

# How to Guides - Configure Option Set Products

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Author: Cynthia Augustine

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# Introduction

This document outlines how a user can configure an option set to cater for products relationships that provide additional product selection driven by primary product. This will guide the user on adding different types of options/attributes to customize a product or a product range. These can be configured and managed through the Attribute / Option Set Maintenance option.

This document will also elaborate on the various ways option sets can be used in a sale transaction. Through which the parent product or the child product can be set individually for each item or both types of products with the following:

- Manual Basket-level Discounts
- Allow Promotions
- Allow Returns
- Allow different prices per item/s
- Allow Single Mixed-rate Tax Calculation per item/s
- Allow Option Sales type per item/s.

Key details and the configuration of each function will be explained in the document and will walk the user through all basic elements of the product option set.

## Overview

Following common configurations should be applied to work with the Product Option set.

**Product** – Product maintenance is where products are configured; and will contain all the required attributes.

**Product List** – A Product can be listed according to the specific context and includes a set of properties in common.

**Option Set** – The Option Sets function is used to systematically configure Parent-Child products.

**Product Price** – Each product may have a retail price assigned to it.

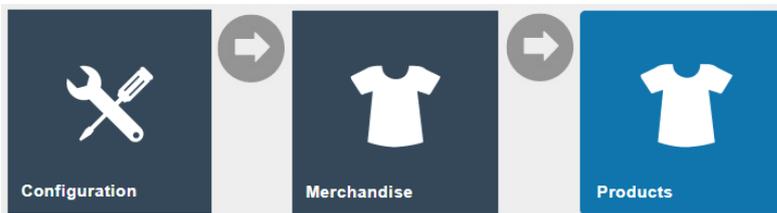
# Configuration Steps

## Product Maintenance

**Products** are configured based on a set of specific attributes and characters in the application and identified to the software through a unique **Product ID**. The **Products Maintenance** provides a list of configurable attributes for a product.

The process to configure an Option Product type follows all the steps described for a standard Merchandise Product type.

The Product Maintenance application can be accessed through:  
Configurations-> Merchandise -> Products



	Product ID	Product Description
	003764	Twilight Shower Gel
	003766	Popcorn Lip Scrub
	003767	100g Sea Spray

To create a new Option Product, select **Create a new Product** on the Product Maintenance page.

Select **Merchandise Product** from the Product Type drop-down.

No selection should be made for **Template**. The creation and use of Templates are covered in a separate How-to Guide.

Enter a unique **Product ID** for this product that can be alphanumeric and contain a maximum of 20 characters.

## Product Maintenance

You are adding a new product, please enter the ID:

Product Type	Merchandise Product
Template	-
Product ID	30397934

[← Back](#) [+ Create](#)

Select **Create**.

\* The Product ID cannot be changed once the Product has been created.

Numerous tabs and sub-tabs are presented under product maintenance. This guide is focused on the core aspects that are required to create Option Products against Merchandise Products and the key tabs considered are General, Prices, Selling Options and Tenders.

### Product – General – General sub tab

The General tab has all the basic information that captures the identity of the Product.

Product Maintenance

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

You are editing Merchandise Product 30397934 : Reading Glasses .

<b>General</b>	Selling Options	Alternative	Tenders	Tax	Merchandise	Prices	Location	Supplier	Attributes	Product Media
----------------	-----------------	-------------	---------	-----	-------------	--------	----------	----------	------------	---------------

<b>General</b>	Label	Information	Product Group	Product Sale Region	Selling Codes	Product Lists
----------------	-------	-------------	---------------	---------------------	---------------	---------------

Product Description\*      Reading Glasses      English (UK)

Product Long Description

Reduce eyestrain, anti-blue ray to a great extent.  
Enjoy your digital time, NO worry about eye fatigue,  
blurred vision, and headache, let you have a better sleep.

Product Long Description URL

Product Information URL

Product External Reference

Image (Preloaded)      -      [Test Image](#)

Image URL      [Test Image](#)

Essia

Set the appropriate values on the **General** tab as follows:

Configuration	Description
Product Description	Enter a user-friendly, meaningful name for the Product that can be alphanumeric with a maximum of 30 characters.
	Select the locale in the second field from a dropdown list of all configured locales.
Product Long Description	Enter a long description of the Product, if necessary, that can be alphanumeric with a maximum of 30 characters.
	Select the locale in the second field from a dropdown list of all configured locales.
Product Long Description URL	Enter a URL pointer to an externally defined, usually HTML-formatted, description of the Product.
Product Information URL	Enter a URL pointer to an externally defined, usually HTML-formatted, set of information of the Product.
Image (Preloaded)	Select the ID of an image from the drop-down list to choose the product display image. Images are managed through Image Maintenance. (This is described in a separate how-to guide)
Image URL	Add a URL that points to an externally stored image.
Product Status	Select an appropriate status of the product from a drop-down list. <ul style="list-style-type: none"> <li>• <b>Live</b> – Indicates that the product is currently available.</li> <li>• <b>Discontinued</b> – Indicates that the product is unavailable.</li> <li>• <b>Suspended</b> – Indicates that the product is terminated.</li> </ul>

## Product – Prices Tab

The Prices tab has all the price details of the selected Product.

Product Maintenance

Save Cancel

You are editing Merchandise Product 30397934 : Reading Glasses .

General Selling Options Alternative Tenders Tax Merchandise **Prices** Location Supplier Attributes Product Media

The following prices are defined for this product

	Store	Price Group	Currency	Start Date	End Date	Price Type	Price Change Id	Price Change Type	Price Context	Price
 		United Kingdom	Pounds Sterling	21/07/2021, 00:00		Retail Unit				£89.00
<b>+ Add</b>										

Page 1 of 1

Context pricing can be configured for Option Products, for the purpose of configuring a particular parent-child option set. It is also possible to define a single product to have different context prices against different Option Sets.

To add a context price to a specific product, select the **Add** and you will be navigated to the Product Price Maintenance where you can add context price applicable on the selected product.

### Product Price Maintenance

Please enter following details for the new Product Price

Product ID	<input type="text" value="30397934"/>
Location	<input type="text" value="Estate Manager"/>
Price Group	<input type="text" value="-"/>
Currency	<input type="text" value="Pounds Sterling"/>
Start Date	<input type="text" value="22"/> <input type="text" value="November"/> <input type="text" value="202"/> <input type="text" value="..."/> <input type="text" value="00"/> <input type="text" value=":"/> <input type="text" value="00"/> <input type="text" value=":"/> <input type="text" value="00"/>
End Date	<input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value="..."/> <input type="text" value=""/> <input type="text" value=":"/> <input type="text" value=""/> <input type="text" value=":"/> <input type="text" value=""/>
Price Type	<input type="text" value="Retail Unit"/>
Price Context	<input type="text"/>

Enter a positive numeric value for the product Price Context and select **Save**. You will be taken back to the product maintenance prices tab where the configured product price will be visible with the options to edit or delete.

## Product - Selling Options - Option Sets Sub Tab

The option set in the product maintenance should be configured in the option sets tab to make sure that the products are added to complete the parent-child option set configuration.

Product Maintenance

Save Cancel

You are editing Merchandise Product 30397934 : Reading Glasses .

General **Selling Options** Alternative Tenders Tax Merchandise Prices Location Supplier Attributes Product Media

General Prompts Restrictions Selling Options **Option Sets** Option Prices Option Details Allowed Product Types

	Set	Type	Option	Mandatory
  	1	Option Set	Lens Types	<input checked="" type="checkbox"/>
  	2	Option Set	Lens Thickness	<input checked="" type="checkbox"/>
			<b>Product Option...</b>	

Select the desired Option Set for this product, from the drop-down list that contains all available Product Options. (In this case LENS TYPES, LENS THICKNESS etc.)

Select **Add**.

\*Configuring Option Sets are described later in the document.

## Product - Selling Options - Option Prices Sub Tab

Product Maintenance

Save Cancel

You are editing Merchandise Product 30397934 : Reading Glasses .

General **Selling Options** Alternative Tenders Tax Merchandise Prices Location Supplier Attributes Product Media

General Prompts Restrictions Selling Options Option Sets **Option Prices** Option Details Allowed Product Types

The following is the list of all products in Option Sets of this product. Products that have prices with the Price Context set to the product id of this product are shown with their price details. Products with no price set in this context default to a zero price.

	Option	Option ID	Product ID	Product Description	Store	Price Group	Currency	Start Date	End Date	Price Type	Price Change Id	Price
	Lens Types	LENS_TYPES	LENS1	Clear Lenses		United Kingdom	Pounds Sterling	22/07/2021, 00:00		Product Option		£0.00
	Lens Types	LENS_TYPES	LENS2	Sun tint and UV		United Kingdom	Pounds Sterling	22/07/2021, 00:00		Product Option		£30.00
	Lens Thickness	LENS_THICKNESS	THICK1	Standard		United Kingdom	Pounds Sterling	22/07/2021, 00:00		Product Option		£0.00
	Lens Thickness	LENS_THICKNESS	THICK2	Extra Thin plus Light		United Kingdom	Pounds Sterling	22/07/2021, 00:00		Product Option		£55.00

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The option prices tab will be mapped to the child products that are added to the Option Sets. Products that have prices with the Price Context set to the product ID of this product are shown with their price details. Products with no price set in this context default to a zero price.

## Product - Selling Options - Option Details Sub Tab

Product Maintenance

Save Cancel

You are editing Merchandise Product 30397934 : Reading Glasses .

General **Selling Options** Alternative Tenders Tax Merchandise Prices Location Supplier Attributes Product Media

General Prompts Restrictions Selling Options Option Sets Option Prices **Option Details** Allowed Product Types

Add Option Prices

Option Sale Type

Allow Option Returns

Allow Option Voids

Allow Option Discounts

Allow Option Price Overrides

Allow Option Promotions

The Option Details sub tab is used to configure the way the parent/child product can be handled in a transaction.

Set the appropriate values on the **Option Details** tab as follows:

Configuration	Description
Add Option Prices	Select the checkbox to indicate that the product price will be added to the total transaction when the configured product option set is added.
Option Sale Type	Select an appropriate combination of Product Options that must be applied from a drop-down list. <ul style="list-style-type: none"> <li>• Sell One or None</li> <li>• Sell One</li> <li>• Sell Multiple or None</li> <li>• Sell Multiple</li> <li>• Sell All</li> </ul>
Allow Option Returns	Select the checkbox to indicate that the parent product can be returned along with the child product. In this scenario a restriction has been set indicating that the child product cannot be returned individually in a transaction.
Allow Option Voids	Select the checkbox to indicate that the product is allowed to be voided in a transaction. When a parent product is voided, the child product too will be automatically voided. This option will also allow a child product to be voided if necessary.
Allow Option Discounts	Select the checkbox to indicate that discounts can be configured for the parent/child product individually or for both.
Allow Option Price Overrides	Select the checkbox to indicate that price overrides can be performed on both Parent and child products.
Allow Option Promotions	Select the checkbox to indicate that promotions can be configured for the parent/child product individually or for both.

## Product - Tenders Tab

Product Maintenance

Save Cancel

You are editing Merchandise Product 30397934 : Reading Glasses .

General Selling Options Alternative **Tenders** Tax Merchandise Prices Location Supplier Attributes Product Media

Allowed Tenders	
-	-
<b>+ Add</b>	Cards PDQ UK

In Product Maintenance, the user is enabled configuration of Tenders that may be used to purchase the Product; a list of one or more Allowed Tenders may be associated with the Product.

Select the desired Allowed Tender(s) for this product, from the drop-down list.

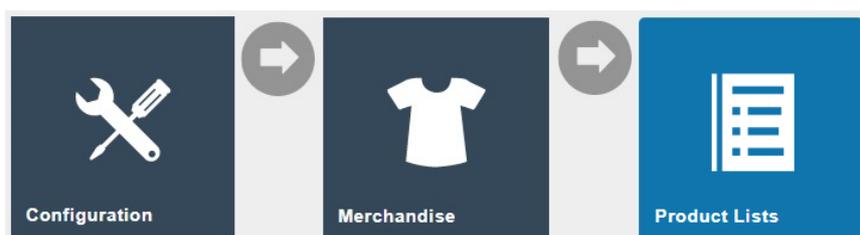
Select **Add**.

## Product List

A Product List is a collection of products referenced by an ID and a specific Region. Each product ID in the collection (list) is also associated with predefined Product Attributes. (Also referred to as option sets). These products can be considered as child products and be used for option set configuration, which is discussed later in this document.

Product Lists are configured through the Product List Maintenance application on the estate manager.

The Product List Maintenance application can be accessed through:  
Configurations-> Merchandise -> Product Lists



	Product List ID	Group	Name
	RECENTLY_VIEWED_777	United Kingdom	
	RECENTLY_VIEWED_ADMIN	United Kingdom	
	1	United Kingdom	
	1	United States	
	0005004	United Kingdom	
	0005003	United Kingdom	

To create a new Product List, select **Create a new Product List** on the Product List Maintenance page.

Enter a unique **Product List ID**. The ID can be alphanumeric and contain a maximum of 50 characters.

Select the Group type **Region**, from the **Group Type** drop-down.

Select a region that is applicable from the **Group** drop-down in which the POS terminal is configured. (Can opt to select **All Regions**)

The screenshot shows a form titled "Product List Maintenance" with the following fields:

- Product List ID: LENS\_TYPES
- Group Type: Region
- Group: United Kingdom

At the bottom of the form, there are two buttons: "Back" and "Create".

Select **Create**.

\* The Product List ID cannot be changed once the Product List has been created.

You will be presented with the following options to complete creating the new product list:

## Product List - General Tab

The screenshot shows the "Product List Maintenance" form with the "General" tab selected. The form displays the following information:

- Product List ID: LENS\_TYPES
- Region: All Regions
- Name: Lens Types
- Locale: English (UK)

There are "Save" and "Cancel" buttons at the top left. A red asterisk indicates that the Name field is mandatory.

Set the appropriate values on the **General** tab as follows:

Configuration	Description
Name	Enter your product list name in this field which can be alphanumeric and contain a maximum of 40 characters. This name will be displayed in screens and other configuration options. The name is locale dependent. Select the appropriate Locale from the drop-down list.

## Product List - Items Tab

The Items tab allows specifying multiple products to a product list.

To add a new product, enter the Product ID in the space and Select **Add**.  
Or select the search icon and you will be navigated to a product search screen as shown below:

Select the checkboxes of all the child products that you wish to add to the Product list and select **Apply Selection**.

All products added to the list will be displayed under the specific product list:

Field	Example Value	Description
Button Position	1, 2, 3	A read-only value, which indicates the position of the button on the POS.

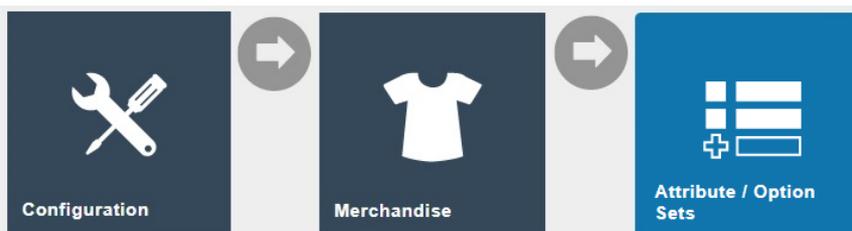
Product ID	LENS1	A read-only value, which indicates the product ID(s) of product added to the list.
Product Description	Clear Lenses	Alphanumeric; maximum 40 characters description to be displayed on POS button. The original values obtained from product configuration can be edited as required. Select the Locale from the dropdown list as required.
Button Image URL	image://PRODUCT/hildonstill33.png	A read-only value, which indicates the URL that identifies the image to be displayed on POS button.

\* You can edit the order of the Product List items using directional arrow buttons. Select the edit icon to navigate directly to product maintenance, which will enable you to edit product details.

## Attribute / Option Set Maintenance

Option Sets are used to create user-configurable data entry fields to map a Product and a Product List against an Option Set. The purpose and function of the option set is defined by the Option Set Type. This determines the flow in which the product is added to the basket. The Parent-child relationship configuration will be done under the Attribute/ option set Maintenance.

The Product Attribute / Option Set Maintenance application can be accessed through: Configurations-> Merchandise -> Attribute / Option Sets



Attribute / Option Set Maintenance ? || x

Attribute / Option Set ID: Starts With  Hide

Name: Contains

Type:

Region:

Apply Filters

	Attribute / Option Set ID	Name	Type	Region
	LENS_THICKNESS	LENS THICKNESS	Product Options	All
	LENS_TYPES	LENS TYPES	Product Options	All

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+ Create a new Option Set

When a user maps a product option in the **Option Set** tab under the product maintenance, the defined product will act as a Parent product. This will call the child products by the mapped option set. In the Options set, one or more child products can be configured. This will be done by using either mapping of one product or a product list. A product list will have a range of products that the user can select from.

To create a new Option Set select **Create a new Option Set** on the Attribute / Option Set Maintenance page.

Enter a unique **Option Set ID**. The ID can be alphanumeric and contain a maximum of 40 characters.

Select **Product Options**, from the **Type** dropdown list.

Select the appropriate **Region** from the drop-down list.

**New Attribute / Option Set**

Please enter the Attribute / Option Set ID, Type and Region:

Attribute / Option Set ID:

Type:

Region:

Select **Create**.

\* The Option Set ID cannot be changed once the Option Set has been created.

You will be presented with the following options to complete creating the new option set:

## Edit Attribute / Option Set

 Save  Cancel

You are editing Attribute / Option Set ID: 'LENS\_TYPES' of Type: 'Product Options', for the Region: 'All'

Name\*

Attribute / Option Set  
└─ Lens Types - External option

- Add Group
- Add Boolean Option
- Add Choice Option
- Add Compound Option
- Add Date Option
- Add Percentage Option
- Add Product Option**
- Add Text Option
- Add List Option
- Add Preparation Choice Option
- Add Numeric Option
- Add Product List
- Add Capture Product Option

Enter an alphanumeric character value for the **Name**.

Select **Add Product Option**, from the list displayed against the Add button.

You will be presented with the following options to complete adding the new product option to the selected Attribute / Option Set:

## Edit Product Option - General Tab

The screenshot shows the 'Edit Product Option' dialog box with the 'General' tab selected. The form contains the following fields and values:

- ID\***: Lens\_Types
- Name\***: Lens Types
- Description**: (empty text area)
- Product ID\***: LENS1 (with a search icon)
- Mandatory**:
- Next Option Set**: Lens Thickness (dropdown menu)
- Next Option**: Lens Thickness (text field)

\* Denotes Mandatory

Set the appropriate values on the **General** tab as follows:

Configuration	Description
ID	Enter an alphanumeric value for the Product Option ID. This will be displayed in screens and other configuration options.
Name	Enter an alphanumeric value. This will be displayed in screens and other configuration options.
Description	Enter an optional description for Product Option. This will be displayed in screens and other configuration options.
Product ID	Enter the appropriate Product ID or select the icon to search and select the product through Product Maintenance.
Mandatory	Select the checkbox to indicate that at least one option from the Product Option Set must be selected when present on the POS application.
Next Option Set	This optional configuration allows the user to configure the next option set which needs to be displayed. Select an appropriate option for the next option set to proceed.
Next Option	Once an option set is selected, this optional configuration allows the user to select the next option in the option set, which needs to be displayed.

## Edit Product Option - Restrictions Tab

Set the appropriate values on the **Restrictions** tab as follows:

Configuration	Description
Allow Option Returns	Select the checkbox to indicate that the parent product can be returned along with the child product. In this scenario a restriction has been set indicating that the child product cannot be returned individually in a transaction.
Allow Option Voids	Select the checkbox to indicate that the product is allowed to be voided in a transaction. When a parent product is voided, the child product too will be automatically voided. This option will also allow a child product to be voided if necessary.
Allow Option Discounts	Select the checkbox to indicate that discounts can be configured for the parent/child product individually or for both.
Allow Option Price Overrides	Select the checkbox to indicate that price overrides can be performed on both Parent and child products.
Allow Option Promotions	Select the checkbox to indicate that promotions can be configured for the parent/child product individually or for both.

To Add a Product List as the Option:

Edit Attribute / Option Set

Save Cancel

You are editing Attribute / Option Set ID: 'LENS\_TYPES' of Type: 'Product Options', for the Region: 'All'

Name\* LENS TYPES

Attribute / Option Set  
Lens Types - External option

Add...  
Add Group  
Add Boolean Option  
Add Choice Option  
Add Compound Option  
Add Date Option  
Add Percentage Option  
Add Product Option  
Add Text Option  
Add List Option  
Add Preparation Choice Option  
Add Numeric Option  
Add Product List  
Add Capture Product Option

Select **Add Product List**, from the list displayed against the Add button.

You will be presented with the following options to complete adding the new product list to the selected Attribute / Option Set:

## Edit Product List - General Tab

The screenshot shows the 'Edit Product List Option' dialog box with the 'General' tab selected. The form contains the following fields and values:

- ID\***: Lens\_Types
- Name\***: Lens Types
- Description**: (Empty text area)
- Product List\***: Lens Types (with a search icon)
- Mandatory**:
- Auto Submit**:
- Next Option Set**: Lens Thickness
- Next Option**: Lens Thickness

\* Denotes Mandatory

Set the appropriate values on the **General** tab as follows:

Configuration	Description
ID	Enter an alphanumeric value for the Product List ID. This will be displayed in screens and other configuration options.
Name	Enter an alphanumeric value. This will be displayed in screens and other configuration options.
Description	Enter an optional description for Product List. This will be displayed in screens and other configuration options.
Product List	Select the pre-defined Product List referenced by this option set from the dropdown list. or select the icon to search and select the product list through Product Maintenance.
Mandatory	Select the checkbox to indicate that at least one option from the Product Option Set must be selected when present on the POS application.
Next Option Set	This optional configuration allows the user to configure the next option set which needs to be displayed. Select an appropriate option for the next option set to proceed.
Next Option	Once an option set is selected, this optional configuration allows the user to select the next option in the option set, which needs to be displayed.

## Edit Product List - Restrictions Tab

Set the appropriate values on the **Restrictions Tab** as per the sample on adding a Product Option.

# Broadcasting Data

To deliver the configuration changes to the POS, broadcast the following entities.

- Products
- Product List
- Product Price
- Option Set

# POS Functionality

Enter the Parent Product ID in the POS terminal.

The screenshot shows the Enactor POS terminal interface. At the top is a dark navigation bar with the Enactor logo and icons for HOME, PRODUCTS, CRM, and a keyboard icon. On the right of the bar, it displays 'Trans - 8', 'Nov 11, 2021 1:25:55 PM', and 'Till 2222222222222222 - Mike ...' with a LOG OUT button.

The main area features a large shopping bag icon and the text 'There are no items in your bag'. To the right is a numeric keypad with buttons for digits 0-9, a decimal point, CLR, and ENT. Above the keypad is a text input field containing '30397934'. A message above the keypad reads: 'Please scan or enter a product or select another function.'

At the bottom, there is a grid of function buttons: Sell Item, Discounts / Overrides, Returns, User Functions, Transaction Functions, and Other Functions. On the right side of the bottom section, it shows 'TOTAL £0.00'.

The Child product options will be displayed as per the configured order.

KEYBOARDTrans - 26  
Jan 28, 2022 5:32:13 PM  
Till 2222222222222222 - Mike ...

**Reading Glasses** £89.00

Lens Types

Clear Lenses Sun tint and UV

Please select or enter options.  
You can go back to a previous entry by pressing the Clear button next to it.

7	8	9	CLR
4	5	6	ENT
1	2	3	
0		.	

Cancel

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Select the desired options and those with a price context configured will be added to the total.

**enactor**

Trans - 26  
Jan 28, 2022 5:33:13 PM  
Till 2222222222222222 - Mike ...

KEYBOARD

### Reading Glasses £119.00

Lens Types Clear

Clear Lenses Sun tint and UV

LENS THICKNESS

Standard Extra Thin plus Light

Cancel

Please select or enter options. You can go back to a previous entry by pressing the Clear button next to it.

7	8	9	CLR
4	5	6	ENT
1	2	3	
0	.		

The final product price will be displayed along with a breakdown of the product options added.

enactor
HOME
PRODUCTS
KEYBOARD
Trans - 29  
Jan 28, 2022 5:51:18 PM  
Till 222222222222222222 - Mike ...
LOG OUT

ITEM	PRICE	
Reading Glasses <i>Sun tint and UV Standard Standard</i>	£89.00 £30.00	

Sell Item	Discounts / Overrides	Returns	Voids
User Functions	Transaction Functions	Other Functions	

Please scan or enter a product or select another function.

7	8	9	CLR
4	5	6	ENT
1	2	3	
0	.		

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TOTAL      £119.00

TOTAL

# 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 2.7

## 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 produce 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](mailto: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	11/09/2021	Cynthia Augustine	Initial version
1.1	Second Draft	22/11/2021	Thilini Sayakkara	Formatting and content additions
1.2	Review	24/02/2022	Kevin Charlesworth	Final Review