the Promotions Plugin (i.e. the RPROProm.dll file is present in the ...RetailPro\Plugins folder) Both of these parameters are run automatically when you apply the MP for this Retail Pro 9 release.

If you need to run the parameter at a later time, you can use the following steps:

Steps	Instructions	Screen Elements
1.	Right-click the RPROProm shortcut.	
2.	Select Properties from the pop-up menu.	
3.	Enter the parameter(s) in the Target field. Click OK to save and close the dialog.	
4.	Double-click the shortcut to run the parameters.	

<i>Steps</i>	<i>Instructions</i>	<i>Screen Elements</i>
5.	<p>Next, remove the parameters.</p> <p>Right-click on the shortcut and select Properties. On the Shortcut tab, delete the parameters you entered.</p> <p>Click OK to close.</p>	

Reference: See the *Retail Pro 9 Promotions* document for more information

Transfers

Control Update of Received Dates

DevTrack ID #28801

This release includes new preferences that give retailers greater control over the updating of received dates on transfers. This option is especially useful for retailers who use the Last Received Date to determine items included in markdowns. For these retailers, if the Last Received Date is updated by a transfer, it makes the merchandise appear new, when in fact the merchandise might be quite old and a good candidate for a markdown.

The new preferences are found in System Preferences > Local Preferences > Transfers > General. Separate options are available for *intracompany* transfers (between stores belonging to the same subsidiary) and *intercompany* transfers (between stores belonging to different subsidiaries).

<input checked="" type="checkbox"/> Intracompany transfer voucher updates received dates
<input checked="" type="checkbox"/> Intercompany transfer voucher updates received dates

By default, these preferences are ENABLED, meaning that received dates WILL be updated. If the new preferences are DISABLED, the received dates WILL NOT be updated for items on a transfer voucher. Previously, any time an item was listed on an updated voucher (receiving or transfer), the item's Last Received Date (and First Received Date, if a new item) would be updated.

Note: Receiving vouchers will continue to always update received dates.

Determining Source Subsidiary at Remotes that only receive Transfer ASNs

The source subsidiary entered on a voucher is usually looked up from the from the corresponding slip record. But such lookup is impossible at a remote store that only receives transfer ASNs and not slips. In such cases, Retail Pro 9 will try to determine the source subsidiary from the first three digits of the Package Number field. If the source subsidiary number cannot be determined from the Package Number field, Retail Pro 9 will check if the new preference is DISABLED for either intra- or inter-company transfers. If either is disabled (i.e. set to not update received dates), the dates will not be updated.

Reference: See Chapter 8. Transfers and Appendix B. Preferences of the *Retail Pro 9 User's Guide*.