

How-To Guide - Transaction Recovery

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Introduction

The Transaction Recovery functionality allows a copy of an in-progress transaction to be stored in the local database each time the transaction is updated (e.g. when an item is added to it). In the event of a power cut or a POS restart, this function allows the current transaction to be recovered and either completed, stored, or voided.

There are numerous configuration options offered to control the behaviour of this function detailed in the User Roles section below. For example, it is possible to restrict the user to only be able to resume transactions that they originally created. Alternatively, it is possible to allow the user to resume transactions that were created by any user.

Enactor will store both Retail and Cash Management transactions. Transactions are written locally to the POS database in the *storedrecoverytransactions* table.

Recovered Cash Management transactions are automatically voided when the user signs in

Overview

This guide will cover the configuration for the following: (List down the key elements of the document)

- **POS Terminals** – Enables the function at the POS (or mobile POS)
- **User Roles** – Controls the behaviour of the Transaction Recovery function depending on the privileges assigned to users.

Prior Training / Experience

You should be familiar with the following:

- Estate Manager Configuration
- Data Broadcasting

Configuration Steps

There are two key configuration elements to enable and control the behaviour of Transaction Recovery.

Firstly, it must be enabled via the POS Terminal (or POS Terminal Template). Once enabled, privileges can be assigned to User Roles to control how the function behaves. The User Role configuration can also be used to define different behaviours for different User types – for example, a sales assistant may not have permission to void a recovered transaction, but a manager does.

POS Terminal Template Configuration

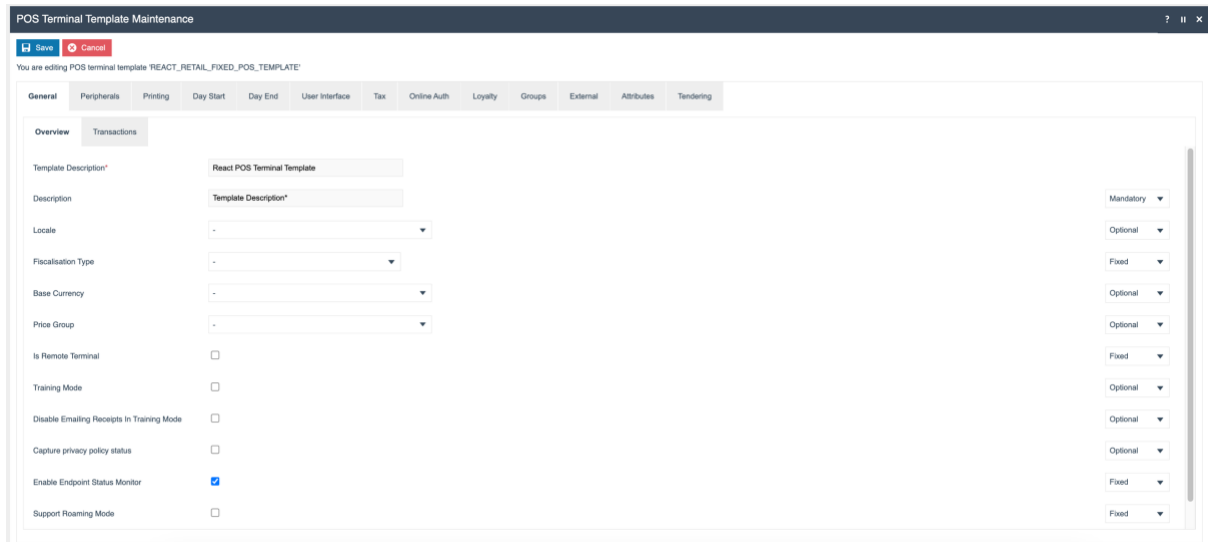
This section describes configuring Automatic Transaction Recovery in the POS Terminal Template. The configuration steps detailed are equally applicable to a POS Terminal and could alternatively be defined there.

The POS Terminal Template maintenance application can be accessed through:
Configuration-> Organisation -> POS Terminal Templates

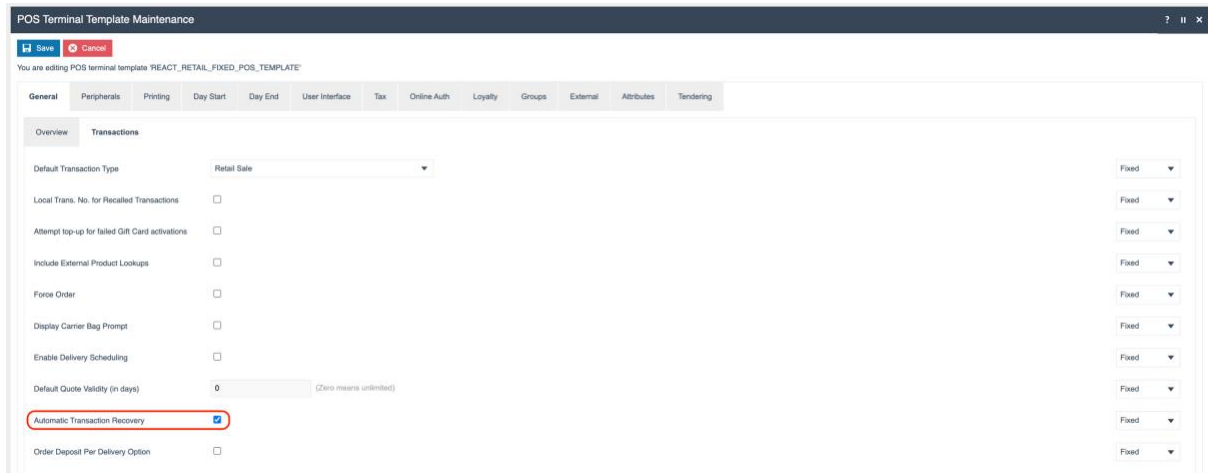


Template ID	Description
REACT_AIRPORT_FIXED_POS_TEMPLATE	React Airport POS Terminal Template
REACT_RETAIL_MOBILE_POS_TEMPLATE	React Mobile POS Terminal Template
REACT_RETAIL_MOBILE_WAREHOUSE_TEMPLATE	React Mobile POS Warehouse Template
REACT_RETAIL_FIXED_POS_TEMPLATE	React POS Terminal Template
REACT_RETAIL_FIXED_WAREHOUSE_TEMPLATE	React POS Warehouse Template
RETAIL_MOBILE_POS_TEMPLATE	Standard Mobile POS Terminal Template
RETAIL_FIXED_POS_TEMPLATE	Standard POS Terminal Template
RETAIL_FIXED_WAREHOUSE_TEMPLATE	Standard POS Warehouse Template

To edit the configuration of a POS Terminal Template, select the Edit icon (pencil) next to it.



Select the General > Transactions sub-tab



Tick the **Automatic Transaction Recovery** checkbox (and optionally set it to Fixed so this value applies to all POS Terminals that use this template), then select the Save icon to save the record. This completes the POS Terminal Template Configuration.

User Roles

The User Roles maintenance application allows a set of privileges to be assigned to a User Role, of which one or more can be assigned to a User.

This configuration makes the assumption that the Enactor POS Jar has been deployed via the Jar Deployer application so the Enactor POS privileges are available.

The User Role maintenance application can be accessed through:
Configuration -> HR -> User Roles



User Role Maintenance

Region: [Dropdown]

User Role ID: Starts With [Text Input]

Authorisation Level: [Text Input]

Apply Filters | Reset Filters

User Role ID	Description	Authorisation Level
LOYALTY	Loyalty	15
MANAGER	Manager	60
OPERATIONAL_ADMIN	Operational Administrator	90
POS_ADMIN	Pos Admin	70
POS_CASH_MAN	Pos Cash Management	40
PRE_SIGN_ON_POS	PRE SIGN ON POS	0
REPORTS	Reports	10
RETURNS	Returns	30
SALES_ASSISTANT	Sales Assistant	5
STORE_INVENTORY	Store Inventory	55

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Create a new User Role | Export Role

Authorisation to run the Transaction Recovery functionality is controlled with privileges maintained in User Roles.

Select the appropriate Role to edit, in this example, the SALES_ASSISTANT Role is being edited.

The privileges available to control the behaviour of transaction recovery are detailed in the following table. The Application Package for all privileges is Enactor POS.

Process	Function ID	Description
Handle Recovery Transactions	enactor.pos.AuthorisesSkipRecoveryTransactions	Authorises the user to skip the transaction recovery screen at sign-on.
Handle Recovery Transactions	enactor.pos.AutoRecoverSingleTransaction	When a single recovery transaction is stored, it is automatically recovered at sign-on.
Handle Recovery Transactions	enactor.pos.ResumeRecoveryTransactionAllowed	Allows the user to resume a recovery transaction that they created.
Handle Recovery Transactions	enactor.pos.ResumeRecoveryTransactionForDifferentUserAllowed	Allows the user to resume a recovery transaction that any user created.
Handle Recovery Transactions	enactor.pos.SkipRecoveryTransactionsAllowed	Allows the user to skip any recovery transactions.
Handle Recovery Transactions	enactor.pos.StoreRecoveryTransactionAllowed	Allows the user to store a recovery transaction that they created.
Handle Recovery Transactions	enactor.pos.StoreRecoveryTransactionForDifferentUserAllowed	Allows the user to store a recovery transaction that any user created.
Handle Recovery Transactions	enactor.pos.VoidRecoveryTransactionAllowed	Allows the user to void a recovery transaction that they created.
Handle Recovery Transactions	enactor.pos.VoidRecoveryTransactionForDifferentUserAllowed	Allows the user to void a recovery transaction that any user created.
Recover And Resume Transaction	enactor.pos.AuthorisesResumeRecoveryTransaction	Authorises the user to resume a recovery transaction that they created.
Recover And Resume Transaction	enactor.pos.AuthorisesResumeRecoveryTransactionForDifferentUser	Authorises the user to resume a recovery transaction that any user created.
Recover And Store Transaction	enactor.pos.AuthorisesStoreRecoveryTransaction	Authorises the user to store a recovery transaction that they created.
Recover And Store Transaction	enactor.pos.AuthorisesStoreRecoveryTransactionForDifferentUser	Authorises the user to store a recovery transaction that any user created.
Recover And Void Transaction	enactor.pos.AuthorisesVoidRecoveryTransaction	Authorises the user to void a recovery transaction that they created.
Recover And Void Transaction	enactor.pos.AuthorisesVoidRecoveryTransactionForDifferentUser	Authorises the user to void a recovery transaction that any user created.

Broadcasting

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

- POS Terminals
- POS Terminal Templates
- Roles

POS Functionality

Transaction Recovery Functionality

The POS operator begins a transaction and adds some items. As each item is added, the transaction is updated in the *storedrecoverytransactions* table in the local database.

The screenshot shows the Enactor POS application interface. At the top, there is a navigation bar with icons for HOME, BAG, PRODUCTS, CRM, and KEYBOARD. The transaction details are: Transaction Number: 205, Date & Time: 24/01/2024, 13:48:21, Till Number: 3 | Hertford Manager, and a LOG OUT button. The main area displays a list of items:

ITEM	PRICE
JVC LT-40CA890 Android TV 40"	£299.00
APPLE MacBook Pro 13.3"	£1,150.00

Below the items is a numeric keypad with buttons for digits 0-9, CLR, ENT, and a keyboard icon. To the right of the keypad, the total tax is £241.50 and the total is £1,449.00. A large green 'Total' button is at the bottom right. At the bottom of the screen, there are several function buttons: Sales, MMG Sale, Voids, Returns, Discount / Overrides, Management, Select Payment Device, and Sign Off.

The screenshot shows a SQL query result in a database client. The query is: `SELECT * FROM storedrecoverytransactions`. The result set contains one record:

ID	Entity_Name	Storage_Tag	Storage_Ref	User_Id	Storage_Date	Device_Id	Transaction_Type	Transac
6ce7-7e6cf9bb3d81e4226d75cd49c54871ea5719	[http://www.enactor.com/retail]storedRecoveryTran...	RECOVERY	00010003002052401241348001	000101	2024-01-24 13:48:05	pos3@0001.enactor	SALE	

If the Enactor POS application is closed (this could be due to a reboot of the POS device, or a power cut), the next time it is launched, the operator is prompted to recover the in-progress transaction after they sign on:

enactor KEYBOARD Date & Time : 24/01/2024, 13:51:51
Till Number : 3 | Hertford Manager

Type	Transaction ID	Date	Stored By	Total
Sale	00010003002052401241348001	24/01/24	Hertford Manager	£1,449.00

Recovery Transactions have been found.
Choose how they should be handled.

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

Resume Store
Void Skip

In the scenario shown above, the POS operator doesn't have the privilege to auto-recover a single transaction, but does have the privileges to Resume, Store, Void and Skip the recovery transaction. Selecting the Resume function allows the transaction to be continued from where it left off.

enactor HOME BAG PRODUCTS CRM KEYBOARD Transaction Number : 205
Date & Time : 24/01/2024, 13:53:41
Till Number : 3 | Hertford Manager LOG OUT

ITEM	PRICE
JVC LT-40CA890 Android TV 40"	£299.00
APPLE MacBook Pro 13.3"	£1,150.00

Please scan or enter a product or select another function.

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

TOTAL TAX £241.50

TOTAL £1,449.00

Sales MMG Sale Voids Returns
Discount / Overrides Management Select Payment Device Sign Off

Total

When the transaction is completed, it is automatically purged from the *storedrecoverytransactions* table in the local database.

Host: 127.0.0.1 Database: enactpos Query

```
1 SELECT * FROM storedrecoverytransaction
```

Filter ...

- > Columns
- > SQL functions
- > SQL keywords
- > Snippets
- > Query history
- > Query profile

storedrecoverytransactions (0r = 13c)

ID	Entity_Name	Storage_Tag	Storage_Ref	User_Id	Storage_Date	Device_Id	Transaction_Type	Transaction_Total	Transaction_Currency_Id	Last_Updated	Training_Mode	XML
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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 producing the highest quality documentation to reflect and enhance the quality of our product. If you find that the document is inaccurate or deficient in any way, please assist us in improving our standard by letting us know.

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

By Email: documentation@enactor.co.uk

Document History

The following versions of the document have been produced:

VERSION	STATUS	ISSUE DATE	AUTHOR	REASON FOR ISSUE
1.0	Initial Draft	24/01/24	John Wood	