

Order Management

Introduction

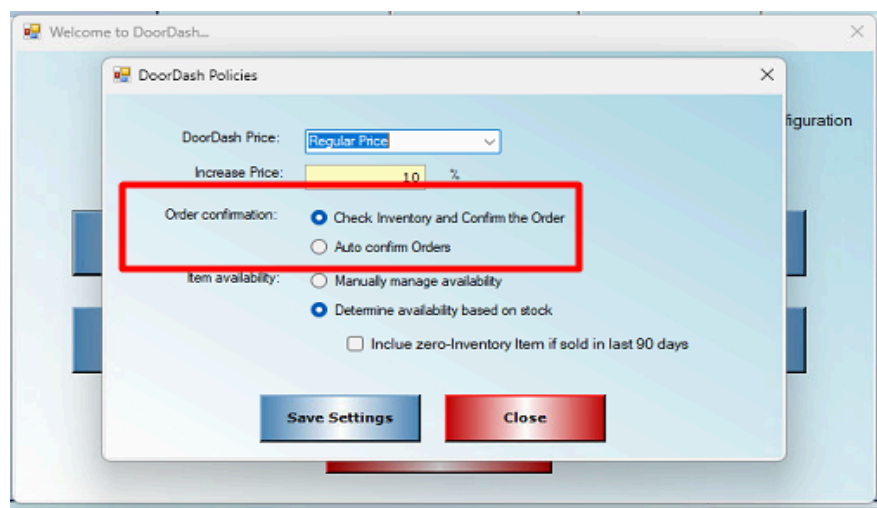
This document describes the Order Management process for the POS9 Register (Web Orders) and DoorDash integration. It covers order confirmation policies, order lifecycle, and system behavior from both the DoorDash Portal and POS9 Web Order.

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.

The screenshot shows the POS9 register interface. At the top, a blue banner displays "WEB ORDER RECEIVED". Below this, the register shows a transaction with a quantity of 1.000. The interface includes a grid of product images on the right, a summary section at the bottom left showing a Sub Total of \$0.00, Total Taxes of \$0.0000, FoodStamp of \$0.00, and Gross Total of \$0.00. The Net Payable is \$0.00, and the Change is \$0.00. The bottom of the screen features a row of function buttons: \$1, \$2, \$5, \$10, \$20, \$40, \$50, \$100, Exact, Next, Custom, Drawer F2, Setup F3, Resume, Refresh F5, Return F6, Misc F7, Accounts F8, Gift Card F9, Groups F10, and Close Shift.

Set audio for WebOrder notifications

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

The screenshot shows the AEPOS Back Office interface. The top menu bar includes System, List, Item Master, Api, Report, Tools, and Help. The main area is divided into several sections: ITEM LIST, ITEM GROUP, SHORT-CUT BUTTONS, GLOBAL CHANGES, SECURITY SETTINGS, and SYSTEM SETTINGS (highlighted with a red box). The SYSTEM SETTINGS section is further divided into sub-sections: TRANSACTIONS (0 Today), SALES PROMOTIONS, COUPONS, EMPLOYEES, REPORTS, ADJUST TIME-LOG, and CURRENCY BUTTONS. The bottom of the screen features a row of icons for various functions: Inv, Sales Analysis, Profit Analysis, Reconcile Drawer, Configure Tenders, Import Data, Customers, Vendors, Macros, and EXIT.

- 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.

System Settings

DOORDASH DEMO LIQUOR

Credit Card Setup

General Settings Barcode & Scanner Settings Receipt Settings Report Settings Cost & Pricing Policies Gift/Reward/ScanData Sales Control Quote Settings Email / SMS E-Commerce

Use default settings of :

Date Format : MM/dd/yyyy

Phone Format : (999)999-9999

Zipcode Format : 99999

Currency Code : USD

Currency Symbol : \$

Currency Digits : 2

☒ Use touch-screen layout ☐ Alpha Numeric UPC

☐ Auto Load Item Details ☐ Load Sales History ☐ Always Open Item Filter Drawer

☐ All Item Details

Scanner sound settings

Play this file upon Successful Scan :

Play this file when Item Is Not Found :

Play this file when it is a Prompt Price Item :

Play this file when Multipack Item Scan :

Play this file when Web Order Received :

Customer Name text case : InitCap

Default Search Field for Item : SKU/UPC

Primary Item Field : SKU

Default Sort order for Item : SKU / UPC

Item Name text case : InitCap

Keyword Search filter mode : Contains

Re-Order Level : All Stock

Default Item history period : Today

Default Clock-Out time : 11:23:21 AM

Default Division Group : -- All --

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.

Web Orders

Select Period: Custom Start Date: 09/18/2025 End Date: 10/14/2025 Status: Received Conveyance: All Order Type: DoorDash Apply Filter

Search By Order #: Total Orders: 1 Search Item: Items: 0

Order #	Order Date	Type	Customer	Amount	Items	Status	Payment	Dasher Status
0300fc5-5480-42bf-8e52-15252	09/18/2025 06:00 AM	Delivery	TEST DO NOT MAKE	\$77.38	3	Received	CARD	

Confirm Order Change Status

Check-Out View Receipt

Sub Total: 0.00
Tax Total: 0.00
Deposit Fee: 0.00
Order Discount: 0.00
Shipping Charge: 0.00
Tip Amount: 0.00
Order Total: 0.00

Close

General Bill Informati... Shipping Informati...

Order #: Conveyance:

Shipping: Tracking #:

Gift Message:

Special Note:

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:

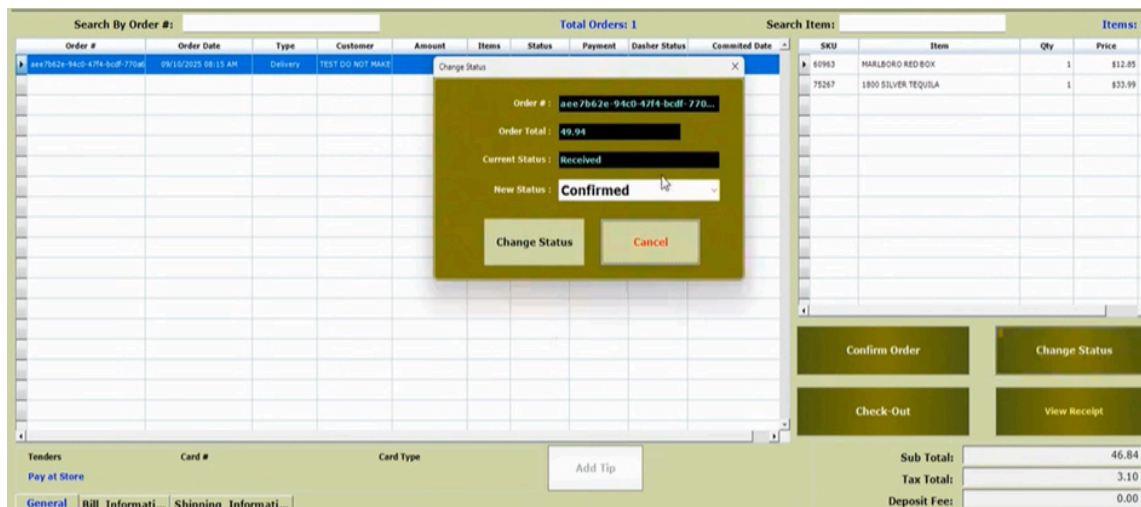
Changing Order Status:

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)'.

Substitute Item

Scan Item :

SKU :

Item Name :

Reg. Price : \$ 0.00

Qty : 1

Buttons: Items, Substitute, Cancel, Close

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 EAC	EACH	Single	2	2.36	4.72	Updated
51643	MARLBORO SILVER BOX BOX	BOX	Single	1	14.14	14.14	
51659	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

Buttons: Update Qty, Delete Item, Substitute Item

Sub Total : 50.54

Tax Total : 2.75

TIP Amount : 0.00

Order Total : 53.29

Update Order

Total Items : 5

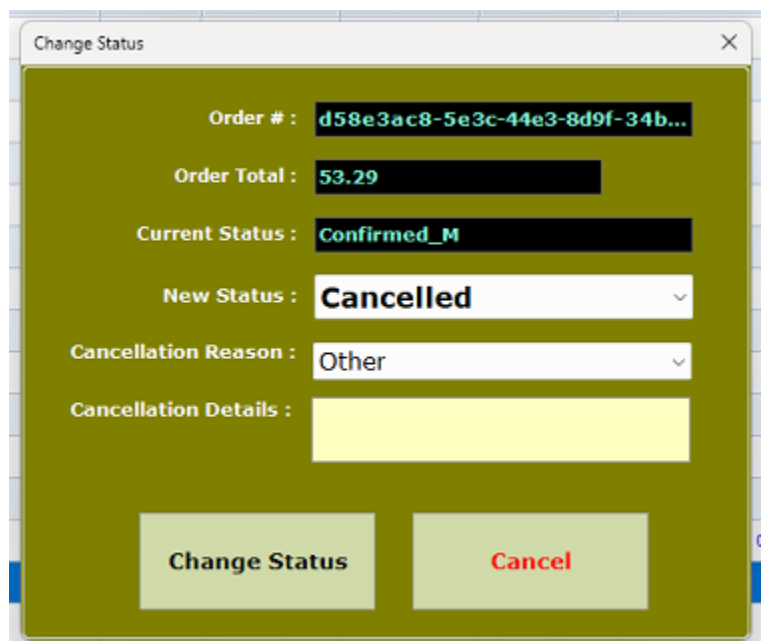
- Color notation for modified Items in the Order is as below:
 - Quantity changes are shown in **blue**.
 - Deleted items are shown in **red**.
 - Unchanged items remain in **black**.
 - Substituted items are shown in **green**
 - The order status is updated to **Confirmed_M**. (On Web order page).

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**”.



The screenshot shows a 'Change Status' dialog box with a dark olive green background. It contains the following fields and options:

- Order # :** d58e3ac8-5e3c-44e3-8d9f-34b...
- Order Total :** 53.29
- Current Status :** Confirmed_M
- New Status :** Cancelled (selected from a dropdown menu)
- Cancellation Reason :** Other (selected from a dropdown menu)
- Cancellation Details :** (empty text field)

At the bottom, there are two buttons: 'Change Status' and 'Cancel'.