

How-To Guide Configuring Styles and Themes

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Author: Peter Rush

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Introduction

The purpose of this guide is to show how to configure Themes and other Styling components to allow you to style the Enactor POS application to meet your organisation's branding requirements.

There are two approaches to managing the styling on the POS. The first uses Stylesheets and images which are uploaded and configured using the Estate Manager, and are then broadcast to the POS as for normal configuration data.

The second approach uses custom "Themes" that are deployed onto the POS as part of a custom POS installation.

This how-to guide will cover both approaches.

Overview

The following steps are required to configure POS Styles and Themes:

- Stylesheet Configuration
- Image Category Configuration
- Image Configuration
- POS Terminal Configuration (Stylesheets and Images)
- Theme Configuration
- POS Terminal Configuration (Themes)
- Rich Product Menu Configuration

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.)
- Examples of Data to be used as models, particularly product data

Prior Training/Experience

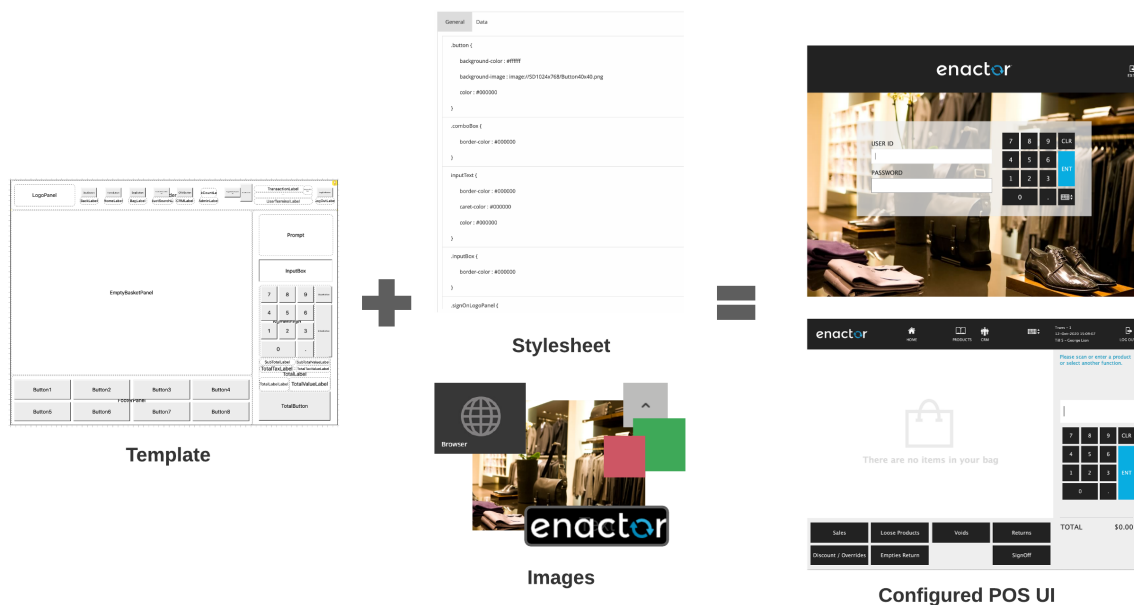
You should be familiar with the following:

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

Configuration Steps


Stylesheet Configuration

The Stylesheet is a document containing the rules for how the POS application should appear, including fonts, colours and images. It is combined with a set of templates that define the structure of the POS Pages, and a set of images, to provide the final User Interface design:

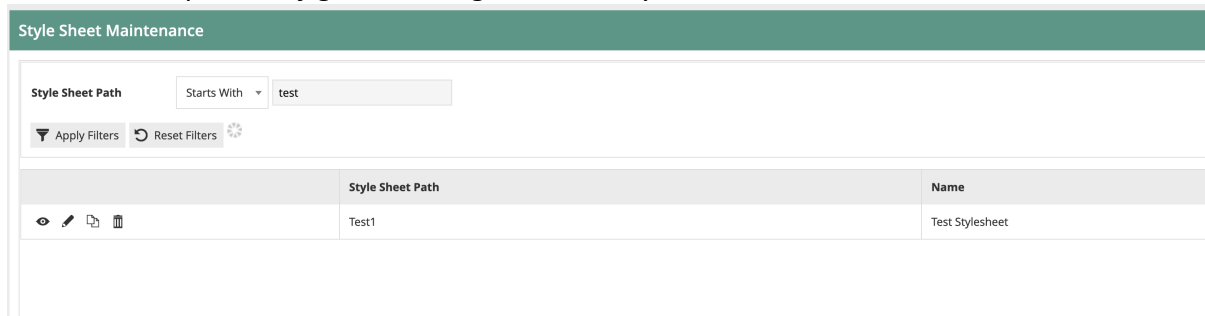


The stylesheet may be maintained using standard CSS editing tools and techniques. An existing Stylesheet should be used as a model, to ensure all the required styles are included.

The main components of the stylesheet that will be maintained comprise:

- Colours – entered as hexadecimal RGB codes, e.g. #FF3344: 
- Images – these use a standard URL Structure e.g.
image://ImageCategory/Button40x40.png
This URL relates to the images and image categories that have been created/uploaded for this POS UI
- Fonts: these normally come from the template, but may be overridden with the stylesheet

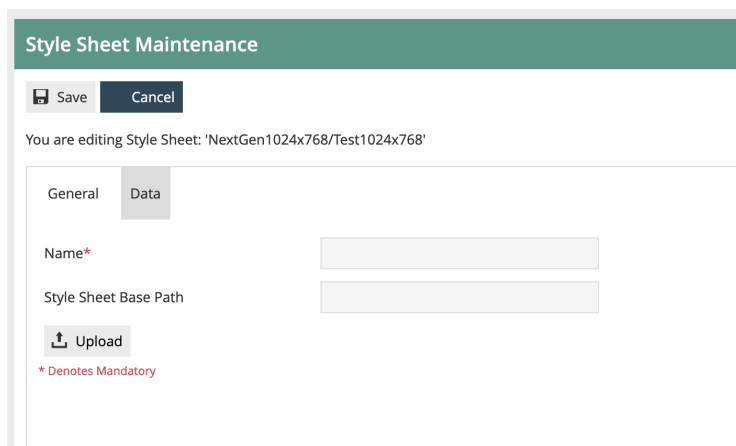
To configure a stylesheet, navigate to the Maintenance utility in the Estate Manager using search or the path *Configuration-Organisation-Stylesheet Maintenance*.



The screenshot shows the 'Style Sheet Maintenance' interface. At the top, there is a header bar with the title 'Style Sheet Maintenance'. Below the header, there is a search bar labeled 'Style Sheet Path' with a 'Starts With' dropdown menu and a text input field containing 'test'. Below the search bar, there are two buttons: 'Apply Filters' and 'Reset Filters'. Below these buttons, there is a table with two columns: 'Style Sheet Path' and 'Name'. The table contains one row with the path 'Test1' and the name 'Test Stylesheet'. To the left of the table, there are icons for viewing, editing, deleting, and adding new items.

Click the “Create Style Sheet” button to create a new style sheet.

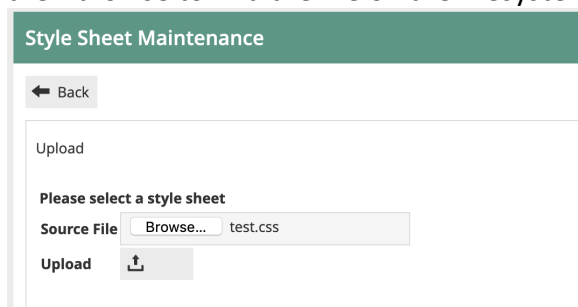
Enter the Path of the style sheet. This will be a path structure based on an existing Enactor POS theme. For example, a stylesheet that is a child of the Enactor NextGen1024x768 theme may have the path “NextGen1024x768/Test1024x768”



The screenshot shows the 'Style Sheet Maintenance' interface with the 'Create Style Sheet' form. At the top, there is a header bar with the title 'Style Sheet Maintenance'. Below the header, there are two buttons: 'Save' and 'Cancel'. Below these buttons, there is a message: 'You are editing Style Sheet: 'NextGen1024x768/Test1024x768''. Below the message, there are two tabs: 'General' and 'Data'. The 'General' tab is selected. Below the tabs, there are two input fields: 'Name*' and 'Style Sheet Base Path'. Below the input fields, there is an 'Upload' button. Below the 'Upload' button, there is a red asterisk and the text '* Denotes Mandatory'.

On the next page, enter a Name for the stylesheet.
The Base Path field is not required.

Then Upload the CSS file that will be the basis of your stylesheet. This may have been provided by Enactor, or edited externally using a 3rd party tool. Click the Upload button, then browse to find the file on the filesystem. Then click Upload.



The screenshot shows the 'Style Sheet Maintenance' interface with the 'Upload' form. At the top, there is a header bar with the title 'Style Sheet Maintenance'. Below the header, there is a 'Back' button. Below the 'Back' button, there is a section titled 'Upload'. Below the 'Upload' section, there is a message: 'Please select a style sheet'. Below the message, there is a 'Source File' input field with a 'Browse...' button and a text input field containing 'test.css'. Below the input field, there is an 'Upload' button.

If you then navigate to the Data tab, you will see the CSS content. The CSS cannot be edited on this page. If editing is required, this should be done externally and the file re-uploaded.

Once the file is uploaded, you may Save the Stylesheet.

Note: Once the CSS file is uploaded to an Enactor Stylesheet and saved, it is recorded internally in Enactor in XML format. This is the format used if Enactor broadcasts or exports the Stylesheet data. Do not confuse the CSS file (which may only be uploaded to Enactor using the Stylesheet maintenance utility) with the Enactor Stylesheet XML, which operates in the same way as all other Enactor master data XML entities.

This concludes Stylesheet configuration.
















Image Category Configuration

Image Categories are used to classify different types of images within Enactor. Several Image Categories are provided with Enactor initially. More categories may be created to hold different sets of images for use within POS UI configurations.

As noted above, the standard image URL for each POS image contains the Image Category as a folder path. E.g. `image://TestCat1024x768/Button40x40.png` points to a standard-sized button image in the TestCat1024x768 folder.

When images are deployed to the filesystem on the POS (which is done automatically by the data broadcast & receive process) they will be located within folders matching the Image Categories.

To configure Image Categories, navigate to the maintenance utility using Search or the path *Configuration-Media-Image Categories*.

Image Category Maintenance		
Category	Starts With	
 Apply Filters	 Reset Filters	
	Category	Description
   	BRANDING	Branding Images
   	CARD	Card Images
   	EMPLOYEE	Employee Images

To create a new category, click on “Create a new Image Category”.

Image Category Maintenance

Please enter the ID for the new Image Category

Category

[← Back](#) [+ Create](#)

Give the Category an appropriate ID. Often this will include the resolution of the UI (e.g. 1024x768, 1920x1080) so it is clear to which scale the images in the category relate.

Image Category Maintenance

[Save](#) [Cancel](#)

You are editing Image Category 'PR1024x768'

General

Description*

* Denotes Mandatory

Then give the Category an appropriate name and save. This concludes image category maintenance.

Image Configuration

Now we have an image category, we can upload the images required for the User Interface. The Images will each belong to the category we have created, and will be referenced in the Stylesheet.

To create the image records, navigate to Image maintenance using Search or the path *Configuration-Media-Images*.

Image Maintenance

Image ID Starts With

Category

Description Starts With

[Apply Filters](#) [Reset Filters](#)

	Image ID	Category	Description
	339001	PRODUCT	339001
	339001A	PRODUCT	339001A
	535001	PRODUCT	535001
	535002	PRODUCT	535002

The Image maintenance utility is used to manage several categories of images, including those used for products, receipt logos etc.

Start by selecting the Image Category you have created from the dropdown. You will then have an empty list as no images have been created for this category yet.

The screenshot shows the 'Image Maintenance' interface. At the top, there's a green header bar with the title 'Image Maintenance'. Below it, there are three filter sections: 'Image ID' with a 'Starts With' dropdown and a text input; 'Category' with a dropdown menu showing 'Test 1024x768'; and 'Description' with a 'Starts With' dropdown and a text input. Below these filters are two buttons: 'Apply Filters' (with a funnel icon) and 'Reset Filters' (with a circular arrow icon). At the bottom, there is a table with four columns: 'Image ID', 'Category', and 'Description'. The table is currently empty, showing only the header row and one data row with dashes.

	Image ID	Category	Description
-	-	-	-

Start a new image by clicking “Upload a new image”.

The screenshot shows the 'Image Maintenance' interface with a green header bar. Below the header, there's a message: 'Please select the category and enter an ID for the new image:'. There are two input fields: 'Category' with a dropdown menu showing 'Test 1024x768' and 'Image ID' with a text input. At the bottom, there are two buttons: 'Back' (with a left arrow icon) and 'Create' (with a plus icon).

The Category should be preset to your image category. Give the image ID the name of your file, excluding the extension. So testimage.png would have an image ID of *testimage*. Here I am uploading a background image.

The screenshot shows the 'Image Maintenance' interface with a green header bar. Below the header, there are two buttons: 'Save' (with a floppy disk icon) and 'Cancel' (with a red X icon). Below these buttons, there's a message: 'You are editing Image ID 'background' in Category 'Test 1024x768''. There is a section titled 'General' with four input fields: 'Description*' (with a red asterisk), 'Original Filename', 'Size' (with a value of 0), and 'Upload Image' (with an upload icon). At the bottom, there's a red asterisk and the text '* Denotes Mandatory'.

Give the image an appropriate description. Then click on “Upload Image” and browse to find the image file on your local filesystem.

Image Maintenance

[← Back](#)

You are editing Image ID 'background' in Category 'Test 1024x768'

General

Please select an image file and press Upload

Image Filename background.jpg

Upload...

Then click Upload... to load the file into the Estate Manager.

Image Maintenance

You are editing Image ID 'background' in Category 'Test 1024x768'


General

Description* Background

Original Filename background.jpg

Size 1160689

Upload Image



The utility will show a preview of the image, and the filename and size will be populated. Save the image record.

Then repeat this process for all the images required by your stylesheet.

This concludes the image configuration step.

POS Terminal Configuration (Stylesheet and Images)

The final configuration step is to apply the stylesheet you have configured to your POS Terminals/POS Terminal Templates. This will then make the changes effective.

Navigate to POS Terminal Configuration using Search or the path *Configuration-Organisation-POS Terminals* or *Configuration-Organisation-POS Terminal Templates*.

Then select the POS Terminal/Template you wish to modify, and click on edit.
Then switch to the User Interface Tab, and the Branding/Style sub-tab:

The screenshot shows the 'POS Terminal Template Maintenance' interface. At the top, there is a green header bar with the title. Below it, there are 'Save' and 'Cancel' buttons. A message states: 'You are editing POS terminal template 'RETAIL_FIXED_POS_TEMPLATE''. Below this is a horizontal tab bar with tabs: General, Peripherals, Printing, Day Start, Day End, User Interface, Tax, Online Auth, Loyalty, Groups, External, and Tendering. The 'User Interface' tab is selected. Under the 'User Interface' tab, there is a sub-tab bar with 'General', 'Branding / Style', and 'Customer View'. The 'Branding / Style' sub-tab is selected. The main area contains the following fields:

Operator View Parent Theme	NextGen
Operator View Theme	NextGen 1024x768
Operator View Style Sheet	-
Logo Image	-
Sign On Logo Image	-
Sign On Background image	-

The Operator View Theme should be set to the parent theme of which your stylesheet is a child (see Stylesheet maintenance above for reference).

Then select the Operator View Style Sheet drop-down. Select your Stylesheet name from the list.

POS Terminal Template Maintenance

Save

Cancel

You are editing POS terminal template 'STANDARD_POS_TEMPLATE'

General

Peripherals

Printing

Day Start

Day End

User Interface

Tax

Online Auth

Loyalty

Groups

External

Tendering

General

Branding / Style

Customer View

Operator View Parent Theme

Operator View Theme

NextGen 1024x768

Operator View Style Sheet

Test Stylesheet

Logo Image

-

Sign On Logo Image

-

Sign On Background image

-

Save the POS Terminal/POS Terminal Template.

This concludes the POS Terminal configuration Step. All the configuration required to set the Styling of the POS UI is now complete. Broadcast all the amended entities to your target POS Device(s). Once they have been received, restart the POS application.

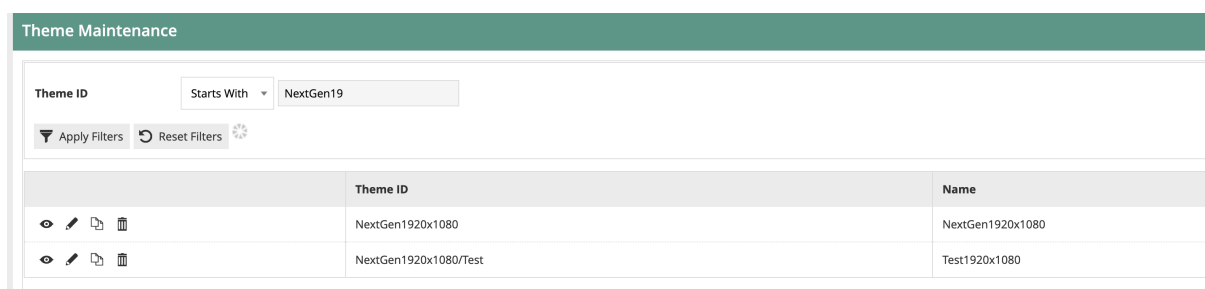
You should see the reconfigured POS user interface displayed.









Theme Configuration

The alternative approach to POS UI configuration is to use a Theme. This theme will have been developed, either by Enactor, a partner, or an in-house development team. The Theme will be installed on the POS along with the rest of the POS application. It will then need to be configured, to ensure the POS devices use the appropriate theme(s).

The development team will provide a Theme xml file. This should be uploaded to the Estate Manager using the File Importer.

Once the Theme xml has been imported, it should then appear in the Theme Maintenance utility (Navigate to Theme Maintenance using Search or the Path *Configuration-Organisation-Theme*):



Theme Maintenance		
Theme ID	Starts With	
	NextGen19	
 Apply Filters	 Reset Filters	
	Theme ID	Name
  	NextGen1920x1080	NextGen1920x1080
  	NextGen1920x1080/Test	Test1920x1080

To review the theme, click on view or edit. The Page Definition tab lists all the Page Definitions that are included in the Theme. This should not normally be amended.

This concludes Theme configuration.

POS Terminal Configuration (Themes)

Once the Theme has been uploaded and checked, it may be assigned to the appropriate POS Terminals/POS Terminal Templates. This will then make the changes effective.

Navigate to POS Terminal Configuration using Search or the path *Configuration-Organisation-POS Terminals* or *Configuration-Organisation-POS Terminal Templates*.

Then select the POS Terminal/Template you wish to modify, and click on edit. Then switch to the User Interface Tab, and the Branding/Style sub-tab:

POS Terminal Template Maintenance

Save Cancel

You are editing POS terminal template 'RETAIL_FIXED_POS_TEMPLATE'

General	Peripherals	Printing	Day Start	Day End	User Interface	Tax	Online Auth	Loyalty	Groups	External	Tendering
---------	-------------	----------	-----------	---------	----------------	-----	-------------	---------	--------	----------	-----------

General	Branding / Style	Customer View
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Operator View Parent Theme NextGen

Operator View Theme NextGen 1024x768

Operator View Style Sheet -

Logo Image -

Sign On Logo Image -

Sign On Background image -

The Operator View Theme should be set to the name of the Theme you have uploaded:

POS Terminal Template Maintenance

Save Cancel

You are editing POS terminal template 'STANDARD_POS_TEMPLATE'

General	Peripherals	Printing	Day Start	Day End	User Interface	Tax	Online Auth	Loyalty	Groups	External	Tendering
---------	-------------	----------	-----------	---------	----------------	-----	-------------	---------	--------	----------	-----------

General	Branding / Style	Customer View
---------	------------------	---------------

Operator View Parent Theme NextGen

Operator View Theme Test1920x1080

Operator View Style Sheet -

Logo Image -

Sign On Logo Image -

Sign On Background image -

Once this has been set, you may save the POS Terminal/POS terminal Template.

This concludes the POS Terminal configuration Step. All the configuration required to set the Styling of the POS UI is now complete. Broadcast the amended entities to your target POS Device(s). Once they have been received, restart the POS application.

You should see the reconfigured POS user interface displayed.

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