

How-To Guide Configuring Order Capture

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Introduction

The purpose of this guide is to show how to configure the Enactor Estate Manager and POS to support Order Capture at the Point of Sale.

Order Capture at the POS can be carried out in two ways:

- one is simply using the Order button from the Sales menu – this puts the POS into Ordering mode, so that products then entered are treated as ordered rather than sold
- the other is using Rich Product Search – this allows users to browse and find products using a web-style interface, which provides a richer and more intuitive experience.

This guide will focus on the Rich Product Search approach, but ordering using the menu will also be covered.

Please note configuring order capture requires amendments to several types of data. It is recommended that you familiarise yourself with the main Enactor configuration pages before undertaking this task (see Prerequisites for details).

Overview

The following steps are required to enable Order Capture:

- Location Configuration – setting the rules on where orders may be accepted, and on how they may be fulfilled.
- Reason Configuration – setting up the reason codes used in the order capture flow
- Product Configuration – setting products so they may be ordered, and adding appropriate details so they may be accessed using Rich Product Search
- Menu Configuration – setting up the Rich Product Search menu, and adding Order functions to the Sales Menu on the POS
- Role Configuration – ensuring POS users have the appropriate privileges to carry out ordering functions
- POS Terminal Configuration – setting up the POS so it has the correct menu and other required settings
- Inventory Configuration – setting product inventory so that the Inventory and Order Management systems can find the right stock levels to support Ordering functions.
- Synchronising Configuration with the POS (“Broadcasting”).
- Executing the Order Capture at the POS
- Checking Order Details at the Estate Manager

Prerequisites

Resources

Before starting, you should have the following resources in place:

- Enactor Estate Manager
- Enactor POS (configured within the UK Region, connected to the Estate Manager)
- Standard Configuration, including:
 - Base Configuration
 - UK Retail (I have used UK in this example, but it could be other regional config packs)
 - Retail Segment pack (I have used UK Grocery here, but it could be UK Fashion etc.)
- Examples of Data to be used as models, particularly product data

Prior Training/Experience

You should be familiar with the following:

- Estate Manager configuration
- Enactor configuration concepts, including Locations, POS Terminals, Products etc.
- Data broadcasting
- Standard POS Sales processes

If necessary, please revise the appropriate how-to guides on these concepts before starting the Order Capture configuration process.

Configuration Steps


Location Configuration

The first step is to configure the warehouse location which will be the main Inventory source for orders in our environment.

Go to Location configuration using Search or the path *Configuration-Organisation-Locations*. The key tabs are the General tab and the Ordering Tab

Warehouse Location

Create a new Warehouse as follows:

 Create a new Location

Location Maintenance

You are adding a new location, please select the type, template and enter the ID:

Location Type

Warehouse

Template

-

Location ID

0100

Back

Create

Note: you can use whichever Location ID you wish, and you may choose to use Location Templates if you prefer. Warehouse Location 0100 may already exist in your configuration. If so, you can edit it, or create a new warehouse if you wish.

Location Maintenance

Save

Cancel

You are editing warehouse ID: 0100

General

Address

Purging

Email

MM Groups

MM Group Price

Attributes

General

Ordering

Currency

Is Live

☒

Name*

UK Warehouse

Company ID

Region*

All Regions

Locale

English (UK)

Document Code

VAT Number

MM Group Hierarchy

GROCERY

Start Date

22

December

2015

...

Menu Group

Default

Default Menu Group

-

Price Group

United Kingdom (All Regions)

The key fields on the General tab are:

- Description – set as required
- Region – set the warehouse at the country level. If you have a multi-country configuration, you should have one warehouse for each country that will be taking orders.

Location Maintenance

Save

Cancel

You are editing warehouse ID: 0100

General

Address

Purging

Email

MM Groups

MM Group Price

Attributes

General

Ordering

Currency

Volumetric Weight Factor

Customer Forwarder Surcharge

Default Delivery Zone

Accept Collection Orders

☐

Accept Reservation Orders

☐

Fulfil Collection Orders

☒

Fulfil Delivery Orders

☒

Prevent Local Collections using Own Stock

☒

The key fields on the Ordering tab are:

- Accept Collection Orders – this should be set to off as the warehouse will not normally accept orders
- Accept Delivery Orders – this should be set to off as the warehouse will not normally accept orders
- Fulfil Collection Orders – this should be set to on as the warehouse will be the primary fulfilment source
- Fulfil Delivery Orders – this should be set to on as the warehouse will be the primary fulfilment source
- Prevent Local Collections Using Own Stock – this should be set to On. The warehouse will not normally accept orders so this scenario is unlikely to arise.

Set the data on the other tabs as required – currency should be set to the Country's main currency. Address should also be set.

Store Location

Each of the store locations where you will be accepting orders should be set as follows. This would normally be done using a location template. The guide below will configure the location directly, but the process is similar with templates.

The critical tab on the Store Location configuration is Ordering.

The screenshot shows the 'Location Maintenance' interface for editing store ID: 0002. It features a top navigation bar with tabs: General, Address, Purging, Day End, Email, Nearest Stores, and Cash Management. Below this, a sub-navigation bar highlights the 'Ordering' tab, with other sub-tabs: General, Tax, Currency, and Security. The main configuration area includes the following fields:

- Manager:** A text input field.
- Volumetric Weight Factor:** A numeric input field with the value '0'.
- Customer Forwarder Surcharge:** A numeric input field with the value '£0.00'.
- Default Warehouse:** A dropdown menu currently showing 'UK Warehouse'.
- Default Delivery Zone:** A dropdown menu currently showing '-'.
- Accept Collection Orders:** A checkbox that is checked.
- Accept Reservation Orders:** A checkbox that is checked.
- Fulfil Collection Orders:** An unchecked checkbox.
- Fulfil Delivery Orders:** An unchecked checkbox.
- Prevent Local Collections using Own Stock:** An unchecked checkbox.

The main fields on the Ordering Tab are as follows:










- Default Warehouse – this should be set to the warehouse you have configured for the region
- Accept Collection Orders – this should be set to on, assuming you wish to allow Click and collect orders
- Accept Delivery Orders – this should be set to on, assuming you wish to allow Home Delivery orders
- Fulfil Collection Orders – this should be set dependent on whether you want to allow fulfilment of click and collect orders from the store
- Fulfil Delivery Orders – this should be set dependent on whether you want to allow fulfilment of Home Delivery orders from the store
- Prevent Local Collections Using Own Stock – this should be set dependent on whether you want the store to fulfil collect orders using its own stock (i.e. click and reserve)

This completes the location configuration.

Reason Configuration

The following reason code is used by the Order capture process:

Customer Order Deposit

Reason Maintenance						
<div>Region: United Kingdom</div> <div>Reason Type: Customer Order Deposit</div> <div>Reason ID: Starts With</div> <div>Apply Filters Reset Filters</div>						
	Reason ID	Reason Type	Region	Reason Start Date	Reason End Date	Description
  	COD003	Customer Order Deposit	United Kingdom			0% no preauth
  	COD002	Customer Order Deposit	United Kingdom			10% plus preauth
  	COD004	Customer Order Deposit	United Kingdom			100%

This is used to set the order deposit values that may be accepted on the POS. For example, if the deposit is always 100% up front for all POS orders, only the 100% option should be included. If the deposit can be a specific value or % of the total order value, this can be configured on the reasons. Where the deposit value is less than 100% of the total, you can choose to have the POS create a card pre-authorisation for the remaining amount.

Product Configuration

Product

There is one key field that is required on the Product configuration. This is held on the Merchandise Tab. The field is the “Allow Customer Order” checkbox. This should be set for all Merchandise, SKU and Style products which may be ordered by customers.

The configuration process below uses the Estate Manager UI to configure the Product. This is fine for small volumes and for creating example data. For large volumes of product data, this would be handled by integration. An example configured product may be exported to provide a template of the XML structure required to include the Allow Customer Order data.

Go to Product Configuration using search or the path *Configuration-Merchandise-Product*.

Product Maintenance

Save

Cancel

You are editing Merchandise Product 535024 : Chardonnay Gran Reserva.

GeneralSelling OptionsAlternativeTendersTaxMerchandisePricesLocation

GeneralInventoryDimensionsWarrantyMovements

MM Group

GROC-DRINK-WINE - Wines

Brand

-

Range

-

Season

-

Measure System

-

Sales Units

-

Standard Cost Price

£0.00

Standard Margin

0%

Allow For Loan

☐

Allow Customer Order

☒

Product Ordering

Product Ordering is an **optional** configuration entity. If all products have the same rules (e.g. they all allow Collection, Delivery and Reservation, and use the same delivery types) then the Product Ordering data is not required.

If different rules are applicable depending on the product, then product Ordering may be used to record the settings for each product.

Go to Product Ordering Configuration using search or the path *Configuration-Merchandise-Product Ordering*.

The screenshot shows the 'Product Ordering Maintenance' interface. At the top, there's a green header bar with the title. Below it, there are 'Save' and 'Cancel' buttons. A message states 'You are editing Product Ordering ID: '11111''. The main section is titled 'General' and contains several configuration options: 'Permits Collection' (checked), 'Permits Reservation' (checked), 'Permits Delivery' (checked), and 'Preferred Delivery Method' (set to 'Express'). Below these are two sections for delivery methods: 'Return Delivery Methods' and 'Alternative Delivery Methods'. Each section has a table with columns 'ID' and 'Description'. The 'Return Delivery Methods' table has one row with ID '-' and Description '-'. Below it is a button '+ Add Return Delivery Type' and a dropdown menu. The 'Alternative Delivery Methods' table also has one row with ID '-' and Description '-'. Below it is a button '+ Add Alternative Delivery Type' and a dropdown menu. At the bottom left, there is a red asterisk and the text '* Denotes Mandatory'.

Set the “Permits” flags dependent on which delivery methods are allowed.

Set the Preferred delivery method

If additional returns and send delivery methods are allowed, these may also be maintained.

Product Group



Products should be added to a Product Group structure to support browsing via the Rich Product Search facility on the POS.

The Product Group is maintained using the Group maintenance UI. A hierarchical structure may be configured to reflect how products may be browsed for, as on a commerce website. This is usually different from the main MMGroup hierarchy, which is typically used for reporting.






Go to Group Configuration using search or the path *Configuration-Organisation-Group*. Then select the Group Type *Product Group*.

An example Product Group structure is shown below. You should configure your Product Group to reflect the required structure for browsing. The product group hierarchy should be assigned to the appropriate region.:

Group Hierarchy Maintenance

 Save  Cancel

You are editing Product Group hierarchy ID: food, for region: All Regions

-  **food - Food**
 -  f_bakery - Bakery
 - fb_bread - Bread
 - fb_desserts - Desserts
 - fb_rolls - Rolls
 -  f_chilled - Chilled
 - fc_dips - Dips
 - fc_meals - Meals
 - fc_soupsalad - Soups and Salads
 -  f_cupb - Food Cupboard
 - fcup_crispnut - Crisps and Nuts
 - fcup_dried - Dried
 - fcup_teacoffee - Tea and Coffee
 -  f_drinks - Drinks
 -  f_fruitsveg - Fruits and Vegetables
 -  f_haba - Health and Beauty
 -  f_meat - Meat
 -  f_middle - Middle of GROCERY

Add Product Group

Edit Product Group

If the group structure is common to all regions, it may be assigned to the top-level “All Regions”. If it is only applicable at, say, country level, then it should be assigned to the appropriate country region

Product Group Products

Once the Product Group structure is in place, products should be assigned to the appropriate Group(s). Note: products may be assigned to multiple Product Groups.

Go to Product Configuration using search or the path *Configuration-Merchandise-Product*.

In Product Configuration, select the “Product Group” sub-tab from the “General” tab:

The screenshot shows the 'Product Maintenance' interface. At the top, there's a green header bar with the text 'Product Maintenance'. Below it, there are two buttons: 'Save' (with a floppy disk icon) and 'Cancel' (with a red 'X' icon). A message states: 'You are editing Merchandise Product 535001 : Red Peppers.' Below this, there are two rows of tabs. The first row includes 'General', 'Selling Options', 'Alternative', 'Tenders', 'Tax', 'Merchandise', and 'Prices'. The second row includes 'General', 'Label', 'Information', 'Product Group', 'Selling Codes', and 'Product Lists'. The 'Product Group' tab is currently selected. Below the tabs, there's a table with the following structure:

Product Groups	
	Vegetables
Add	

A dropdown menu is open from the 'Add' button, showing a list of product groups:

- Food
- Bakery
- Bread
- Desserts
- Rolls
- Chilled
- Dips
- Meals
- Soups and Salads
- Food Cupboard
- Crisps and Nuts
- Dried
- Tea and Coffee
- Drinks
- Wine
- Fruits and Vegetables
- Fruits
- Herbs
- Vegetables
- Health and Beauty
- Meat

You may add the product to one or more groups from the Product Group list.

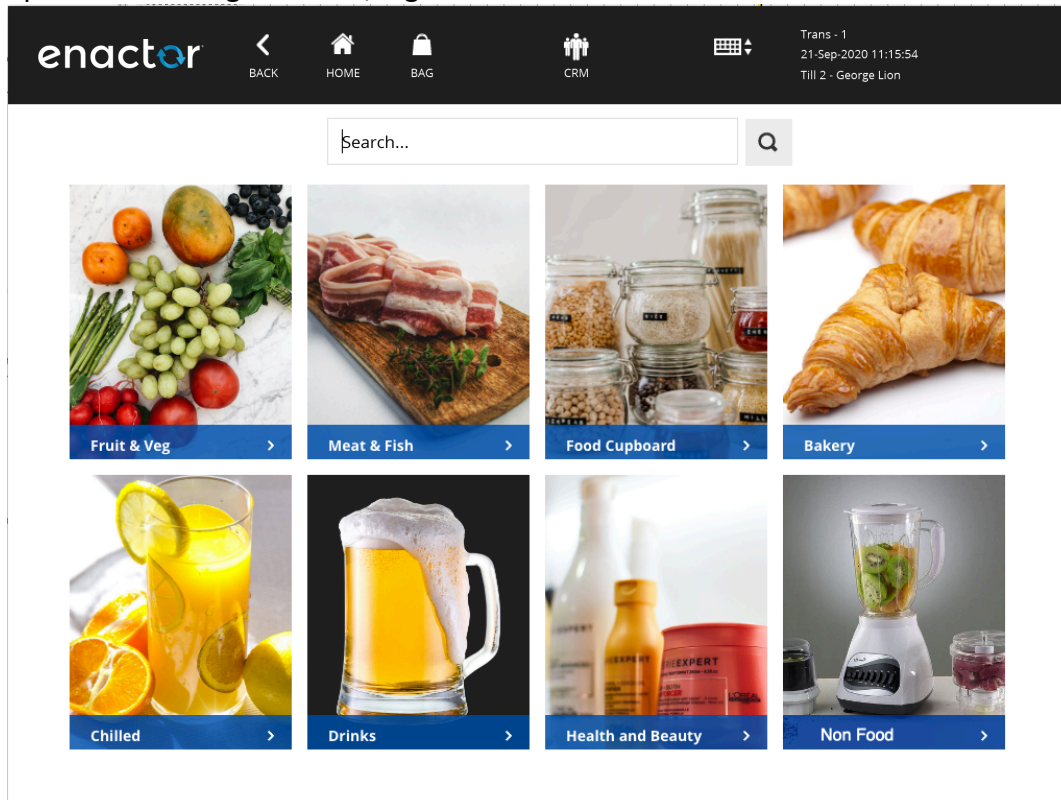
If you have multiple Product Group hierarchies configured, make sure all the Groups to which the Products belong are from the correct Hierarchies.

This concludes the Product Configuration.

Menu Configuration

Rich Product Menu

Menu is the next part of the Rich Product Search Configuration. The Rich Product Menu provides the initial view of the Rich Product Search on the POS, and holds a set of menu options with image buttons, e.g.:



Go to Menu Configuration using search or the path *Configuration-System-Menus*.

The menu selection required is as follows:

- Menu Set – POS
- Role – Whichever role your POS menus are assigned to. I am using a Role of Sales Assistant-UK
- Menu Group – whichever Menu Group is configured for your POS Terminals. I am using a Menu Group of GROCERY.
- Locale – appropriate Locale for your region. I am using English(UK)
- Menu ID – set to RICH_PRODUCT

Menu Maintenance					
Menu Set	POS				
Role	Sales Assistant - UK				
Menu Group	GROCERY				
Locale	English (UK)				
Menu ID	Starts With RICH_PRODUCT				
<input type="button" value="Apply Filters"/> <input type="button" value="Reset Filters"/>					
	Menu Set	Role	Menu Group	Menu ID	Name
	POS	Sales Assistant - UK	GROCERY	RICH_PRODUCT	RICH_PRODUCT

Edit the Rich Product Menu. If one does not exist for your Role/Menu Group, then copy one from another Role/Menu Group.

There should be a set of up to 8 button items on the menu:

The screenshot shows the 'Menu Maintenance' form. At the top, there are 'Save' and 'Cancel' buttons. Below them, a message states: 'You are editing menu ID RICH_PRODUCT for menu set POS, role Sales Assistant - UK, menu group GROCERY, locale English (UK)'. The form contains three fields: 'Name' with the value 'RICH_PRODUCT', 'Menu Type' with a dropdown set to 'Panel', and 'Menu Category' with a dropdown set to 'Retail'. Below these fields is a tree view showing the menu structure: 'RICH_PRODUCT' with sub-items '1 - Veg_1', '2 - Meat_2', '3 - FoodCupboard_3', '4 - Bakery_4', '5 - Chilled_5', '6 - Drinks_6', '7 - HABA_7', and '8 - Middle_8'.

Each Button item should be configured as follows:

General Tab

The screenshot shows the 'Menu Maintenance' form with the 'General' tab selected. At the top, there are 'Save' and 'Cancel' buttons. Below them, a message states: 'You are editing a button on 'RICH_PRODUCT'. Please update the button details'. The form has two tabs: 'General' and 'Data'. Under the 'General' tab, there are several fields: 'Type' with radio buttons for 'Event' (selected) and 'Menu Link'; 'Event*' with a dropdown menu; 'ID*' with a text input field containing 'Veg_1'; 'Button Label' with a text input field; 'Button Message Id' with a text input field; 'Button Message Base' with a text input field; and 'Image URL' with a text input field containing 'IMAGE:///Grocery1024x768/Veg.png'.

Set the values on the **General** tab as follows:

- The Event should be set to *MmgSelected*.
- The ID should be a unique ID of your choice
- The Image URL should point to an appropriate image.

If you have uploaded images to the Enactor system, they will have a URL like this:
IMAGE://Grocery1024x768/Veg.png

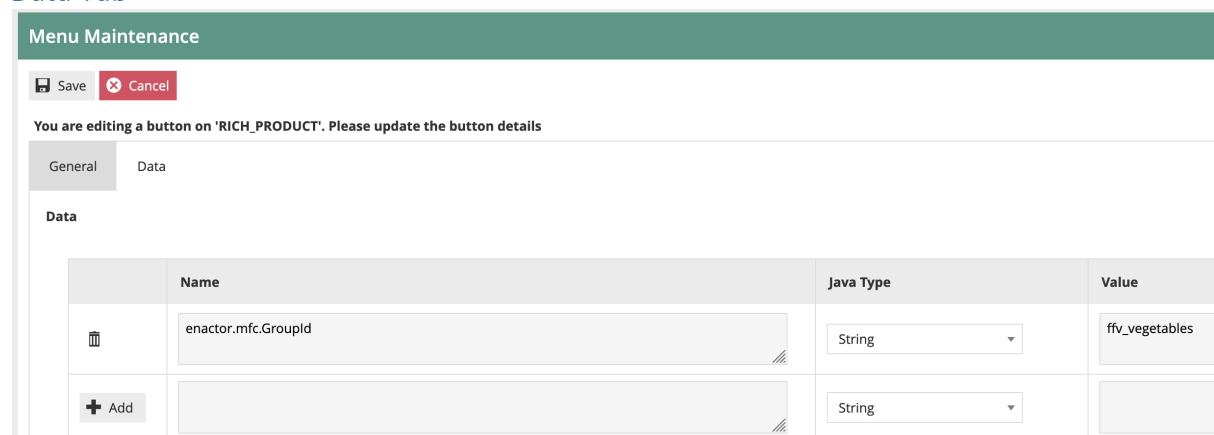
In my example:

- “Grocery1024x768” is the Image Category to which the images have been assigned
- “Veg.png” is the image filename.



Note: it is also possible to point at external URLs for the menu images, using a normal http URL structure.

As we are using images, the message (text) details on the menu items can be ignored.

Data Tab



The screenshot shows the 'Menu Maintenance' interface. At the top, there are 'Save' and 'Cancel' buttons. Below them, a message states: 'You are editing a button on 'RICH_PRODUCT'. Please update the button details'. There are two tabs: 'General' and 'Data'. The 'Data' tab is selected. Below the tabs, there is a table with the following structure:

	Name	Java Type	Value
	<input type="text" value="enactor.mfc.GroupId"/>	<input type="text" value="String"/>	<input type="text" value="ffv_vegetables"/>
 Add	<input type="text"/>	<input type="text" value="String"/>	<input type="text"/>

Set the **Data** tab as follows:

There should be one data item, with a Name of *enactor.mfc.GroupId*. The Java Type should be String.

The Value should be set to the appropriate Product Group ID. In the example above I am using the Group ID of the vegetables group.

Ordering Functions Menu

As well as/Instead of using Rich Product Search, we may wish to select ordering directly from the Sale menu. This will necessitate adding certain functions to the menu structure.

In the example below, I have ordering functions in a sub-menu of the Sales Menu, called “OrderFunctions”:

The screenshot shows the 'Menu Maintenance' interface. At the top, there's a green header bar with the text 'Menu Maintenance'. Below it, there are buttons for 'Save' and 'Cancel'. A message states: 'You are editing menu ID SALE for menu set POS, role Sales Assistant - UK, menu group GROCERY, locale English (UK)'. The form has three fields: 'Name' with the value 'SALE', 'Menu Type' with a dropdown set to 'Tree', and 'Menu Category' with a dropdown set to 'Retail'. Below these fields is a tree view of the menu structure. The root is 'SALE', which has a sub-menu '1 - Sales'. Under '1 - Sales', there are several items: '1 - Rich Product Search', '2 - Store / Recall Options', '3 - Gift Cards', '4 - Receipts', '5 - Salesperson', '6 - QTY Sale', and '7 - More'. Under '7 - More', there are sub-items: '1 - Employee Sale', '2 - Gift Voucher', '3 - Loyalty', '4 - Promotions', '5 - Customers', '6 - Quotes', and '8 - Back'. Under '5 - Customers', there are sub-items: '1 - Customer AC', '2 - Customer Deposits', and '3 - Capture Customer'. Under '4 - Promotions', there is a sub-item '4 - OrderFunctions'. Under '4 - OrderFunctions', there are sub-items: '1 - Order', '2 - CancelOrder', '3 - OrderCollection', '5 - CustomerFindOrder', and '8 - OrderFunctionsBack'.

You may choose to put the Order functions at whichever location in the Sale menu is appropriate for your environment.

The three key menu functions are:

- Order – starts the order capture process
- CollectOrder – records the in-store collection of an existing order
- FindOrder – finds an existing order, for enquiry or other functions.

Order Function

This has the following settings:

- Event: Order
- Button Message ID: ORDER_BUTTON
- Visibility expression: `#{priv:checkPrivilege('enactor.pos.OrderAllowed')}`

This visibility expression will ensure the menu button is only shown to users who are allowed to carry out orders. There are no data tab settings.

Order Collection Function

This has the following settings:

- Event: CustomerOrderCollection
- Button Message ID: CUSTOMER_ORDER_COLLECTION_BUTTON
- Visibility expression: #{priv:checkPrivilege('enactor.pos. CustomerOrderCollectionAllowed')}

This visibility expression will ensure the menu button is only shown to users who are allowed to carry out order collections. There are no data tab settings.

Find Order Function

This has the following settings:

- Event: CustomerFindOrder
- Button Message ID: CUSTOMER_FIND_ORDER_BUTTON
- Visibility expression: #{priv:checkPrivilege('enactor.pos. CustomerFindOrderAllowed')}

This visibility expression will ensure the menu button is only shown to users who are allowed to carry out find order functions. There are no data tab settings

This concludes the Menu Configuration.

Role Configuration

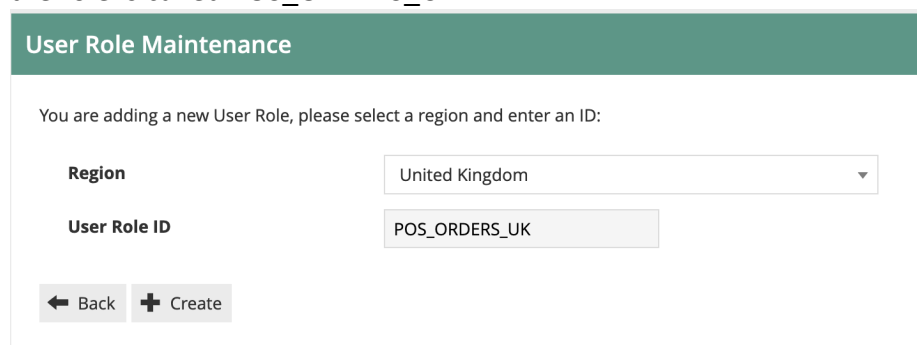
Order Capture Role

The role configuration approach I will take is to create a Role that has all the privileges necessary to capture and manage orders at the POS.

This role may then be assigned to users (or user templates) so that the appropriate people may execute Order Capture.

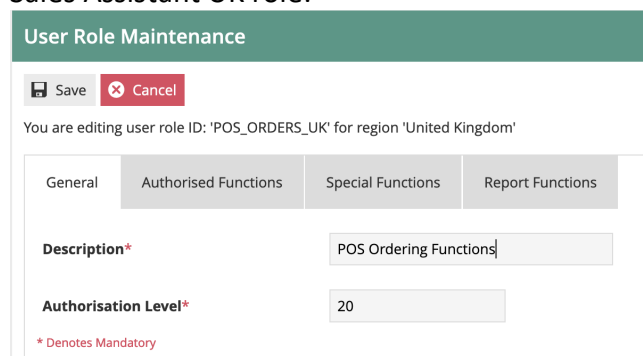
Go to Role Configuration using search or the path *Configuration-HR-User Roles*.

Create a new Role called *POS_ORDERS_XX*, where XX is a country abbreviation. I recommend that this role is set at the Country level. In my example, the country is UK so the role is called *POS_ORDERS_UK*



The screenshot shows the 'User Role Maintenance' interface. At the top, a green header bar contains the text 'User Role Maintenance'. Below this, a message states: 'You are adding a new User Role, please select a region and enter an ID:'. There are two input fields: 'Region' with a dropdown menu showing 'United Kingdom', and 'User Role ID' with a text box containing 'POS_ORDERS_UK'. At the bottom left, there are two buttons: 'Back' with a left arrow and 'Create' with a plus sign.

Set an appropriate authorisation level for the role. This should be lower than the standard Sales Assistant UK role:



The screenshot shows the 'User Role Maintenance' interface for editing an existing role. At the top, a green header bar contains the text 'User Role Maintenance'. Below this, there are 'Save' and 'Cancel' buttons. A message states: 'You are editing user role ID: 'POS_ORDERS_UK' for region 'United Kingdom''. Below this, there are four tabs: 'General', 'Authorised Functions', 'Special Functions', and 'Report Functions'. The 'General' tab is selected. There are two input fields: 'Description*' with a text box containing 'POS Ordering Functions', and 'Authorisation Level*' with a text box containing '20'. At the bottom left, there is a red asterisk and the text '* Denotes Mandatory'.

Then go to the Authorised Functions tab.

From Application Package, select "Enactor Customer Orders POS". If this is not shown in the list, you need to deploy the Customer Orders POS jar – refer to the JAR deployer how-to guide for this.

You should now have a list of around 40 privileges. Enable the following Function ID privileges for the POS_ORDERS_XX role:

Function ID	Function Name
enactor.pos.AuthorisesVoidOrder	Authorises Void Order
enactor.pos.VoidOrderAllowed	Void Order Allowed
enactor.pos.AuthorisesCustomerFindOrder	Authorises Find Order
enactor.pos.CustomerFindOrderAllowed	Find Order Allowed
enactor.pos.AuthorisesCustomerOrderCollection	Authorises Customer Order Collection
enactor.pos.CustomerOrderCollectionAllowed	Customer Order Collection Allowed
enactor.pos.AuthorisesDeliveryChargeOverride	Authorises Delivery Charge Override
enactor.pos.AuthorisesDeliveryChargeReduction	Authorises Delivery Charge Reduction
enactor.pos.DeliveryChargeOverrideAllowed	Delivery Charge Override Allowed
enactor.pos.AuthorisesOrder	Authorises Order
enactor.pos.OrderAllowed	Order Allowed
enactor.pos.AuthorisesOrderReturnAsStandardReturn	Authorises Order Return as Standard Return
enactor.pos.AuthorisesCollectionPaymentVoidCollection	Authorises Void Collection Payment To Void Collection

Note this provides the shopfloor user with the most commonly required order functions. You may need to add or remove functions depending on your specific requirements.

Save the new Role.

Assign the role to the appropriate users or user templates.

This concludes the role configuration.

POS Terminal Configuration

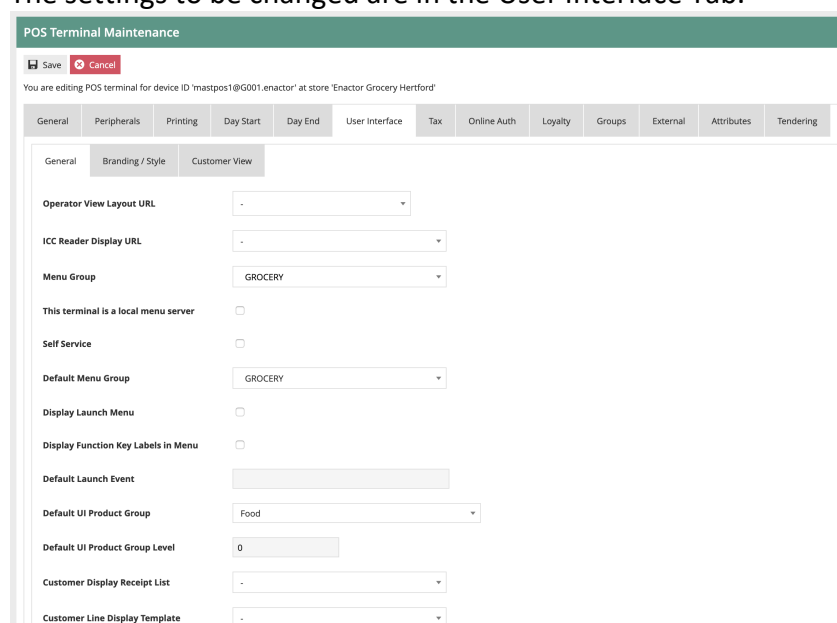
The POS Terminals need to be configured to use the Menu Groups, product groups etc that have been set up above.

You may either configure the POS terminals directly, or use POS Terminal Templates to group similar POS configurations together (recommended). I will use POS terminal configuration below, but the process is the same for configuring a template.

Navigate to POS Terminal configuration using Search or the path *Configuration-Organisation-POS Terminals (or POS Terminal Templates)*

Select the POS Terminal you require by filtering the list, then edit.

The settings to be changed are in the User Interface Tab.



The screenshot shows the 'POS Terminal Maintenance' interface. At the top, there are 'Save' and 'Cancel' buttons. Below them, a message states: 'You are editing POS terminal for device ID 'mastpos1@G001.enactor' at store 'Enactor Grocery Hertford''. A horizontal tab bar contains the following tabs: General, Peripherals, Printing, Day Start, Day End, User Interface (selected), Tax, Online Auth, Loyalty, Groups, External, Attributes, and Tendering. Under the 'User Interface' tab, there are three sub-tabs: General, Branding / Style, and Customer View. The 'General' sub-tab is active, showing the following configuration fields:

- Operator View Layout URL: - (dropdown)
- ICC Reader Display URL: - (dropdown)
- Menu Group: GROCERY (dropdown)
- This terminal is a local menu server: ☐
- Self Service: ☐
- Default Menu Group: GROCERY (dropdown)
- Display Launch Menu: ☐
- Display Function Key Labels in Menu: ☐
- Default Launch Event: (text input)
- Default UI Product Group: Food (dropdown)
- Default UI Product Group Level: 0 (text input)
- Customer Display Receipt List: - (dropdown)
- Customer Line Display Template: - (dropdown)

Set the following fields:

- Menu Group - set to the Menu Group to which you have assigned the Rich Product Menu (I have used GROCERY in my example)
- Default Menu Group – as above
- Default UI Product Group – set to the Product Group you have maintained to hold the Rich Product group structure (I have used Food)
- Default UI Product Group Level - set to 0

Inventory Configuration

The final Configuration step is to set up some example inventory levels. These will be used by the POS and the Order Management system to ensure inventory is available to be ordered by the customer.































For each of the products you wish to order, you should:

- Set up Warehouse Inventory
- Set up Store inventory, if you wish to allow picking from the store

I will set up inventory at the Warehouse for an example product. You can apply this approach to as many items as you wish. Also, you may choose to import inventory data from an external source. To assist with this, you may export example Item Inventory Levels.

Item Inventory Levels

Go to the Item Inventory levels configuration page using Search or the path *Configuration-Merchandise-Item Inventory Levels*.

Item Inventory Level Maintenance							
Location		Location Area		Hide			
Inventory Container		Inventory Type					
Inventory Item Type		Inventory Item ID		Starts With			
Apply Filters		Reset Filters					
	Location	Area	Container	Inventory Type	Item Type	Item ID	Value
  	UK Warehouse			Available	Product	11111	20,000
  	UK Warehouse			Available	Product	11112	20,000
  	UK Warehouse			Available	Product	11114	20,000
  	UK Warehouse			Available	Product	535001	73,456
  	Enactor Grocery Hertford			Available	Product	535001	227
  	UK Warehouse			Available	Product	535002	6,526
  	UK Warehouse			Customer Collection	Product	535002	0
  	UK Warehouse			Inter Branch Transfer - Reserved for Outgoing	Product	535002	16
  	Enactor Grocery Hertford			Available	Product	535002	346
  	Enactor Grocery Hertford			Customer Collection	Product	535002	2

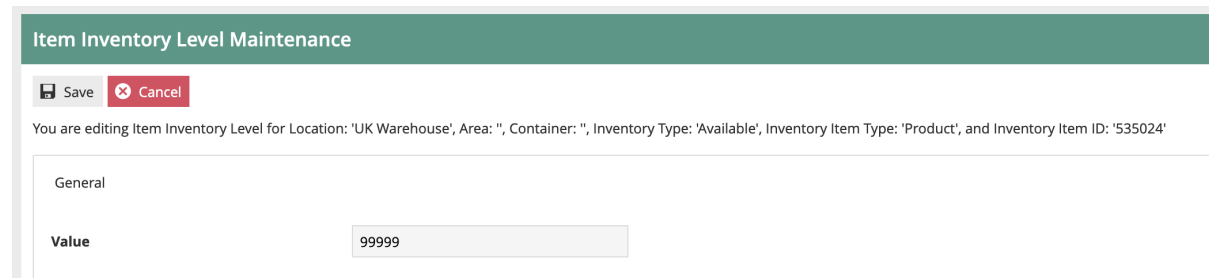
This will show the item inventory data that has already been maintained.

Create a new Item Inventory level record for the Warehouse you created above. I am using product 535024

Item Inventory Level Maintenance	
Please enter following details for the new Item Inventory Level	
Location	UK Warehouse
Area	-
Container	-
Inventory Type	Available
Item Type	Product
Item ID	535024
← Back + Create	

The Inventory Type should be set to “Available” : this means it is available for picking to fulfil orders.

Set the number available:



Save the inventory level. You can repeat this process for each of the items you wish to be able to order.

You can also set local inventory at the store level if you wish. The process is the same as above, but you will use the Store location instead of the Warehouse location.

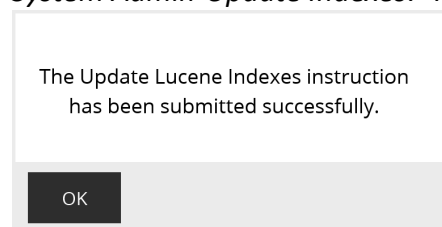
This concludes the inventory configuration.

Synchronising Configuration with the POS

Use the Broadcast functionality to send all the configuration changes you have made to your POS Device(s). Refer to the “How to broadcast Configuration Data to stores and devices” guide if you need a reminder on this process. Ensure the configuration has been received on the POS.

To use the Rich Product Search functionality on the POS, it is necessary to update the local indexes (Lucene). This is a process that normally runs daily on the POS at 5am. However, if you do not wish to wait, you can execute the process manually. You only need to run this process if you have created or changed products that you wish to order.

Log onto the POS as a POS Admin user. Then follow the menu path *Management-Admin-System Admin-Update Indexes*. You will then get an acknowledgement:



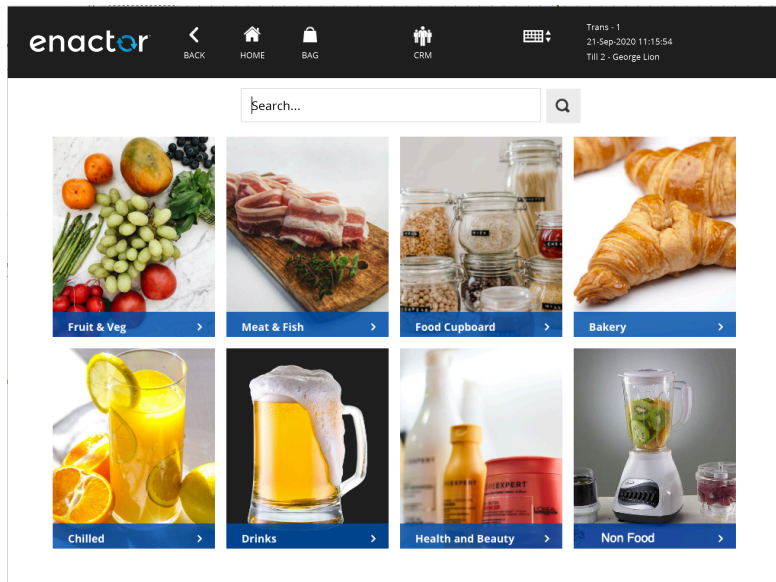
The time taken for the update process will depend on the volume of product data on the POS. Normally for a POS with a small number of products, it should take only a few minutes. You can check the progress of the job by looking at the Scheduled Jobs display: *Management-Admin-System Status-Scheduled Jobs*. When the job has completed, it's status will update to “Successful”.

Processing an Order on the POS

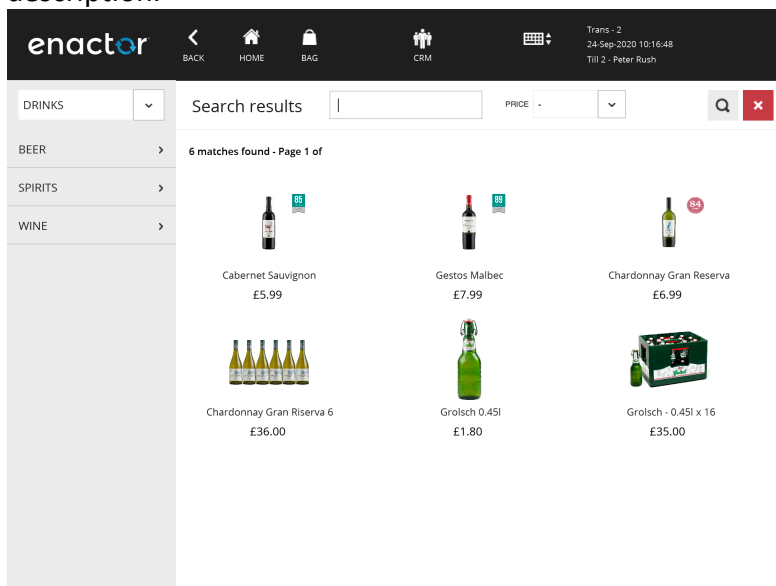
You are now ready to try creating an order on the POS.

Rich Product Search

To start, go to the Rich Product Search page by clicking the “Products” icon at the top of the POS Screen.

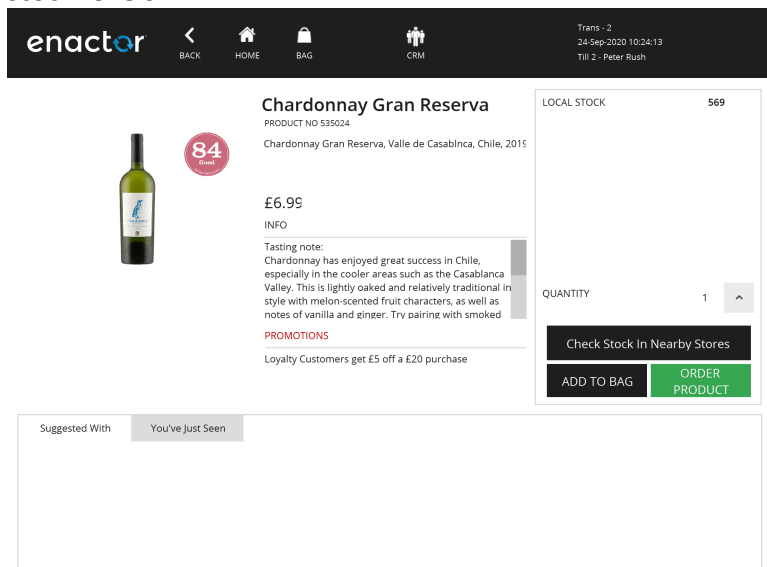


(Your menu will be specific to your environment). You can then search for a product, or use the menu to browse to a category page. You can search by Product Code, barcode or description.



You can then select a product to view the product details:

This will show rich data, including images and product information. It will also show local stock levels.



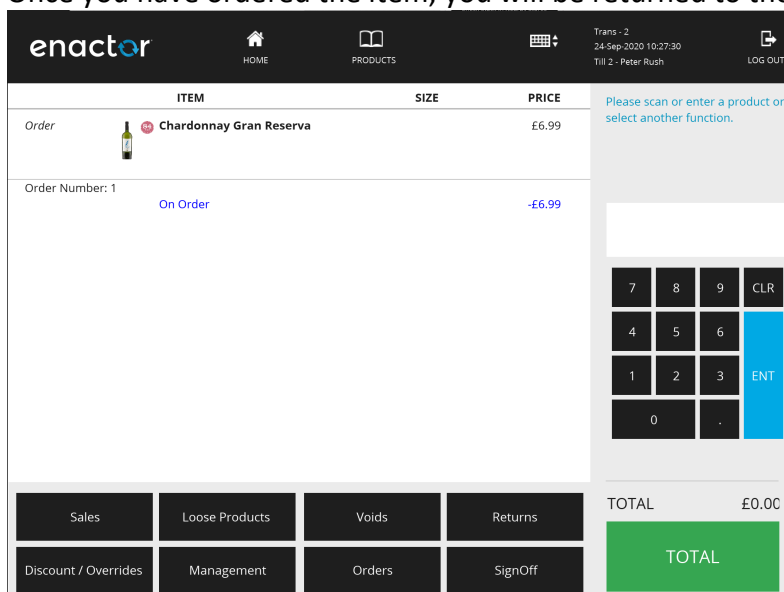
You can click on “Check Stock in nearby Stores”. This will show inventory levels at any nearby stores, plus the warehouse(s).

To order this item, click on the “Order Product” button. If you wish to order more than one, choose the quantity first then order.

Note: clicking “Add to bag” button will create a “Take” sale for the product, and will **not** put the POS into “Order” mode.

Order Basket

Once you have ordered the item, you will be returned to the basket view:



Note that the item is marked as “Order”, an Order Number has been assigned (Order no. 1 in this case), and there is a total “On order” value of £6.99.

The total value of the basket is considered to still be £0.00 because ordered items are not considered to be part of the basket total.

At this point, you can add more items to the basket, or you can complete the order.

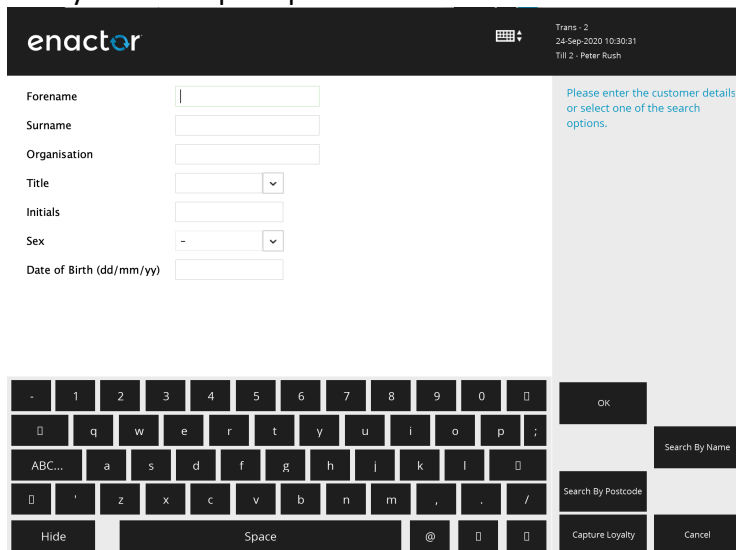
To complete, click the “Total” button.

Completing Order Capture

You will then be taken through the Order Checkout process.

Customer Details

First you will be prompted for Customer Details:



The screenshot shows the 'enactor' Customer Details form. The form has a dark header with the 'enactor' logo and a transaction summary: 'Trans - 2', '24-Sep-2020 10:30:31', and 'Till 2 - Peter Rush'. The form fields include: Forename, Surname, Organisation, Title (dropdown), Initials, Sex (dropdown), and Date of Birth (dd/mm/yy). A blue message on the right says: 'Please enter the customer details or select one of the search options.' Below the form is a virtual keyboard with buttons for numbers, letters, symbols, and function keys like 'OK', 'Search By Name', 'Search By Postcode', 'Capture Loyalty', and 'Cancel'.

You can either key in the customer details manually, or if you have customer/loyalty data available, you can search for the customer (e.g. by name or postcode).

There may be several customer data capture screens.

Delivery Options

Once you have entered the customer details, you will be taken to the “Delivery Options” page. This is where you select the destination for the order. The order may be sent to the customer’s address, or you can select Collect from Store. Alternatively if the goods are available in the current store, the customer can take them immediately.

enactor Trans: 2 24-Sep-2020 10:34:59 Till: 2 - Peter Rush

Your Shopping Bag
Order ID: 1

Store: Enactor Grocery Hertford [Change store](#)

Customer: Peter Rush
Address: 36 Avondale Avenue, Esher, KT100DA [Change address](#)

ITEM	SIZE	QTY	PRICE
Chardonnay Gran Reserva	-	1	£6.99

Take now
Collect at store
Delivery to home

Select a delivery option for each item

7	8	9	CLR
4	5	6	ENT
1	2	3	
0	.		

TOTAL £0.00

[Continue](#) [Cancel](#)

When you have multiple items on the order, you can select different options for each item.

If the customer wishes to have the goods delivered to a different store, you can choose this at the top of the screen

Once the delivery options have been selected, click on Continue.

If you have selected “Delivery to Home”, you will be taken through Destination Address entry pages. These will default to the Customer address, but you can change to a different address if you wish.

The next page is for “Delivery Status” messages. This confirms how the customer will receive updates on their order.

enactor Trans: 2 24-Sep-2020 10:39:28 Till: 2 - Peter Rush

Email Address ☒

Sender Email Address

Mobile Phone Number ☒

Sender Text Number

Would the customer like to receive Delivery Status messages?

-	1	2	3	4	5	6	7	8	9	0		OK	
	q	w	e	r	t	y	u	i	o	p	;		
ABC...	a	s	d	f	g	h	j	k	l				
	'	z	x	c	v	b	n	m	,	.	/		
Hide	Space										@		

[Back](#) [Skip](#)

There is then a Delivery Instructions page. This is for messages to the courier company.

Deposit Entry

The next step is to choose the deposit amount. The values here are dependent on the Order Deposit reasons that have been setup (see Customer Order Deposit above)

If only one deposit reason is configured (e.g. always 100% up front) then the deposit reason capture is skipped.

Payment

Once the deposit amount is confirmed, you will be taken to the Payment (Tendering) page:

enactor

Trans - 2
24-Sep-2020 10:56:38
Till 2 - Peter Rush

Customer: Peter Rush
Address: 36 Avondale Avenue
Esher KT100DA

Balance Due £6.99, Please Select a Tender or press Sales to return to Sales.

ITEM	SIZE	PRICE
Order	Chardonnay Gran Reserva	£6.99

Order Number: 1

Deposit £6.99
On Order -£6.99
Deposit Payment £6.99

7 8 9 CLR
4 5 6
1 2 3 ENT
0 .

Cash Cards Cheque Vouchers
Customers Foreign Currencies More Back

TOTAL £6.99

(In this example, the customer is paying a 100% deposit).

This is similar to the normal POS payment page.

Choose the tender type(s) and values that the customer wishes to use. Once the order deposit value is fully paid, the transaction will complete and the order receipt should be printed. If email receipts are enabled, the receipt printing menu will be presented.

enactor

Trans - 2
24-Sep-2020 10:59:58
Till 2 - Peter Rush

Customer: Peter Rush
Address: 36 Avondale Avenue
Esher KT100DA

How would the customer like their receipt?

ITEM	SIZE	PRICE
Order	Chardonnay Gran Reserva	£6.99

Order Number: 1

Deposit £6.99
Cash UK -£7.00
Change (Cash UK) £0.01
On Order -£6.99
Deposit Payment £6.99

7 8 9 CLR
4 5 6
1 2 3 ENT
0 .

Email Only Email and Print Print Only
More...

TOTAL £0.00

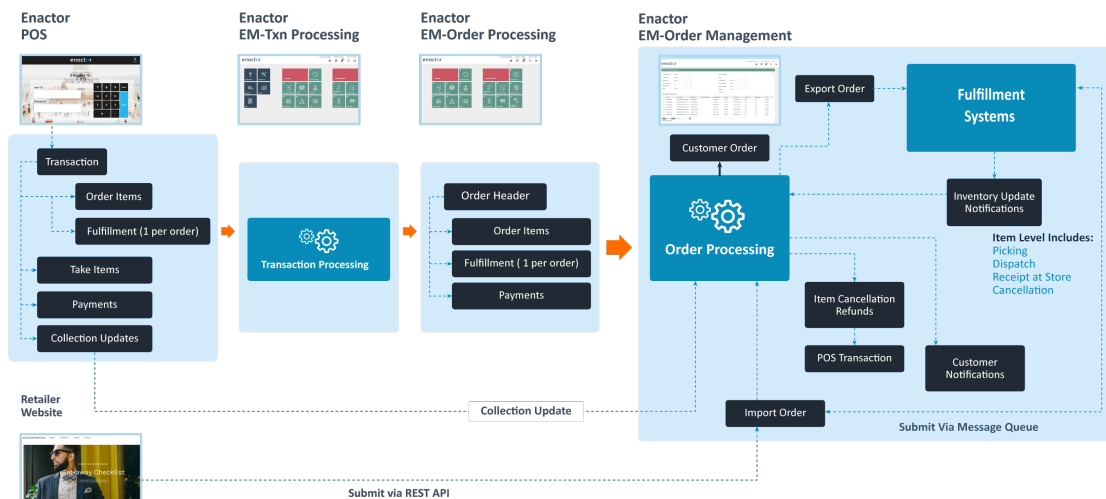
The order capture is now completed.

Checking the Order in the Estate Manager

Once the order has been completed on the POS, it is initially created as a POS transaction (containing all the order details). The POS transaction will then be submitted to the Estate Manager, like all other POS transactions. Once there, it is processed and the Customer Order is created.

Here is an overview of the process

Enactor OMS - Order Process Overview



Once it has been processed by the Estate Manager, you can then view the Customer Order using the Customer Orders Maintenance UI.

In the EM, navigate by Search to Customer Orders or use the Menu Path *Operations-CRM-Customer Orders*.

This will show all the orders on the system. You can use the filters to find the order(s) you are looking for.

Customer Order Management

Customer Order ID: Starts With []

Transaction ID: Starts With []

Reference ID: Starts With []

Date Created From: [] []

Date Created To: [] []

Email: Starts With []

Customer Order Type: []

Status: []

Customer Name: Starts With []

Customer Number: Starts With []

Customer Postcode: Starts With []

Telephone: Starts With []

Active Orders: []

Apply Filters [] Reset Filters []

Order ID	Transaction ID	Reference ID	Customer Number	Customer Name	Postcode	Date Created	Order Value	Balance Owed	Status
1	20010002000022009241023462	1		Peter Rush	KT100DA	24-Sep-2020 10:59	£6.99	-£6.99	In Progress

To view or edit the order, click on the view (eye) icon. This will display the order details:

Customer Order Details

Back

Order Details

STATUS: IN PROGRESS

Hide

Customer Name

Peter Rush

Contact Phone

Customer Number

Contact Mobile Phone

077982352352

Order Placed

24 September 2020 10:59 AM

Contact Email:

p.d@g.com

Order Reference

1

Contact Address

36 Avondale Avenue

Transaction Reference

20010002000022009241023462

Esher

Internal Reference

33307403-7e07-4ade-be27-9aa8a602410

KT100DA

UK

Order Value: £ 6.99

Refund Due: -£ 6.99

Notes (0)

Show

Items (1)

Hide

535024 Chardonnay Gran Reserva

Net Value:

£ 6.99

Status:

New

Quantity

1

Shipped:

0

Unit Price:

£ 6.99

Open

Cancel

Cancel Order

Cancel Items

Sub Total:

£ 6.99

This displays the order header information (including customer and address details). It also shows each of the items on the order. The order header and item-level statuses are also shown.

About This Document

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The amendment history of this document can be found in the table below.

Current Document Version information

Document Version 1.0

Product Version 2.6

Document Context

This document is part of the Enactor Product Documentation Series. All Enactor products include a comprehensive documentation set designed to improve understanding of the product and facilitate ease of use.

Document Inquiries

At Enactor we aspire to producing the highest quality documentation to reflect and enhance the quality of our product. If you find that the document is inaccurate or deficient in any way, please assist us in improving our standard by letting us know.

For matters of document quality or any other inquiries regarding this document please contact:

By Email: documentation@enactor.co.uk

Document History

The following versions of the document have been produced:

VERSION	STATUS	ISSUE DATE	AUTHOR	REASON FOR ISSUE
1.0	Initial Draft			Initial version