

How-To Guide Configuring an Organisation Structure

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Base Organisation Structure

Description

This How-to guide covers the setting up the core Organisation Structure, on which the key Configuration components will be based. The base level of the structure begins with the basic company information and default trading currency. With the basic company information in place, a regional structure that reflects the Retailer's business organization including stores, warehouses and other locations is added. The regional structure also provides the underpinnings for other components such as Menu Groups, Price Groups and Fascias.

The intent of the guide is to provide basic guidance on configuration including required and the most common options. Please refer to the full solution documentation for a detailed explanation of all available settings.

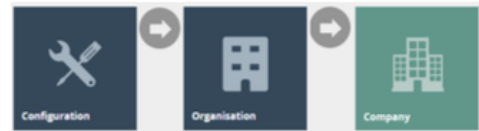
Company Configuration

Basic Company information is made available to applications in a **Company** configuration element. For example, the Company Address may be used in receipts.

At least one **Company** element is required. Although other Company entries may be created and used in processing and reporting the mandatory entry is required for Licencing and other built-in processing requirements. The mandatory entry *must* have a **Company ID** value of 1 and the **Company Name** value must correspond *exactly* to the string provided for the software Licence. A built-in Company element with Company ID of '1' is typically provided with Installed default data if so, has default Company Name value of 'Enactor'. This entry, if present, should be modified to provide the correct Company Name (as per licence) and other details.


Accessing the Company Configuration

The **Company** element may be accessed using the Company option, obtained via the selection sequence shown at right starting from the Main Menu:



The *Company* option invokes the Company Maintenance page as illustrated below. The example illustrated contains the installed default data entry, which should be modified to provide the correct Company Name (as per licence) and other details. Use the **Edit** option (✎) to access the entry for edit.

The screenshot shows the 'Company Maintenance' page with a search filter section and a table of company entries.

	Company ID	Company Name
	1	Enactor Ltd

Page 1 of 1 | Page Size 20 | [+ Create a new Company](#)

New Company

In the Company Maintenance page as illustrated above, select the **Create a new Company** option:

Please enter following details for the new Company

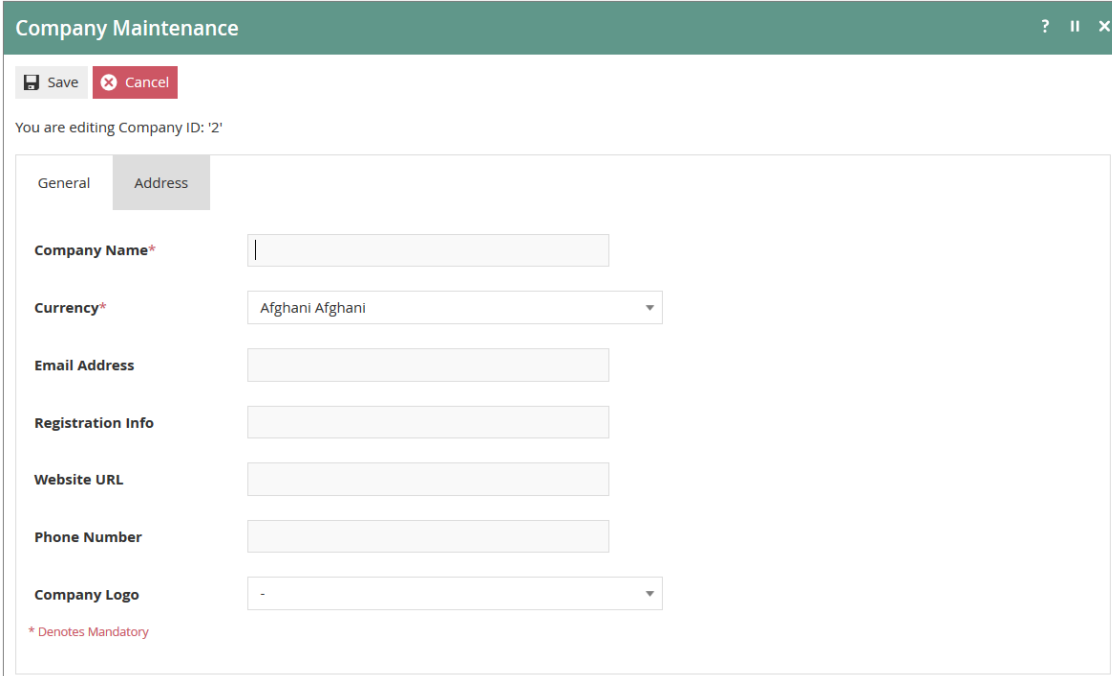
Company ID

[← Back](#) [+ Create](#)

In the initial screen of Company Create a Company ID is required.

General Tab

Other information associated with the Company can be entered into the properties of the **General** and **Address Tabs** of the Company Maintenance page and provides information that may be used variously throughout the Retail Applications such as for printing receipts and builtin reports and may also be used in Custom Reports or generated documents. The General Tab illustrated below captures the properties described in the following table:



The screenshot shows a web application window titled "Company Maintenance" with a dark green header. Below the header, there are "Save" and "Cancel" buttons. A message states "You are editing Company ID: '2'". The form has two tabs: "General" (selected) and "Address". The "General" tab contains the following fields:

- Company Name***: A text input field.
- Currency***: A dropdown menu with "Afghani Afghani" selected.
- Email Address**: A text input field.
- Registration Info**: A text input field.
- Website URL**: A text input field.
- Phone Number**: A text input field.
- Company Logo**: A dropdown menu with "-" selected.

A red asterisk indicates that fields marked with an asterisk are mandatory.

Address Tab

In the **Address** Tab (following) specify the Company Address and other contact details as described in the table following.

The screenshot shows a web application window titled "Company Maintenance". At the top, there are "Save" and "Cancel" buttons. Below the buttons, it says "You are editing Company ID: '2'". The main content area has two tabs: "General" and "Address". The "Address" tab is active, showing a form with the following fields:

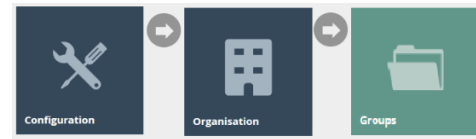
Field Name	Input Type
Organisation	Text input
Street 1	Text input
Street 2	Text input
Street 3	Text input
Town	Text input
County	Text input
Postcode	Text input with a visibility toggle icon
Country	Text input

Configuring Groups

The Groups architecture provides for a variety of predefined **Group Types**, all of which are managed in the Group Hierarchy Maintenance Application of Estate Manager Web Maintenance. Groups configuration is foundational, especially the Region Group Type

Accessing Groups

Groups are accessed using the Groups option, obtained via the selection sequence shown at right starting from the Main Menu:



New Groups

After making a Group Type selection in the *Group Type* Filter field use the **Create new (selected Group Type) Hierarchy** option to create a new Group Hierarchy.

A screenshot of the 'Group Hierarchy Maintenance' application window. The title bar says 'Group Hierarchy Maintenance' with help, full screen, and close icons. The main content area has a green header with the same text. Below the header, it says 'Please enter an ID for the new Price Group hierarchy.' There are two input fields: 'Hierarchy ID' with the text 'UK Standard Pricing' and 'Region' with a dropdown menu showing 'United Kingdom'. At the bottom left, there are two buttons: 'Back' with a left arrow and 'Create' with a plus sign.

In the initial page of the Group Hierarchy create function a **Hierarchy ID** value is required and in most cases a **Region** must be also specified.

Group Maintenance

Use the **Group Hierarchy Maintenance** page, as illustrated below, to manage Groups of a selected **Type**. Having selected a Group Type the user is able to Add View, Edit, Copy, or Delete **Group Hierarchies** and manage the **Groups** within them.

A screenshot of the 'Group Hierarchy Maintenance' application window showing a table view. The title bar and header are the same as in the previous screenshot. Below the header, there are filter fields: 'Group Type' with a dropdown set to 'Price Group' and a 'Hide' button, and 'Hierarchy ID' with a dropdown set to 'Starts With' and an empty text input. Below the filters are 'Apply Filters' and 'Reset Filters' buttons. The main area contains a table with columns: 'Hierarchy ID', 'Name', and 'Region'. There is a row with 'ALL' in the first two columns and 'All Regions' in the third. Below the table is a pagination bar with 'Page 1 of 1', 'Page Size 20', and a refresh button. At the bottom, there are two buttons: 'Create New Price Group Hierarchy' and 'Export Price Group Hierarchy'.

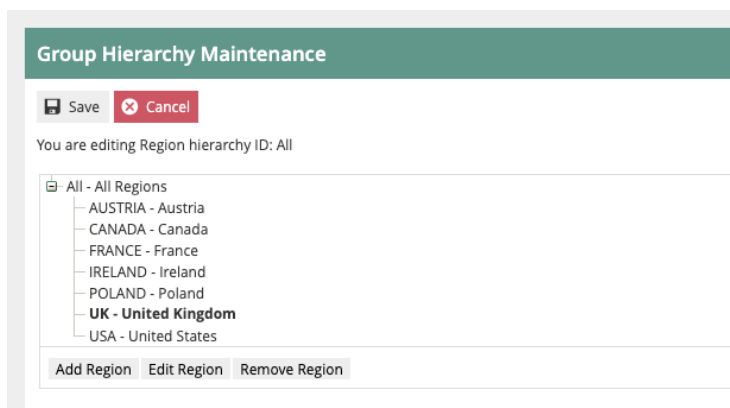
Filter the listed **Group Hierarchies** by entering or selecting values in the Filter properties and selecting **Apply Filters**.

Region Group

The Region Group Type permits only one Region Hierarchy (All Regions), which is used to represent geographical areas. For example, a UK based company may have a regional hierarchy based on geographic subdivisions of the UK, whereas a Europe- wide company may have a regional hierarchy based on countries.

Region Maintenance

Once the Group Hierarchy has been created, the **Group Hierarchy Edit** page of Group Hierarchy Maintenance is available to **Add**, **Edit** or **Remove** Group nodes in the hierarchy as illustrated for the example from the Region Group Type below:

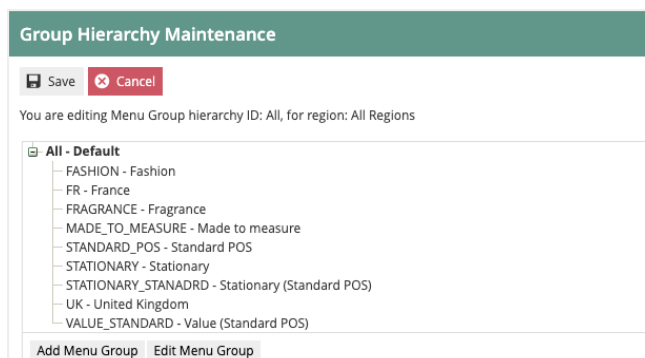


Menu Group

The Menu Group Type allows 2 levels and is used to identify a given set of menus applicable to Location or POS Terminal context and in Role maintenance to identify a Menu Group applicable to given Role.

Menu Group Maintenance

Once the Group Hierarchy has been created, the **Group Hierarchy Edit** page of Group Hierarchy Maintenance is available to **Add**, **Edit** or **Remove** Group nodes in the hierarchy as illustrated for the example from the Menu Group Type below:

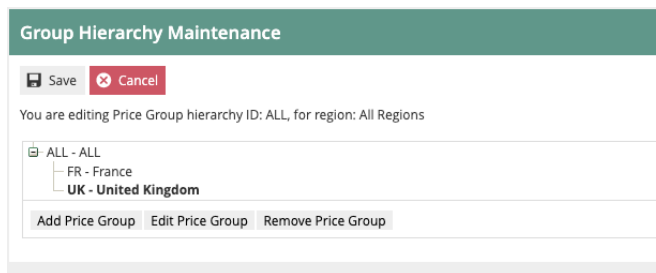


Price Groups

The Price Group Type is used to identify groups of Product Prices in a hierarchical structure of up to 10 levels. In Product Price Maintenance, Price Groups differentiate Product Prices and may be used to assign Product Prices by Price Group to be used at a POS in POS Terminal configuration.

Price Group Maintenance

Once the Group Hierarchy has been created, the **Group Hierarchy Edit** page of Group Hierarchy Maintenance is available to **Add**, **Edit** or **Remove** Group nodes in the hierarchy as illustrated for the example from the Price Group Type below:

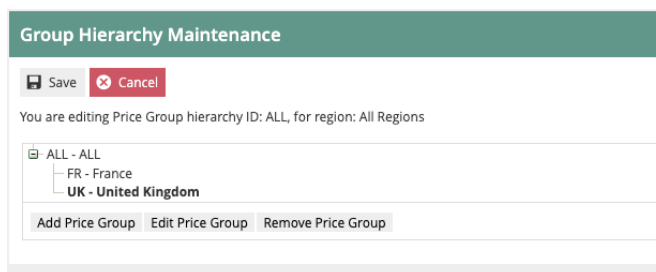


Fascias

Facia Groups allow 2 levels and are used to identify different stores within a store based on the association of Products with a Facia Group and is used in product-related presentation (e.g. receipt logo images) and reporting.

Fascia Group Maintenance

Once the Group Hierarchy has been created, the **Group Hierarchy Edit** page of Group Hierarchy Maintenance is available to **Add**, **Edit** or **Remove** Group nodes in the hierarchy as illustrated for the example from the Price Group Type below:



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	22/07/20	M Tolson	Initial version