

# How-To Guide Configuring Void Reasons

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# Introduction

The purpose of this guide is to provide a foundational understanding of the options and capabilities available when configuring Void Reasons. Reasons are configured based on a Reason Type (E.g: Item Void Reason, Transaction Void Reason, Post Transaction Void Reason) and are associated with a Region in which they are applicable.

The properties of a Reason configuration too depend on the Reason Type. Void Reasons are Reasons for which either a particular item or an entire transaction may be deemed to be void and not taken into consideration, due to reasons such as the item being faulty, a customer leaving the store, operator error, etc. This guide provides the basic step-by-step configurations required to set up the necessary Void Reasons.

## Overview

This guide will cover the configuration for the following:

- **Item Void Reason** – Allows setting a particular item in a transaction as a void item.
- **Transaction Void Reason** – Allows setting an entire transaction as a void transaction.
- **Post Transaction Void Reason** – Allows setting an entire completed transaction as a void transaction.
- **Item Tender Void** – Allows setting a tender function applied on a transaction as void.

## Prior Training / Experience

You should be familiar with the following:

- Estate Manager Configuration
- Data Broadcasting

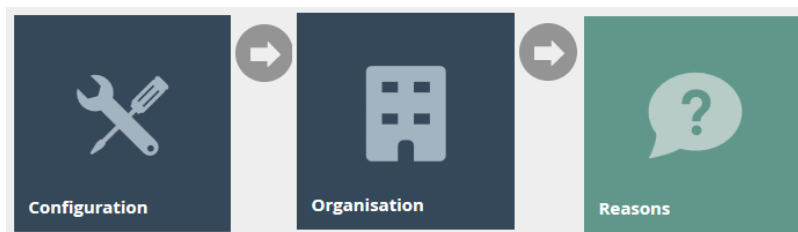
# Configuration Steps

Reasons are created based on a pre-defined **Reason Type** and associated with a Region in which they are applicable. Each Reason Type is known to a specific function of the application, that is required to capture reasons of the specific type. Many of the Reason Types relate to Application-Specific built-in functionality.

## Item Void Reason

There are instances when a customer requires to eliminate a selected item before proceeding with the transaction. Item Void Reason allows setting a particular item in a transaction as a void item.

The reason maintenance application can be accessed through:  
Configuration -> Organisation -> Reasons



Reason Maintenance

Region:  Reason Type:  Reason ID:

	Reason ID	Reason Type	Region	Reason Start Date	Reason End Date	Description
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	IV-UK2	Item Void	United Kingdom			Customer Left Store
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	IV-FR2	Item Void	France			Customer Left Store
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	IV-FR1	Item Void	France			Item Faulty
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	IV-UK1	Item Void	United Kingdom			Item Faulty
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	IV-AR1	Item Void	All Regions			Item Faulty
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	IV-UK4	Item Void	United Kingdom			Item Faulty - Witness Capture

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To create a new Reason, select **Create a New Reason** on the Reason Maintenance page.

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

Select **Item Void** from the **Reason Type** drop-down.

Enter a unique **Reason ID** for the new Item Void Reason. The ID can be alphanumeric and contain a maximum of 20 characters.

## Reason Maintenance

You are adding a new Reason, please select the Region and Reason Type and enter an ID:

Region	All Regions
Reason Type	Item Void
Reason ID	IV-AR1

[← Back](#) [+ Create](#)

Select **Create**.

You will be presented with the following options to complete creating the new Item Void Reason:

### Reason – General Tab

The General tab has all the basic information that captures the identity of the Item Void Reason.

#### Reason Maintenance

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

You are editing Item Void Reason ID: 'IV-AR1' for region 'All Regions'

General

Transaction Types

Witness

Description\*

Item Faulty

English (UK)

Function Authorisation Code

-

Capture Reference Number?

☐

Capture Customer Name and Address?

☐

Parent Reason ID

-

Reason Start Date

...

Reason End Date

...

\* Denotes Mandatory

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

Configuration	Description
Description	Enter a user-friendly, meaningful description for the Reason that can be alphanumeric with a maximum of 50 characters.
	Select the locale from the dropdown list of all configured Locales.
Function Authorisation Code	Select the applicable Function Authorisation Code from the drop-down list. These are defined and configured in Role Maintenance and applicable only if the reason selection requires authorisation.
Capture Reference Number	If checked, the User will be prompted to enter a reference number when using this Reason.

Capture Customer Name and Address	If checked, indicates that the User must be prompted to capture the Customer's Name and Address when using this Reason.
Parent Reason ID	If the reason requires a parent reason, select the relevant parent reason from the drop-down list of all configured Reasons of the same Reason Type.
Reason Start Date	Enter a Reason Start Date
Reason End Date	Enter a Reason End Date

## Reason – Transaction Types Tab

The Transaction Types tab is available for Reasons which are only valid for certain transaction types (Eg: Restaurant sale transaction). All Transaction Types for this Reason can be selected here and if no transaction types are selected, it is assumed that the Reason is valid for all.

## Reason – Witness Tab

The Witness tab is available for Reasons which require the User to obtain a witness when using this Reason. If checked, the user will be prompted for a witness whenever the Reason is selected.

If checked, additional configuration options will appear. Set appropriate values on the fields as follows:

Configuration	Description
Witness User Function Authorisation Code	Select from the drop-down list to determine this as a <b>Manager Authorised Functions</b> .

Witness Skip Function Authorisation Code	Select from the drop-down list to determine this as a <b>Manager Authorised Functions</b> .
Capture Witness Rate	Enter a numeric value to define a percentage for the capture witness rate. (Indicates the percentage that the user should be prompted to capture witness; against the number of times this reason is used)

Select **Save** to complete creating the Item Void Reason.

\*Multiple Reasons can be created for the Item Void Reason Type as required, and these Reasons will be presented to the operator to select from when performing an Item Void.

## Transaction Void Reason

Unlike eliminating a single purchased item as discussed previously, there are instances when a complete transaction might require eliminating. Transaction Void Reason allows setting an entire transaction as a void transaction.

To create a new Reason, select **Create a New Reason** on the Reason Maintenance page.

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

Select **Transaction Void** from the **Reason Type** drop-down.

Enter a unique **Reason ID** for the new Transaction Void Reason. The ID can be alphanumeric and contain a maximum of 20 characters.

Reason Maintenance

You are adding a new Reason, please select the Region and Reason Type and enter an ID:

Region	All Regions ▼
Reason Type	Transaction Void ▼
Reason ID	TV-AR1

← Back   + Create

Select **Create**.

You will be presented with the following options to complete creating the new Transaction Void Reason:

Reason Maintenance

Save Cancel

You are editing Transaction Void Reason ID: TV-01 for region All Regions

General Witness

Description\* Customer Left Store English (UK)

Function Authorisation Code -

Capture Reference Number? ☐

Parent Reason ID -

Reason Start Date

Reason End Date

\* Denotes Mandatory

## Reason – General Tab

The General tab has all the basic information that captures the identity of the Transaction Void Reason.

Set the appropriate values on the **General Tab** as per the sample on configuring item void reason.

## Reason – Witness Tab

The Witness tab is available for Reasons which require the User to obtain a witness when using this Reason. If checked, this option is made active for this Reason.

Set the appropriate values on the **Witness Tab** as per the sample on configuring item void reason.

Select **Save** to complete creating the Transaction Void Reason.

\*Multiple Reasons can be created for the Transaction Void Reason Type as required, and these Reasons will be presented to the operator to select from when performing a Transaction Void.



## Post Transaction Void Reason

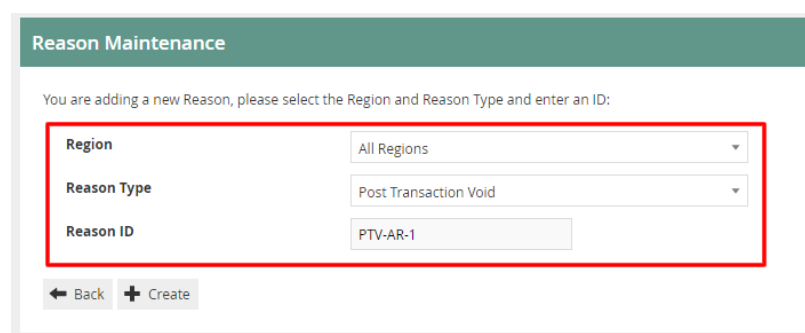
Post Transaction Void Reason allows setting an entire transaction that had been completed, as a void transaction.

To create a new Reason, select **Create a New Reason** on the Reason Maintenance page.

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

Select **Post Transaction Void** from the **Reason Type** drop-down.

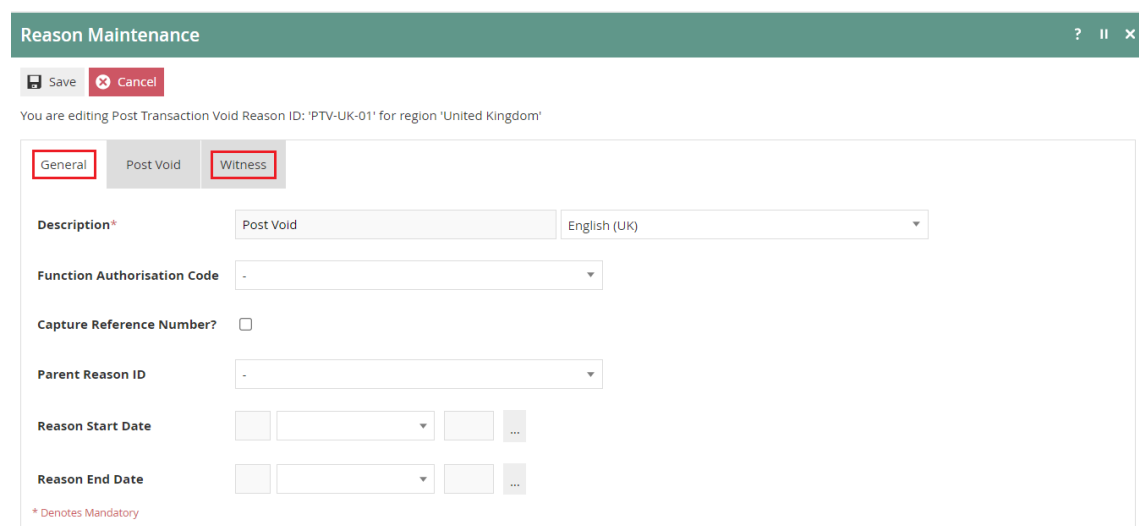
Enter a unique **Reason ID** for the new Post Transaction Void Reason. The ID can be alphanumeric and contain a maximum of 20 characters.



The screenshot shows the 'Reason Maintenance' page with a green header. Below the header, a message states: 'You are adding a new Reason, please select the Region and Reason Type and enter an ID:'. A red box highlights the form fields: 'Region' (dropdown menu showing 'All Regions'), 'Reason Type' (dropdown menu showing 'Post Transaction Void'), and 'Reason ID' (text input field containing 'PTV-AR-1'). At the bottom of the form are two buttons: 'Back' and 'Create'.

Select **Create**.

You will be presented with the following options to complete creating the new Post Transaction Void Reason:



The screenshot shows the 'Reason Maintenance' page with a green header. Below the header, there are 'Save' and 'Cancel' buttons. A message states: 'You are editing Post Transaction Void Reason ID: 'PTV-UK-01' for region 'United Kingdom''. Below this, there are three tabs: 'General' (highlighted with a red box), 'Post Void', and 'Witness'. The 'General' tab contains the following fields: 'Description\*' (text input field containing 'Post Void'), 'Function Authorisation Code' (dropdown menu showing '-'), 'Capture Reference Number?' (checkbox), 'Parent Reason ID' (dropdown menu showing '-'), 'Reason Start Date' (date picker), and 'Reason End Date' (date picker). A note at the bottom left states: '\* Denotes Mandatory'.

### Reason – General Tab

The General tab has all the basic information that captures the identity of the Post Transaction Void Reason.

Set the appropriate values on the **General Tab** as per the sample on configuring item void reason.

## Reason – Witness Tab

The Witness tab is available for Reasons which require the User to obtain a witness when using this Reason. If checked, this option is made active for this Reason.

Set the appropriate values on the **Witness Tab** as per the sample on configuring item void reason.

## Reason – Post Void Tab

### Reason Maintenance

 Save  Cancel

You are editing Post Transaction Void Reason ID: 'PTV-UK-01' for region 'United Kingdom'

General	<b>Post Void</b>	Witness
Reversal Time Limit (hours)	<input type="text" value="0"/>	(Zero means unlimited)
Reversal Days Limit (days)	<input type="text" value="0"/>	(Zero means unlimited)
Allow Manual Reversal	<input type="checkbox"/>	
Transaction Value Limit	<input type="text" value="£0.00"/>	(Zero means unlimited)
Item Count Limit	<input type="text" value="0"/>	(Zero means unlimited)
Limit To Last Day End	<input type="checkbox"/>	

Set the appropriate values on the **Post Void** tab as follows:

Configuration	Description
Reversal Time Limit (hours)	Enter a numeric value to indicate the limit for reversal in hours. If set to zero, the hours will be unlimited.
Reversal Days Limit (days)	Enter a numeric value to indicate the limit for reversal in days. If set to zero, the days will be unlimited.
Allow Manual Reversal	Select checkbox to enable the user to perform a manual reversal through the POS.
Transaction Value Limit	Set a Transaction Value Limit for the post transaction void reason. If set to zero, the transaction value will be unlimited.
Item Count Limit	Enter a numeric value to indicate a limit for items for this void reason. If set to zero, the item count will be unlimited.
Limit To Last Day End	Select checkbox to indicate that the reason is limited to Last Day End.

Select **Save** to complete creating the Post Transaction Void Reason.

\*Multiple Reasons can be created for the Post Transaction Void Reason Type as required, and these Reasons will be presented to the operator to select from when performing a Post Transaction Void.

## Item Tender Void Reason

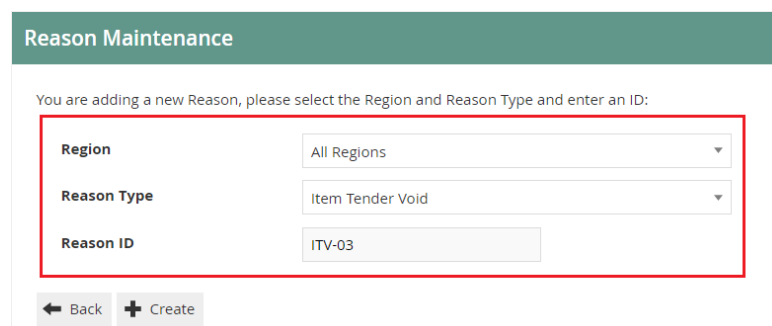
When adding various tenders to an order there may be instances where the customer will need to change the mode of payment. Item Tender Void Reason allows setting a selected tender function (Cash or Card) of a transaction as void.

To create a new Reason, select **Create a New Reason** on the Reason Maintenance page.

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

Select **Item Tender Void** from the **Reason Type** drop-down.

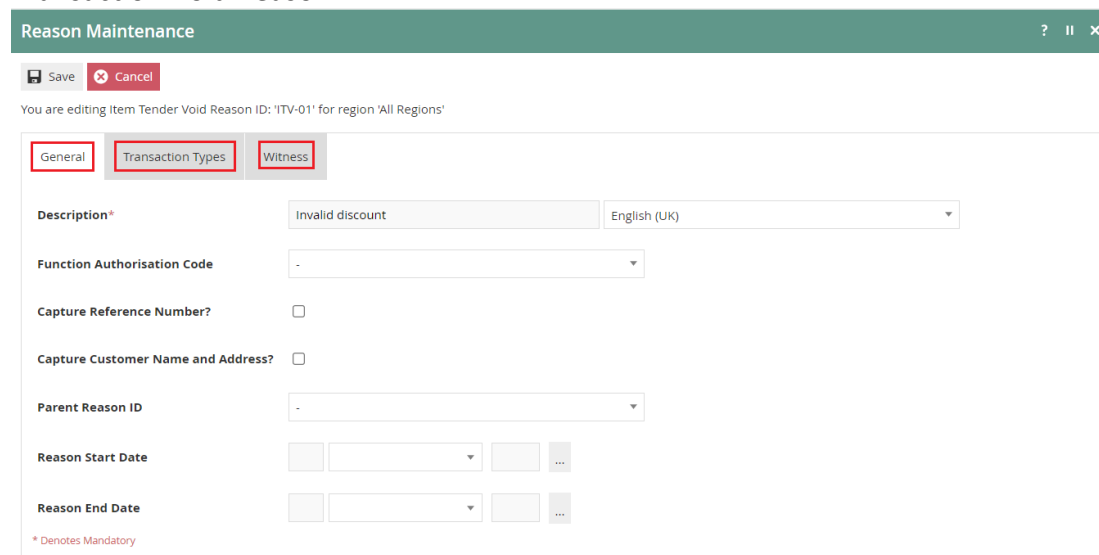
Enter a unique **Reason ID** for the new Item Tender Void Reason. The ID can be alphanumeric and contain a maximum of 20 characters.



The screenshot shows the 'Reason Maintenance' header in a green bar. Below it, a message states: 'You are adding a new Reason, please select the Region and Reason Type and enter an ID:'. A red rectangular box highlights the form fields: 'Region' (a dropdown menu with 'All Regions' selected), 'Reason Type' (a dropdown menu with 'Item Tender Void' selected), and 'Reason ID' (a text input field containing 'ITV-03'). At the bottom of the form are two buttons: 'Back' with a left arrow icon and 'Create' with a plus icon.

Select **Create**.

You will be presented with the following options to complete creating the new Post Transaction Void Reason:



The screenshot shows the 'Reason Maintenance' header in a green bar with a close button (X) on the right. Below the header, there are 'Save' and 'Cancel' buttons. A message states: 'You are editing Item Tender Void Reason ID: 'ITV-01' for region 'All Regions''. Below this, there are three tabs: 'General', 'Transaction Types', and 'Witness'. The 'General' tab is selected and highlighted with a red box. The form fields under the 'General' tab include: 'Description\*' (a text input field with 'Invalid discount' and a language dropdown set to 'English (UK)'), 'Function Authorisation Code' (a dropdown menu with '-' selected), 'Capture Reference Number?' (a checkbox), 'Capture Customer Name and Address?' (a checkbox), 'Parent Reason ID' (a dropdown menu with '-' selected), 'Reason Start Date' (a date picker), and 'Reason End Date' (a date picker). A red asterisk indicates that the 'Description' field is mandatory.

### Reason – General Tab

The General tab has all the basic information that captures the identity of the Item Tender Void Reason.

Set the appropriate values on the **General Tab** as per the sample on configuring item void reason.

## Reason – Transaction Types Tab

The Transaction Types tab is available for Reasons which are only valid for certain transaction types (Eg: Restaurant sale transaction). All Transaction Types for this Reason can be selected here and if no transaction types are selected, it is assumed that the Reason is valid for all.

Set the appropriate values on the **Transaction Types Tab** as per the sample on configuring item void reason.

## Reason – Witness Tab

The Witness tab is available for Reasons which require the User to obtain a witness when using this Reason. If checked, this option is made active for this Reason.

Set the appropriate values on the **Witness Tab** as per the sample on configuring item void reason.

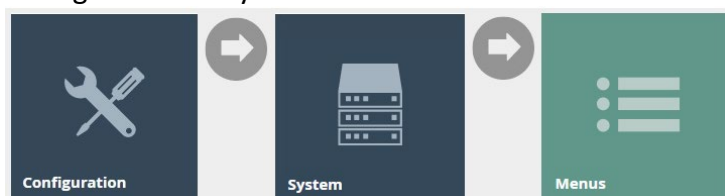
Select **Save** to complete creating the Item Tender Void Reason.

\*Multiple Reasons can be created for the Item Tender Void Reason Type as required, and these Reasons will be presented to the operator to select from when performing an Item Tender Void.

## Menus

To enable the use of the above reasons, appropriate Menus and Role privileges should be configured separately.

The menu maintenance application can be accessed through:  
Configuration -> System -> Menus



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.

A screenshot of the 'Menu Maintenance' application window. The title bar is green with the text 'Menu Maintenance' and window control icons. Below the title bar is a toolbar with 'Save' and 'Cancel' buttons. A message states: 'You are editing menu ID SALE for menu set POS, role Sales Assistant, menu group Default Standard POS, locale English (UK)'. The main form has three fields: 'Name' with the value 'SALE', 'Menu Type' with a dropdown menu showing 'Tree', and 'Menu Category' with a dropdown menu showing 'Retail'. Below these fields is a list of menu items under the heading 'SALE': '1 - Sales', '2 - Dept Sale', '3 - Voids', '4 - Returns', '5 - Discount / Overrides', '6 - Management', and '7 - SignOff'. At the bottom of the list, there are two buttons: 'Add a new Button Folder' and 'Add a new Button', both highlighted with a red box. Below these buttons is an 'Add...' button.

Following are the events that can be configured for this reason menu:

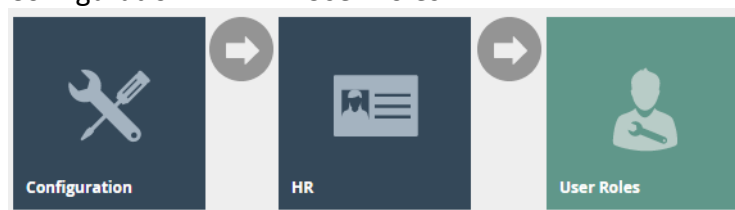
Reason Type	Event Name	Event ID
Item Void	Item Void	ItemVoid
Transaction Void	Transaction Void	TransactionVoid
Post Transaction Void	Post Void	PostVoid

\*Configuring Menus is further described in a separate How-to Guide.

## User Roles

The user role maintenance application can be accessed through:

Configuration -> HR -> User Roles



The configuration interface used to specify User **Roles** facilitates the selection of required permissions by applying a discovery process to the Package resources of the Enactor Retail Software itself.

Authorisation to run the specific functionality documented here are controlled with privileges maintained in roles.

Select an appropriate role you wish to edit, the example here is using SALES\_ASSISTANT.

 The screenshot shows the 'User Role Maintenance' application window. At the top, it says 'You are editing user role ID: 'SALES\_ASSISTANT' for region 'All Regions''. Below this are tabs for 'General', 'Authorised Functions', 'Special Functions', and 'Report Functions'. The 'General' tab is active, showing 'Application Package' set to 'Enactor POS' and 'Process' set to '# Void Item'. There are also fields for 'Function ID' and 'Function Name', both set to 'Starts With'. Below these are 'Apply Filters' and 'Reset Filters' buttons. A table lists three functions: 'enactor.pos.AuthorisesVoidItem', 'enactor.pos.ExcludeTenderFromVoidItem', and 'enactor.pos.VoidItemAllowed'. The first and third functions are checked. At the bottom, there are checkboxes for 'Enable All Displayed Functions' and 'Disable All Displayed Functions', and a footer showing 'Page 1 of 1' and 'Page Size 10'.

Select the enactor POS package and configure the privileges as required.

Following are the privileges that can be configured for this user role:

Reason Type	Package	Function ID
Item Void	Enactor POS	enactor.pos.AuthorisesVoidItem
		enactor.pos.VoidItemAllowed
Transaction Void	Enactor POS	enactor.pos.AuthorisesVoidTransaction
		enactor.pos.VoidTransactionAllowed

Post Transaction Void	Enactor POS	enactor.pos.AuthorisesPostTransactionVoid enactor.pos.PostTransactionVoidAllowed
Item Tender Void	Enactor POS	enactor.pos.AuthorisesVoidTenderItem enactor.pos.VoidTenderItemAllowed

\* Configuring User Roles is further described further in a separate How-to Guide.

## Broadcasting

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

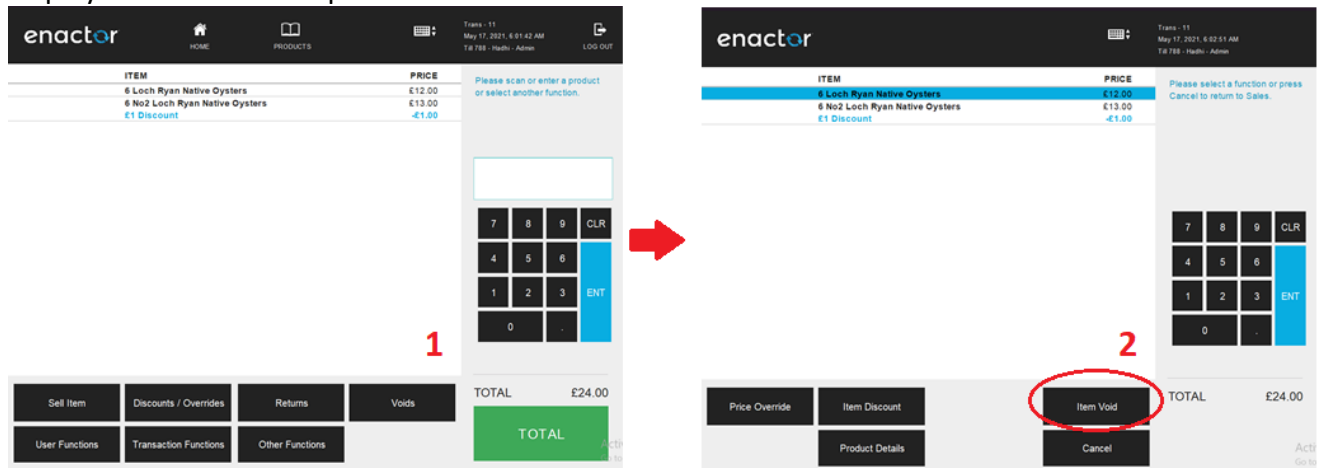
- Reason
- Menu
- Roles

# POS Functionality

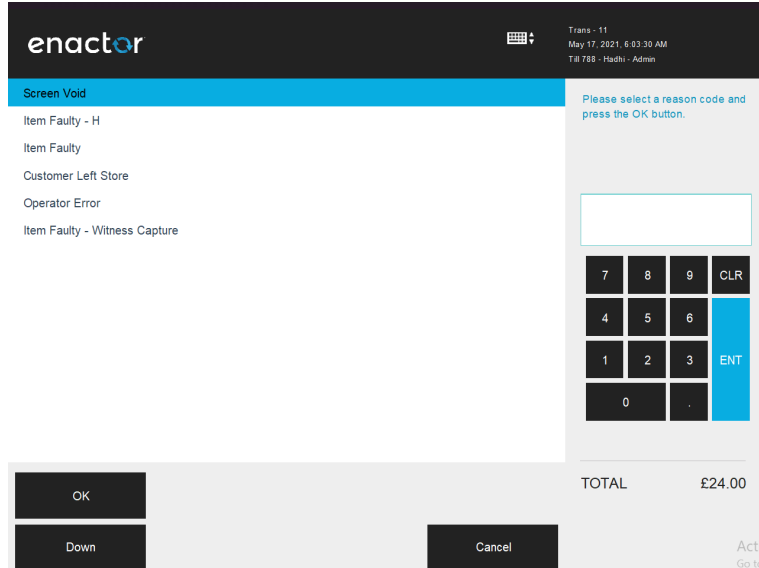
## Item Void Reason Functionality

On adding products to the bag, the operator will be presented with screen 1.

Select product as shown on screen 2, to view all applicable functions for the product displayed at the bottom pane.



Select **Item Void** and a set of configured Item Void Reasons are displayed to the operator.

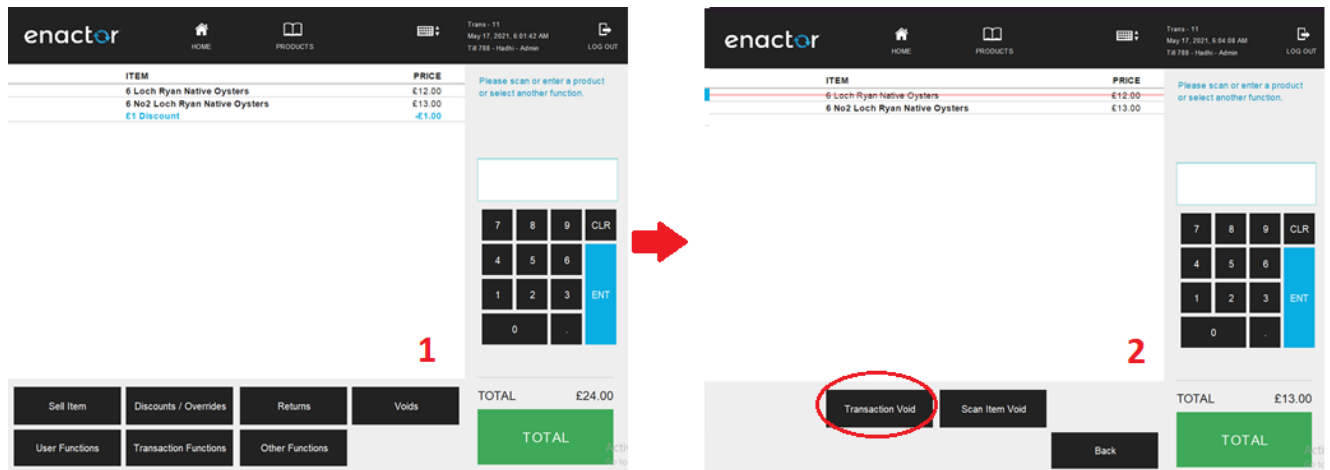


The operator can then select the applicable Reason and click **OK** to apply the Item Void reason to the selected product.

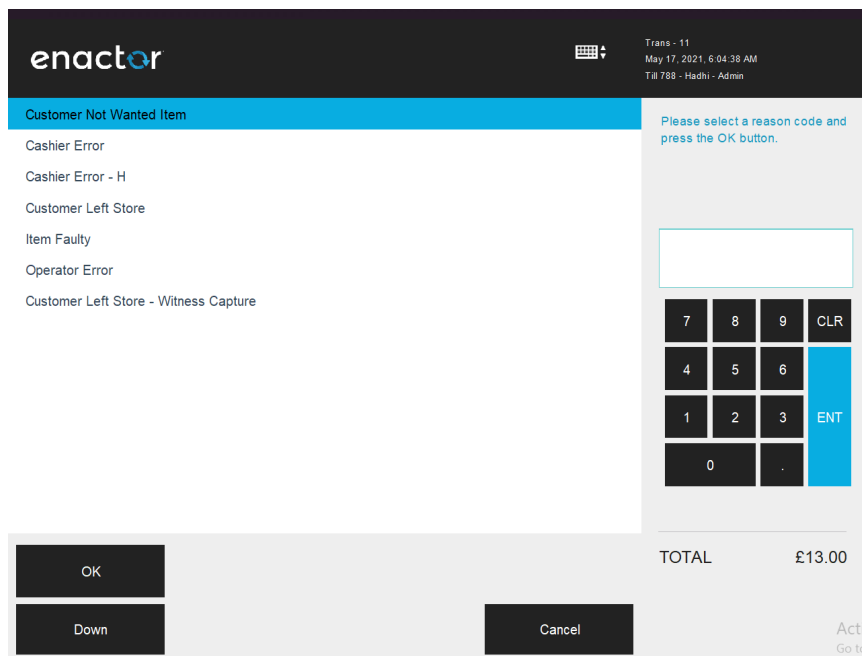
## Transaction Void Reason Functionality

On adding products to the bag, the operator will be presented with screen 1.

All applicable functions for transaction are displayed at the bottom pane. Select **Voids** and the option of Transaction Void will be displayed to the operator as shown on screen 2.



Select **Transaction Void** and a set of configured Transaction Void Reasons are displayed to the operator.



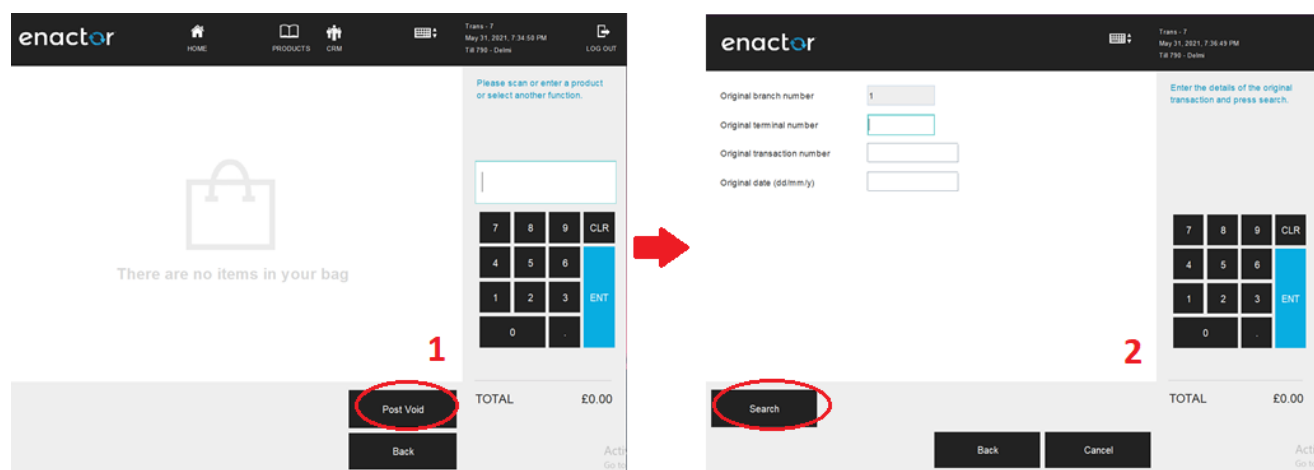
The operator can then select the applicable Reason and click **OK** to apply the Transaction Void function to the selected transaction.



## Post Transaction Void Reason Functionality

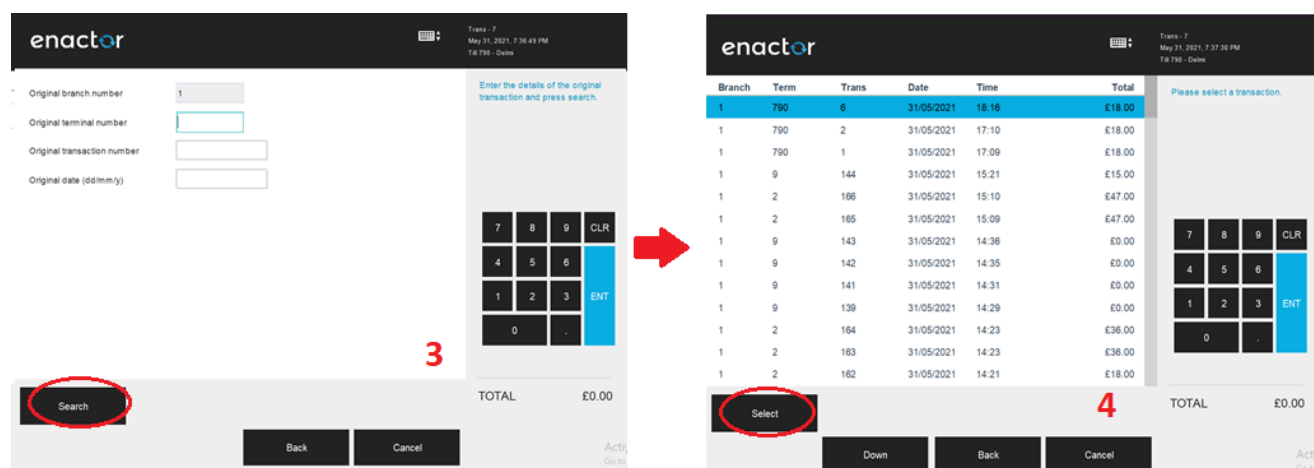
The operator after completing a transaction will be able to use the Post Transaction Void function by clicking on the **Post Void** button as shown of screen 1.

Once Post Void is selected, click on the **Search** button as shown of screen 2 to pick the transaction to void.



Enter search criteria and select the **Search** button again as shown on screen 3.

Search results of the transactions will be displayed as shown on screen 4.

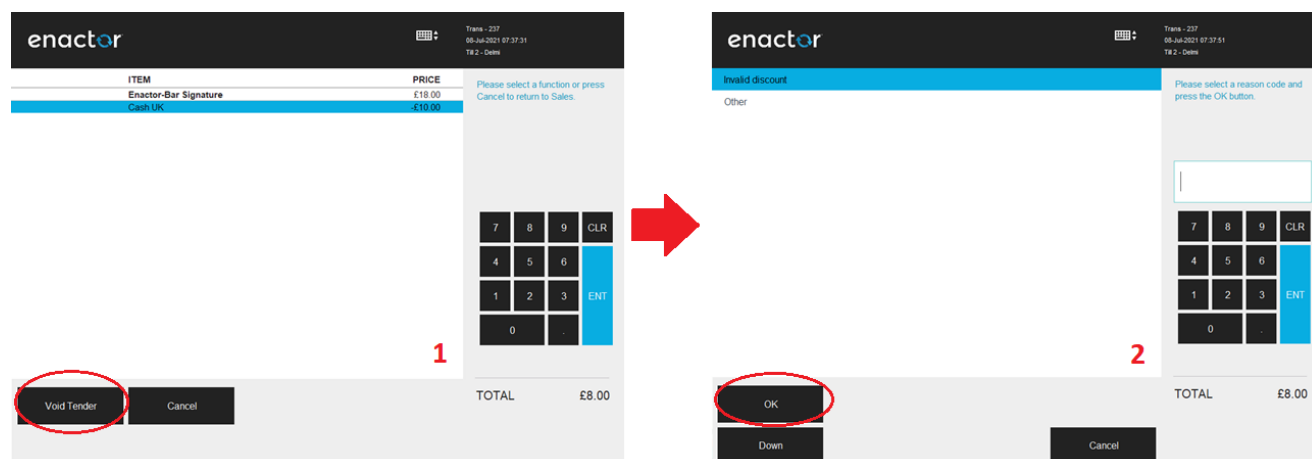


Select the transaction from the list and select the **Confirm** button, which will result in a Post Transaction Void.

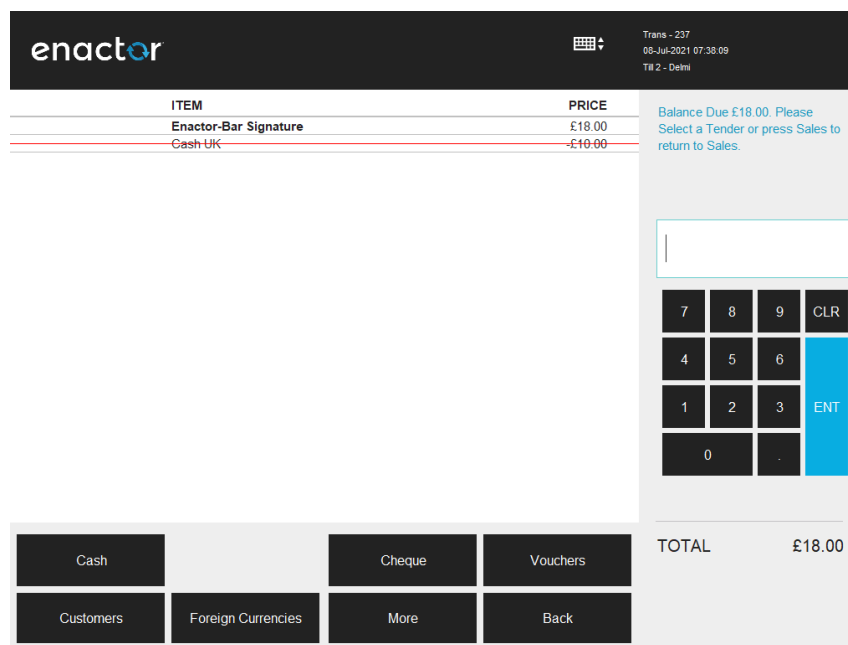
## Item Tender Void Reason Functionality

The operator after completing a transaction will be able to use the Item Tender Void function.

Selecting the tender applied and click on the **Void Tender** button as shown of screen 1.



A of configured Item Tender Void Reasons are displayed to the operator as shown on screen 2.



The operator can then select the applicable Reason and click **OK** to apply the Item Tender Void function to the selected transaction.

# About This Document

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The amendment history of this document can be found in the table below.

## Current Document Version information

Document Version 1.0

Product Version 2.6

## Document Context

This document is part of the Enactor Product Documentation Series. All Enactor products include a comprehensive documentation set designed to improve understanding of the product and facilitate ease of use.

## Document Inquiries

At Enactor we aspire to producing the highest quality documentation to reflect and enhance the quality of our product. If you find that the document is inaccurate or deficient in any way, please assist us in improving our standard by letting us know.

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

By Email: [documentation@enactor.co.uk](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	03/08/21	Thilini Sayakkara	Initial version