

How-To Guide Configuring Custom Receipt for Estate Manager

Document Type: External

Document Version: 1.0

Date: 16/02/2024

Author: Hadhi Jawahir

Table of Contents

Introduction	3
Overview	3
Prior Training / Experience	3
Custom Receipt Configuration	4
User Role Configuration	4
Page Definition Detail Maintenance	5
Page Definition Detail – General Tab	7
Retail Transaction Archive Maintenance	9
About This Document	11
Current Document Version information	11
Document Context	11
Document Inquiries	11
Document History	12

Introduction

The purpose of this guide is to describe the steps required to configure a custom receipt template, which will be used to display the virtual receipt in the Estate Manager Retail Transaction Archive Maintenance.

Overview

This guide will cover the configuration for the following:

- User Role Configuration.
- Page Definition Detail Configuration.

Prior Training / Experience

You should be familiar with the following:

- Estate Manager Configuration.

Pre-Requisite

The custom receipt is already configured in the Estate Manager and is available as an Enactor Page Definition XML file.

Custom Receipt Configuration

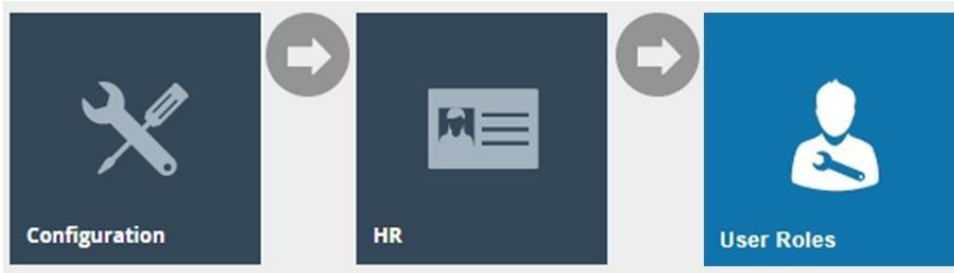
This section covers all the required configuration changes in the Estate Manager to successfully display a custom virtual receipt in the Retail Transaction Archive Maintenance.

User Role Configuration

Specific privileges must be configured to access the Page Definition Details functions in the Estate Manager. This section lists the privileges that are specific to Page Definition Details.

Privileges should be enabled in the User Role Maintenance of the Estate Manager. The User Role Maintenance application can be accessed through:

Configuration -> HR -> User Roles



In the User Role Maintenance, select the **Edit** icon of the desired User Role to enable the privilege for.

Navigate to the **Authorised Functions** tab of that selected User Role and apply the following filters:

Application Package > Enactor Web Maintenance

Process > Page Definition Detail Maintenance

User Role Maintenance

You are editing user role ID: 'ADMINISTRATOR' for region 'All Regions'

General **Authorised Functions** Special Functions Report Functions

Application Package: Enactor Web Maintenance
Process: * Page Definition Detail Maintenance

Function ID: Starts With
Function Name: Starts With

Apply Filters Reset Filters

Package	Process	Function ID	Function Name
<input checked="" type="checkbox"/> Enactor Web Maintenance	Page Definition Detail Maintenance	enactor.pageDefinitionDetailMaintenance.CopyPageDefinition	Copy Page Definition
<input checked="" type="checkbox"/> Enactor Web Maintenance	Page Definition Detail Maintenance	enactor.pageDefinitionDetailMaintenance.Edit	Edit
<input checked="" type="checkbox"/> Enactor Web Maintenance	Page Definition Detail Maintenance	enactor.pageDefinitionDetailMaintenance.EditPageDefinition	Edit Page Definition
<input checked="" type="checkbox"/> Enactor Web Maintenance	Page Definition Detail Maintenance	enactor.pageDefinitionDetailMaintenance.Export	Export
<input checked="" type="checkbox"/> Enactor Web Maintenance	Page Definition Detail Maintenance	enactor.pageDefinitionDetailMaintenance.List	List
<input checked="" type="checkbox"/> Enactor Web Maintenance	Page Definition Detail Maintenance	enactor.pageDefinitionDetailMaintenance.New	New
<input checked="" type="checkbox"/> Enactor Web Maintenance	Page Definition Detail Maintenance	enactor.pageDefinitionDetailMaintenance.Remove	Remove
<input checked="" type="checkbox"/> Enactor Web Maintenance	Page Definition Detail Maintenance	enactor.pageDefinitionDetailMaintenance.Run	Run
<input checked="" type="checkbox"/> Enactor Web Maintenance	Page Definition Detail Maintenance	enactor.pageDefinitionDetailMaintenance.View	View
<input checked="" type="checkbox"/> Enactor Web Maintenance	Page Definition Detail Maintenance	enactor.pageDefinitionDetailMaintenance.ViewPageDefinition	View Page Definition

Enable All Displayed Functions Disable All Displayed Functions

Ensure that the selected User Role has all the above required privileges enabled by ticking the required functions.

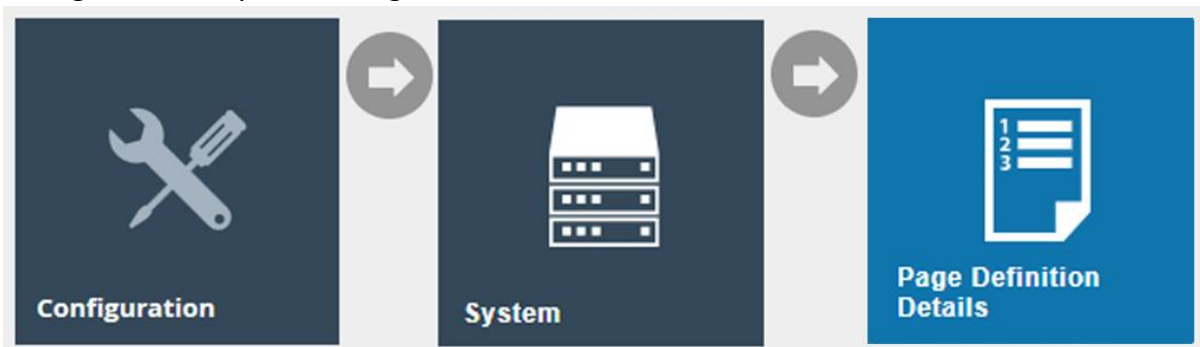
Select **Save**.

Now the User with that User Role assigned will be able to carry out all Page Definition Detail functions in the Estate Manager.

Page Definition Detail Maintenance

This application is used to specify which receipt template is to be used for display in the Retail Transaction Archive.

The Page Definition Detail Maintenance application can be accessed through:
Configuration -> System -> Page Definition Details



To create a new Page Definition Detail, select **Create a new Page Definition Detail** on the Page Definition Detail Maintenance page.

Page Definition Detail Maintenance

Definition ID Starts With

Type

	Definition ID	Type	Name
	AlterationService30	Alteration Slip	Alteration Service Slip 30 Col
	AlterationService35	Alteration Slip	Alteration Service Slip 35 Col
	AlterationService40	Alteration Slip	Alteration Service Slip 40 Col
	AlterationService42	Alteration Slip	Alteration Service Slip 42 Col
	AlterationService44	Alteration Slip	Alteration Service Slip 44 Col
	AlterationService48	Alteration Slip	Alteration Service Slip 48 Col
	AuditPrint30	Audit Print Format	Audit Print 30 Col
	AuditPrint35	Audit Print Format	Audit Print 35 Col
	AuditPrint40	Audit Print Format	Audit Print 40 Col
	AuditPrint42	Audit Print Format	Audit Print 42 Col

Page 1 of 30 Page Size 10

+ Create a new Page Definition Detail record Export Page Definition Details

Enter the appropriate **Definition ID** as follows, based on the Receipt Type that you have used for your POS transactions:

Enter **MAINTENANCE_RECEIPT** for all **Standard Receipt** Templates.

Page Definition Detail Maintenance

Please enter following details for the new Page Definition record

Definition ID	MAINTENANCE_RECEIPT
---------------	---------------------

[← Back](#) [+ Create](#)

Enter **MAINTENANCE_COMBINED** for all **Combined Receipt** Templates.

Page Definition Detail Maintenance

Please enter following details for the new Page Definition record

Definition ID	MAINTENANCE_COMBINED
---------------	----------------------

[← Back](#) [+ Create](#)

Select **Create**.

Page Definition Detail – General Tab

The General tab captures the basic information of the new Page Definition Detail.

Page Definition Detail Maintenance

 Save  Cancel

You are editing Page Definition Detail ID 'MAINTENANCE_RECEIPT'

General

Type*

Name

URL

Source Filename

Upload Page Definition

* Denotes Mandatory

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

Configuration	Description
Type	Select the Receipt Type from the dropdown list. If you entered MAINTENANCE_RECEIPT as your Page Definition ID, then select Standard Receipt . If you entered MAINTENANCE_COMBINED as your Page Definition ID, then select Combined Receipt .
Name	Enter any identifiable name. Eg: Standard Maintenance Receipt.
Upload Page Definition	Select your Page Definition for upload here. This should be the Page Definition for the custom receipt specified in the Pre-Requisites. This will be the Receipt Template that will be displayed in the Retail Transaction Archive Maintenance.

Once the Page Definition is uploaded, there will be more fields as follows:

Page Definition Detail Maintenance

Save
Cancel

You are editing Page Definition Detail ID 'MAINTENANCE_RECEIPT'

General

XML

Type*

Name

URL

Source Filename

Select a Retail Transaction to View...

Upload Page Definition

Edit Page Definition

Copy Page Definition

Remove Page Definition

* Denotes Mandatory

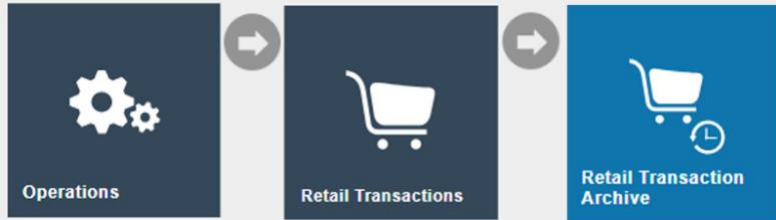
Configuration	Description
URL	This will be auto populated based on the Uploaded Page Definition.
Source Filename	This will be auto populated based on the Uploaded Page Definition.
Select a Retail Transaction to View...	Used to select and view a transaction from the Retail Transaction Archive using this Page Definition.
Edit Page Definition	Navigates to the Receipt Maintenance application so changes can be made to the Page Definition.
Copy Page Definition	Copies of the Page Definition.
Remove Page Definition	Removes the Page Definition.

Select **Save**.

Retail Transaction Archive Maintenance

This maintenance is used to view the retail transactions that have been carried out in the POS. This will also provide the receipt previews for each of the transactions.

The Retail Transaction Archive Maintenance application can be accessed through:
Operations -> Retail Transactions -> Retail Transaction Archive



Select a transaction and navigate to the Receipt tab:

Retail Transaction Archive Search

← Back

You are viewing Retail Transaction with ID: '00050796003932402150959524'

General	Receipt	Receipt as PDF	Transaction XML
---------	----------------	----------------	-----------------

Retail Transaction

Kings Road
London
SW3 5ES
Tel: 01992 500881

Sale

JVC LT-40CA890 Android TV 40"	£299.00
-------------------------------	---------

TOTAL	£299.00
Cash	-£299.00

00050796003932402150959524

Thank you for shopping at Enactor
15/02/2024 11:3Hertford Manager - 0005 0796 0393

The above displays the Custom Receipt template which was configured in the Page Definition Details Maintenance.

This can also be seen in the Receipt as PDF tab:

Retail Transaction Archive Search

← Back

You are viewing Retail Transaction with ID: '00050796003932402150959524'

General Receipt **Receipt as PDF** Transaction XML

☰ | 🗑️ | ▾ | ▾ Draw ▾ | 📄 | 🗣️ Read aloud


– + 🖨️ | 1 of 1 | 🔍 | 📄

Kings Road
London
SW3 5ES
Tel: 01992 500881

Sale

JVC LT-40CA890 Android TV 40"	£299.00
-------------------------------	---------

TOTAL	£299.00
Cash	-£299.00



00050796003932402150959524

Thank you for shopping at Enactor
15/02/2024 11:3Hertford Manager - 0005 0796 0393

About This Document

©2024 Enactor Ltd

All documents produced by Enactor Ltd are supplied to customers subject to Copyright, commercial confidentiality and contractual agreements and must not be copied or transferred without permission.

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	16/02/24	Hadhi Jawahir	Initial version