Checkout Methods

Menu: Manage POS/ Checkout Methods

Feature: Checkout

Editions: Cloud, Corporate*

Checkout methods are the way that you can configure how customers and sales people (or *users*, as we refer to them generically) can perform checkout of orders in Kensium POS.

> See Checkout for a summary of how checkout methods are used.

a)Fields

Standard Fields

- Name is the name of the checkout method as displayed to users during the checkout process.
- Note is an optional note that is displayed beside the name. This can provide more details to the user.
- Display Order can be used to sort checkout methods, for example to give priority to certain methods. By default, checkout methods are sorted by name.

Customer Access

The Customer Access field indicates which types of customers (and through which user interfaces) can select and use the checkout method.

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- Enable for Cart App – select this option to make the checkout method available to customers, via the Cart App.

- Enable for Order Pad – select this option to make the checkout method available to sales people, via the Order Pad.

- Require customer selection for Order Pad – select this to remove the **Skip** option in the customer selection page, displayed for the Order Pad. This will require the sales person to select a customer.

Order Type

The Order Type specifies the type of order that will be created during checkout.

- Order – the checkout process will create a regular sales order.
- Quote – the checkout process will create a sales quote.

Email Address

The Email Address Mode specifies whether an email address is entered by the user. You can specify whether the checkout method requires entry, allows optional entry or does not allow entry of an email address.

During checkout, the customer's email address on record is used as the default value for this field.

If you want the customer to receive email notifications regarding the order status, the customer must also enter a Message Template ID value.

- This value should contain only alphanumeric characters (0..9,a..z).
- You can the same value across multiple checkout methods, if you want to re-use the same email template across those checkout methods. For example, *All*.
- Alternatively, you can use a unique email template for the checkout method by supplying a unique template ID.

Email notifications are sent when the order is placed, and when the order is fulfilled. Youll typically want to customize the standard email templates for these notifications:

- TemplateOrderPlaced
- TemplateOrderFulfilled

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Shipping Address

The checkout method also indicates how the shipping address for orders are determined.



- Do not enter a shipping address is typically used for quotes, or other orders that do not require shipping.
- The customer can optionally supply their shipping address may be used for quotes or other orders where the shipping address can be confirmed later.
- The customer must supply their shipping address is typically used for orders that are shipped.
- Set to the fulfillment location
- Set to the pickup location is typically used for orders that are shipped to a store for a pickup.

Order Note

The Order Note Modespecifies whether an order note is entered by the user. You can specify whether the checkout method requires an order note, allows optional entry or does not allow entry of an order note.

The Default Order Note enables you to provide a default order note, if desired.

Payment Mode

The Payment Modeindicates if and how the customer will pay for an order.

- Require payment for all customers is a common configuration for orders.
- Do not gather payment is typically used for quotes.
- Payment is optional for all customers is not common, but may be used if payment can be deferred.
- Payment is optional for customers with an account; otherwise payment is required may be used when customers can pay on-account.

A payment service integration must be enabled and configured in order to take payments. An example payment service is the BridgePay provider .

A warning message is shown during the checkout process if no payment provider is configured.

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Fulfillment Location

The Fulfillment Location field indicates the location group which will fulfill orders created with this checkout method.

> Location groups are managed through the location group pages, and individual locations are assigned to location groups via their location page. Using this mechanism, checkout methods can be configured to use different locations for fulfillment.

The location group mechanism is the building block for routing orders to different fulfillment locations. The current mechanism uses the following logic to select a location from the location group:

- If the fulfillment location group has one location, the order will be sent to that location.
- If the fulfillment location group contains multiple locations, the user will select the location in the checkout shipping page.

> In the future, we may expand the capabilities of location groups to specify how fulfillment location is chosen. Options may include algorithms that consider the customer's location, current availability of items, and current order demand spread across locations.

Pickup Location

Pickup locations are like fulfillment locations. However, they are only specified as a separate option if the order should be processed in one location, then shipped to another location for pickup by a customer. This makes sense only if the shipping address mode is **set to the order's pickup location**.

> If the pickup location is the same as the fulfillment location -or if the order

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is shipped to the customer - leave this configuration option blank.

b) POS Integration

When integrated with the POS feature, the checkout method contains two additional fields.

Ship Via

The Ship Via field indicates the POS Ship Via type that will be associated with any order that is created through this checkout method.

One possible way to configure checkout methods is to create similar checkout methods that only differ according the Ship Via field. With this arrangement you would be able to offer different types of shipping methods to customers, e.g. Standard Shipping and Expedited Shipping.

> Given the flexibility of checkout methods, you could even route orders with different shipping types to fulfillment locations. There are many possibilities.

Fulfillment Time

The Fulfillment Time is used when calculating estimated shipment or fulfillment dates on orders. If provided, the fulfillment date of an order is set to the order's creation date/time plus this value. Fulfillment times are expressed in a time interval, usually from hours or days.

You can leave this empty, which indicates that no estimated fulfillment date will be calculated.

c) Checkout Permissions

Role-based permissions should be configured for the checkout process. These are configurable through the Roles security pages, listed under the Kensium.XMS.Checkout section.

Typically, you assign:

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- Checkout via the Cart App to the Anonymous role if you want guest users to checkout Cart App orders.
    - Alternatively, enable this permission for the Authenticated role if you want only signed-in customers to check out orders.
- Checkout via the Order Pad to the Salesperson role.
- Bypass customer terms… to the Salesperson role, **only if** you want salespeople to be able to override customer terms checks.
    - Alternative, you can assign this permission to new custom roles if you want to differentiate which salespeople can perform this action.

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