

# How-to Guide Configure POS Behaviour (Menus)

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# POS Menus

## Description

This How-to guide covers the basic configuration of POS Menus. Enactor Retail Applications that present User Interfaces (UIs) use **Menus** as the principal means to navigate and access functionality of the Application. Menu configuration provides the first level of Retailer control over what Application Functionality individual Users and groups of Users may access and how they navigate to the functions they require.

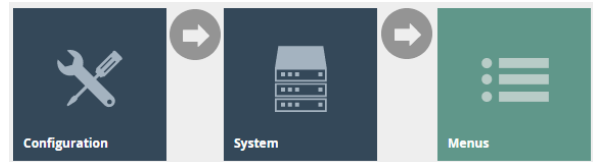
The intent of the guide is to provide basic guidance on configuration of POS Menus. In this guide we will specifically review the POS Sale and Tender Menus. Please refer to the full solution documentation and other how-to guides for more information on other Menus.

## Configuration

*Menus* are associated with a **Locale**, **User Role** and **Menu Group**. These relations must be understood, and the related configuration elements defined before proceeding to create Menu configurations. From the POS User perspective some POS Menu options select other Menus or invoke software functions. These are the POS Menus for which the action behind the Menu Option is an Event; a Function or Process defined within the constraint of the Menu Set.

## Accessing Menus









Access Menus using the Menus option, obtained via the selection sequence shown at right, starting from the Main Menu:



## Select Menu

The Menus option invokes the Menus Maintenance select page as shown below. The Select page lists currently configured Menus and enables the User to Add, View, Edit, Copy or Delete Menus.

The screenshot shows the 'Menu Maintenance' interface. At the top, there are filter dropdowns for Menu Set, Role, Menu Group, and Locale. Below these is a 'Menu ID' field with a 'Starts With' dropdown and a text input. There are 'Apply Filters' and 'Reset Filters' buttons. Below the filters is a table with columns: Menu Set, Role, Menu Group, Menu ID, and Name. The table contains two rows of data. At the bottom, there are navigation controls including 'Page 1 of 1', 'Page Size 20', and a 'Create New Menu' button.

	Menu Set	Role	Menu Group	Menu ID	Name
   	Web Maintenance	Administrator	Default	Default	Default
   	Web Maintenance	Admin for Test	Default	Default	Default


## New Menu

In the Menu Maintenance select page select the **Create a new Menu** Option, which presents an initial page to capture a Menu Set, Role, Menu Group, Locale and Menu ID, all of which serve to uniquely identify a Menu. Enter values and select the **Create** option.

The screenshot shows the 'Menu Maintenance' interface for creating a new menu. It prompts the user to 'Please enter an ID for the new menu.' Below this are dropdown menus for Menu Set, Role, Menu Group, and Locale (set to 'English (UK)'). There is a text input field for Menu ID. At the bottom, there are 'Back' and 'Create' buttons.

Menu Set	Role	Menu Group	Locale	Menu ID
			English (UK)	

## Menu Creation Options

The **Create New Menu** option initiates the creation of a new Menu 'from scratch'. However, Menus may also be created by copying existing Menus including the supplied *Example Menus* mentioned above. To copy an existing Menu mouse-click on the Copy Icon (  ) associated with it in the *Menu Maintenance* List. The initial page shown above, which is used to capture the mandatory elements that uniquely identify the new Menu, is common to both methods.

### Specifying MenuSet

The **Menu Set** is specific to each Application and is associated, in the Estate Manager Database, with all the Events of the Application, which are available to be referenced by Options in Menus. The MenuSets available to the Estate Manager appear in the Dropdown list field for the property. There are two fundamental Enactor Retail Application Menu Sets, namely **Web Maintenance** and **POS**


### Specifying Locale

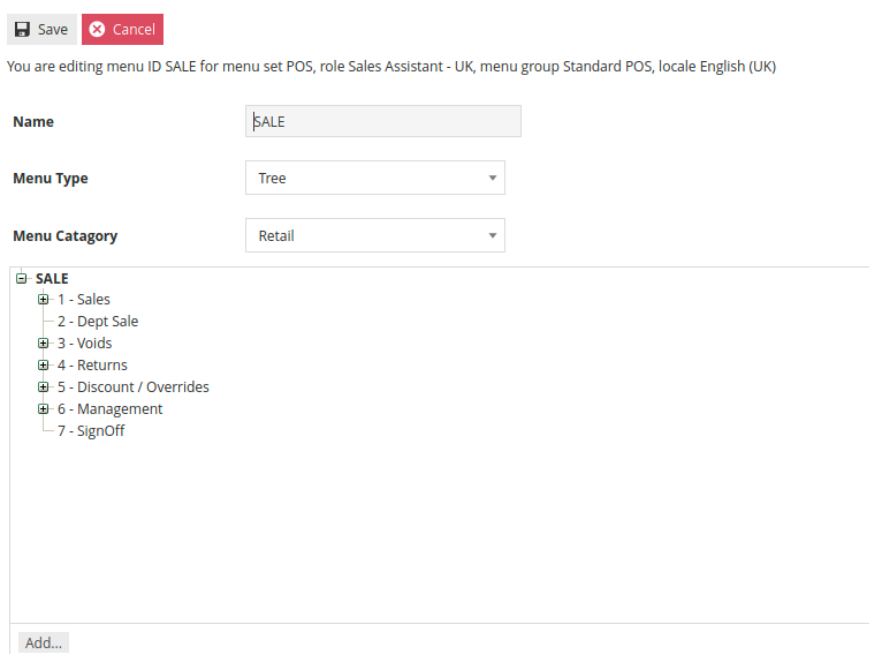
Locale is configured using **Configuration>Organisation>Locales**. Equivalent Menus for different Locales may be created by creating copies of the first-created Menu and applying the different Locale values. These copied Menus may remain equivalent in all respects other than Locale if the Menu Option labels are specified based on a Message Resource since the Message Resource will be dynamically selected based on the Locale of the User. Alternatively, Locale-Specific labels may be explicitly specified as text in the Menu configuration.

### Specifying Menu ID

For supplied Enactor Retail Applications, the set of **Menu IDs** applicable to the software associated with the **Menu Set** is available as a drop-down list for selection. Absent any Customisation using the Enactor Toolset the **Menu ID** need and should only ever be selected from the drop-down list, since these are the only Menus that the software will ever request and load.

### Editing the Menu

An individual Menu once created, or when selected for Edit presents in the Edit window of the Menu Maintenance Page as shown below, in an expandable Tree structure; Sub-Menu nodes have an Expand/Collapse Icon (  ) by which the User may navigate and view the Menu (as presented in the configuration maintenance interface). The Menu Edit page captures identifying properties of the Menu and allows for manipulation of its structure and content.



Save Cancel

You are editing menu ID SALE for menu set POS, role Sales Assistant - UK, menu group Standard POS, locale English (UK)

Name: SALE

Menu Type: Tree


Menu Category: Retail

SALE

- 1 - Sales
- 2 - Dept Sale
- 3 - Voids
- 4 - Returns
- 5 - Discount / Overrides
- 6 - Management
- 7 - SignOff

Add...

### Menu Construction

Menu Options shown in the Edit window of the Menu Maintenance Page that have an Expand/Collapse Icon (  ) are Sub-Menu nodes (i.e. Folders) to which new Options may be added. When such options, including the root configuration Menu itself, are selected (shown highlighted in **Bold**) the **Add** option will be available to add new options to them. This is the basic method of Menu Construction and the available options are described following. Although the Create new Menu Option described in section *Menu New* provides a starting point for creating configuration Menus, using the Copy method, as described in *Menu Creation Options* above, is the ideal starting point for Menu construction as it has the advantage of providing a ready-built Menu structure, which may be customized to the requirement by applying the various options described below in sections *Editing Menu Elements* to the existing elements and *Adding Menu Elements*. In both cases the menu is constructed (or re-constructed) in the Edit page of Menu Maintenance, which is illustrated and described above.

Menus are internally hierarchical in the sense that **Folder** options may be added to the main, root Menu, which appear in the User Interface as Sub-Menus, and to which further options may be added, including other *Folder* options.

### Adding Menu Elements

New Menu Options may be added using the **Add** option. When selected, the User is presented with a pop-up menu of the types of Menu Items that may be added, as shown at right. The options illustrated are described in brief in the following table and in detail in the following sections. In all cases, when one of these options is selected, the Menu Maintenance function opens in the General Tab of the Menu Element Maintenance page to capture details of the new element.

Only two of the Add options shown above should ever be required for the creation of Restaurant and POS Menus, these being **Add a new Button** and **Add a new Button Folder**.

## POS Menus




























This guide will cover the POS **Sale Menu** and the **Tender Menu**. While there are other menus in the POS Menu Set, these are most likely to require some level of customization to suit the retailer.

In the standard NextGen UI, the menu is represented as 2 rows of 4 buttons at the bottom of the screen or a single column of 8 buttons on the right side depending on the theme resolution. The **Sale Menu** is displayed while in the basket view. Once the transaction has been tendered, the menu switches to the **Tender Menu**.

As mentioned previously, example menu configurations are available in Estate Manager. It is recommended to start by copying an existing menu and making modifications rather than starting from scratch.

### Sale Menu



In the Menu Maintenance view, use the filters to help locate an existing **Sale Menu**. In the example below, we have filtered on POS as the **Menu Set**, Sales Assistant as the **Role** and Standard POS as the **Menu Group**.

<b>Menu Set</b>	POS	<b>Role</b>	Sales Assistant - UK	<b>Menu Group</b>	Standard POS	<b>Locale</b>	-	<b>Menu ID</b>	Starts With
 Apply Filters  Reset Filters 									
	Menu Set	Role	Menu Group	Menu ID	Name				
   	POS	Sales Assistant - UK	Standard POS	CREDIT_TENDER	CREDIT_TENDER				
   	POS	Sales Assistant - UK	Standard POS	DISPLAY_REPORTS	DISPLAY_REPORTS				
   	POS	Sales Assistant - UK	Standard POS	PRINT_REPORTS	PRINT_REPORTS				
   	POS	Sales Assistant - UK	Standard POS	RICH_PRODUCT	RICH_PRODUCT				
   	POS	Sales Assistant - UK	Standard POS	SALE	SALE				
   	POS	Sales Assistant - UK	Standard POS	TENDER	TENDER				

Locate the **Sale Menu** and click the icon to create a duplicate.

Please enter an ID for the new menu.

<b>Menu Set</b>	POS
<b>Role</b>	Sales Assistant - UK
<b>Menu Group</b>	Standard POS
<b>Locale</b>	English (UK)
<b>Menu ID</b>	Sale

 Back  Create

Select the desired **Role**, **Menu Group**, **Locale** and assign a **Menu ID**. Click on **Create** to create the new menu which is now ready to be edited.

Save Cancel

You are editing menu ID Sale\_New for menu set POS, role Sales Assistant - UK, menu group Standard POS, locale English (UK)

Name Sale\_New

Menu Type Tree

Menu Category Retail

Sale\_New

- 1 - Sales
  - 2 - Dept Sale
- 3 - Voids
- 4 - Returns
- 5 - Discount / Overrides
- 6 - Management
  - 7 - SignOff

Add...

The **Sale Menu** contains most of the functions that will be required by a retailer. Most of the customization work will involve restructuring the hierarchy of the menu, removing unnecessary items or potentially adding a new item.

The numbers in the Menu tree represent the button position for the item. In the above example, the main **Sales Menu** only has 7 buttons defined so the eighth button will not appear. To change the order in which the functions appear, select the button that needs to be moved and then use the **Move Up** or **Move Down** buttons until the order is corrected. This can be done at any level of the hierarchy.

Save Cancel

You are editing menu ID Sale\_New for menu set POS, role Sales Assistant - UK, menu group Standard POS, locale English (UK)

Name Sale\_New

Menu Type Tree

Menu Category Retail

Sale\_New


- 1 - Sales
  - 2 - Dept Sale
- 3 - Voids
- 4 - Returns
- 5 - Discount / Overrides
- 6 - Management**
  - 7 - SignOff


Add... Edit Remove Copy Move Up Move Down Change Folder



Removing an item is done by selecting the item and then clicking **Remove**. It is important to note that the **Remove** action can be used on individual functions as well as folders. If it is used on a folder, it will remove the folder and all contents within the folder.

Buttons and Folders can be added by selecting the containing folder first and then clicking **Add** and then selecting either **Add a new Button Folder** or **Add a new Button**.

 Save

 Cancel

You are editing menu ID Sale\_New for menu set POS, role Sales Assistant - UK, menu group Standard POS, locale English (UK)

Name


Sale\_New


Menu Type

Tree


Menu Category


Retail


 Sale\_New

 1 - Sales

1 - Rich Product Search


 2 - Store / Recall Options

 3 - Gift Cards

 4 - Receipts

5 - Salesperson

6 - QTY Sale

 7 - More

8 - Back

Add a new Button Folder

Add a new Button

Add...

Edit

Remove

Copy

Move Up

Move Down

Change Folder

If **Add a new Button Folder** was selected a prompt will appear to collect the folder name and button position.







Menu Maintenance

Save

Cancel

Please select a destination folder for menu item 'Loyalty'

Menu Folder

Sale\_New

Sale\_New

Sales

Store / Recall Options

Gift Cards

Receipts

More

Promotions

Customers

Customer AC

Customer Deposits

OrderFunctions

Quotes

Voids

Returns

Discount / Overrides

Management

Reports


Exit


After saving the change, the **Loyalty Folder** will now appear in the top level of the **Sales Folder**. When a folder or button is moved, it will retain its previous position ID. Use the **Move up** and **Move down** functions to select the desired position within the new folder.









 Save  Cancel





You are editing menu ID Sale\_New for menu set POS, role Sales Assistant - UK, menu group Standard POS, locale English (UK)

<b>Name</b>	<input type="text" value="Sale_New"/>
<b>Menu Type</b>	<input type="text" value="Tree"/>
<b>Menu Category</b>	<input type="text" value="Retail"/>

 Sale\_New

 1 - Sales

- 1 - Rich Product Search
-  2 - Store / Recall Options
-  3 - Gift Cards
-  3 - Receipts
-  **5 - Loyalty**
- 6 - QTY Sale
-  7 - More
  - 1 - Employee Sale
  - 2 - Gift Voucher
  -  4 - Promotions
  -  5 - Customers
  -  6 - Quotes
  - 8 - Back
- 8 - Back

- 2 - Dept Sale
-  3 - Voids
-  4 - Returns
-  5 - Discount / Overrides
-  6 - Management
- 7 - SignOff

Add...

Edit

Remove

Copy

Move Up

Move Down

Change Folder

Once the **Sales Menu** is completely revised it can be saved. If additional variations of the menu are to be created for different **Roles**, **Locales** or **Menu Groups** this process can be repeated using the newly created menu as the source for the working copy.

## Tender Menu

In the Menu Maintenance view, use the filters to help locate an existing **Tender Menu**. In the example below, we have filtered on POS as the **Menu Set**, Sales Assistant as the **Role** and Standard POS as the **Menu Group**.

Menu Set

POS

Role

Sales Assistant - UK

Menu Group

Standard POS

Locale

























-

Menu ID

Starts With

Apply Filters

Reset Filters

	Menu Set	Role	Menu Group	Menu ID	Name
   	POS	Sales Assistant - UK	Standard POS	CREDIT_TENDER	CREDIT_TENDER
   	POS	Sales Assistant - UK	Standard POS	DISPLAY_REPORTS	DISPLAY_REPORTS
   	POS	Sales Assistant - UK	Standard POS	PRINT_REPORTS	PRINT_REPORTS
   	POS	Sales Assistant - UK	Standard POS	RICH_PRODUCT	RICH_PRODUCT
   	POS	Sales Assistant - UK	Standard POS	SALE	SALE
   	POS	Sales Assistant - UK	Standard POS	TENDER	TENDER

Locate the **Tender Menu** and click the icon to create a duplicate.

Please enter an ID for the new menu.

Menu Set

POS

Role

Sales Assistant - UK

Menu Group

Standard POS

Locale

English (UK)

Menu ID



Tender

← Back

+ Create

Select the desired **Role**, **Menu Group**, **Locale** and assign a **Menu ID**. Click on **Create** to create the new menu which is now ready to be edited.

---

 Save  Cancel

You are editing menu ID Tender\_New for menu set POS, role Sales Assistant - UK, menu group Standard POS, locale English (UK)

**Name**


Tender\_New





**Menu Type**

Tree ▼

**Menu Category**

Retail ▼

 Tender\_New

- 1 - Cash
- 2 - Cards
- 3 - Cheque
-  **4 - Vouchers**
-  5 - Customers
-  6 - Foreign Currencies
-  7 - More
- 8 - Back

Add...

Edit

Remove

Copy

Move Up

Move Down

Change Folder

The process to reorder, add and remove items from the **Tender Menu** are the same as what was described previously for the **Sales Menu**. What is different about the **Tender Menu** is that each tender represented on the menu must be linked to a tender that has already been configured. Because of this, it is recommended to complete tender configuration prior to modifying the **Tender Menu**. Additionally, the **Event** triggered must also be properly selected.

In the above example, **Cash** is the first button in the menu. By editing the button, we can see on the **General Tab** that the **Event** is set to **Cash Tender**, the **Button Label** is **Cash** and the **Position** is **1**.





Tender Maintenance

Region

United Kingdom

Tender ID

Starts With

Apply Filters

Reset Filters

	Tender ID	Tender Type	Region	Description
<div> <div></div> <div></div> <div></div> <div></div> </div>	CASH_UK	Cash	United Kingdom	Cash UK

On the **General Tab**, **enactor.mfc.TenderID** must have the correct **Tender ID** specified in the **Value** field. In this example, the correct **Value** would be **CASH\_UK**. If the **Value** is incorrect it must be changed to match the desired **Tender ID**.

Save

Cancel

You are editing a button on 'Tender\_New'. Please update the button details

General

Data

Data

	Name	Java Type	Value
<div> <div></div> </div>	enactor.mfc.TenderId	String	CASH_UK
<div> <div>+ Add</div> </div>		String	

If a new **Menu Button** is being added, there will be no pre-existing entry on the **Data Tab**. In this scenario, enter **enactor.mfc.TenderId** in the **Name** field and the appropriate **Tender ID** in the **Value** field. After entering the information, it is critical to remember to press the **+Add** button before leaving the page.

All options remaining on the **Tender Menu** must be linked to the appropriate **Tender ID**.

# 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.

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

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# 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