

How-To Guide Configuring Email Receipts

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Introduction

The purpose of this guide is to show how to configure the Enactor Estate Manager and POS to support Email Receipts.

Enabling Email receipts allows the POS user to offer the customer the choice of receiving a printed receipt, emailed receipt or both.

To send the Email receipt requires a connection to an SMTP server. This may be a traditional on-premise Mail server such as MS Exchange, or a cloud mail service such as Gmail. We will use a connection to a Gmail service in this example.

Email receipts may also be configured with an HTML message body, allowing the retailer to use the email for marketing etc.

Overview

The following steps are required to enable Email Receipts:

- Configure an Email Receipts user (to whom the sending email account will be linked)
- Configure the Estate Manager location with a connection to an SMTP (Mail sending) server or service
- Check the Outgoing Email Service is enabled on the Estate Manager.
- Configure a communication script for the Email message body
- Enable Email Receipts for the POS Terminal
- Broadcast settings to the POS and test.

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 Fashion here).

Prior Training/Experience

You should be familiar with the following:

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

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

Configuration Steps


User Configuration

Navigate to User Maintenance (*Configuration – HR – Users*) and create a new user with an ID of RECEIPTS if it does not exist. Enter the values as follows:

- Set the Mandatory entries on the General tab (Display name, surname)
- Edit the user and go to Email tab
- Enter the email address to be used for sending the email
- Enter the Email Account Name. This may be the same as the email, or may be the email address without the @domain element for example (it is just used as a visible Account name).
- Click on Change Email Account Password and enter the password for the email address
- For the Email Receipt user, the receiving server type does not matter (it will not be used)
- Make sure the account status shows as valid by clicking on the bin icon next to the field

See example below:

You are editing user ID: 'RECEIPTS'

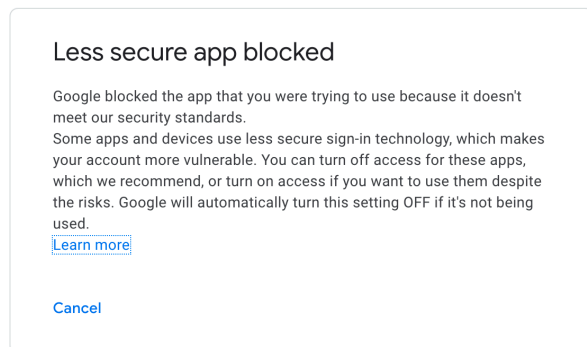
General	Address	Roles	Security	Access Times	E-mail	Biometrics	Associated Locations
Email Address		<input type="text" value="test.emailsch@gmail.com"/>					
Email Account Name		<input type="text" value="test.emailsch@gmail.com"/>				Change Email Account Password	
Receiving Server Type		<input type="text" value="IMAP"/>					
Check Email on Login		<input type="checkbox"/>					
Check Email in the Background		<input checked="" type="checkbox"/>					
Account Status		<input type="text" value="Valid"/>					

Save the Receipts User.

Note: Gmail Account Security

(Skip this section if you are not using Gmail as the SMTP service.)

With Gmail, you may get notifications about allowing access to “Less Secure Apps”:



Without this setting, you will not be able to send emails via Gmail. To correct this, go to your Gmail account and enable Less Secure App access:

← Less secure app access


Some apps and devices use less secure sign-in technology, which makes your account vulnerable. You can turn off access for these apps, which we recommend, or turn it on if you want to use them despite the risks. Google will automatically turn this setting OFF if it's not being used. [Learn more](#)

Allow less secure apps: ON



Once you have changed this, go back to your user record in Enactor. If Gmail rejected the enactor email login, the status will have changed to Invalid:

You are editing user ID: 'RECEIPTS'

General	Address	Roles	Security	Access Times	E-mail	Biometrics	Associated Locations
Email Address		test.emailsch@gmail.com					
Email Account Name		test.emailsch@gmail.com		Change Email Account Password			
Receiving Server Type		IMAP					
Check Email on Login		<input type="checkbox"/>					
Check Email in the Background		<input checked="" type="checkbox"/>					
Account Status		Invalid 					

Reset the status to Valid by clicking on the Bin icon. Enactor will try to log in to the Gmail account again.

Location Configuration

Navigate to Location Maintenance (*Configuration – Organisation – Locations*) and edit the Estate Manager location.


Go to the Email Tab. Enter the SMTP server details (the POP3 and IMAP details are only relevant if you are receiving emails into Enactor as well as sending them. They are not required for Email Receipts.)

The entries you use will depend on the settings of your outgoing mail server. The example below is applicable for Gmail:

- Authenticate Outgoing Mail: True
- SMTP Server: smtp.gmail.com
- SMTP Port: 587
- SMTP Encryption: TLS/STARTTLS

Set the System user to the User created above (i.e. RECEIPTS)

You are editing office ID: estatemanager

General	Address	Purging	Email	MM Groups	MM Group Price	Attributes
Authenticate Outgoing Mail			<input checked="" type="checkbox"/>			
Allow fallback to unencrypted connection			<input type="checkbox"/>			
POP3 Server			<input type="text" value="pop.gmail.com"/>			
POP3 Port			<input type="text" value="995"/>			
POP3 Encryption Type			<input type="text" value="SSL"/>			
IMAP4 Server			<input type="text" value="imap.gmail.com"/>			
IMAP4 Port			<input type="text" value="993"/>			
IMAP4 Encryption Type			<input type="text" value="SSL"/>			
SMTP Server			<input type="text" value="smtp.gmail.com"/>			
SMTP Port			<input type="text" value="587"/>			
SMTP Encryption Type			<input type="text" value="TLS/STARTTLS"/>			
Support Email Address			<input type="text"/>			
System User			<input type="text" value="RECEIPTS"/> 			

Save the Location Settings.

Service Definition Configuration

An Enactor Service called Email Sender needs to be running for the emails to be sent. To check the Email Sender Service configuration, go to Service Definitions (*Administration-Services-Service Definitions*).

Choose “Email Sender Service” from the filter at the top:

Region

-

Service Type













Email Sender Service

Device Type

-

Apply Filters

Reset Filters

	Service Type	Device Type
   	EmailSender	Back Office
   	EmailSender	Inventory Manager
   	EmailSender	Estate Manager

Edit the Email Sender Service for the Estate Manager:

You are editing the service definition for Service Type: 'Email Sender Service' and Device Type: 'Estate Manager'.

General

Disabled

☐

Service Type

Email Sender Service

Device Type

Estate Manager

Cluster Node

Region

All Regions

Runtime Context

Enactor Web Core

Name*

Email Sender

Auto Start

☒

* Denotes Mandatory

Check that the Disabled checkbox is empty, and the Auto Start checkbox is enabled.
Save the Service Definition.

Go to the Service Status UI (*Administration – Services – Service Status*) and check the Email Sender service is running. If not, click the ► button to start it:

	Application	Status	Name	Current Activity
■ ► ►	ProcServer	Running	Email Sender	Idle worker Idle
■ ► ►	ProcServer	Stopped	Estate Manager Document Extractor	
■ ► ►	ProcServer	Running	Estate Monitor	Idle

Communication Script Configuration

A communication script is used to set up the body of the email that will be sent to the customer (with the actual receipt as an attachment).

Navigate to Communication Scripts (*Configuration – CRM – Communication Scripts*). There should be an example Email Communication Script available. If not, create one:

On the General tab, set the name of the script. Note: the Campaign is not required. Ignore any warnings about Use of the script in Campaigns.

In the Content tab, Set the Subject of the Email.
The Content type can either be Plain Text or HTML.

Enter the actual content in the Content field. For Plain Text emails, this will just be included as-is. For HTML emails, enter the HTML source in the Content field (with the Editor type set as plain text). This will normally be copied from an HTML editor (e.g. MS Word).

GeneralContentAttachments

Subject

Please find your Enactor receipt attached

Content Type

Rich Text (HTML)

Template Type

Editor Type

Plain Text



Available Data References

Content

```
<html xmlns:v="urn:schemas-microsoft-com:vml"
xmlns:o="urn:schemas-microsoft-com:office:office"
xmlns:w="urn:schemas-microsoft-com:office:word"
xmlns:m="http://schemas.microsoft.com/office/2004/12/omml"
xmlns="http://www.w3.org/TR/REC-html40">

<head>
<meta http-equiv=Content-Type content="text/html; charset=utf-8">
<meta name=ProgId content=Word.Document>
<meta name=Generator content="Microsoft Word 15">
<meta name=Originator content="Microsoft Word 15">
```

With HTML emails, embedded images and other attachments should be uploaded to the communication script using the Attachments tab.

General		Content		Attachments	
		File Name	Content ID	Content-Type	Content Length
		enactorlogo.png	enactorlogo.png	image/png	4078
		Upload Attachment			

Save the Communication Script.

POS Terminal Configuration

The POS Terminal needs to be set so that the user is given the opportunity to offer Email receipts when completing a transaction. Navigate to the POS Terminal (or POS Terminal Template) Configuration for your test POS. For this example, we will be using a POS Terminal Template.

Edit the POS Terminal Template and go to the Printing Tab, and then the Flags Sub-Tab:

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	Receipt Locales	Cards	Inventory	Sundry	Flags	Email	Reports
---------	-----------------	-------	-----------	--------	-------	-------	---------

Print Tax Details on Receipt ☒

Print Receipt for Void Transaction ☐

Disable Automatic Printing ☐

Offer to email the receipt ☒

Embed the receipt as an image ☐

Offer printer selection ☐

Offer gift receipts ☐

Offer product notes ☐

Offer Receipt Locale Selection ☐

Prompt for Receipt Locale on Reprint ☐

Tick the “Offer to email the receipt” checkbox. By default, the receipt will be attached to the email as a PDF. If you prefer to use an image attachment, tick the “Embed the receipt as an image” option.

Then go to the “Email” Tab:

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	Receipt Locales	Cards	Inventory	Sundry	Flags	Email	Reports
---------	-----------------	-------	-----------	--------	-------	-------	---------

Receipt Communication Script

Quote Receipt Communication Script

Select the configured communication script for Email Receipts from the drop-down list. You do not need the Quote receipt setting unless you specifically use quotation functionality.

Save the POS Terminal/POS Terminal Template.

Broadcast to POS

The changes above should be broadcast out to the POS/PDP Server devices. Make sure the following entities are included in the broadcast:


- Location
- User
- Communication Script
- POS Terminal
- POS Terminal Template

Once received, you are ready to test.

Testing

Complete a normal sale transaction. Following tendering, you should be prompted with an offer to email the receipt:

The screenshot shows the enactor POS interface. At the top, the header displays 'enactor' and transaction details: 'Trans - 30', '03-Feb-2021 10:40:13', and 'T8 101 - Mkt Carrot'. Below this, a table lists the items in the transaction:

ITEM	PRICE
 Tile Print Shorts Style: 00QJOJ4 Colour: White/Blue Size: XS Cash UK	£123.00
	£123.00

To the right of the table, a prompt asks 'How would the customer like their receipt?'. Below this is a numeric keypad with buttons for digits 0-9, a decimal point, and function keys 'CLR', 'ENT', and '0'. At the bottom left, there are buttons for 'Email Only', 'Email and Print', 'Print Only', and 'More...'. At the bottom right, the 'TOTAL' is displayed as '£0.00'.

Select “Email Only” or “Email and Print”. You will then be prompted to enter the customer’s email address. If the customer’s email has already been identified (e.g. using Customer loyalty) then this will be pre-populated. If not, enter it manually:

The screenshot shows the enactor POS interface for entering an email address. The header is the same as the previous screenshot. Below the header, there is a text input field for 'Email Address' containing 'peter.rush@enactor.co.uk'. To the right of the input field, a prompt says 'Please enter email address.'. Below the input field, there is a checkbox for 'Allow internal marketing'. At the bottom, there is a full QWERTY keyboard layout. To the right of the keyboard, there are 'OK' and 'Cancel' buttons. The 'TOTAL' at the bottom right is still '£0.00'.

The Marketing prompt may be used for GDPR compliance purposes.

When you have clicked OK, the email receipt service will be called. The Email should be received shortly afterwards:

test.email.sd001@gmail.com

to me ▾

The transaction receipt you requested is attached. Thank you for shopping at enactor.



The Receipt is attached as a PDF by default:



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