

# Retail Pro 9 Applications Expert (RPAE) Certification Exam Preparation Guide

## OVERVIEW

Candidates should use this preparation guide to prepare for the Retail Pro 9 Applications Expert (RPAE) Certification Exam. Retail Pro International, LLC does not identify the format in which the exam will be presented, but this preparation guide is intended for the candidate to use regardless of the exam format.

**Note:** This preparation guide is subject to change at any time without prior notice and at the sole discretion of Retail Pro University and Retail Pro International, LLC.

### **About this Exam**

The Retail Pro 9 Applications Expert (RPAE) exam will measure your knowledge of Retail Pro features and functionality system-wide, including the various preference settings. This certification exam includes both a written exam and practical assessment:

- The written exam assesses your overall competency in several different areas. You must score a minimum of 80% (across all competencies) in order to pass the certification exam

Written Exam Duration: 2 hours

- The practical assessment is designed to test your ability to apply your knowledge. This assessment must be passed (along with the written exam) in order to pass the certification exam  
Practical Exam Duration: 3 hours

## SKILLS MEASURED

The competencies listed below are being addressed in the written exam and/or practical assessment. For more detailed information, review the study guide associated with this certification exam.

### **Using Retail Pro in a Multi-subsidiary Environment**

- Set up multiple subsidiaries for a retailer
- View information for different subsidiaries within Retail Pro
- Set up stores within each subsidiary
- Assign items across subsidiaries
- Setup and maintain regional inventory items

### **Customizing the Retail Pro Interface & Navigating the System**

- Launch Retail Pro 9
- Able to navigate comfortable around Retail Pro 9
- Able to view data using different screen views
- Able to customize the Retail Pro interface

### **Managing Employees & Securing the System**

- Control employee access to selected areas and features of the program
- Understand the various Employee Password and Logon Policies
- Understand the use of Drawers and Tills
- Exporting and Importing Security Information

- Understand the different ways to safeguard against employees forgetting to logout of the system
- Set up Time Shifts
- Use Check In/Check Out receipts to keep track of when and for how long employees are working
- Assign multiple stores to an employee account
- Understand how to inactivate and/or disable employees
- Track employee sales commissions & SPIFs

### **Managing Inventory**

- Create new department records
- Create new vendor records
- Create new inventory items
- Create new inventory styles
- Create new scales
- Assign multiple UPCs and/or multiple ALUs to a single inventory item
- Edit inventory records
- Locate inventory records using a variety of options
- Understand the various Lookup Modes that can be used to list items on a Retail Pro document
- Use Choose/Edit Items to list items on a Retail Pro document
- Create custom inventory fields using UDF (User-defined) and AUX (Auxiliary) fields
- Automatically populate the Desc2 field with information from UDF and AUX fields
- Create inventory kits
- Create inventory packages
- Create non-inventory items
- Track inventory items with serial numbers
- Track inventory items with lot numbers
- Inactivate unwanted inventory items
- Propose new inventory items
- View the transactional history of any inventory item
- Understand how to handle gift certificates

### **Managing Inventory Price & Cost**

- Establish different sets of prices for all inventory items
- Use Price Manager to update inventory prices (or costs)
- Update secondary price levels when changes are made to the base price level
- Establish different pricing instructions that determine how prices are recorded into the system
- Set up the system to use the correct price based on the current season
- Understand the role of cost and price when determine profit margins

### **Using Memos to Adjust Inventory**

- Manually create adjustment memos
- Understand when quantity, price and cost memos are automatically generated by the system

### **Managing Customers**

- Create new customer records
- View customer profiles
- Setup the system to prevent users from seeing sensitive customer information
- View a customer's past receipts and sales orders directly from the "Customer" module
- Divide customers into saved groups or "Segments" based on certain criteria
- Divide customers into saved groups or "Bins" based on certain criteria

### **Tracking Sales Transactions**

- Understand the different types of Sales Orders and their intended purpose
- Understand how to handle Layaway Transactions
- Setup the system to suggest/require a certain percentage of the total amount when taking a SO deposit

- Understand how to handle Customer Order SO Transactions
- Understand how to handle Special Order SO Transactions
- Understand how to handle Registry SO Transactions
- Understand the different types of Receipts and their intended purpose
- Set up Tendering Options
- Understand how to handle Sales Transactions
- Tender a sale by foreign currency
- Display customized "Quick Tender buttons" (or cash buttons) on the "Receipts" screen
- Use "Multiplier Buttons" to quickly specify quantity values on selected documents
- Understand how to handle Merchandise Returns
- Understand how to handle Merchandise Exchanges
- Understand how to handle Merchandise Voids
- Manually give discounts at point-of-sale
- Assign a default discount to a given customer, which takes effect automatically whenever the customer purchases any item
- Understand the various ways to control the use of discounts
- Lookup the price for a given item at point-of-sale
- Understand how to handle cash disbursements
- Understand how to handle held receipts
- Open the cash drawer
- Setup taxes
- Setup the system to ensure that a specific item's price automatically changes depending on the quantities purchased
- Track miscellaneous fees and services at point-of-sale using the Fee and Shipping fields
- Setup the system to automatically track when certain activities occur in the system to help with loss-prevention measures
- Use POS Flags to capture information at point-of-sale
- Check the availability of items at point-of-sale

#### **Running Midday Reports & Reconciling the Cash Drawer**

- Run X-Out Reports
- Run Flash Reports
- Run Z-Out Reports

#### **Tracking the Purchasing of Merchandise**

- Create purchasing documents to track the ordering (and future receiving) of merchandise
- Track the ordering of the same item from different suppliers
- Set up the system to automatically convert "PO Cost" information on a PO into a foreign currency
- Setup the system to ensure that the "PO Cost" for items receiving a vendor discount is correctly stated on the PO
- Automatically populate the "Item Allocation" table with a predefined distribution plan
- Track the ordering of the items that come in cases
- Handle the ordering of "Pre-Packs" or "Minimum Order Requirements" on a PO
- Prevent the ordering of items on a PO

#### **Tracking the Receiving of Merchandise**

- Create receiving documents to track the receiving of merchandise
- Create documents to give advanced notice to receiving stores that merchandise is on its way
- Track freight charges, fees, taxes, and discounts on a PO
- Determine how vouchers can update the inventory "cost" value

#### **Tracking the Transfer of Merchandise**

- Plan the future transfer of merchandise from store-to-store
- Automatically populate the "Item Allocation" table with a predefined distribution plan
- Generate a TO directly from a Marked-For PO
- Generate a TO directly from a voucher
- Track the transfer of merchandise from store-to-store

- Resolve discrepancies that exist between the transfer documents
- Generate a Transfer Slip directly from a TO
- Track the transfer of merchandise from subsidiary to subsidiary

#### **Running Pre-designed Reports**

- Use the Report Viewer to run pre-defined reports
- Update the delta table
- Register externally-created reports

#### **Using the Auto-utilities to Generate Documents**

- Use the Auto Min/Max Wizard to assign new Minimum and Maximum quantity values for each inventory item based on a sales history analysis and established formulas
- Use the Auto PO Wizard to generate new Purchase Orders for replenishment purposes and to back up existing commitments
- Use the Auto Transfers Wizard to generate transfer documents to redistribute merchandise between stores
- Understand how the Retail Pro Scheduler program can be used to run the Auto Utilities without any user intervention

#### **Viewing Statistics in Retail Pro**

- View profile reports for item, vendor, department and customer records

#### **Using Centralized Services to Handle Customer Lookups and Returns Processing**

- Create a central repository for customer and sales information for the purposes of customer lookup and the handling of merchandise returns/exchanges
- Handle centralized customer lookups at point-of-sale
- Handle centralized merchandise returns and exchanges at point-of-sale

#### **Customizing Field Labels & Translating the System**

- Use the Language Manager to customize default field labels or translate Retail Pro
- Switch the default "Native" language used by Retail Pro
- Distribute translation files

## **PREPARATION TOOLS AND RESOURCES**

Even though there are no prerequisites for this certification exam, you may find the following resources useful when preparing for the exam:

### ***Online Courses***

- Retail Pro 9 – The Fundamentals
- Retail Pro 9 – Beyond the Fundamentals

### ***Classroom Training***

- Retail Pro 9 – Beyond the Fundamentals

### ***Online Resources/Reference Materials***

- RPAE\_Study Guide.doc