

# Retail Pro 9 Applications Expert (RPAE) Certification Exam

## Study Guide

### SKILLS MEASURED

The examination competencies listed below are the competencies being addressed in the written examination and/or practical assessment. Additionally, this list includes the specific tasks (and sub-tasks) you should be able to accomplish for each competency.

Use this list to help you prepare for the certification exam.

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

- *Set up multiple subsidiaries for a retailer*
  - *Understand when setting up multiple subsidiaries is advantageous for a retailer*
  - *Understand how many subsidiaries can be managed by Retail Pro*
  - *Create a new subsidiary by copying settings from an existing subsidiary*
  - *When creating a new subsidiary by copying settings from an existing subsidiary, understand what can be copied from the model subsidiary*
  - *Create a new subsidiary without copying settings from an existing subsidiary*
  - *Understand the minimum information needed to create a new subsidiary*
- *View information for different subsidiaries within Retail Pro*
  - *Switch between subsidiaries when viewing inventory records*
  - *Switch between subsidiaries when viewing customer records*
  - *Switch between subsidiaries when viewing employee records*
  - *Switch between subsidiaries when viewing documents records*
  - *Switch between subsidiaries when viewing system preference settings*
- *Set up stores within each subsidiary*
  - *Define the stores that fall within a given subsidiary*
  - *Understand the minimum information needed to define a store*
  - *Group stores into regions and districts for filtering purposes*
  - *Establish the default store for all documents created on a given Retail Pro server*
  - *Establish the default store for all documents created on a given Retail Pro client (i.e. workstation)*
- *Assign items across subsidiaries*
  - *Assign an existing item/style across one or more subsidiaries*
  - *Understand what information is/is not carried across to other subsidiaries when assigning items/styles*
  - *View a specific inventory item across all subsidiaries at the same time*
- *Setup and maintain regional inventory items*
  - *Create a subsidiary grouping consisting of master and child subsidiaries*
  - *Understand the default and optional item information that is controlled by the Master Subsidiary*
  - *Set up the system so that all new inventory items, departments and/or vendors created are made regional items*
  - *Understand the key differences between regional item and assign item functionality*

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

- *Launch Retail Pro 9*
  - *Use the desktop shortcut to launch Retail Pro*
  - *Use to program executable to launch Retail Pro*
  - *Understand what Oracle services must be started in order to launch Retail Pro*
  - *Ability to create BAT file to stop/start Oracle services*
- *Able to navigate comfortable around Retail Pro 9*
  - *Use the Retail Pro 9 button to return to the previous screen*
  - *Use the ESC button to return to the previous screen*
- *Able to view data using different screen views*
  - *Use List View to display a list of several records at one time*
  - *Use Form View to view a single record in more detail*
  - *Use the <F8> key to switch between views*
  - *Use the toggle button to switch between views*
- *Able to customize the Retail Pro interface*
  - *Use Workstation Preferences to customize the home screen*
  - *Understand the various options that can be placed on the home screen*
  - *Use Menu Designer to add/remove/re-order buttons on the toolbars*
  - *Use Menu Designer to add custom buttons to the toolbars*
  - *Use Menu Designer to remove captions from toolbar buttons*
  - *Use Menu Designer to adjust toolbar button height and width*
  - *Use Menu Designer to remove one or both toolbars*
  - *Use Menu Designer to reposition the toolbars to the left, right, top or bottom of the screen*
  - *Use Page Manager to add/remove pages from List View*
  - *Use Page Manager to add/remove data columns from List View*
  - *Use Page Manager to add/remove pages from Form View*
  - *Use Page Manager to customize the font type/style/size/color for page labels*
  - *Use Page Manager to customize the font type/style/size/color for records displayed in List View*
  - *Use Page Manager to customize the font type/style/size/color for column headings displayed in List View*
  - *Use Page Designer to add/remove/reposition data fields in Form View*
  - *Use Page Designer to add/remove/reposition groups of data fields in Form View*
  - *Use Page Designer to format a given field or group of fields (fonts, size, color, etc.)*
  - *Use Page Designer to align a group of select fields*
  - *Use Page Designer to increase the grid sizes used to quickly align fields.*
  - *Use Page Designer to set the order in which the cursor moves when the {TAB} key is pressed.*
  - *Use Page Designer to customize the page background*
  - *Use Page Designer to add an image to the page*
  - *Use Page Designer to add a label to the page*
  - *Use Page Designer to add a memo to the page*
  - *Use Layout Manager to copy an existing layout, rename it and then customize the copied layout*
  - *Use Layout Manager to switch between different layouts (i.e. screen designs) that may exist for a screen in Retail Pro*
  - *Understand where Retail Pro saves layouts specific to each user*

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

- *Control employee access to selected areas and features of the program*
  - *Create a new security group and assign permissions to that group*
  - *Create a new employee account for a given subsidiary*
  - *Understand the minimum amount of information needed to create a new employee account*
  - *Understand the importance of the "Employee" field when creating a new employee account*

- Understand the importance of the "System Administrator" checkbox when creating a new employee account
- Require new employee accounts to change their password
- Assign an employee account to one or more security groups
- If an employee does not have rights to perform a specific function, allow another employee (with permission to perform that same function) to override the security restriction
- Track when a given function occurs in Retail Pro (i.e., whenever a user assigned to the current group attempts that action)
- View tracking information using audit reports
- Understand the various Employee Password and Logon Policies
  - Enforce strong passwords to force employees to create more secure passwords
  - Enforce password history to prevent employees from re-using the same passwords when changing
  - Set the number of days before a password expires
  - Specify the number of days before the password expiration date that a reminder is displayed to the employee
  - Specify how many failed logon attempts are allowed before the user is locked out of Retail Pro
  - Use the User Account Lockout Duration settings to automatically unlock an account after X minutes
  - Use the User Account Lockout Duration settings to require a System Administrator to change a locked user's password in order to unlock the account
  - Understand the relationship between the "Failed Logon Attempts" and "User Account Lockout Duration" settings
  - Track when specific user account-related events occur in the system.
- Understand the use of Drawers and Tills
  - Understand the difference between drawers and tills
  - Configure and test a workstation's cash drawers
  - Assign a cash drawer to an employee account
  - Define all Tills used in a Retail Pro 9 system
  - Define a maximum cash amount for each Till
  - Assign a Till to an employee account
  - Temporary change an employee's Drawer and Till assignment without modifying the default settings
- Exporting and Importing Security Information
  - Understand when it is advantageous to use an exported security file
  - Export security information to future use
  - Understand the name and location of the exported security file
  - Imported security information that has been exported from another Retail Pro system
  - Understand the role of version numbers between the Retail Pro system that produced an exported security file and the Retail Pro system importing the file
  - Open and review import (and export) logs to help troubleshoot importing (and exporting) issues
- Understand the different ways to safeguard against employees forgetting to logout of the system
  - Enable/Disable High Security for select documents
  - Set up the Retail Pro client (workstation) to automatically lockout after X minutes of inactivity
- Set up Time Shifts
  - Create a new Time Shift with beginning/end times for each day and overtime rates
  - Assign a shift to a given employee
- Use Check In/Check Out receipts to keep track of when and for how long employees are working
  - Use Retail Pro to check in
  - Use Retail Pro to check out

- *Set up the system so that employees are unable to make certain to employee name and time on the Check In/Out window*
- *Assign multiple stores to an employee account*
  - *Assign multiple stores to an employee account so the employee can create documents for each store*
- *Understand how to inactivate and/or disable employees*
  - *Inactivate an employee account when the employee leaves the company*
  - *Re-activate an inactive employee*
  - *Disable an employee account if the employee is on temporary leave*
  - *Re-enable an employee account if the employee returns from temporary leave*
- *Track employee sales commissions & SPIFs*
  - *Setup commission level/commission code combinations with designated commission rate*
  - *Assign commission levels to employee records*
  - *Assign commission codes to inventory items*
  - *Understand how commission amounts are recorded at point-of-sale*
  - *Spread the commission amount amongst 1-5 different associates*
  - *Assign a SPIF amount to an inventory item*
  - *Understand how SPIF amounts are recorded at point-of-sale*
  - *Understand the difference between commissions and SPIFs*

## **Managing Inventory**

- *Create new department records*
  - *Create a new department*
  - *Understand the three parts that make up the DCS Code*
  - *Understand how many characters each part can consist of*
  - *Specify a default Allocation Pattern to be used by all items created under a given department when they are listed on future PO's*
  - *Make sure new items created under a given department uses decimals for on-hand quantity values*
  - *Make sure Retail Pro automatically computes the price or cost of new items created under a given department*
  - *Specify a default Tax Code for items created under a given department*
- *Create new vendor records*
  - *Create a new vendor*
  - *Understand how many characters the Vendor Code can consist of*
  - *Understand the minimum information required to create a new Vendor Code*
  - *Understand the various payment terms that can be established as a vendor default*
  - *Specify a default lead time for a vendor to be suggested on future PO's*
- *Create new inventory items*
  - *Create a new inventory item*
  - *Understand which inventory fields are used to define a unique inventory item*
  - *Understand which inventory fields can be used to determine the style description*
  - *Setup the system to include on Description 1 as the style description*
  - *Setup the system to include on Description 2 as the style description*
  - *Setup the system to include both Description 1 and Description 2 as the style description*
  - *When creating a new item, have Retail Pro automatically suggest a price based on the cost entered*
  - *When creating a new item, have Retail Pro automatically suggest a cost based on the price entered*
  - *Understand the role of the Item SID*
  - *Understand the role of the UPC field*
  - *Understand the role of the ALU field*
  - *Have Retail Pro automatically generate the UPC*

- *Have Retail Pro automatically generate the ALU*
- *Copy an existing item to create a new item*
- *Create new inventory styles*
  - *Create a new style with various sizes and attributes*
  - *Understand which inventory fields are used to define a unique style*
  - *Understand the role of the Style SID*
  - *Understand the advantages of working with styles*
- *Create new scales*
  - *Create a new scale on-the-fly during the style-creation process*
  - *Create a new style using a scale*
  - *Create a predefined scale for later use when creating a style*
- *Assign multiple UPCs and/or multiple ALUs to a single inventory item*
  - *Assign multiple UPC's to a single inventory item*
  - *Assign multiple ALU's to a single inventory item*
  - *Lookup an item with multiple UPC's and/or ALU's on Retail Pro documents*
  - *Understand that Retail Pro only records an item's primary UPC and ALU information on documents*
- *Edit inventory records*
  - *Understand that Retail Pro is always in "continuous edit" mode and edits can be made without having to press the Edit button*
  - *Understand that moving to another record automatically saves changes made without having to select the Save button*
  - *Understand the various options available when changes are made to "Style Definition" fields in Item View*
  - *Understand what happens when changes are made in Style View*
- *Locate inventory records using a variety of options*
  - *Use the Quick Filter to locate inventory items*
  - *Cancel or exit a "Quick Filtered" View*
  - *Add/remove/format fields within the Quick Filter*
  - *Use Filter View to locate inventory records*
  - *Add/remove fields available for filtering via Filter View*
  - *Cancel or exit a "Filter View"*
  - *Use Filter Manager to save a filter for later use*
  - *Use the Sorting feature to locate inventory records*
  - *Understand the downside to sorting inventory records for a large database*
  - *Understand why it is recommended that Retail Pro be forced to confirm any requests for sorting*
  - *Use the Find feature to conduct a field-level search for items that meet the defined criteria*
  - *Access the Find window for a given field using the Find button or the <CTRL + F> keyboard shortcut*
- *Understand the various Lookup Modes that can be used to list items on a Retail Pro document*
  - *Set up the system to limit/expand the Lookup Modes that can be used to list items on a document*
  - *Use the Item # to list an item on a document*
  - *Use the UPC to list an item on a document*
  - *Use the ALU to list an item on a document*
  - *Use the Description 1 to list an item on a document*
  - *Use the Description 2 to list an item on a document*
  - *Use the Serial # to list an item on a document*
  - *Use the Lot # to list an item on a document*
  - *Make use of wildcards when listing an item on a document*
- *Use Choose/Edit Items to list items on a Retail Pro document*

- Use Choose/Edit Items to list a single item on a Retail Pro document
- Use Choose/Edit Items to list multiple items at the same time on a Retail Pro document
- Create custom inventory fields using UDF (User-defined) and AUX (Auxiliary) fields
  - For a given UDF field, customize the field label and predefine selection options
  - For a given AUX field, customize the field label and predefine selection options
  - Define additional AUX fields beyond the default 6 AUX fields
  - Locate additional AUX fields that have been added to inventory
- Automatically populate the Desc2 field with information from UDF and AUX fields
  - Automatically populate the Desc2 field with UDF/AUX information
  - Understand how UDF and AUX information can be used for item lookup purposes
- Create inventory kits
  - Assemble a new kit item from other existing inventory items
  - Sell a kit at point-of-sale
  - Break a kit at point-of-sale
  - Receive a "pre-assembled kit" from a vendor
  - Break a kit from the "Package and Kit" inventory area
  - Setup the system to print/not print the kit item (with/without kit item price) on receipts
  - Setup the system so that kit component items are/are not printed on receipts
  - Setup the system so that kit component item prices are/are not printed on receipts
- Create inventory packages
  - Create a new package item
  - Sell a package at point-of-sale
  - Setup a new package item and allow the component items to be substituted by any other item
  - Understand how item price differences are handled when substituting package component items at point-of-sale
  - Setup the system to print/not print the package item (with/without kit item price) on receipts
  - Setup the system so that package component items are/are not printed on receipts
  - Setup the system so that package component item prices are/are not printed on receipts
  - Understand the differences between kits and packages
- Create non-inventory items
  - Create a non-inventory item for miscellaneous fees and services
  - Understand the advantages/disadvantages between using non-inventory items and receipt fees
- Track inventory items with serial numbers
  - Understand the two different ways to track serial number items
  - Understand how invalid SN entry can be handled by Retail Pro
  - For a SN item, manually enter the serial numbers into inventory
  - Understand how special situations between SN items and packages, kits, transfers and mismatched transfers are handled
- Track inventory items with lot numbers
  - Understand the two different ways to track lot number items
  - For a LN item, manually enter the lot numbers into inventory
  - Setup the system so that the user is alerted when trying to sell a LN item past its expiration date
  - Setup the system so that the user is prevented from selling a LN item past its expiration date
  - Understand the differences between LN tracking and SN tracking
  - Understand how special situations between LN items and packages, kits, transfers and mismatched transfers are handled
- Inactivate unwanted inventory items
  - Manually inactivate an inventory item in the "Inventory" area

- Use Clean House to inactivate inventory items
- Understand the advantage of using Clean House to inactivate inventory items
- View all inactivate inventory items
- View only active inventory items
- Propose new inventory items
  - Setup the system so that all newly created inventory items are marked as “proposed items” requiring review and approval
  - Review and approve a proposed inventory item
- View the transactional history of any inventory item
  - View the transactional history of any inventory item for a given date range
  - View the adjustment history for an inventory item
  - View the purchasing history for an inventory item
  - View the receiving history for an inventory item
  - View the transfers history for an inventory item
  - View the sales history for an inventory item
- Understand how to handle gift certificates
  - Create new gift certificate items in inventory
  - Sell a gift certificate item at point-of-sale
  - Tender a sale by gift certificate

## **Managing Inventory Price & Cost**

- Establish different sets of prices for all inventory items
  - Create new
  - Create a new price level
  - Setup the system so only authorized users can view certain price levels
  - Setup the system so that the active price level is used to obtain pricing information when selling items.
  - Setup the system to use different price levels depending on where items are sold (i.e. the store location)
  - Setup the system to use different price levels depending on which customers make the purchase
- Use Price Manager to update inventory prices (or costs)
  - Use Price Manager to suggest new prices based on the specified pricing instructions
  - Use Price Manager to update prices for a given price level immediately
  - Use Price Manager to update prices for a given price level at some future point
  - Use Price Manager to temporarily adjust prices for a given price level
  - Understand when planned markdowns are applied by Retail Pro
  - Use Price Manager to copy prices between price levels
- Update secondary price levels when changes are made to the base price level
  - Setup the system so that secondary price levels can be updated when the base price level changes
  - Update prices (for designed secondary price levels) using the established default discount percentages
- Establish different pricing instructions that determine how prices are recorded into the system
  - Setup the system to adjust the inventory prices to the closest value existing in the “Adjusting” table
  - Setup the system to round the inventory price up/down according to the instructions given in the “Rounding” table
  - Use Price Manager to update existing prices with newly established pricing instructions
  - Establish the active pricing method to be used by the system
- Set up the system to use the correct price based on the current season

- Create a new season
- Establish the current season for each subsidiary
- Use "Price Manager" to establish seasonal prices for an existing price level
- Understand the role of cost and price when determine profit margins
  - Understand the difference between the various cost-related fields in inventory
  - Understand the formulas for Margin%, Markup% and Coefficient

## **Using Memos to Adjust Inventory**

- Manually create adjustment memos
  - Understand situations when it is appropriate to manually create adjustment memos
  - Manually create Quantity memos
  - Manually create Cost memos
  - Manually create Price memos
  - Understand the minimum information required to manually create quantity, price or cost memos
  - Predefine default memo reasons for use on future memos
- Understand when quantity, price and cost memos are automatically generated by the system
  - Set up Retail Pro to require a memo reason for manual changes made to inventory quantity, cost or price
  - Specify a default memo reason for manual changes made to inventory quantity, cost or price

## **Managing Customers**

- Create new customer records
  - Understand the difference between Global and Local customer types
  - Set up default UDF fields (with default selections) for use when creating customer records
  - Set up default AUX fields (with default selections) for use when creating customer records
- View customer profiles
  - Understand the different types of sales and statistical information that can be viewed from the customer profile
  - View a customer's profile for multiple date ranges
  - Rebuild the "Delta Table" to ensure that statistical data in the customer profile is current
- Setup the system to prevent users from seeing sensitive customer information
  - Define the actual rights associated with each "Security Level"
  - Establish default security levels for new customers added to the system
  - Establish custom names for each security level
  - Assign a "Security Level" to each customer
- View a customer's past receipts and sales orders directly from the "Customer" module
  - View a customer's sales and return transactions for a specified date range
  - View a customer's sales orders for a specified date range
- Divide customers into saved groups or "Segments" based on certain criteria
  - Create a customer segment
  - View customers that fall within a segment
  - Manually add customers to a segment
- Divide customers into saved groups or "Bins" based on certain criteria
  - Create a bin run
  - View bins for a given bin run
  - View customers that fall within a bin
  - Manually add customers to a segment
  - Understand the general steps required to track customer movement across bins

## Tracking Sales Transactions

- *Understand the different types of Sales Orders and their intended purpose*
  - *Understand what Customer Orders are used for*
  - *Understand what Layaways are used for*
  - *Understand what Special Orders are used for*
  - *Understand what Store Registries are used for*
  - *Understand what Company Registries are used for*
- *Understand how to handle Layaway Transactions*
  - *Create a Layaway SO without taking a deposit*
  - *Complete the planned sale by creating a receipt referencing the Layaway SO*
  - *Create a Layaway SO and a take a deposit (specified deposit amount)*
  - *Complete the planned sale by creating a receipt referencing the Layaway SO with deposit*
  - *Create a Layaway SO and record the sale to make sure the layaway items are immediately removed from inventory*
  - *For a Layaway SO where the sale has been recorded, complete the planned sale by creating another SO deposit to cover the remainder of the balance*
- *Setup the system to suggest/require a certain percentage of the total amount when taking a SO deposit*
  - *Setup the system to automatically suggest a certain percentage of the total amount when taking a SO deposit*
  - *Setup the system to require a certain percentage of the total amount when taking a SO deposit*
- *Understand how to handle Customer Order SO Transactions*
  - *Create a Customer Order SO with/without taking a deposit*
  - *Complete the planned sale by creating a receipt referencing the Customer Order SO*
  - *Generate a PO directly from the Customer Order SO*
- *Understand how to handle Special Order SO Transactions*
  - *Create a Special Order SO with/without taking a deposit*
  - *Complete the planned sale by creating a receipt referencing the Special Order SO*
  - *Generate a PO directly from the Special Order SO*
- *Understand how to handle Registry SO Transactions*
  - *Create a Store Registry SO*
  - *Create a Company Registry SO*
  - *Complete a sale made against a Registry SO by creating a receipt referencing the Registry SO*
- *Understand the different types of Receipts and their intended purpose*
  - *Understand what Sales Receipts are used for*
  - *Understand what Return Receipts are used for*
  - *Understand what Lost Sale Receipts are used for*
  - *Understand what Disbursement Receipts are used for*
  - *Understand what High Security Receipts are used for*
  - *Understand what Check In/Out Receipts are used for*
- *Set up Tendering Options*
  - *Set up Tendering options that will be available at point-of-sale*
  - *Make sure certain tendering options are available for counting when closing the drawer*
  - *Specify the order in which certain tendering options appear in the Tenders window at point-of-sale*
  - *Specify the receipt information required in order to use certain tendering options at point-of-sale*
  - *Make sure a change window is displayed when given change back to customers*

- *Understand how to handle Sales Transactions*
  - *Create a Sales Receipt to sell a few items, tendered by cash*
  - *Create a Sales Receipt to sell a few items, tendered by cash w/ change*
  - *Create a Sales Receipt to sell a few items to a specific customer, tendered by cash*
  - *Set up the system to limit/expand the Customer Lookup Modes that can be used to list a customer on receipts and sales orders*
  - *Create a Sales Receipt to sell a few items, tendered by cash and credit*
- *Tender a sale by foreign currency*
  - *Define a foreign currency that will be available at point-of-sale, along with exchange rate and all denominations*
  - *Create a Sales Receipt to sell a few items, tendered by a foreign currency*
- *Display customized "Quick Tender buttons" (or cash buttons) on the "Receipts" screen*
  - *Define quick tender buttons that will be available for display, along with multiple and button image*
  - *Create a Sales Receipt to sell a few items, tendered using the quick tender buttons*
- *Use "Multiplier Buttons" to quickly specify quantity values on selected documents*
  - *Define multiplier buttons that will be available for display, along with multiple and button image*
  - *Create a Sales Receipt to sell a few items and use the multiplier buttons to modify the item quantity values*
- *Understand how to handle Merchandise Returns*
  - *Create a Return Receipt to return an item*
  - *Create a Sales Receipt to return an item (and referencing an original sales receipt)*
  - *Require a return reason when using a sales receipt for item returns*
  - *Specify a default return reason for use when returning items on a sales receipt*
- *Understand how to handle Merchandise Exchanges*
  - *Create a Sales Receipt to exchange an item (and referencing an original sales receipt) for a new identical item*
- *Understand how to handle Merchandise Voids*
  - *Create a sales receipt listing several items and remove one of those listed items*
  - *Create a sales receipt listing several items and void one of those listed items*
- *Manually give discounts at point-of-sale*
  - *Discount a specific line item on the sales receipt*
  - *Predefine the various discount types to be used on future sales receipts*
  - *Discount the entire sales receipt so that all line items are given the discount*
  - *Predefine the Comment 1 or Comment 2 field to track future global discounts*
  - *Spread a specified global discount across all items listed on the receipt*
  - *When spreading global discounts, set up the system to have the global discount add to the existing line item discount*
  - *Set up the system to allow/prevent global discounts to be spread across receipts and/or sales orders*
- *Assign a default discount to a given customer, which takes effect automatically whenever the customer purchases any item*
  - *Assign a default discount to a given customer*
- *Understand the various ways to control the use of discounts*
  - *Place a limit on how much of a discount each employee can give to customers*
  - *Place a limit on how much employees can discount a specific item*
  - *Understand the relationship between Max Item Limits and the employee Max Discount limit*

- Understand the difference between Max Discount % and Max Accumulative Discount % fields
- Establish default maximum discount values for the Max Discount % and Max Accumulative Discount % fields
- Place a limit on how much of a default discount employees can assign to a given customer record
- Lookup the price for a given item at point-of-sale
  - Lookup the price for a given item at point-of-sale using the Price Lookup functionality
- Understand how to handle cash disbursements
  - Predefine all necessary reasons for future disbursements
- Understand how to handle held receipts
  - Place a receipt on hold
  - "Un-hold" the receipt and complete the receipt
  - Covert a held receipt into a Lost Sale Receipt
- Open the cash drawer
  - Set up the system to automatically open Cash Drawer 1 and/or Cash Drawer 2 for specific tender types
  - Manually open the cash drawer
- Setup taxes
  - Setup taxes for the "Sales Tax" tax method
  - Understand the difference between tax codes and tax areas
  - Assign Tax Areas to Stores
  - Assign Tax Codes to Inventory items
  - Assign Tax Areas to Customers
  - Setup taxes for the "Sales Tax - Multi" tax method
  - Setup "Sliding Taxes" so that tax rates (tax percentage) changes based on the price of an item.
  - Setup a "Luxury Tax" so that tax rates are assessed only on the amount above a defined price threshold (cutoff point)
  - Setup taxes so that any nothing above a certain threshold is taxed
  - Setup taxes so that the tax rates only apply to the portion of the item price at/below a certain amount or "taxable ceiling"
  - Setup the system so that the "VAT" tax method is used
- Setup the system to ensure that a specific item's price automatically changes depending on the quantities purchased
  - Setup Quantity-based Pricing
  - Setup the system to jump over price levels not used for quantity pricing purposes
  - Understand when it would not be appropriate to jump over price levels not used for quantity pricing purposes
  - Setup Promo Pricing
  - Setup the system to make sure promos are applied automatically/manually at point-of-sale
  - Understand the differences between Quantity-Based Pricing and Promo Pricing
- Track miscellaneous fees and services at point-of-sale using the Fee and Shipping fields
  - Understand how many fees can be tracked on a given receipt at a time
  - Setup the system so that fee-specific taxes are automatically applied to the receipt
  - Setup the system to automatically suggest a fee amount
- Setup the system to automatically track when certain activities occur in the system to help with loss-prevention measures
  - Understand which activities can potentially generate security receipts
  - Setup the system to use the Document # Sequence used for regular receipts for system-generated security receipts

- *Use POS Flags to capture information at point-of-sale*
  - *Understand how many POS Flags can be established on a given receipt at a time*
  - *Customize the POS Flag label and predefine several selection options*
  - *Setup the system to require certain POS Flags to be populated before the transaction can be completed*
  - *Define a default selection option for certain POS Flags*
- *Check the availability of items at point-of-sale*
  - *Use the Committed Window to view all planned transactions for the selected item*
  - *Use the Inventory Quantities Window to view an item's available quantity at different store locations*
  - *Setup the system to automatically display an alert when there is insufficient stock on-hand for a listed item*
  - *Understand how to interpret the Information displayed on the Committed Window*
  - *Understand the various methods that can be used for availability checking*
  - *Activate Availability Checking for Select Documents*

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

- *Run X-Out Reports*
  - *Setup the system to allow x/z-out reports to be previewed on the computer screen*
  - *Run an x-out report to check on sales activity*
  - *Understand the various parts of the x-out report*
- *Run Flash Reports*
  - *Run a flash report to check on sales activity*
  - *Understand the different chart formats available to display sales information in flash reports*
  - *Understand the different elements used to display sales information in flash reports*
  - *Understand the different sales values that can be displayed on flash reports*
  - *Understand the different effects that can be applied to charts and graphs in flash reports*
  - *Understand the different formats that flash reports can be saved in*
- *Run Z-Out Reports*
  - *Understand the difference between "Structured Mode" and "Unstructured Mode" in handling media counts and reconciliation*
  - *Set up Retail Pro to handle media counts and reconciliation using the "Structured Mode" method*
  - *Set up Retail Pro to handle media counts and reconciliation using the "Unstructured Mode" method*
  - *Set up the system to open and close the register with a blind close*
  - *Run a z-out report to open and close the register*

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

- *Create purchasing documents to track the ordering (and future receiving) of merchandise*
  - *Understand the difference between Drop-Ship and Marked-For PO's*
  - *Create a single store drop-ship PO to track the ordering of merchandise being shipped directly to a single store*
  - *Set up the system to use the Inventory "Order Cost" as the suggested cost on PO's*
  - *Understand the intended purpose for each of the date fields on the PO*
  - *Set up the system to allow/not allow for the receiving of merchandise against a PO that has passed its cancel date*
  - *Understand the intended purpose of the PO Info/Instructions fields*
  - *Create a marked-for PO to track the ordering of merchandise targeted to ship to a central location, such as a warehouse or distribution center*
  - *Create a multi-store drop-ship PO to track the ordering of merchandise being shipped directly to different stores*
  - *When creating multi-store PO's, understand the role of the Item Allocation table*

- *Track the ordering of the same item from different suppliers*
  - *When ordering the same item from different vendors, ensure that the correct cost is used on PO's*
  - *Use the multi-vendor table to track all alternate suppliers and associated costs for a given item*
- *Set up the system to automatically convert "PO Cost" information on a PO into a foreign currency*
  - *Setup exchange rates between all currencies*
  - *Establish a default "currency" for all foreign suppliers*
  - *Display the "FO Cost" and "Currency" on the PO*
- *Setup the system to ensure that the "PO Cost" for items receiving a vendor discount is correctly stated on the PO*
  - *Enable the use of "Trade Discounts" to ensure that the "PO Cost" for items receiving a vendor discount is correctly stated on the PO*
  - *With Trade Discounts enabled, understand which field is suggested as the "PO Cost" and*
  - *Designate which inventory items receive vendor discount*
  - *Specify the default trade discount percentage to be used by all new items created for a given vendor*
- *Automatically populate the "Item Allocation" table with a predefined distribution plan*
  - *Create an Allocation Pattern to predefine a distribution plan for ordered merchandise*
  - *Apply an Allocation Pattern on a PO to automatically populate the "Item Allocation" table*
- *Track the ordering of the items that come in cases*
  - *Setup the system to require that certain items are always ordered by the case*
  - *Setup the system to always round up/down/to the near case when ordering cases*
  - *Designate which inventory items come in cases and the number of units per case*
  - *For an item that comes in cases, display the number of cases the item has currently on-hand*
  - *Setup the system to allow for partial cases to be ordered on a PO*
  - *Use the PO "Case Ord" field to specify the number of cases to order*
- *Handle the ordering of "Pre-Packs" or "Minimum Order Requirements" on a PO*
  - *Create size patterns to predefine all items to be ordered (each size/color combination) and the quantities to order*
  - *Understand the relationship between scales and size patterns*
  - *Apply a Size Pattern on a PO to automatically order the correct items at the correct quantities*
  - *When applying a Size Pattern on a PO, use the multiplier functionality to order two or more pre-packs*
- *Prevent the ordering of items on a PO*
  - *Prevent an item from be listed on a PO effective immediately*
  - *Prevent an item from being ordered before a specified date*
  - *Prevent an item from being ordered after a specified date expires*

## **Tracking the Receiving of Merchandise**

- *Create receiving documents to track the receiving of merchandise*
  - *Understand the difference between Receiving and Return Vouchers*
  - *Create a Receiving voucher to receive merchandise that came from a supplier or another store*
  - *Create a Receiving voucher referencing a PO*
- *Create documents to give advanced notice to receiving stores that merchandise is on its way*
  - *Generate an ASN Voucher directly from a PO*
  - *Generate a receiving voucher directly from an ASN Voucher*
  - *Manually create an ASN Voucher*

- Manually create an ASN Voucher referencing a PO
- Track freight charges, fees, taxes, and discounts on a PO
  - Track freight charges, fees, taxes and/or discounts separate from the cost of items received
  - Incorporate freight charges, fees, taxes and/or discounts into the cost of items received
  - Remove freight charges, fees, taxes and/or discounts that have been incorporated into the cost of items received
- Determine how vouchers can update the inventory “cost” value
  - Setup the system to use Average, Overview or Leave as the inventory costing method
  - Setup the system to have costs in inventory remain consistent day-to-day even though, in reality, the cost is fluctuating throughout the year
  - Setup the system to have costs in inventory reflect the most current cost at all times
  - Setup the system to have costs in inventory be a weighted average throughout the year
  - Setup the system to allow users to manually select an inventory costing method when receiving merchandise
  - Understand how the system calculates a new weighted average
  - Understand which inventory costing method is most-commonly used by retailers

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

- Plan the future transfer of merchandise from store-to-store
  - Create a TO to plan the future transfer of merchandise
  - When creating TO's, understand the role of the Item Allocation table
- Automatically populate the “Item Allocation” table with a predefined distribution plan
  - Create an Allocation Pattern to predefine a distribution plan for ordered merchandise
  - Apply an Allocation Pattern on a TO to automatically populate the "Item Allocation" table
- Generate a TO directly from a Marked-For PO
  - Generate a TO directly from a Marked-For PO and ensure that the distribution plan in maintained
  - Generate a TO directly from a Marked-For PO and ensure that no distribution plan is used
  - Generate a TO directly from a Marked-For PO and ensure that enough merchandise is transferred to each target store to get them up to their defined minimum quantity level
- Generate a TO directly from a voucher
  - Generate a TO directly from a voucher and ensure that no distribution plan is used
  - Understand the advantage to generate a TO from a voucher as opposed to a PO
- Track the transfer of merchandise from store-to-store
  - Set up the system for minimum verification to ensure that it automatically generates a matching “Receiving Voucher” when the “Transfer Slip” is updated
  - Setup the system for maximum verification to ensure that the transfer is verified by the receiving store
  - Generate a transfer-related receiving voucher directly from an ASN Voucher
  - In Trans Verification, locate all matching transfer documents and copy them to history
- Resolve discrepancies that exist between the transfer documents
  - Understand the different variables used to determine if there is a transfer discrepancy
  - Setup verification rules that can be used to resolve transfer discrepancies that arise in the future
  - Understand the various actions that can be taken to resolve transfer discrepancies
  - Understand the possible role of adjustment memos when resolving transfer discrepancies
  - Setup the system to automatically resolve transfer discrepancies based on established verification rules
  - Manually resolve transfer discrepancies using established verification rules
- Generate a Transfer Slip directly from a TO

- *Generate a Transfer Slip directly from a TO*
- *When generating a Transfer Slip from a TO and there is insufficient quantities, ensure that only complete transfers are executed*
- *When generating a Transfer Slip from a TO and there is insufficient quantities, execute all transfers as planned even if the source store's quantities go negative*
- *When generating a Transfer Slip from a TO and there is insufficient quantities, ensure that the available quantity is transferred to the destination stores*
- *Track the transfer of merchandise from subsidiary to subsidiary*
  - *Setup the system to allow for merchandise to be transferred between subsidiaries*
  - *Specify the transfer method to be used when transferring merchandise between subsidiaries*
  - *Understand how items that do not exist at the target subsidiary are handled during intercompany transfers*
  - *Understand how subsidiaries with different currencies are handled during intercompany transfers*

## **Running Pre-designed Reports**

- *Use the Report Viewer to run pre-defined reports*
  - *Understand the major differences between the four report types*
  - *Use the Report Viewer to run pre-defined reports*
  - *Export a report to a variety of different external programs*
  - *Save a report into the Crystal Reports format*
- *Update the delta table*
  - *Understand the need to update the Delta Table as it relates to running reports*
  - *Update the delta table*
- *Register externally-created reports*
  - *Register a report created externally by an ODBC-compliant report writer so that it can be viewed within the Report Viewer*
  - *Specify all information needed to register a report, including name, report type, report path and access level*
  - *Un-register a report and remove it from the Report Viewer*

## **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*
  - *Understand the general steps involved to assign new Min and Max quantity levels to inventory items*
  - *When performing a sales analysis, understand the role of various settings, including sales range, filters and locations*
  - *When establishing min/max formulas, understand the various elements involved, including sold range, condition, days of supply, quantity, annual sales, percent increase and out of stock*
  - *Establish the proper min/max formulas to meet user requirements*
  - *When calculating new min/max quantity levels, understand the various settings, including formulas, override filter and stores*
  - *When updating Retail Pro with new min/max quantity levels, understand the various settings, including update qty only, update all, filters, locations and company min/max*
- *Use the Auto PO Wizard to generate new Purchase Orders for replenishment purposes and to back up existing commitments*
  - *Understand the variables that can be potentially analyzed by the Auto PO Wizard before generating purchase orders*
  - *Understand settings used by the Auto PO Wizard to determine how much to order*
  - *Be able to anticipate how the Auto PO Wizard would behave if given a specific scenario*

- *Use the Auto Transfers Wizard to generate transfer documents to redistribute merchandise between stores*
  - *Use the Auto Transfers Wizard to generate Transfer Orders to plan the future transfer of merchandise*
  - *Use the Auto Transfers Wizard to generate Transfer Slips to redistribute merchandise from store to store*
  - *Understand the various distribution options available that determine whether items are transferred and in what quantities*
  - *Understand the variables that can be potentially analyzed by the Auto Transfer Wizard to determine the quantity available to be transferred out of the source store*
  - *Understand the variables that can be potentially analyzed by the Auto Transfer Wizard to determine the quantity available at the target store*
- *Understand how the Retail Pro Scheduler program can be used to run the Auto Utilities without any user intervention*
  - *Understand the program and command-line parameter used to automate the Auto Min/Max utility*
  - *Understand the program and command-line parameter used to automate the Auto PO utility*
  - *Understand the program and command-line parameters used to automate the Auto Transfer utility*

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

- *View profile reports for item, vendor, department and customer records*
  - *Manually update/rebuild the Delta Table to make sure statistical information is up-to-date*
  - *Understand the program and command-line parameters used to automatically update/rebuild the Delta Table*

### **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*
  - *Install the Retail Pro Centrals Server*
  - *Use the Centrals Management Utility to establish relevant settings including host IP, port number, database name and customer lookup permissions*
  - *Setup Retail Pro to allow the local system to process returns and perform centralized customer lookups*
  - *Set up ECM to ensure that the Centrals Server is updated throughout the day*
- *Handle centralized customer lookups at point-of-sale*
  - *Use the "Quick Customer Lookup" window to refine customer lookup criteria*
- *Handle centralized merchandise returns and exchanges at point-of-sale*
  - *Use the "Original Receipt Lookup" dialog window to locate the original receipt and select a return reason*
  - *Manually locate a receipt when the system is unable to locate the receipt based on provided information*

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

- *Use the Language Manager to customize default field labels or translate Retail Pro*
  - *Add additional language columns*
  - *Open dictionary files that display the text available for customization or translation*
  - *Understand the various text categories available for display and customization, including application errors, application labels, etc.*
  - *Switch between read-only to translator modes*
  - *Use the "Find" window to locate specific field labels*
  - *For fields located on various Retail Pro screens, display all areas where the field resides*

- *Switch the default “Native” language used by Retail Pro*
  - *Switch the Retail Pro language to a different language*
- *Distribute translation files*
  - *When distributing translation files for use on other Retail Pro systems, understand the file format used during export*
  - *When distributing translation files for viewing/editing outside of Retail Pro, understand the file format used during export*
  - *Select the text categories to be exported*
  - *Select the languages to be exported*
  - *Import translation files for use in Retail Pro*