

How-To Guide Configuring A New Store

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Introduction

The purpose of this guide is to show the typical steps involved when setting up a New Store. Often, a retailer will leverage the Template capabilities within Enactor to setup new and manage existing locations. The use of Templates is covered in a separate guide. This document will focus on completing the core configuration steps manually.

Overview

The following steps are required to configure a New Store:

- Region Configuration
- Location Configuration
- Device Configuration
- POS Terminal Configuration

Region configuration is covered in the “How to configure a base Organisation Structure” guide. This guide will cover Location, Device, and POS Terminal 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.)
- Regionally appropriate data including Product, Localisation, Tenders, etc.

Prior Training/Experience

You should be familiar with the following:

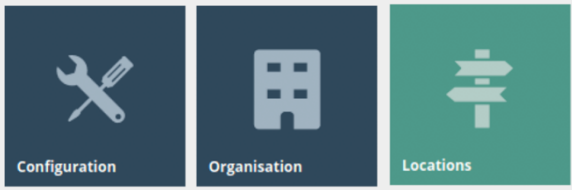
- Estate Manager configuration
- Enactor configuration concepts, including Locations, POS Terminals, Products etc.
- Data broadcasting
- Standard POS Sales processes

Configuration Steps

Location Configuration

Enactor supports multiple Location types including Store, Office, Warehouse and Restaurant. This guide focuses on setting up a new store. Examples of the other locations can be found in other configuration guides. Before setting up the New Store, validate that the necessary Regional hierarchy exists to support the location. Refer to the “How to configure a Base Organizational Structure” guide for assistance if necessary.

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



Location Maintenance?||x

Region

-

Location Type

-

Location ID

Starts With

Name

Starts With

Apply Filters

Reset Filters

	Location ID	Location Type	Name
	0006	Store	Configuration Example Store
	0101	Store	Customer Home
	0003	Store	Enactor (Demo Room)
	0099	Store	Enactor (PDP) Mobile POS Server
	0001	Store	Enactor Store
	estatemanager	Office	Estate Manager
	0004	Store	Marseille
	0100	Warehouse	UK Warehouse
	WebShop	Store	Web Shop

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Page Size 10

+

 Create a new Location

🔔

 Update diary entries for day start/end

➡

 Export Locations

On the Location Maintenance page, select “Create a new Location”.



The screenshot shows a web interface titled "Location Maintenance" with a teal header bar containing a help icon, a full-screen icon, and a close icon. Below the header, a message states: "You are adding a new location, please select the type, template and enter the ID:". The form contains three fields: "Location Type" with a dropdown menu showing "Store", "Template" with a dropdown menu showing "-", and "Location ID" with a text input field containing "0006". At the bottom left, there are two buttons: "Back" with a left arrow icon and "Create" with a plus icon.

Select Store from the Location Type dropdown. Enter a unique Location ID for this location. Note, the Location ID cannot be changed once the Location has been created. Select Create.

Numerous tabs and sub-tabs are presented as part of Location configuration. This guide is focused on the core Location aspects and will cover the following: General, Address, Purging, Day End, Email, Nearest Stores, Receipt, and Display.

The General tab has all the basic information that controls the store behavior and identity.

Location Maintenance

Save

Cancel

You are editing store ID: 9922

General

Address

Purging

Day End

Email

Nearest Stores

Cash Management

Receipt

Display

MM Groups

MM Group Price

Attributes

General

Ordering

Tax

Currency

Security

Is Live

☐

Name*

Company ID

Region*

All Regions

Locale

English (UK)

Document Code

VAT Number

Branch Number

0

Fascia

-

MM Group Hierarchy

All

Airport Terminal Building

-

Start Date

23

December

2020

...

Menu Group

Default

Default Menu Group

Default

Price Group

-

Product Notes Attributes

-

Privacy policy URL

Fiscal Product Group Hierarchy

-

Template

Change Template

* Denotes Mandatory

The Is Live checkbox specifies the location status. When checked, the location is “live”, “available for trading”, or “active”. This box should be checked or ticked if the Store is transacting (sales or inventory).

Give your location a name in the Name field. This could be the same as the location ID or it could be the name of the store location. This name will be shown on other configuration pages when referring to the location so it must be conclusive and recognisable.

Select the appropriate Region from the Region groups. If the appropriate Region does not appear, it must be created. Refer to the How to configure a base Organisation Structure guide for assistance.

Select the Locale for this location. Locale will affect locale-dependent operation in language, time zone, etc.

If you have VAT number, enter it in VAT Number. If you do not have a VAT number, leave the field blank. The VAT Number is typically printed on receipts and is included with the transaction data.

Set the Branch Number to the location ID.

Select the Merchandise Management Group that is appropriate for this location from the MM Group Hierarchy. This will set the POS Rich Product Search starting MM Group.

Enter the date when this location will go live in the Start Date field.

If this location has a specific menu that must be used, select the appropriate Menu Group for this location. Otherwise, select Default. Select the default menu group for the organisation from the Default Menu Group dropdown.

Select the appropriate Price Group from the dropdown for the location. Price Group is used for the valuation of purchase orders, stock transfers, and orders. If the appropriate Price Group does not exist it must be created. Refer to the How to configure a base Organisation Structure guide for assistance.

The ordering Sub-tab handles configuration for the customer orders functionality.

The screenshot shows the 'Location Maintenance' interface with the 'Ordering' sub-tab selected. The main header bar is green with the title 'Location Maintenance' and icons for help, full screen, and close. Below the header, there are 'Save' and 'Cancel' buttons. A message states 'You are editing store ID: 9922'. A series of tabs are visible: General, Address, Purging, Day End, Email, Nearest Stores, Cash Management, Receipt, Display, MM Groups, MM Group Price, and Attributes. The 'Ordering' sub-tab is active, showing a secondary set of tabs: General, Ordering, Tax, Currency, and Security. The 'Ordering' sub-tab contains the following fields and controls:

- 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.
- Default Delivery Zone:** A dropdown menu with a '-' symbol.
- 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.

When a location Accepts Collection Orders or Accepts Reservation Orders, the location will be providing the stock for the order. Normally these functions are done at a warehouse.

When a location Fulfills Delivery Orders, the location is handling the carrier (UPS, FedEx, Post, etc) or courier handoff for delivery to the customer. This could be done at a warehouse or at a store location.

When a location Fulfills Collection Orders, the location will be handling the final step in the order process with a customer. Normally this is done at a store.

The Default Warehouse will be used to route orders from this location. Select the UK Warehouse.

If this location should not use its own stock to fulfill orders, check the Prevent Location Collections using Own Stock to require orders to be fulfilled from another location. Otherwise. This is often done if store stocking levels do not account for sales from other channels.

The Tax sub-tab captures Tax parameters applicable at the Location. Tax configuration is handled in a different guide.

The General-Currency sub-tab is only used when there are multiple locations with different base currencies. If all stores have the same base currency, the data on this sub-tab does not need to be set.

The Address Tab provides two Sub-Tabs to capture the Address and Contact Details of the Location. These fields are used in receipt printing, supplying Store Locations in web inquiry, etc.

Location Maintenance

Save

Cancel

You are editing store ID: 9922

General

Address

Purging

Day End

Email

Nearest Stores

Cash Management

Receipt

Display

MM Groups

MM Group Price

Attributes

Address

Contact Details

Organisation

Street 1

Street 2

Street 3

Town

County

Postcode

Country

The Location Address properties are Organisation, Street Address, Town, County, Postcode and Country. The Contact Details sub-tab captures Phone Numbers, a Fax Number and Email Address.

The Purging tab contains the rules for removing old data from the system that is no longer needed. Purging can remove 2 different types of data from the system: directories in the filesystem and data entities in the local database.

Directory purging is based on age in days since the file was last modified. Directories can be absolute or relative based on the ENACTOR HOME environment variable. A common setting for the “Default Directory Purge Age (days)” is 90 days.

The logs and the updates directories can generate a lot of data, so it is recommended to specify a more aggressive Purging guidelines. These directories are commonly set for a 45-day Purge Age as shown below.

Location Maintenance

Save

Cancel

You are editing store ID: 0006

General

Address

Purging

Day End

Email

Nearest Stores

Cash Management

Receipt

Display

MM Groups

MM Group Price

Attributes

Directory Purging

Entity Purging

Default Directory Purge Age (days)

30

Zero means don't purge

	Directories	Purge Age (days)
	logs	45
	updates/failed	30
	updates/processed	30
	Add	

Entities in the database can be purged based on age.

A “Default Purge Age (days)” of 365 days will keep entity data in the database for 1 year. This is a common setting but may vary with your retailer’s business requirements. Specific tables can be set other values if needed. In this guide we will just set the default for all tables.

Location Maintenance

Save

Cancel

You are editing store ID: 0006

General

Address

Purging

Day End

Email

Nearest Stores

Cash Management

Receipt

Display

MM Groups

MM Group Price

Attributes

Directory Purging

Entity Purging

Default Purge Age (days)

365

Zero means don't purge

Entity Type	Purge Age (days)
(backOrderWorkItem)	0
(customerOrderHeader)	0
(customerOrdersWorkBatch)	0
(customerReceivedSequenceNumber)	0
(customerReturnOrderHeader)	0
(restaurantProductDiscount)	0
(restaurantTerminalException)	0
Account Balance Snapshot	0
Account Movement	0
Activity Log Entry	0
Activity Statistic	0
Activity Statistic Config	0
Activity Statistic Type	0
Advance Shipping Notice Handling Unit	0
Advance Shipping Notice Header	0
Application Process Log Entry	0
BP Event Listener	0

The Day End tab allows configuration of the normal Day Start and Day End processing. These processes can be manual or automated. Users who will manually initiate Day Start or Day End will need user role permission.

Location Maintenance?||x

Save

Cancel

You are editing store ID: 9922

GeneralAddressPurgingDay EndEmailNearest StoresCash ManagementReceiptDisplayMM GroupsMM Group PriceAttributes

	Store Open	Store Closed	Day End	Week End	Earliest POS Day End
Monday	<div><div>00</div><div>:</div><div>00</div></div>	<div><div>00</div><div>:</div><div>00</div></div>	<div><div>00</div><div>:</div><div>00</div></div>	<div><div></div></div>	<div><div>00</div><div>:</div><div>00</div></div>
Tuesday	<div><div>00</div><div>:</div><div>00</div></div>	<div><div>00</div><div>:</div><div>00</div></div>	<div><div>00</div><div>:</div><div>00</div></div>	<div><div></div></div>	<div><div>00</div><div>:</div><div>00</div></div>
Wednesday	<div><div>00</div><div>:</div><div>00</div></div>	<div><div>00</div><div>:</div><div>00</div></div>	<div><div>00</div><div>:</div><div>00</div></div>	<div><div></div></div>	<div><div>00</div><div>:</div><div>00</div></div>
Thursday	<div><div>00</div><div>:</div><div>00</div></div>	<div><div>00</div><div>:</div><div>00</div></div>	<div><div>00</div><div>:</div><div>00</div></div>	<div><div></div></div>	<div><div>00</div><div>:</div><div>00</div></div>
Friday	<div><div>00</div><div>:</div><div>00</div></div>	<div><div>00</div><div>:</div><div>00</div></div>	<div><div>00</div><div>:</div><div>00</div></div>	<div><div></div></div>	<div><div>00</div><div>:</div><div>00</div></div>
Saturday	<div><div>00</div><div>:</div><div>00</div></div>	<div><div>00</div><div>:</div><div>00</div></div>	<div><div>00</div><div>:</div><div>00</div></div>	<div><div></div></div>	<div><div>00</div><div>:</div><div>00</div></div>
Sunday	<div><div>00</div><div>:</div><div>00</div></div>	<div><div>00</div><div>:</div><div>00</div></div>	<div><div>00</div><div>:</div><div>00</div></div>	<div><div></div></div>	<div><div>00</div><div>:</div><div>00</div></div>

The Store Open and Store Closed times should be entered for each day of the week. Additionally, the time that a normal Day End should occur should be specified for each day of the week. The day of the week that represents the last day of the retailer’s business week is selected in the “Week End” column.

The Email Tab captures information about the location’s email server. The applications that send email will use this information to connect to the email server. The necessary settings will typically be provided by the retailer’s IT organization.

If the support team has an email for collecting alerts, enter that email in Support Email Address.

Location Maintenance

Save

Cancel

You are editing store ID: 0006

General

Address

Purging

Day End

Email

Nearest Stores

Cash Management

Receipt

Display

MM Groups

MM Group Price

Attributes

Authenticate Outgoing Mail

☒

Allow fallback to unencrypted connection

☐

POP3 Server

POP3 Port

110

POP3 Encryption Type

None

IMAP4 Server

imap.gmail.com

IMAP4 Port

993

IMAP4 Encryption Type

SSL

SMTP Server

smtp.gmail.com

SMTP Port

465

SMTP Encryption Type

SSL

Support Email Address

System User

EMAIL_USER

The Nearest Stores tab permits the pre-selection of locations that the POS will use in the Rich Product Search and other functionality to identify other locations that may be helpful during a customer transaction.

Use the “Store” dropdown to select the appropriate locations and select “Add”. Repeat the process as necessary. The Arrows can be used to reorder the list into a meaningful priority.

Location Maintenance

Save

Cancel

You are editing store ID: 0006

General

Address

Purging

Day End

Email

Nearest Stores

Cash Management

Receipt

Display

MM Groups

MM Group Price

Attributes

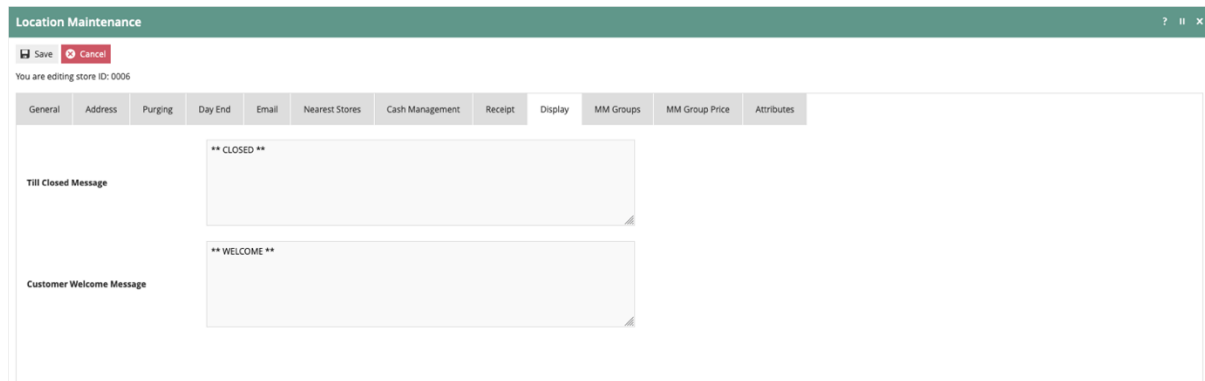
Nearest Stores

The order of stores in the table below, may be used to order nearest stores by proximity.

	Store
<div><div></div><div></div></div>	Enactor Store
<div><div></div><div></div></div>	Enactor (Demo Room)
<div><div>+</div><div>Add</div></div>	<div>Customer Home</div>

The Cash Management tab provides the necessary settings to configure the appropriate Cash Management settings for the location. The configuration of Cash Management is covered in a separate How-To guide.

The Receipt tab allows location specific information to be added to Receipts. Use this tab to specify the Receipt Header Lines, Receipt Trailer Lines, the Receipt Header Logo, and/or a Receipt Trailer Logo.



The screenshot shows the 'Location Maintenance' application window. At the top, there is a green header bar with the title 'Location Maintenance' and a close button. Below the header, there is a toolbar with 'Save' and 'Cancel' buttons. A status bar indicates 'You are editing store ID: 0006'. The main area contains a tabbed interface with the following tabs: General, Address, Purging, Day End, Email, Nearest Stores, Cash Management, Receipt, Display, MM Groups, MM Group Price, and Attributes. The 'Receipt' tab is currently selected. It contains two text input fields. The first field is labeled 'Till Closed Message' and contains the text '** CLOSED **'. The second field is labeled 'Customer Welcome Message' and contains the text '** WELCOME **'.

After entering the Receipt Header Lines and the Receipt Trailer Lines, the text can be formatted further by selecting Header Lines Centered or Trailer Lines Centered.

If a Receipt Header or Receipt Trailer Logo has been uploaded, it can be selected. A preview of the Logo is also provided as confirmation. For more information on uploading Receipt Logos, please refer to the How-To guide covering Media Management.

The Display tab is used only if customer-facing line displays are in use. If the location has deployed terminals with line displays, the Till Closed Message and Customer Welcome Message is defined here.

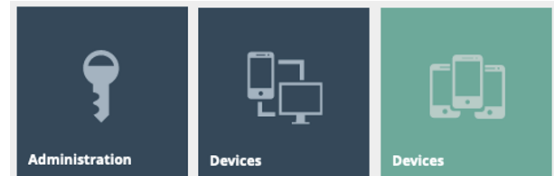
The information on the preceding pages represents the common Location configuration items when setting up a New Store. At this time, the Location can be saved, and Device configuration can begin.

Device Configuration

All endpoints are of a specific type and need a unique device ID. Examples includes point of sale devices, mobile devices, inventory handheld terminals, and servers. Any device that will connect to the Enactor system needs a device type and a unique device ID.

Devices can be of different types. The specific device type is used by the process connection diagram to determine which endpoint to use. Defining a new device type is not covered in this guide.

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



Device Maintenance					
<div>Region: <input type="text"/></div> <div>Location: <input type="text"/></div> <div>Type: <input type="text"/></div> <div>Device ID: Starts With <input type="text"/></div> <div>Not In Use: <input type="text"/></div> <div>Apply Filters Reset Filters</div>					
	Location	Type	Device ID	Name	Not In Use
	Enactor Store	Back Office	BO@0001.enactor	Back Office @ 0001	<input type="checkbox"/>
	Enactor (Demo Room)	Back Office	BO@0003.enactor	Back Office @ Enactor (Demo Room)	<input type="checkbox"/>
	Marseille	Back Office	BO@0004.enactor	Back Office @ Marseille	<input type="checkbox"/>
	Enactor Store	POS	BenPOS@0001.enactor	Ben POS @ Enactor Store (JOHN)	<input checked="" type="checkbox"/>
	Enactor Store	POS	pos1.customerApp.enactor	Customer App Pos	<input type="checkbox"/>
	Estate Manager	Estate Manager	estateManager.enactor	Estate Manager	<input type="checkbox"/>
	Estate Manager	Mobile Server	pdpServer.enactor	Estate Manager	<input type="checkbox"/>
	Enactor Store	POS	FordPOS@0001.enactor	Ford POS @ Enactor Store (JOHN)	<input checked="" type="checkbox"/>
	Enactor (Demo Room)	HHT	hht1@0003.enactor	HHT 1 @ Enactor (Demo Room)	<input type="checkbox"/>
	0010	HHT	hht1@0010.enactor	HHT 1 @ Enactor Inventory 1	<input type="checkbox"/>

Page 1 of 4 Page Size 10 Create a new Device

To create a new Device, On the Device Maintenance page, select Create a new Device.



The screenshot shows a web application window titled "Device Maintenance". Inside the window, there is a message: "You are adding a new device, please enter the ID of the new device:". Below this message is a form with a label "Device ID" and a text input field containing the value "pos1@0006.enactor". At the bottom left of the form, there are two buttons: "Back" with a left arrow icon and "Create" with a plus icon.

Each Device must be assigned a unique Device ID. It is recommended to work with the retailer to establish a naming convention that can be easily replicated across the entire estate. The Device ID should contain sufficient information to convey what it is, how it is used and where it is deployed. As in the example shown above, the Device ID has been set to pos1@0006.enactor. From this Device ID, it can be known that this is a POS terminal which is identified as terminal 1, deployed to location 0006 within the Enactor company/fascia. The convention used in this example is:

<device type><device number>@<location>.<company/fascia>

Select Create once the Device ID has been created. Once a Device has been created, the Device ID cannot be changed.

On the Device Maintenance page, only the **General** sub-tab will be populated in this guide.

Device Maintenance

Save

Cancel

You are editing Device ID: 'pos1@0006.enactor'

General

Data Source

Registration

Name*

POS 1 @ 0006

Host Name*

Http Port*

8080

RMI Port*

2099

Type*

POS

Location

Enactor Store

Not In Use

☐

Notes

* Denotes Mandatory

In the **Name** field, a Device Name must be specified. As with the Device ID, the Name should be derived using a convention across the estate. It is strongly suggested that the name should convey the device type, terminal number or other identifier and deployed location. Often, the Name will be a derivative of the Device ID as shown in the example above. The Host Name entry is for remote connections to the device. Enter “localhost” for Host Name. Select the appropriate Device Type from the drop down. In the Location field, select the Location where this Device will be deployed.

Select “Save” to complete the Device configuration.

POS Terminal Configuration

POS Terminals are the workhorse of the commerce environment. Each POS Terminal can have unique configuration to support the specific task that the terminal will perform.

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



POS Terminal Maintenance

Region

Location

Device ID

Starts With

Apply Filters

Reset Filters

	Terminal Number	Device ID	Description
	60	BenPOS@0001.enactor	Ben POS @ Enactor
	0	pos1.customerApp.enactor	Customer App Terminal
	63	FordPOS@0001.enactor	Ford POS @ Enactor
	61	MonaPOS@0001.enactor	Mona POS @ Enactor
	110	mpos10@0001.enactor	mpos10@0001.enactor
	101	mpos1@0001.enactor	mpos1@0001.enactor
	101	mpos1@0003.enactor	mpos1@0003.enactor
	101	mpos1@0100.enactor	mpos1@0100.enactor
	102	mpos2@0003.enactor	mpos2@0003.enactor
	102	mposST@0001.enactor	mposST@0001.enactor

Page 1 of 3

Page Size 10

Create a new POS Terminal

On the POS Terminal Maintenance page, select **Create a new POS Terminal**.

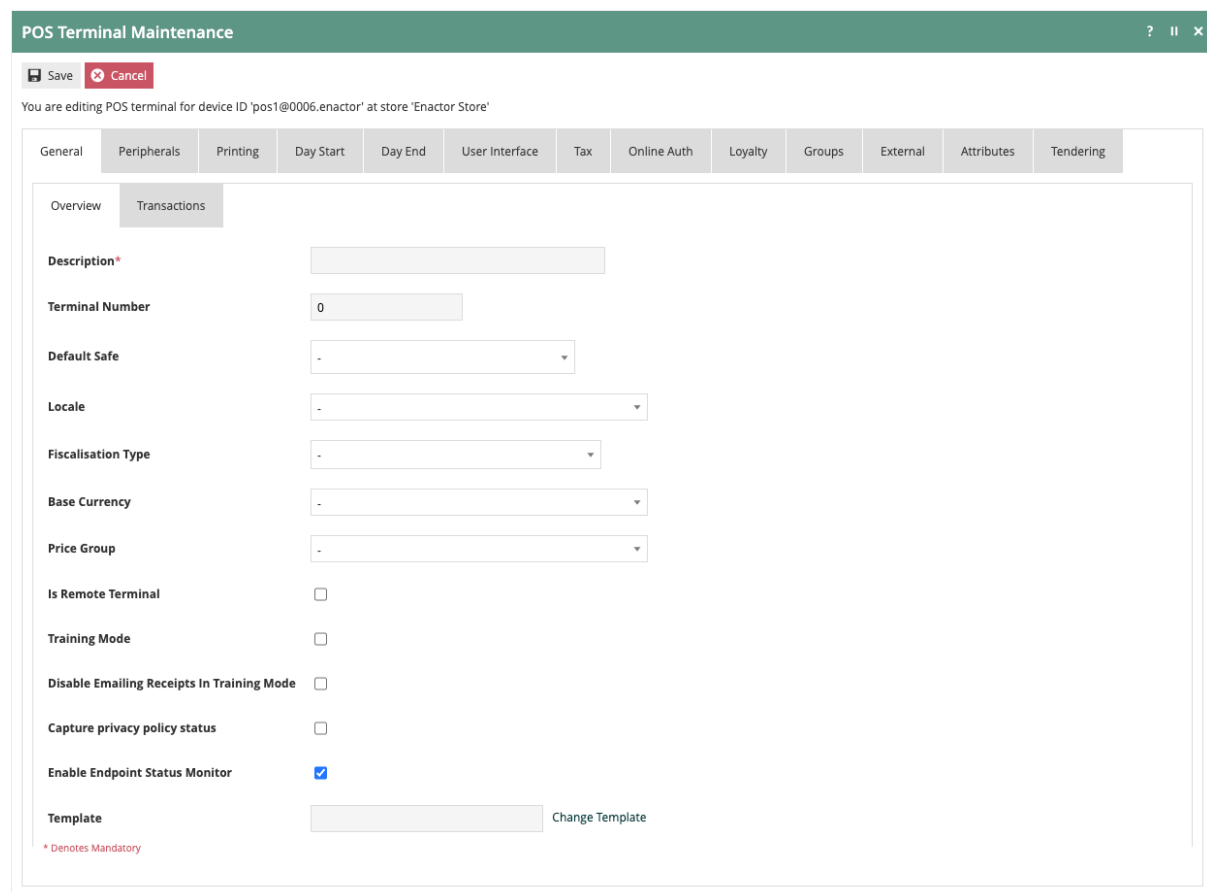


The screenshot shows the 'POS Terminal Maintenance' page with a green header. Below the header, a message states: 'You are adding a new POS terminal, please enter the ID:'. There are two dropdown menus: 'Device ID' with the value 'pos1@0006.enactor' and 'Template' with a hyphen. At the bottom left, there are two buttons: 'Back' and 'Create'.

Only one Device ID can be associated to one POS Terminal. Only Device ID's that have not already been associated with a POS terminal will be presented. Select the **Device ID** for the new POS Terminal. The creation and use of Templates for POS Terminal configuration is covered in a separate How-to Guide. This document covers how to configure the required and common settings manually. No selection should be made for Template.

Select "Create".

On the POS Terminal Maintenance page, the **General, Peripherals, Printing, Day Start, Day End, User Interface, and Loyalty** sub-tabs will be populated in this guide.



The screenshot shows the 'POS Terminal Maintenance' page with a green header. Below the header, there are 'Save' and 'Cancel' buttons. A message states: 'You are editing POS terminal for device ID 'pos1@0006.enactor' at store 'Enactor Store''. Below this, there is a tabbed interface with tabs: 'General', 'Peripherals', 'Printing', 'Day Start', 'Day End', 'User Interface', 'Tax', 'Online Auth', 'Loyalty', 'Groups', 'External', 'Attributes', and 'Tendering'. The 'General' tab is selected. Below the tabs, there is a sub-tabbed interface with 'Overview' and 'Transactions' tabs. The 'Overview' tab is selected. Below the sub-tabs, there is a form with the following fields: 'Description*' (text input), 'Terminal Number' (text input with value '0'), 'Default Safe' (dropdown menu with value '-'), 'Locale' (dropdown menu with value '-'), 'Fiscalisation Type' (dropdown menu with value '-'), 'Base Currency' (dropdown menu with value '-'), 'Price Group' (dropdown menu with value '-'), 'Is Remote Terminal' (checkbox), 'Training Mode' (checkbox), 'Disable Emailing Receipts In Training Mode' (checkbox), 'Capture privacy policy status' (checkbox), 'Enable Endpoint Status Monitor' (checkbox with value checked), and 'Template' (text input with a 'Change Template' button next to it). At the bottom left, there is a note: '* Denotes Mandatory'.

On the General tab, the **Description** of the POS Terminal must be specified. As established previously with Device ID and Device Name, POS Terminals are typically identified using a naming convention. The recommended convention is the same as used for Device Name <device type> <device number> @ <location>.

Each POS Terminal must have a Terminal Number assigned. The assigned Terminal Number must be unique for the assigned location.

Many POS Terminal configuration settings can also be and are more commonly made at the location level. This includes settings for Locale, Fiscalisation Type, Base Currency, Price Group and others. If the setting has been made at the Location level, they will automatically be inherited at the POS Terminal level. It is only necessary to make these settings at the POS Terminal if the Location setting needs to be overridden for a particular terminal.

While only applicable if Email receipts are active, it is recommended to Disable Emailing Receipts in Training Mode.

The screenshot shows the 'POS Terminal Maintenance' form with the 'General - Transactions' sub-tab selected. The form is for device ID 'pos1@0006.enactor' at store 'Configuration Example Store'. The 'Description' field is 'POS 1 @ 0006' with a red warning 'Cannot be blank.' The 'Terminal Number' field contains '1'. Other fields include 'Default Safe', 'Locale', 'Fiscalisation Type', 'Base Currency', and 'Price Group', all with dropdown menus. There are checkboxes for 'Is Remote Terminal', 'Training Mode', 'Disable Emailing Receipts in Training Mode' (checked), 'Capture privacy policy status', and 'Enable Endpoint Status Monitor' (checked). A 'Template' field is at the bottom with a 'Change Template' link. A red asterisk note indicates that fields with an asterisk are mandatory.

On the General – Transactions sub-tab, select “Retail Sale” from the Default Transaction Type dropdown.

The screenshot shows the 'POS Terminal Maintenance' form with the 'Transactions' sub-tab selected. The form is for device ID 'pos1@0006.enactor' at store 'Enactor Store'. The 'Default Transaction Type' dropdown is set to 'Retail Sale'. There are checkboxes for 'Local Trans. No. for Recalled Transactions', 'Attempt top-up for failed Gift Card activations', 'Force Order', 'Display Carrier Bag Prompt', and 'Enable Delivery Scheduling'. The 'Default Quote Validity (in days)' field contains '0' with a note '(Zero means unlimited)'.

The Peripherals tab will specify the input and output devices for the POS Terminal. The settings on this tab will be very specific to the retailer's hardware environment and may be different from terminal to terminal. For a basic test environment without physical peripherals attached, a number of "simulated" peripherals can be used as shown.

The Peripherals Inputs sub-tab covers all of the input devices.

The screenshot displays the 'POS Terminal Maintenance' window. At the top, there is a green header bar with the title 'POS Terminal Maintenance' and window control icons. Below the header, a status bar shows 'Save' and 'Cancel' buttons. A message indicates the user is editing a POS terminal for device ID 'pos1@0006.enactor' at store 'Enactor Store'. The main area features a series of tabs: General, Peripherals, Printing, Day Start, Day End, User Interface, Tax, Online Auth, Loyalty, Groups, External, Attributes, and Tendering. The 'Peripherals' tab is selected, and within it, the 'Input' sub-tab is active. The 'Input' sub-tab contains a list of input devices, each with a dropdown menu for selection. The 'Scanner 1 Type' dropdown is currently set to 'Test Scanner'. The other input devices are set to '-'. The list of input devices includes: Keyboard Type, Scanner 1 Type, Scanner 2 Type, Scales Type, Signature Capture Type, MSR Type, MICR Reader Type, Cash Acceptor Type, Boarding Card Reader Type, ICC Reader Type, ICC Reader Configuration, Payment Service Type, Payment Device Host, Motion Sensor, and Self Checkout Type.

Input	Output
Keyboard Type	-
Scanner 1 Type	Test Scanner
Scanner 2 Type	-
Scales Type	-
Signature Capture Type	-
MSR Type	-
MICR Reader Type	-
Cash Acceptor Type	-
Boarding Card Reader Type	-
ICC Reader Type	-
ICC Reader Configuration	-
Payment Service Type	-
Payment Device Host	-
Motion Sensor	-
Self Checkout Type	-

Select "Test Scanner" for Scanner 1 Type.

The Peripherals Outputs sub-tab covers all of the output devices.

The screenshot displays the 'POS Terminal Maintenance' window. At the top, there is a title bar with the text 'POS Terminal Maintenance' and window control icons. Below the title bar, there are 'Save' and 'Cancel' buttons. A message states: 'You are editing POS terminal for device ID 'pos1@0006.enactor' at store 'Enactor Store''. Below this message is a horizontal tab bar with the following tabs: General, Peripherals, Printing, Day Start, Day End, User Interface, Tax, Online Auth, Loyalty, Groups, External, Attributes, and Tendering. The 'Peripherals' tab is selected. Within the 'Peripherals' tab, there are two sub-tabs: 'Input' and 'Output'. The 'Output' sub-tab is selected. The 'Output' sub-tab contains the following fields: 'Receipt Printer Type' (dropdown menu with 'Test Printer' selected), 'Receipt Printer Shared' (checkbox), 'Audit Printer Type' (dropdown menu with '-' selected), 'Enable Electronic Audit Log Copy of Receipt' (checkbox), 'Audit Print format' (dropdown menu with '-' selected), 'Cash Drawer Type' (dropdown menu with 'Test CashDrawer' selected), 'Cash Drawer Shared' (checkbox), 'Operator Display Type' (dropdown menu with '-' selected), 'Customer Display Type' (dropdown menu with '-' selected), 'Tone Indicator Type' (dropdown menu with '-' selected), and 'Pole Light Type' (dropdown menu with '-' selected).

Select “Test Printer” for Receipt Printer Type.

Select “Test CashDrawer” for Cash Drawer Type.

The Printing sub-tab covers receipt selections for printed and email receipts and reports.

Receipts are defined with a name and either a paper size or a column width. Paper sizes are the standard laser printer sizes such as A4. Retail receipt printers have a defined number of columns.

There are many receipt types and definitions. This guide will only cover the basic printed customer receipt, receipt flags, and reports receipts.

On the Printing – General sub-tab receipt formats are specified for most transaction types. The settings shown assume the default receipt formats are being used on a standard 48-column receipt printer.

The screenshot shows the 'POS Terminal Maintenance' window. At the top, there's a title bar with a green background and icons for help, full screen, and close. Below the title bar, there are 'Save' and 'Cancel' buttons. A message states: 'You are editing POS terminal for device ID 'pos1@0006.enactor' at store 'Enactor Store''. Below this is a tabbed interface with tabs for General, Peripherals, Printing, Day Start, Day End, User Interface, Tax, Online Auth, Loyalty, Groups, External, Attributes, and Tendering. The 'Printing' tab is active, and within it, the 'General' sub-tab is selected. The 'General' sub-tab contains a list of receipt types, each with a dropdown menu for selecting a format. The selected formats are: Primary Receipt (Standard Receipt 48 Col), Page Printer Primary Receipt (-), Combined Card Voucher/Receipt (Combined Receipt & Card Voucher 48), Additional Receipt 1 (Standard Receipt 48 Col), Additional Receipt 2 (Standard Receipt 48 Col), Gift Receipt per Item (Gift Item Receipt 48 Col), Gift Receipt per Transaction (Gift Transaction Receipt 48 Col), Transaction Stored Receipt (Stored Transaction 48 Col), No Sale Receipt (No Sale 48 Col), Post Void Receipt (Standard Receipt 48 Col), Retail Quote Receipt (Standard Receipt 48 Col), Page Printer Quote Receipt (-), and Page Printer Fiscal Invoice (-).

Receipt Type	Selected Format
Primary Receipt	Standard Receipt 48 Col
Page Printer Primary Receipt	-
Combined Card Voucher/Receipt	Combined Receipt & Card Voucher 48
Additional Receipt 1	Standard Receipt 48 Col
Additional Receipt 2	Standard Receipt 48 Col
Gift Receipt per Item	Gift Item Receipt 48 Col
Gift Receipt per Transaction	Gift Transaction Receipt 48 Col
Transaction Stored Receipt	Stored Transaction 48 Col
No Sale Receipt	No Sale 48 Col
Post Void Receipt	Standard Receipt 48 Col
Retail Quote Receipt	Standard Receipt 48 Col
Page Printer Quote Receipt	-
Page Printer Fiscal Invoice	-

Select “Standard Receipt 48 Col” for Primary Receipt.

Select “Combined Receipt & Card Voucher 48” for Combined Card Voucher/Receipt.

Select “Standard Receipt 48 Col” for Additional Receipt 1.

Select “Standard Receipt 48 Col” for Additional Receipt 2.

Select “Gift Item Receipt 48 Col” for Gift Receipt per Item.

Select “Gift Transaction Receipt 48 Col” for Gift Receipt per Transaction.

Select “Stored Transaction 48 Col” for Transaction Store Receipt.

Select “No Sale 48 Col” for No Sale Receipt.

Select “Standard Receipt 48 Col” for Post Void Receipt.

Select “Standard Receipt 48 Col” for Retail Quote Receipt

On the Printing – Flags sub-tab, additional printing parameters are available. The most common options configured in this area include “Print Tax Details on Receipt”, “Offer to email the receipt” and “Offer gift receipts”.

POS Terminal Maintenance

Save

Cancel

You are editing POS terminal for device ID 'pos1@0006.enactor' at store 'Configuration Example Store'

General

Peripherals

Printing

Day Start

Day End

User Interface

Tax

Online Auth

Loyalty

Groups

External

Attributes

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

On the Printing – Reports sub-tab receipt formats are specified for most transaction types. The settings shown assume the default report formats are being used on a standard 48-column receipt printer.

The screenshot shows the 'POS Terminal Maintenance' window. At the top, there's a header bar with 'POS Terminal Maintenance' and a close button. Below it, a sub-header indicates 'You are editing POS terminal for device ID 'pos1@0006.enactor' at store 'Configuration Example Store''. The main area has a tabbed interface. The 'Printing' tab is selected, and within it, the 'Reports' sub-tab is active. The 'Reports' sub-tab contains a list of reports with dropdown menus for selecting the format. The reports listed are: Tender Totals Report, User Sales Report, Department Sales Report, Hourly Sales Report, Trading Exceptions Report, and Trading Summaries Report. Each report has a dropdown menu currently showing '48 Col'.

Report	Format
Tender Totals Report	Tender Totals 48 Col
User Sales Report	User Sales 48 Col
Department Sales Report	Department Sales 48 Col
Hourly Sales Report	Hourly Sales 48 Col
Trading Exceptions Report	Trading Exceptions 48 Col
Trading Summaries Report	Trading Summaries 48 Col

Select “Tender Totals 48 Col” for Tender Totals Report.

Select “User Sales 48 Col” for User Sales Report.

Select “Department Sales 48 Col” for Department Sales Report.

Select “Hourly Sales 48 Col” for Hourly Sales Report.

Select “Trading Exceptions 48 Col” for Trading Exceptions Report.

Select “Trading Summaries 48 Col” for Trading Summaries Report.

The Day Start and Day End tabs are covered in detail as part of the Cash Management How-to Guide. The settings described below represent a minimal, traditional Cash Management process. These settings will likely be changed once reviewing the desired business process with the retailer.

On the Day Start tab, select the Allow Sales option.

The screenshot shows the 'POS Terminal Maintenance' window with the 'Day Start' tab selected. The 'Day Start' tab contains three settings: 'Allow Sales' (checked), 'Opening Float With Day Start' (unchecked), and 'Skip Float Check After Sign On' (unchecked).

Setting	Value
Allow Sales	<input checked="" type="checkbox"/>
Opening Float With Day Start	<input type="checkbox"/>
Skip Float Check After Sign On	<input type="checkbox"/>

On the Day End tab, select the following options:

The screenshot shows the 'POS Terminal Maintenance' window. At the top, there's a title bar with a green background and the text 'POS Terminal Maintenance'. Below the title bar, there are 'Save' and 'Cancel' buttons. A message states: 'You are editing POS terminal for device ID 'pos1@0006.enactor' at store 'Enactor Store''. Below this is a horizontal tab bar with the following tabs: General, Peripherals, Printing, Day Start, Day End, User Interface, Tax, Online Auth, Loyalty, Groups, External, Attributes, and Tendering. The 'Day End' tab is selected. Inside the 'Day End' tab, there are three sub-tabs: General, Day End Reports, and Session End Reports. The 'General' sub-tab is active. Under the heading 'Options for Day End', there are several settings: 'Set Terminal Out Of Use' (checkbox), 'Disallow Sales' (checkbox, checked), 'Manual Day End' (checkbox), 'Delete Stored Transactions' (checkbox), 'Force Cash Declaration' (dropdown menu, showing '-'), 'Keep Cash Drawer Open' (checkbox), 'Finalise Cash Session' (checkbox, checked), 'Finalise Cash Session (No Discrepancy)' (checkbox, checked), 'Allow before Earliest Day End' (checkbox), 'Automatic Day End' (checkbox), 'Exclude From Auto Day End' (checkbox), and 'Close Cash Session' (checkbox, checked).

Select “Disallow Sales”.

Select “Finalise Cash Session”.

Select “Finalise Cash Session (No Discrepancy)”.

Select “Close Cash Session”.

Details on these settings, how they impact business processes and other settings available can be found in the Cash Management How-to Guide.

The User Interface settings specify the look and feel, color schemes, branding, and screen layouts. A retailer will frequently take the opportunity to apply a certain amount of branding to the default UI. That process is covered in the How-to Guide on POS Themes and Styles. This guide covers only how to select those items in terms of POS Terminal configuration.

The User Interface – General sub-tab contains core settings about the information being displayed.

POS Terminal Maintenance?||x

Save

Cancel

You are editing POS terminal for device ID 'mpos1@0001.enactor' at store 'Enactor Store'

General

Peripherals

Printing

Day Start

Day End

User Interface

Tax

Online Auth

Loyalty

Groups

External

Attributes

Tendering

General

Branding / Style

Customer View

Operator View Layout URL

-

ICC Reader Display URL

-

Menu Group

-

This terminal is a local menu server

☐

Self Service

☐

Default Menu Group

-

Display Launch Menu

☒

Display Function Key Labels in Menu

☐

Default Launch Event

Default UI Product Group

-

Default UI Product Group Level

0

Customer Display Receipt List

-

Customer Line Display Template

-

Operator Display Receipt List

-

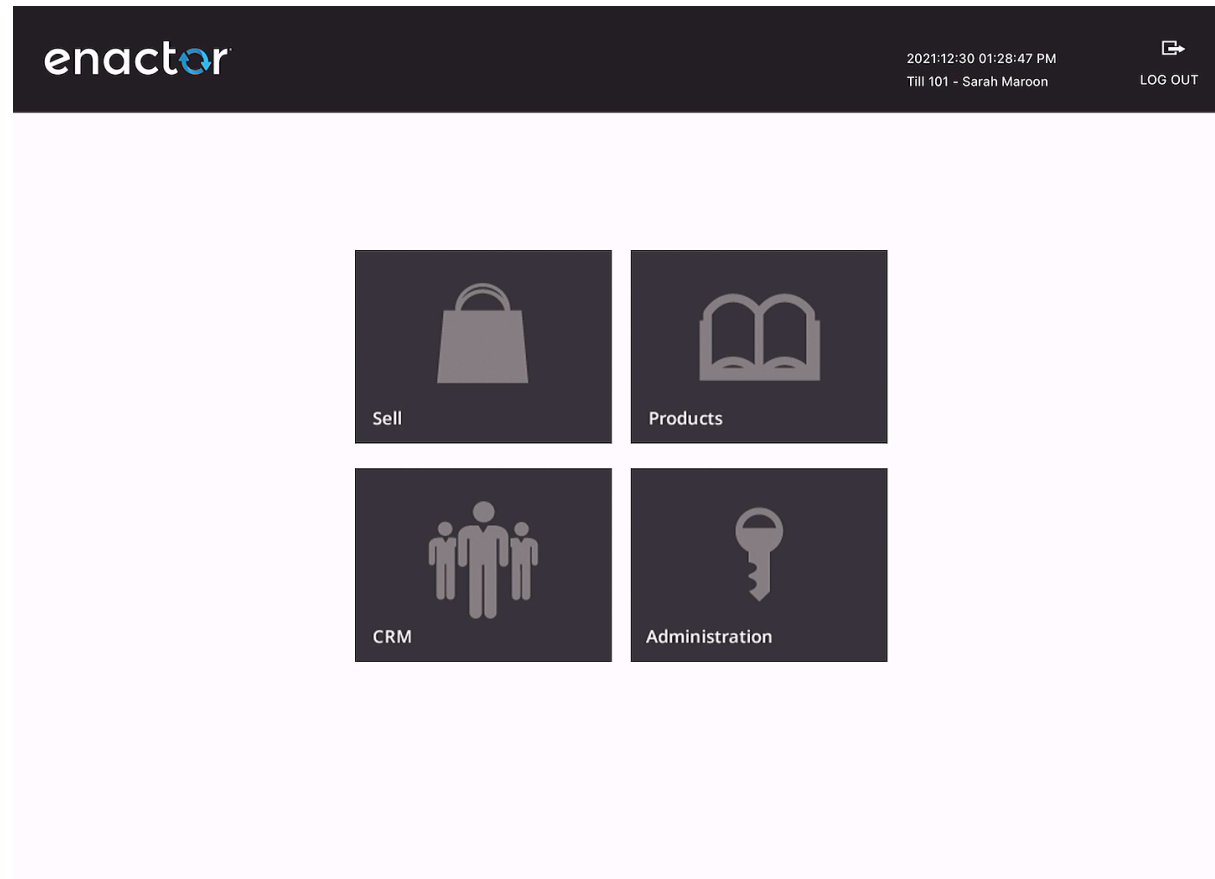
Operator Selection Receipt List

-

Use Alternative Customer Capture

☐

Assuming the default UI is being used, very few selections will need to be made on the General sub-tab. The most common settings include overriding the Menu Group specified at the location level and enabling the Display Launch Menu option. If the Launch Menu is active, the user will be presented with a choice of applications once signing into POS.



On the Branding/Style sub-tab, the components necessary to present the user with a branded experience are selected.

POS Terminal Maintenance?||×

Save

Cancel

You are editing POS terminal for device ID 'mpos1@0001.enactor' at store 'Enactor Store'

General

Peripherals

Printing

Day Start

Day End

User Interface

Tax

Online Auth

Loyalty

Groups

External

Attributes

Tendering

General

Branding / Style

Customer View

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 settings above represent the ‘out of the box’ Enactor retail theme. Customized themes for retailers may be selected as an Operator View Theme or through specifying Operator View Style Sheets in conjunction with additional Logos and Images. Additional information on the creation of Themes and Styles can be found in the How-to Guide on POS Themes and Styles.

On the User Interface – Customer View sub-tab settings are available to configure a customer facing monitor.

The screenshot displays the 'POS Terminal Maintenance' application window. At the top, there is a green header bar with the title 'POS Terminal Maintenance' and icons for help, full screen, and close. Below the header, there are 'Save' and 'Cancel' buttons. A message states: 'You are editing POS terminal for device ID 'mpos1@0001.enactor' at store 'Enactor Store''. Below this is a horizontal tab bar with the following tabs: General, Peripherals, Printing, Day Start, Day End, User Interface, Tax, Online Auth, Loyalty, Groups, External, Attributes, and Tendering. The 'User Interface' tab is selected. Within the 'User Interface' tab, there are three sub-tabs: General, Branding / Style, and Customer View. The 'Customer View' sub-tab is active. The settings for 'Customer View' are as follows:

Setting	Value
Enable Customer View	<input checked="" type="checkbox"/>
Full Screen Height	0
Full Screen Width	0
Monitor Number	0
Window State	Full Screen
Url	
Show Basket	<input checked="" type="checkbox"/>
Customer View Layout URL	-
Customer View Theme	NextGen 1024x768
Customer View Style Sheet	-

The Customer View sub-tab is used when the retailer uses a separate customer facing display. As with the Operator View discussed previously, the Customer View will also have a theme and/or Style Sheet applied to present the information in the context of the retailer's branding.

The following information only applies if the retailer offers a Loyalty programme. Configuration of Loyalty Schemes and Loyalty Tiers is covered in a separate How-to Guide. Once a Loyalty programme has been configured, additional configuration at the terminal is not required. However, there are settings on the Loyalty – Loyalty sub-tab that are often changed.

The screenshot displays the 'POS Terminal Maintenance' window. At the top, there is a title bar with a green background and the text 'POS Terminal Maintenance'. Below the title bar, there are 'Save' and 'Cancel' buttons. A status message reads: 'You are editing POS terminal for device ID 'mpos1@0003.enactor' at store 'Enactor (Demo Room)''. The main area contains a series of tabs: General, Peripherals, Printing, Day Start, Day End, User Interface, Tax, Online Auth, Loyalty, Groups, External, Attributes, and Tendering. The 'Loyalty' tab is selected. Within the 'Loyalty' tab, there are three sub-tabs: Loyalty, Customer Process, and Loyalty Process. The 'Loyalty' sub-tab is active. It contains the following settings:

- Default Loyalty Scheme:** A dropdown menu showing a hyphen (-).
- Default Loyalty Tier Code:** A dropdown menu showing a hyphen (-).
- Prompt for Loyalty at Start of Transaction:** An unchecked checkbox.
- Prompt for Loyalty at Total Pressed:** An unchecked checkbox.
- Offer Loyalty Card:** An unchecked checkbox.
- Stored Customer Transaction Age (Hours):** A text input field with the value '0'.
- Loyalty Claim Validity Period (in days):** A text input field with the value '0'.

By selecting either “Prompt for Loyalty at Start of Transaction” or “Prompt for Loyalty at Total Pressed” the user will be prompted to ask the customer for their Loyalty information at the appropriate point in the transaction. If both options are selected, the prompt will be triggered at the beginning of the transaction and again at the end if no customer information was captured on the first prompt. Loyalty information can be captured at any point of the transaction regardless of the settings for these options. Additionally, “Offer Loyalty Card” will prompt the user to sign the customer up for a Loyalty program upon pressing total if no Loyalty information has been collected previously in the transaction.

This completes the exercise of manually completing a simple POS configuration involving the most common settings. Selecting “Save” will complete the configuration. Refer to the How-to Guide on broadcasting Configuration Data to distribute the changes to the estate. Also, with the base understanding of how Location and POS Terminal configuration is completed, please review the How-to Guides on Templates for a better understanding on how Location and POS Terminal Configuration can be managed more easily and efficiently in a large and complex estate.

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 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
0.1	Initial Draft		Peter Rush	Initial version
1.0	Initial Draft	30 Dec 2020	Michael Tolson	Initial Version