

# Order Management

## Introduction

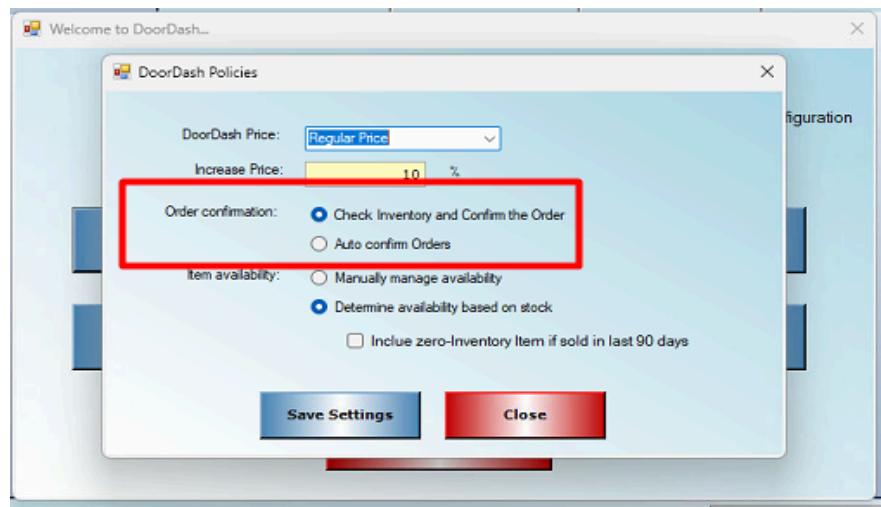
This document describes the Order Management process for the POS9 Register (Web Orders) and DoorDash integration. It covers order confirmation policies, order lifecycle, and system behavior from both the DoorDash Portal and POS9 Web Order.

**Navigation of the Web order:** POS9 (Register) > Misc > Online Orders (Tab) > DoorDash > Web Order

## Order Confirmation policy in POS9

Order confirmation policies are configured in **POS9 (Register) > Misc > Online Orders (Tab) > DoorDash > Settings**. Merchants can select one of two policies:

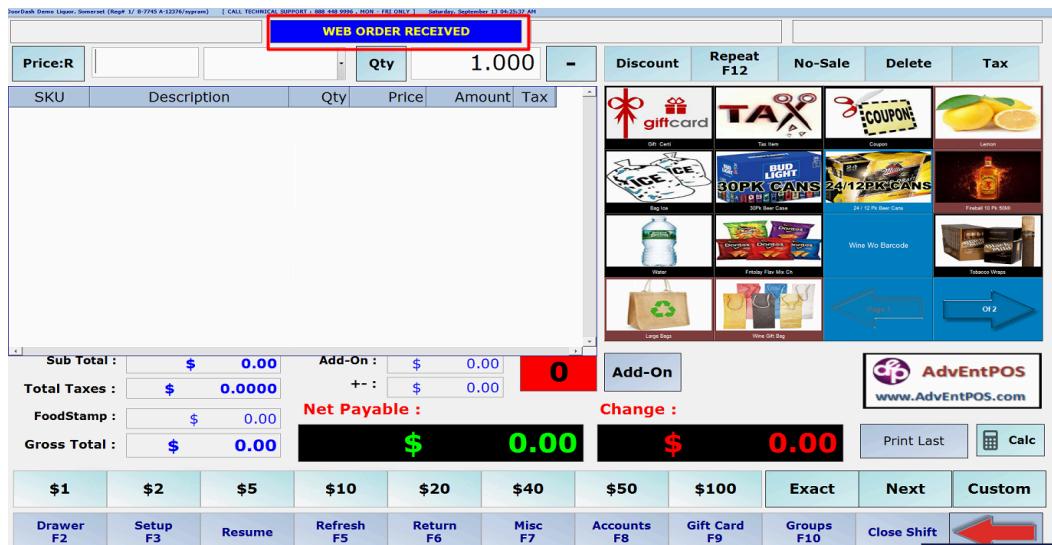
- **Check Inventory and Confirm Order:**
  - The merchant must manually confirm the order via **Web Order > Change Status**. In this case, Orders will be automatically cancelled if not confirmed within 3-8 minutes.
  - On the DoorDash Portal, the status remains **Received** until the merchant confirms.
- **Auto Confirm Order:**
  - Orders are confirmed automatically without manual intervention.
  - The status in the DoorDash Portal updates automatically from **Received > Confirmed**.



# Order Workflow in POS9:

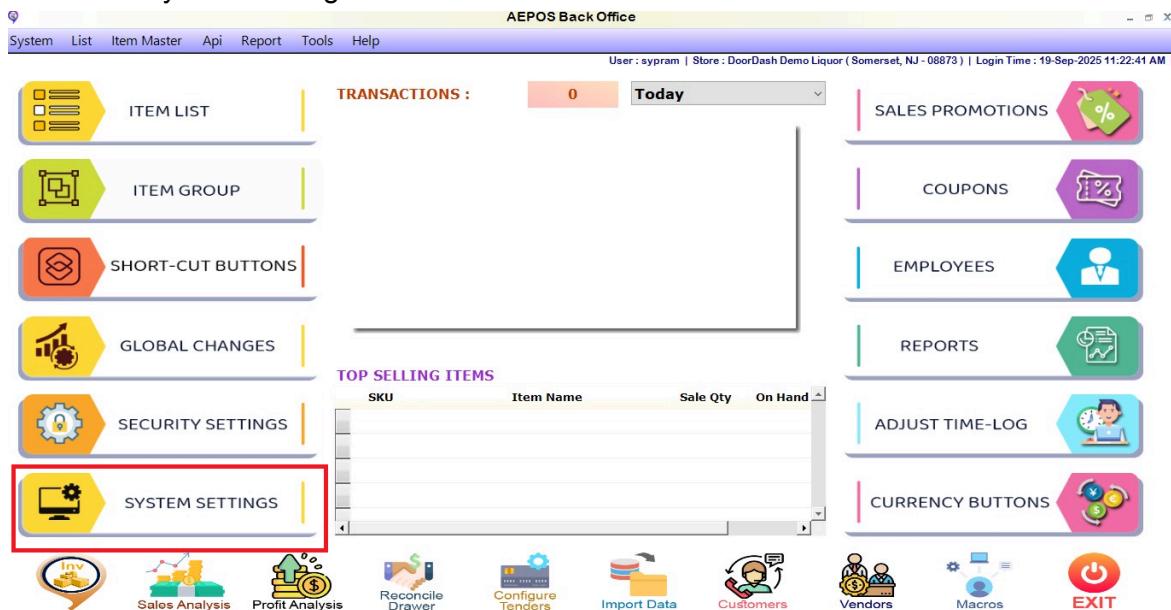
## Order Notification:

- When an order is received, the POS9 register displays “Web Order Received”.
- If voice alerts are enabled, an audio notification will also play.

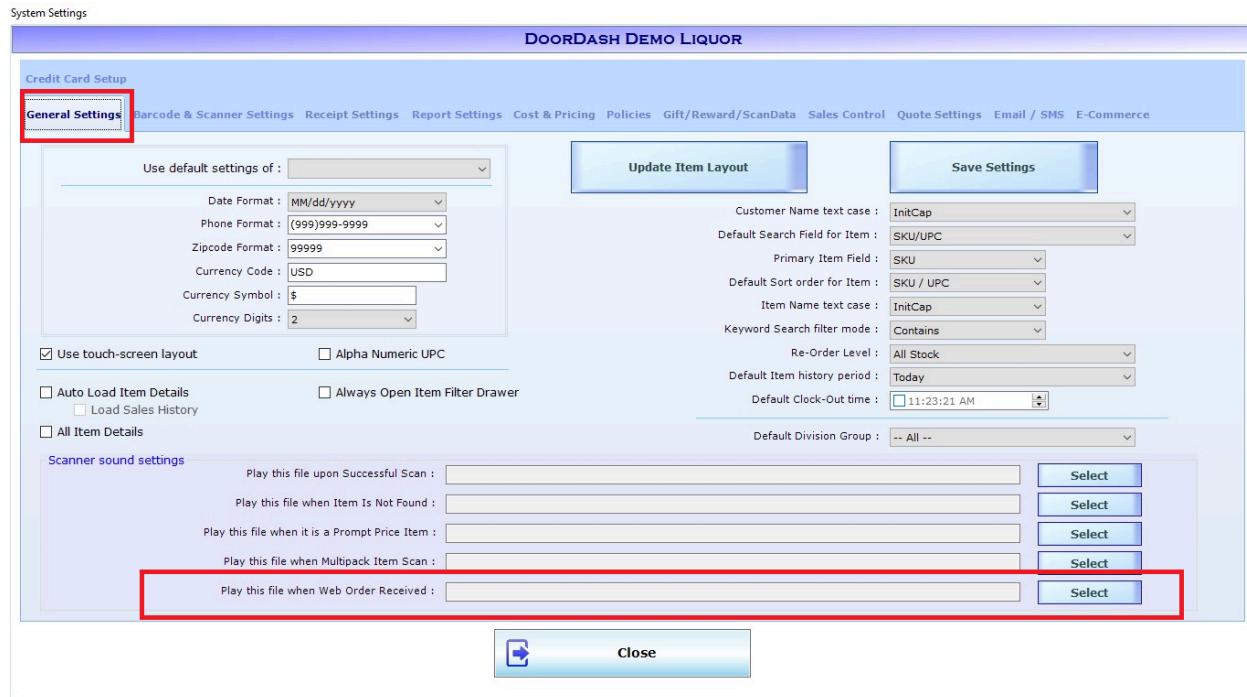


## Set audio for WebOrder notifications

- Open POS Admin Module.
- Go to System Settings as shown below

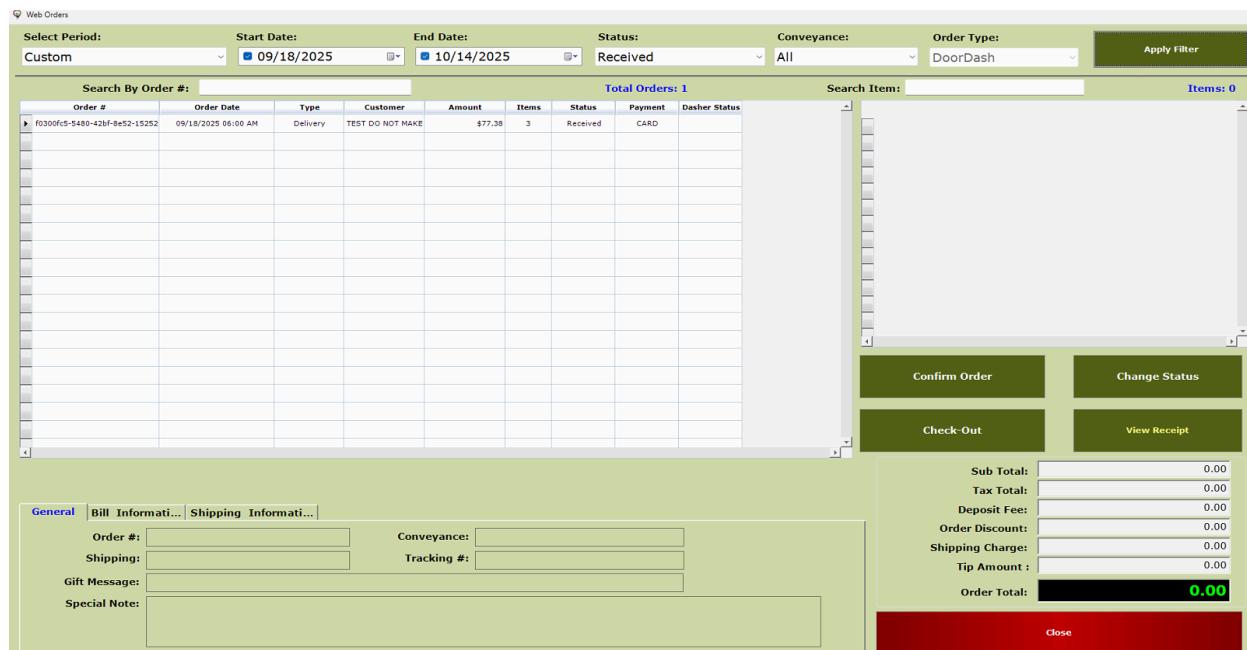


- In System Settings > General Settings (tab) > Scanner sound settings (section) > Select the audio file for 'Play this file when Web Order Received'. The exact location is highlighted in the image below.



## Accessing Orders

- Navigate to the **Web Order** module in **POS9 > Misc > Online Orders (Tab) > DoorDash > Web Orders**.
- The received order is displayed in the order list.



The order will be received in the DoorDash portal under the “order” section. Where users can view active, previous, and scheduled orders.

## Order Status Workflow:

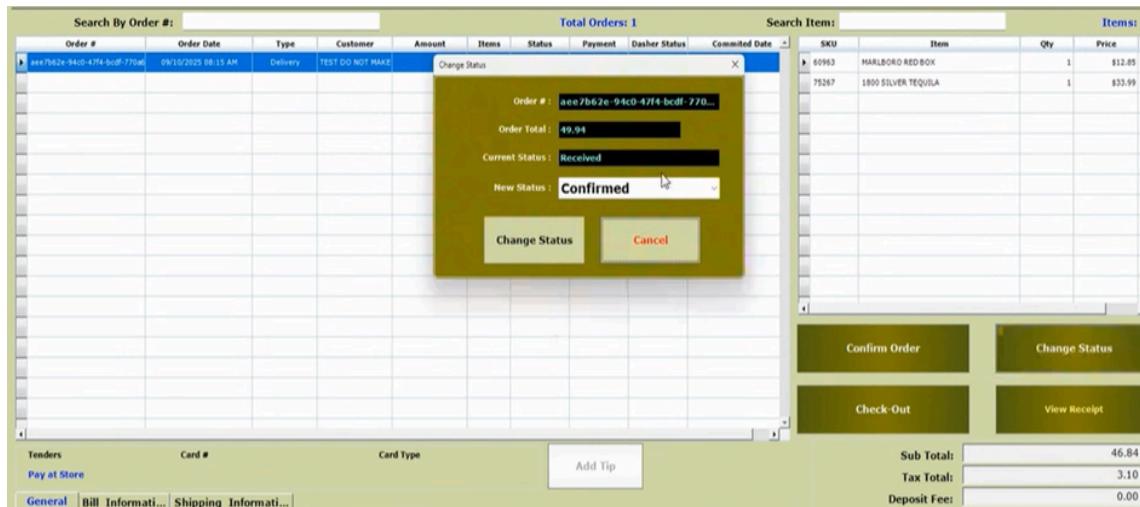
### Changing Order Status:

#### Step 1: Order Received

- When an order is placed through DoorDash, it appears in POS9 under Web Order with the status **Received**.
- A notification “Web Order Received” is displayed on the POS register, and if enabled, a voice alert is triggered.
- The order is reflected in the DoorDash portal with the status ‘**Received**’.

#### Step 2: Order Confirmed

- If the policy is set to ‘Check Inventory and Confirm Order,’ the merchant must manually confirm the order by selecting ‘Change Status’ to ‘**Confirmed**.’ In this case, Orders will be automatically cancelled if not confirmed within 3-8 minutes.
- If the policy is set to ‘Auto Confirm,’ the system will automatically update the order status to ‘**Confirmed**.’
- The updated status will be reflected in the DoorDash Portal under the Order section.



Once the order status changes to ‘Confirmed,’ the ‘Edit Order’ button will be enabled. Using this button, the merchant can update the order by modifying the quantity, deleting items, or substituting items.

### Step 3: Updating order (Manual Change)

From the 'Edit' button, three operations can be performed.

- **Update Quantity:** To update the quantity of a specific item, the user must first select the item, click the 'Update Quantity' button, and then adjust the quantity as needed.
- **Delete Item:** To delete an item, the user must first select it from the ordered item list. Once selected, clicking 'Delete Item' will remove it from the list.
- **Substitute Item:** To substitute an item, the user must first select the ordered item.
  - Once selected, the 'Items' button will be enabled, allowing the user to choose a substitute item from the item list.
  - After selecting the substitute item and clicking 'Add,' a confirmation prompt will appear: 'Do you want to substitute item X with item Y?'
  - If the user clicks 'Yes,' the substitute item will be added as a new row with the status 'New,' and the original item's status will be updated to 'Substituted (New Item SKU)'.

The screenshot shows the 'Substitute Item' dialog box. At the top, there are fields for 'Scan Item :', 'SKU :', 'Reg. Price : \$ 0.00', 'Qty : 1', and buttons for 'Items', 'Substitute', and 'Close'. Below this is a table of items with columns: SKU, ItemName, Size, Pack, Qty, Price, Total, and Status. The table shows several items, some with blue text indicating changes (e.g., 'Updated', 'Deleted', 'Substituted (50854)'). At the bottom right of the dialog are buttons for 'Update Qty', 'Delete Item', and 'Substitute Item'. On the right side of the dialog, there are summary totals: Sub Total: 50.54, Tax Total: 2.75, TIP Amount: 0.00, and Order Total: 53.29. A large green 'Update Order' button is at the bottom right.

SKU	ItemName	Size	Pack	Qty	Price	Total	Status
50858	VERDI SPUMANTE 750ML Sing	750ML	Single	1	0.90	0.90	
68298	EZ WIDER DOUBLE WIDE EACH	EACH	Single	2	2.36	4.72	Updated
51643	MARLBORO SILVER BOX BOX	BOX	Single	1	14.14	14.14	
51059	SALEM MENTHOL BOX BOX SI	BOX	Single	0	13.93	0.00	Deleted
51636	MARLBORO MENTHOL LITE 10	100'S	Single	1	14.29	14.29	
66506	SMIRNOFF PASSION FRUIT 75	750ML	Single	0	18.70	0.00	Substituted (50854)
50854	NANDO ASTI 750ML Single	750ML	Single	1	16.49	16.49	New

Total Items : 5

- Color notation for modified Items in the Order is as below:
  - Quantity changes are shown in **blue**.
  - Deleted items are shown in **red**.
  - Unchanged items remain in **black**.
  - Substituted items are shown in **green**
  - The order status is updated to **Confirmed\_M**. (On Web order page).

#### **Step 4: Ready for Pickup**

- Once an order is confirmed (manual or auto), the Merchant can change the status to “Ready for Pickup.”
- Once the status is changed to ‘Ready for Pickup,’ the merchant can no longer modify the order status from the POS9 Register (Web Order side).
- This status is also reflected on the DoorDash Portal under the Order section as “Ready”

#### **Step 5: Cancelled**

- Cancelled:** The merchant can cancel the order by providing a reason. The status will then be updated to “Cancelled” in the DoorDash Portal, and on the DoorDash portal, it will also be displayed as “Cancelled”.

