Retail Message
Quick Guide

LS Nav 2015 (8.0)

Contents

1   Introduction

The purpose of the Retail Messages functionality is to enable a simple message exchange between Retail people. Retail Messages can contain a request for an Action and when such a message is processed the Action is initiated. Retail Messages are for example used for **Click and Collect** orders to initiate picking and put back.

Message can be sent to different types of recipients like Username or Store. When a message is sent to a store all member of that store will receive the message.

Retail Messages are created and activated at head office. POS's work on HO data by sending and receiving web requests and responses. No data is stored on a POS database.

2   Installation and Setup

Retail Messages is included with the base system and no extra installation is needed.

## 2.1   Retail Message Setup

Retail Messages are identified by a number series. Select **LS Retail > BackOffice > Store Management > Administration > Retail Message Setup**:
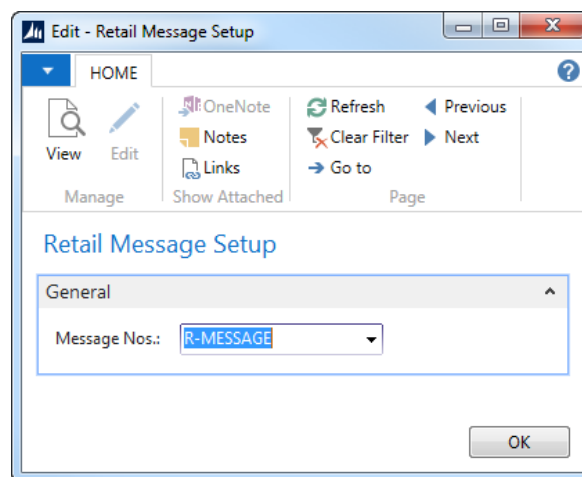

A number series must be created and selected in the **Message Nos.** field. This Nos. will be used as a unique key for **Retail Message Header**.

2.2   Retail Message Recipient Groups

Recipients Groups can be created. These groups can then be selected in the recipients section in the **Retail Message** card for quicker selection of multiple recipients. Select **LS Retail > BackOffice > Store Management > Administration > Retail Message Recipient Groups**:
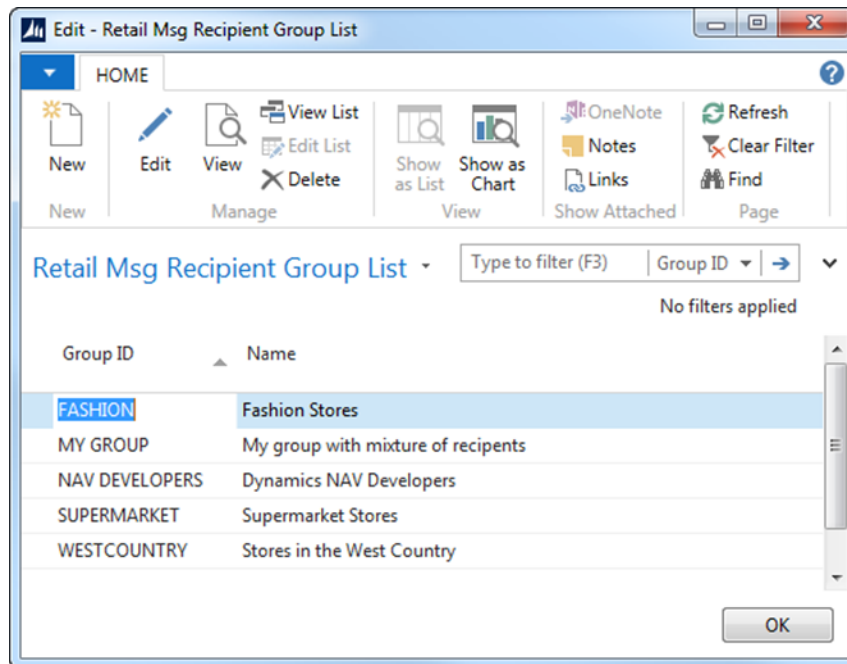
New group can be added directly at the bottom of the list or by pressing the **New** button:
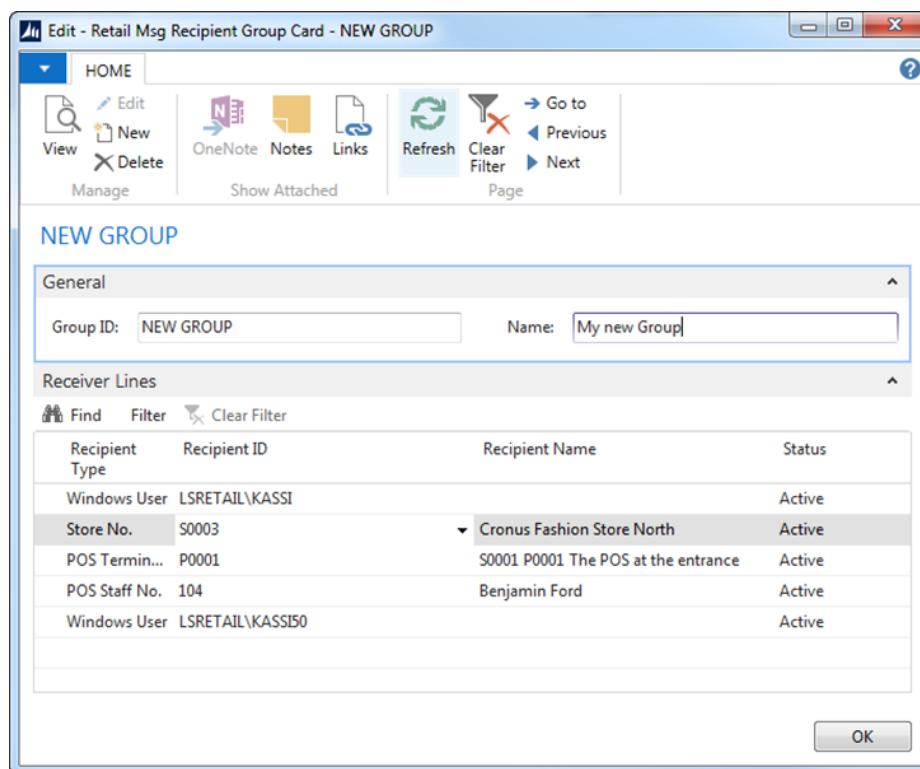

We have four different recipient types in the recipients, Username, Store, Terminal and Staff. When the above group is placed on a message all the recipients will receive the message.

Retail recipients can have status *Active* or *Inactive*. If the status is *Inactive* when a group is exploded (when a **Retail Message** is activated) then the recipient is not made active for the message.

2.3   Retail Message Action Codes

The **Action Code** facility enables the users to create custom actions that can be linked to a **Retail Message**. Select **LS Retail > BackOffice > Store Management > Administration > Retail Message Action Codes**:
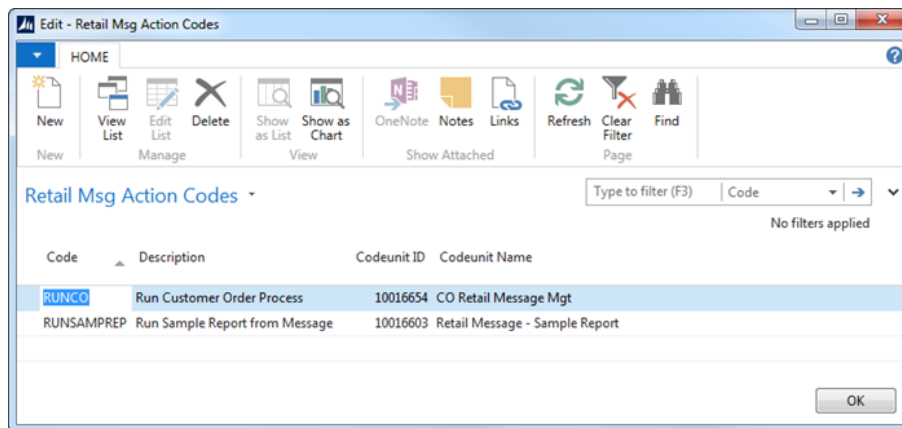

Action Codes are linked to a Codeunit. When a message is processed containing an **Action Code** this codeunit is run and the **Retail Message Header** record should be passed to the codeunit. The general fields in the **Retail Message Header** record can be used to pass parameters to the codeunit.

In the CRONUS LS company there is a sample codeunit that uses information in the **Retail Message** header and runs a specific report. The sample codeunit is here to demonstrate how a custom codeunit, that uses data from the **Retail Message** header, can be written. This codeunit calls a function that prints report *705 Inventory Availability* for items with a number that starts with 10 (filter on Item No. is '10*') and then sets the field **Action Processed (Internal)** to *TRUE*. That will tell the system that the message has been processed and the status of the **Recipient** running it is changed to *Processed by Recipient* and the **Retail Message** will be marked as *Processed*.

2.4   Retail Message POS Commands

Retail Messages uses two panels on the POS (#RETAIL-MSG-LIST and #RETAIL-MSG-DETAILS). To activate the first panel with the **Retail Message Headers** a button's properties must be set as shown below:
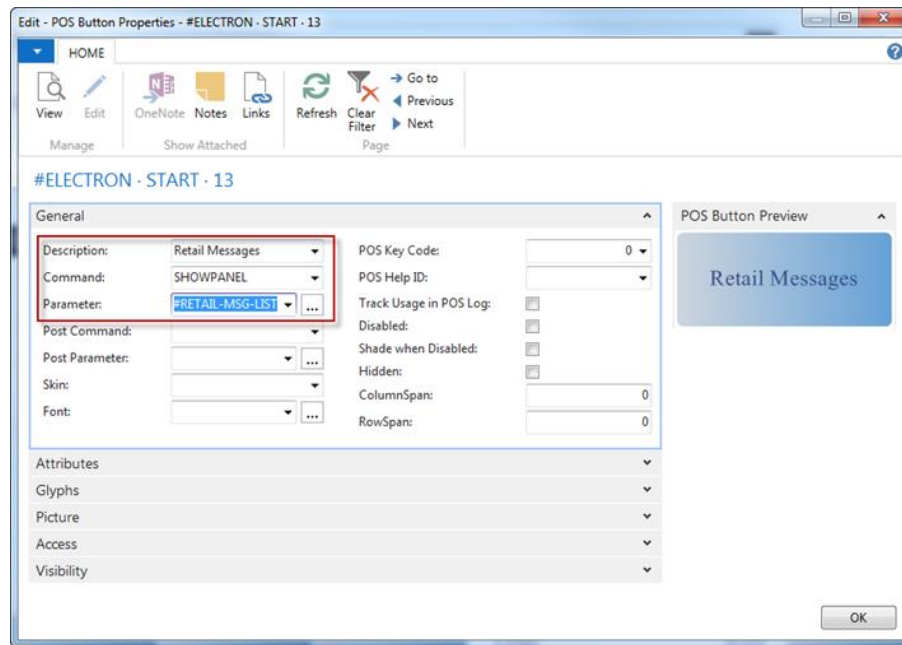
The panel definitions are available in the *LS Cronus demo company*.

2.5   Retail Message Web Requests

The **Retail Message** system uses three Web requests:
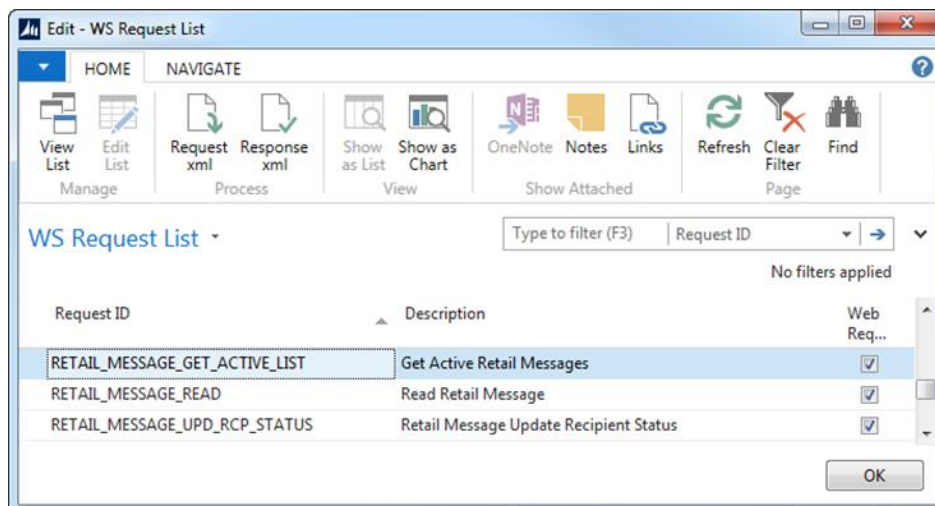
The definitions can be viewed and copied from the *LS Cronus demo company*.

3   Retail Messages

All **Retail Messages** are stored in the Head Office Database. Users can retrieve their active messages by opening a **Retail Message List** on the POS. When the user opens a message the system marks the message as read for that user.
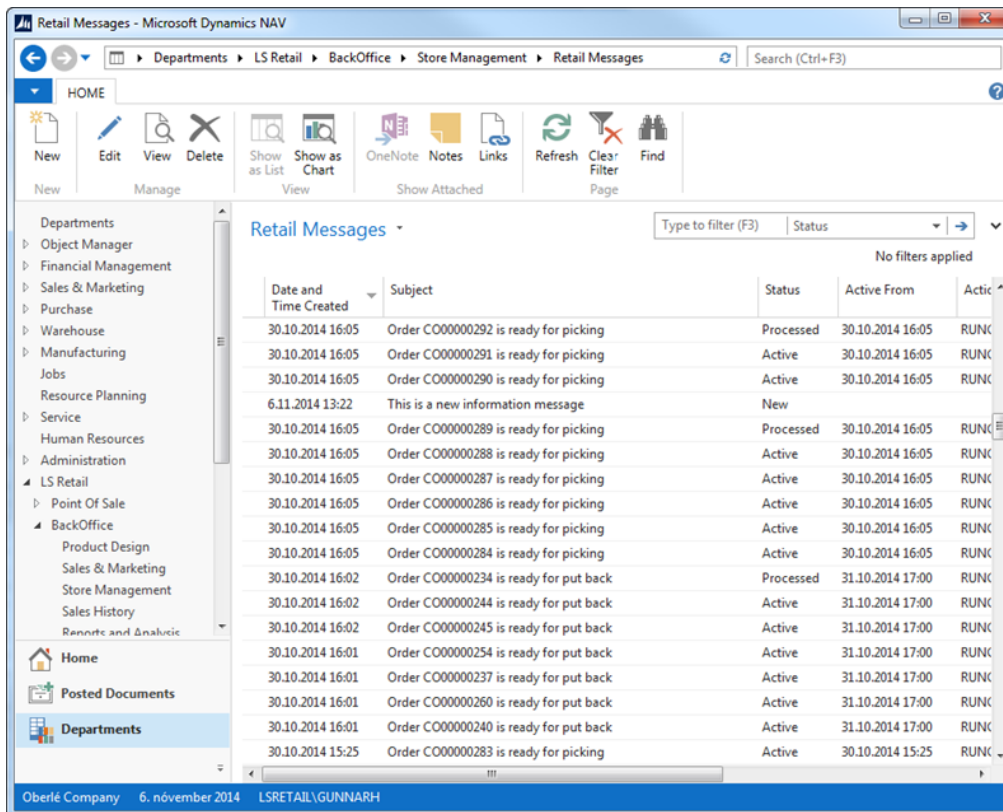
A **Retail Message** can contain a request for an **Action**. If that **Retail Message** has a list of **Recipients** then when the first user processes that message the message is marked as *Processed* and other recipients will not see the message on their list any more. When a user processes an information message or a message that does not contain an action code then the system will only mark that the user has processed its message but not mark the **Retail Message** as *Processed*.

If a message is sent to a Store that has many users then when someone processes that message it is marked as the Store has read the message. That means that other users will never see the message after the first one has processed it. Information messages should therefore always be sent to Windows Users.
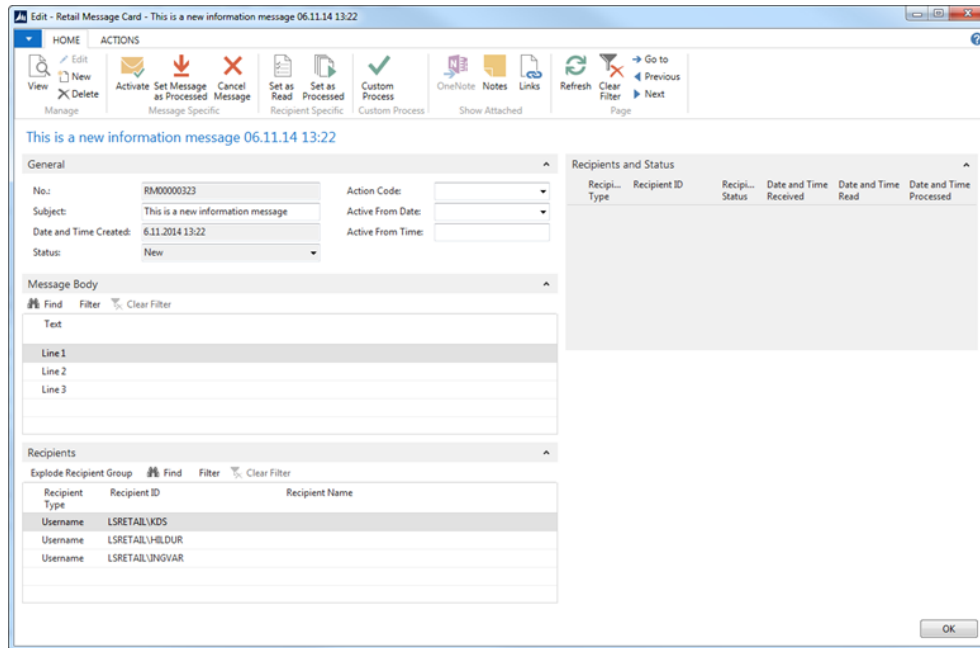
3.1 Create Retail Message

To create a **Retail Message** select **LS Retail > BackOffice > Store Management > Lists > Retail Messages** to get the **Retail Message List**:

From here messages can be edited and new messages can be created:

New message will be given an ID from the Nos. set for **Retail Messages**. The status is *New* until the message is activated. **Subject** must be entered. After the message has been *activated* it is not possible to change it. The **Active From Date** DateTime field can be set in future. In that case the message can be changed until the time has passed.

Action Code can be entered

In the **Message Body** free text lines can be added. When a message is read on POS the lines are displayed.

3.2 Recipients

Recipients are added to Retail Message through the **Recipients** FastTab. **Recipients** are of four types:

- **Username**: User name can be selected from the **User** table.
- **Store**: Store number can be selected from the **Store** table.
- **Terminal**: Pos terminal number can be selected from the **POS Terminal** table.
- **Staff**: Staff ID can be selected from the **Staff** table.
- **Group**: Group ID can be selected from the **Retail Message Recipient Group** table. **Group** can contain all the types above.
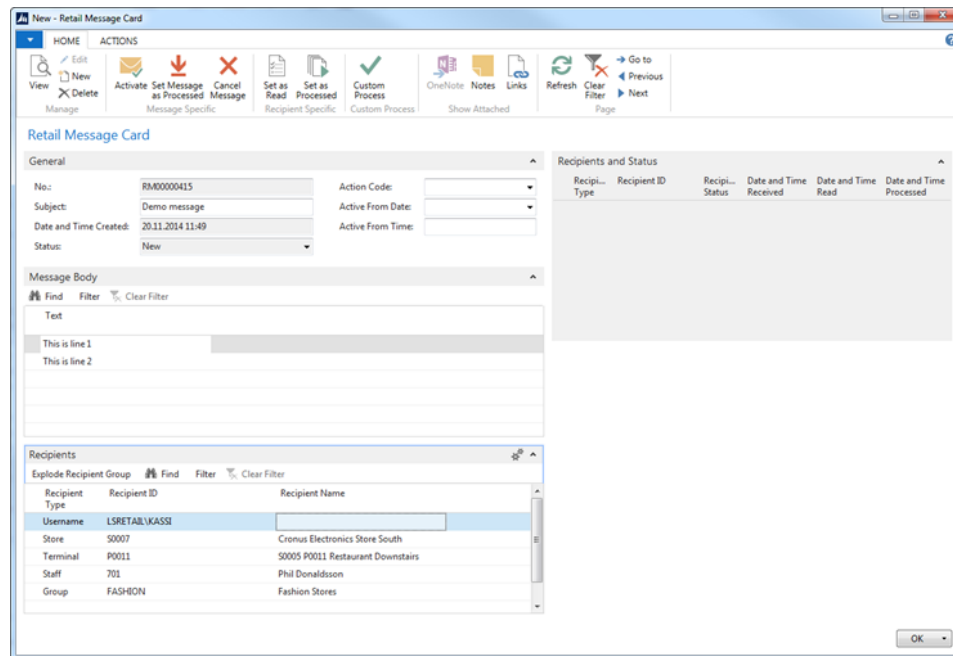
A message addressed to a specific *Username* can only be retrieved on a computer that is logged on to the system with that user's credentials.

A message addressed to a specific POS *Staff ID* can only be retrieved on a POS client that has been logged on by that POS Staff ID.

A message addressed to a specific *Terminal* number can only be retrieved on POS client that is running that POS Terminal number.

A message addressed to a specific *Store Number* can only be retrieved on a POS client that is running in that Store.

When a message is addressed to a *Group* of receivers, the system will explode the group when the message is activated. In the example message below, all information has been entered and the message is ready for activation:

In this case we want to address a specific user, all members of store *S0007*, the user of terminal *P0011*, staff *701* and all members of the group *FASHION*.

The last step is to activate the message. We want the message to be active from *8 o'clock tomorrow*. So we select the date and time and press the **Activate** action:
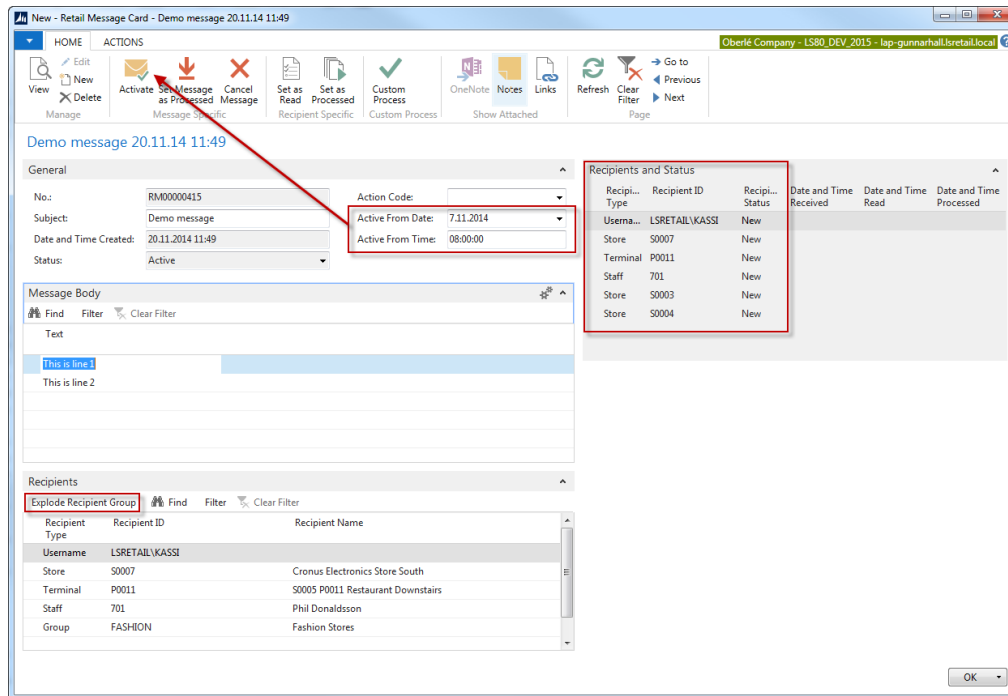
Now the **Recipients** has been exploded and stored in the **Recipients and Status** factbox on the right hand side. Note that it is possible to explode the groups before the message is activated.

Now the system can update the statuses for each recipient when a message is received, read and processed. In the next example, Staff *701* has read the above message on a POS in store *S0007*:

3.3 Actions

The following actions can be run directly from the **Retail Message** card:

Activate	The **Activate** action is used to activate a message. The message gets the status *Active* and if the **Active From** field is empty the current date and time is assigned to the field when the action is pressed. **Recipients** and **Status** lines are created from the **Recipients** lines with the **Recipient Status** *New*.
Set Message as Processed	This action is used to set the status of the current message to *Processed*.
Cancel Message	This action is used to set the status of the current message to *Canceled*.
Set as Read	This action can be used to set the recipient status to *Read* by Recipient. This will only mark the **Recipient** and **Status** line for the current logged in user. This action will not change the recipient status for other recipients.
Set as Processed	This action can be used to set the recipient status to *Processed* by Recipient. This will only mark the **Recipient** and **Status** line for the current logged in user. This action will not change the recipient status for other recipients.

If a message contains an **Action Code** the action can be run directly from the **Retail Message** card by pressing the **Custom Process Action**.
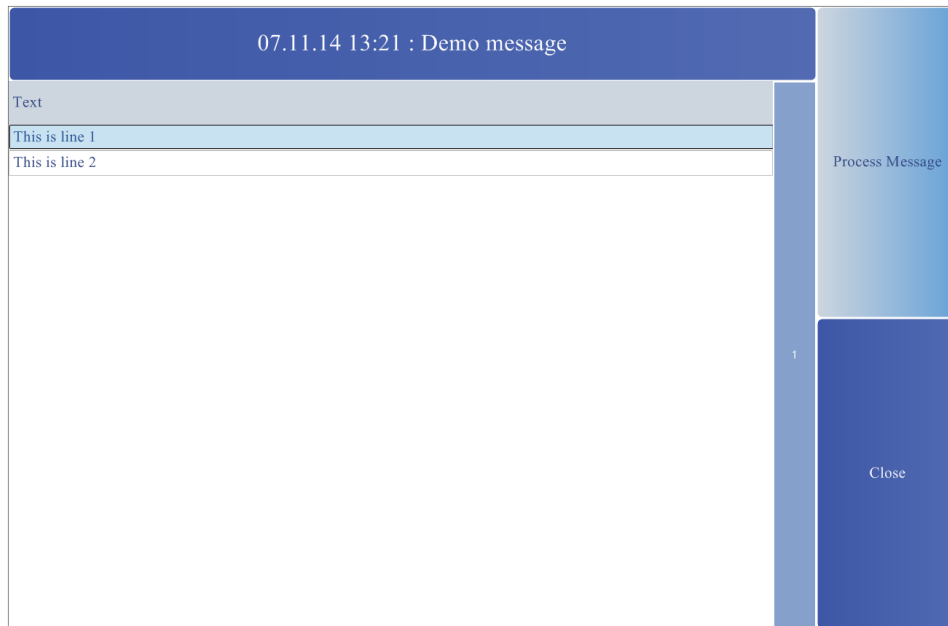
4   Active Retail Messages on POS

When the **Retail Message** button on POS is pressed (see how to setup in setup chapter) a list of active **Retail Messages** for the POS user is retrieved and displayed:

Retail Messages			
Activated	**Subject**	**Recipient Status**	
07.11.14 17:00	Order CO00000315 is ready for put back		Read Message
07.11.14 17:00	Order CO00000320 is ready for put back		1
07.11.14 17:00	Order CO00000334 is ready for put back		
07.11.14 17:00	Order CO00000354 is ready for put back		
07.11.14 17:00	Order CO00000331 is ready for put back		Process Message
07.11.14 17:00	Order CO00000356 is ready for put back		
07.11.14 17:00	Order CO00000343 is ready for put back		2
07.11.14 17:00	Order CO00000342 is ready for put back		
07.11.14 17:00	Order CO00000357 is ready for put back		
07.11.14 17:00	Order CO00000339 is ready for put back		
07.11.14 17:00	Order CO00000336 is ready for put back		Refresh
07.11.14 17:00	Order CO00000309 is ready for put back		3
07.11.14 17:00	Order CO00000328 is ready for put back		
07.11.14 17:00	Order CO00000351 is ready for put back		
07.11.14 13:21	Demo message	Read by Recipient	
06.11.14 13:24	Order CO00000363 is ready for picking		
06.11.14 13:24	Order CO00000362 is ready for picking		Exit
06.11.14 13:24	Order CO00000361 is ready for picking		4
06.11.14 13:24	Order CO00000360 is ready for picking	Read by Recipient	
06.11.14 13:24	Order CO00000359 is ready for picking	Read by Recipient	

The messages are in descending order or the newest first. The order can be changed to ascending by pressing the **Activated** column header.

Message details can be read by selecting it on the list and then press **Read Message** button:

Here it is possible to continue and press the **Process Message** button. If the message contains an **Action Code** the corresponding codeunit is called. If the codeunit returns successfully the **Recipients Status** is set to *Processed* by **Recipient** and the **Retail Message** is marked as *Processed*. On the other hand if the message does not contain an **Action Code** then only the **Recipient** is marked as *Processed* by **Recipient** but the status of the **Retail Message** is not changed.

The message can be processed directly from the first panel. Then the **Recipient** lines will be marked as read and processed.

When a message is processed successfully it is removed from the list but the list is not refreshed. That means that if new messages exist (since the window was loaded) they will not be added to the list unless the **Refresh** button is pressed.