

TrueCommerce™ Nexternal

Connect. Integrate. Accelerate.

TrueCommerce Engage User Guide

Revision 1

5/21/18





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Getting Started

Complete the following procedures to use the Engage application:

First, ensure that the user's iPad is operating on iOS9 or newer. We recommend being on the latest OS unless it has only been out for a few days or less.

1. **Download the App from the Apple App Store.** Ensure the App is downloaded on to the iPad(s) on which you will be using Engage. Download here:
<https://itunes.apple.com/us/app/truecommerce-engage/id1042044171?mt=8>
2. **Activate a License.**
 - a. Log in to your Order Management System ("OMS") and navigate to **Settings**. Scroll down and click **Edit** next to **Engage**. (You do not need to do this on your iPad, but you can if you wish)
 - b. Click the 5-day free trial box if you are just trying it, or if you are beyond the free trial or wish to activate Engage, select the **Use Engage** box. If you are already using Engage, the button will read "Activate Additional iPad").
 - c. Agree to the terms and complete the fields in the dialog box. The *Description* field should be populated with a unique description to identify a particular iPad, especially if using multiple iPads (e.g., Tasting Room or Bob Smith's iPad).
 - d. When the dialog box closes an *Activation Code* will appear. Enter that Activation Code on the iPad. Note, a separate activation code will be required for every iPad.
 - e. Once activated, the registration code in the OMS should say "In Use".
3. **Add Users for the App.** A user record is needed in the OMS for all users who will be accessing the Engage App. There is no additional charge for multiple users on the same iPad license. (Charges apply for additional iPads, not additional users on any single iPad.) We recommend that you create a unique username for each user, for increased security and reporting by user.
 - a. While still in the OMS, navigate to the *Users* section.
 - b. Select the **Pencil** icon to edit an existing user record (or create a new record for a new user.)

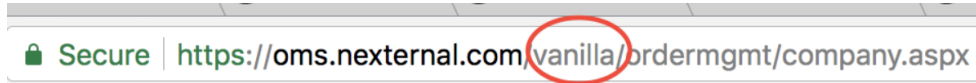
At the bottom of the record, in the Engage Access box, select an access level. (Read the ? *Tool Tip* to guide your selection.) (We suggest Manager for the free trial, to see full discounting functionality.)
 - c. In the Engage Four-Digit Pin field, create a unique pin for that user. Be sure to remember this pin, as it cannot be displayed again. All pins must be unique.
 - d. Retype the pin in the *Re-type* field, and Click Finish

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4. Connect the Nexternal Account to the App.

- a. On the iPad select the blue *Engage* icon to open the App.
- b. Click **Add** and carefully add your exact Nexternal Account Name (which may be different than the name of your business). If the name is incorrect, the license will not work. (Your exact Nexternal account name can be found in the OMS at **Settings | General Information**, or in the URL of your OMS)



- c. Select the location at which the iPad/Engage is being used (there will be more than one option if you have created multiple pickup locations in your OMS).
- d. Select user and enter that user's private pin.

5. Connect the Payment Gateway.

- a. After logging in to the App, click the hamburger menu (horizontal 3 bars) in the top left corner of the screen.
- b. Select **Processing**.
- c. Follow the steps to connect the Payment Gateway account.

6. Connect the Hardware.

- a. Credit Card Processing Hardware
 - i. If you are using Square for payment processing, the free Square dongle-style credit card reader can simply be plugged in to the headphone jack. If for some reason it does not work, select the iPad main **Settings** icon (it resembles a gear). Find the blue **Engage** App icon and make sure it has access to the headphone jack. You may also use Square's bluetooth contactless card and chip reader (<https://squareup.com/contactless-chip-reader>). There is a charge for it but Square provides processing credits equal to the price of the reader (so it's a wash).
 - ii. If you are using Bridgepay for payment processing, follow the instructions provided with the Bridgepay iCMP device to connect the device via Bluetooth. These instructions can be downloaded from the Training Center in your OMS.
- b. Follow the instructions provided with the barcode reader, cash drawer or receipt printer to connect those devices. Optional hardware suggestions can be found below in this guide.

IMPORTANT



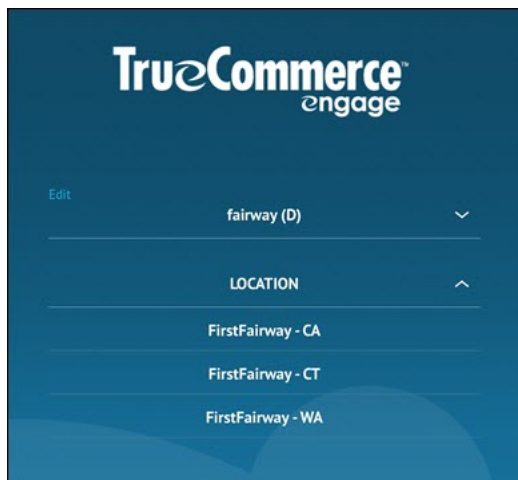
Important Note! Even if you have chosen a free trial, note that the **Engage** App is immediately connected to your live Nexternal Order Management system. Therefore, orders that you create, charges to credit cards, emails that you send, etc. are all live and will show up in the OMS. Remember to refund and cancel any test orders.

We also recommend that throughout your use of Engage, you immediately update your version of Engage when a new version is available in the app store. You should be able to configure your app for automatic updates.


Setting up Products and Categories

Engage shares your existing Nexternal OMS database. All of the categories should flow in to Engage automatically upon opening the App. All products in the OMS that are eligible for pickup (at the location for which you are logging in to Engage) will also automatically appear in Engage. Products that are not eligible for pickup at the location for which you are logging into Engage, will NOT show up in the All Products listing in Engage, but can be found with a search.

OMS Product Edit Screen with Pickup Location Settings



Engage Login Screen with Location Options

NOTE  Remember that if a product is eligible for pickup in your OMS, your online shoppers can place pickup orders for the product. If you wish to prevent online store shoppers from being able to place orders for pickup, you can download instructions from the Training Center in your OMS regarding How to Hide Pickup in your Online Store.

Placing Orders

Carry-out Orders

To add an item to the Engage shopping cart, click on an **Add to Cart** button. If you prefer to go to a product detail screen to see additional details about the product, such as description, inventory (if in use), etc., just click on the item. See the discounting section below to learn about discounts that can be applied by Managers on this product detail screen before adding to cart.

To check out, click the cart icon in the upper right corner of the screen. This will take you to the shopping cart summary, where the contents of the cart will be displayed. Next, select the blue **Checkout** button at the bottom of the screen.

A brief summary of charges is displayed on the Order Review screen, as well as available payment methods (as configured in the Nexternal OMS in **Settings | Engage | Payment Options**). Select a payment method and follow the prompts to check out.

Once the order has been submitted, a Receipt screen will display where you have the option to email the customer or print a hard copy of the receipt (if a printer is connected to the App).

Ship Orders

By default, the App assumes that an order is being placed for pickup. To place an order to ship, identify a customer and select from the customer's saved shipping addresses or add a new address. If the customer is not yet in the database you will first have to create the customer, including their billing and shipping addresses, and then identify them for the order. *Before* adding an item to the cart, a shipping destination can be selected on the Product Detail screen or Product List screen by selecting from the Shipping Destinations menu. Items that have been added to the cart without first designating a shipping address may be associated with a shipping address later by editing the line item and selecting from the Shipping Destinations menu within the Line Item Detail screen.

The available shipping options and prices are configured in the OMS in **Settings | Shipping**.

Navigation

By default, upon login the All Products screen will be displayed. If you prefer to display a different category, select the hamburger menu in the upper left corner and select **Categories**. Select the preferred category.

NOTE



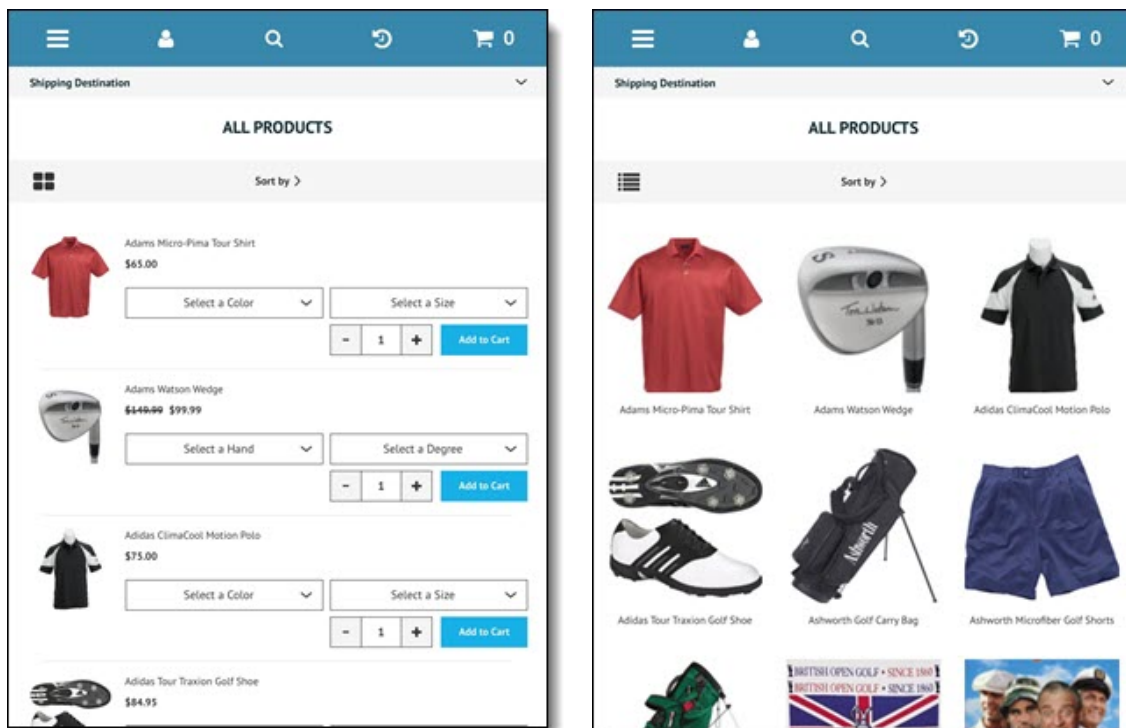
For a tasting room or other retail setting where you may be offering only a select number of products for sale on any given day, we suggest that you set up a Retail or Tasting Room Category with Internal Visibility, put only the products for sale in the retail room in this category, and order the products within this category in a manner that makes sense for you. This will not affect your online store but will make check out easier in the retail room.

Tile vs List Display Mode

There are two display modes that may appear when you log in to Engage to view a list of your products.

In List Mode (shown below on the left), all products will be displayed in a vertical list with Quantity options, Add to Cart buttons, and Dropdown menus (where product options/attributes) exist). For most businesses, this is the fastest mode of operation.

To switch the display to Tile Display Mode (shown below on the right), click the cube shaped icon on the left near the top of the screen. Product icons are slightly larger in this mode, but you may be able to fit more items on to the screen at once. There are no Add to Cart buttons on this screen so you must click on a product to see additional details, select options, or add the item to the cart.



Product Search

For quick navigation between products, use Product Search. To initiate a product search, select the **Search** icon (spyglass) at the top center of the screen. In the box provided, enter a descriptor, such as the Product Name, SKU, Product Number, Brand, Product Customer Field values, etc. A partial entry can generate results. As soon as you begin typing, the system will start searching for potential matches. Select the preferred result.

Identifying a Customer

There are multiple reasons why you may want to identify an existing customer. Before an order is being placed, you may simply want to know who the customer is and what their statistics are. As an order is being placed, you might want to identify the customer to ensure that you keep accurate purchase history records by customer, and/or you may want to ensure that Engage automatically applies a club or other customer or customer-type discount to the order. Or it may be a ship order for which you are required to identify the customer.

To identify a customer, select the Person icon at the top of the screen.



In the spaces provided, search for a customer by Name, Address, Phone Number, Customer Number, Customer Custom Field values, etc. A partial entry can generate results. As soon as you begin typing, the system will start searching for potential matches. Select the preferred result.

When the customer record opens, the Customer Type, Key Metrics, Order History, Activities, Destinations and Contact Information for the selected customer will be displayed. To select the customer for placing an order, click the **X** at the top right side of the screen to close the record. If you wish to select a different customer, click the **Clear Customer & Return to Results** link (next to the X).

Creating a New Customer

Similarly, to keep purchase history records by customer, or to set up a shipping order, you will want to create a new customer if the person doesn't already exist in the database, instead of ringing it through with no customer identification. You may also want to create a new customer record, if the customer doesn't already exist in the database, for the sole purpose of collecting that customer data for future marketing.

To create a new customer, select the Person icon at the top of the screen.



Fill in the required fields. For speed, only First Name, Last Name, Email, and Phone number are required in order to create the customer record quickly and retain valuable contact information for future marketing. If you fill in only those few required fields, the address information required for a complete Nexternal customer record is auto-populated in the OMS with the address of the pickup location in use when the record is created. If you are going to ring up a shipping order or otherwise prefer to fill out the record more completely, select the **Show Address** button and fill in those fields as well. Click **Save** when finished. The dummy address data that will be inserted in the customer record is pulled from the location (i.e. if logged in to the Connecticut location, the customer's data will be pulled from the OMS Connecticut location in **Settings | Site Options | Pickup Locations**).

Tax

The Engage App follows the taxation rules configured in the OMS in **Settings | Tax**. Product by Product taxation eligibility is also controlled in the OMS on each product.

Discounts and Pricing

Until a customer is identified, Engage will display the default pricing for the default Engage customer type (as indicated in the OMS under **Customers | Types**).

	Type Name	Rank	Price Label	Company Field	Loyalty Ratio (%)	BtoB	Club	Tax	Engage	Default	Delete
(Existing) Customer Type #1:	Consumer	1	Our Price	Business Required ▾		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
(Existing) Customer Type #2:	Club Member	5		Business Required ▾	1.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The default customer type for your online store does not need to match the default Engage customer type. This setting allows for different pricing for online and in-person shoppers.

When a customer is identified, the pricing for his or her customer type will be displayed on both the list and detail views. When an item is added to the cart, the difference between the default pricing and the pricing for that customer type is displayed as a Seller Discount.

Cart			
In-Store Pickup			
1	2010 Surfside Petit Sirah		\$28.00
	(Seller Discount \$5.60)		\$22.40

Users with Manager-level access (as defined in the OMS **Users | (select record) | Engage Access**) have the ability to give additional discounts to shoppers. Discounts can be applied on the product level or on the order level. Discounts applied at the product level appear in the cart as Cashier Discounts.

Cart			
In-Store Pickup			
1	Arthur's Black IPA (22 oz Bomber) - Case		\$47.99
	(Cashier Discount \$5.00)		\$42.99

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To apply a Cashier Discount to a product, navigate to the product detail view. If the user has Manager-level access, he or she will be able to enter a discount in the box below the price as a dollar amount or a percentage.

Line Item Detail

2011 Surfside Cabernet Sauvignon » 750ml

ORIGINAL PRICE
\$85.00

CURRENT PRICE
\$75.00

Inventory 1000

ENTER ITEM DISCOUNT

10.00

\$ %

ITEM DISCOUNT
\$10.00 | 11.76%

To apply a Cashier Discount to an order, navigate to the cart. If the user has Manager-level access, he or she will be able to enter a discount in the box below the order line items as a dollar amount or a percentage. The discount will appear in the cart calculations as Order Discount.

Cart

Tap Here to Scan Barcodes

In-Store Pickup

1 Ashworth Golf Carry Bag \$179.99

ENTER ORDER DISCOUNT

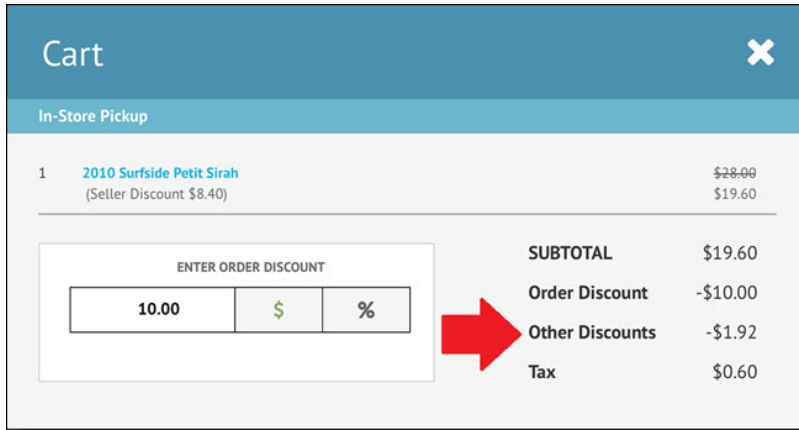
20.00 \$ %

SUBTOTAL \$179.99

Order Discount -\$20.00

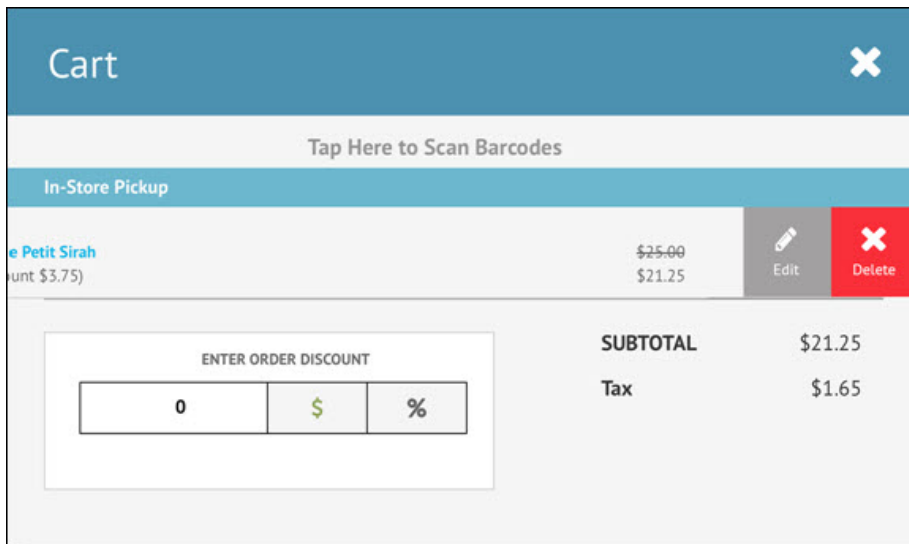
Tax \$10.16

If there are additional discounts set up in the Order Management System, such as category discounts or discounts on individual customer records, these will flow in to the Additional Discounts bucket in the cart.



Editing the Cart

Items in the cart can be deleted by pressing on the item, holding down and carefully swiping it slightly to the left. Select the red **Delete X**.



To edit an item in the cart, swipe left (as above) and select **Edit**, or click on the item and you will be taken to its Line Item Detail screen. You may adjust quantity, edit a discount, identify a customer, change shipping destination, or edit an attribute selection on the Line Item Detail screen. To save any changes, select the **Save** button to be returned to the cart.

Barcoding

Compatible Barcode Scanners

The following two barcode scanners have been tested and validated by our development team. However, any Bluetooth-enabled laser scanner that works with an iPad should work with the Engage App.

Socket Mobile CX2885-1484 CHS 7Ci Barcode scanner.

https://www.amazon.com/Socket-Mobile-CX2885-1484-Red-Antimicrobial-Batteries/dp/B00PB1RUDI/ref=sr_1_7?ie=UTF8&qid=1498158461&sr=8-7&keywords=socket+mobile+chs+7ci

Esky ES016 2.4G Wireless 1D Barcode Scanner with USB Wired Mode and Bluetooth Mode

https://www.amazon.com/gp/product/B01ISJZ4I2/ref=oh_aui_detailpage_o00_s00?ie=UTF8&psc=1

Preparation

The barcode scanner will scan the code and look for a match in two Nexternal OMS fields: UPC or MPN (Manufacturer Part Number). Therefore, the numeric or alphanumeric code must exist in one of those Nexternal OMS fields on the product. These values can be entered one by one or via your product import spreadsheet. They are found under **Products | Marketplace Options**. UPC codes are always numeric and thus the UPC field only accepts numbers. The MPN field accepts alphanumeric values. Symbols, dashes, etc. cannot be used.

How to Operate

To scan a barcode, click on the shopping cart icon, then click on the text "Tap here to scan barcode" at the top of the page. Follow the barcode scanner instructions to scan the barcode. (If using the Socket Mobile scanner referenced above, connect the scanner using your thumb, then proceed with scanning.) Once the barcode is scanned and a match is found, the item will be instantly added to the shopping cart. To continue, simply scan the next item. When you are finished scanning, click **OK**. (If using the Socket Mobile scanner, disconnect the scanner with a click of your thumb).

To scan items to go to a shipping destination:

- Select customer
- Select destination
- Click cart – select Tap Here to Scan Barcodes. Use barcode scanner. The products will go into the cart with the destination selected.

On the Socket Mobile barcode scanner, there is a button on the barcode scanner which you can press to get the keyboard to pop back up.

With the Esky scanner, the keyboard does not come up when the scanner is on, and in use. If you come across an item for which the barcode scan doesn't work for some reason, click ok on the barcode scanner popup (to make it close), and click it again to re-open it. It should disconnect temporarily and allow you to use the keyboard in the barcode scan popup again.

Barcode FAQs

Q: What if there is more than one matching SKU to the SKU that was scanned?

A: If you have 2 matching SKUs assigned to two different products, the first product listed in the OMS is the one that gets added to the cart.

Q: What happens if the barcode is scanned for a product which is sold out?

A: Because the cashier has the physical item in hand, the scanner will automatically override the sold out status and continue to add the item to cart. There will not be a change to the product's status in the OMS.

Q: What happens if the barcode is scanned for a product which is discontinued?

A: Because the cashier has the physical item in hand, the scanner will automatically override the discontinued status and continue to add the item to cart. There will not be a change to the product's status in the OMS.

Q: What happens if the barcode is scanned for a product which is on backorder or preorder?

A: The item adds to cart. This is the same behavior as would occur without the scanner.

Reporting

As previously mentioned, Engage shares the database seen in the Nexternal OMS, thus you will find the Reports section in the OMS is still the most valuable place for reporting on all Engage orders. In addition to our standard order tags, each order placed on Engage is tagged with 1) Placed By Engage, and 2) the User who took the order. You may segment your Reports by first using the Advanced Search feature (in **Orders | Advanced Search/Sort | Order Search**), then clicking Reports and selecting Results of Search. Placed By and User are among the search filters available.

Engage orders are included in all OMS reports along with online orders and OMS orders, unless the user filters out the Engage orders from the report.

X Reports, Z Reports and Cash Drawers

X and Z Reports summarize the Engage transactions that are processed on an iPad for a period of time, and are often used as shift and end of day reports for their corresponding Cash Drawers. X and Z Reports are available for each iPad only after a physical or virtual Cash Drawer has been activated and paired to the respective iPad license in your OMS.

The X report is a snapshot of what occurred from the moment the cash drawer was started (beginning of the shift) until the report is run on the iPad. It can be run several times, and at any time during the shift. The Z report is an overview of everything that occurred from the moment the cash drawer was started until the cash drawer was closed (the entire shift), and is the end-of-shift or end-of-day report.

In order to use a cash drawer and the X and Z reporting, the following steps must be taken:

First, you must activate and pair a cash drawer to the iPad with which you wish to use the cash drawer. Activation and pairing is required only once, but each day thereafter you'll need to start a new cash drawer. Typically merchants require that a new cash drawer be started at the beginning of each shift.

To activate and pair a Cash Drawer for an iPad License:

1. Navigate to **Settings | Engage** in the OMS.
2. Click the **Cash Drawer** check box for the corresponding iPad with which you wish to use a cash drawer. Click **finish**.



After activating and pairing the Cash Drawer, you may need to restart Engage by closing and re-opening the application (double tapping the iPad home button and swiping up on the application). You do not need a physical cash drawer to utilize this functionality.

To start a Cash Drawer:

To start a cash drawer, a Manager must log in to Engage on the iPad and select the hamburger menu in the upper left corner. Only Engage Managers, as defined on user records in the Users section of the OMS, have the ability to start a cash drawer, end a cash drawer, adjust in or adjust out cash and view X and Z reports within Engage.

1. Under **Manage Cash Drawer** click **Start Cash Drawer**.
2. Enter the opening amount which represents the cash in the drawer at the beginning of the shift.
3. Click **Save Amount**. You should see a prompt that the Cash Drawer is now ready. Click **OK**.
4. Operate the iPad as usual. At any point during the shift (before the Cash Drawer is closed indicating the end of the shift), a Manager can generate an X Report by clicking the hamburger menu and selecting X Report. The X Report will display all of the transactions by payment method (credit card, cash, check, etc.) since the cash drawer was started.

To end a Cash Drawer:

To end a cash drawer, count the cash in the drawer. Navigate to the hamburger menu and click **End Cash Drawer**. Enter the amount in the drawer at the end of the shift. Click **Save Amount** and close.

Running X and Z Reports:

To run an X or Z Report in Engage, you must be logged in with Manager access level. Click on the hamburger menu in the top left corner, and click on the View X-Report or View Z-Report. Once the cash drawer is ended, the X Report for the shift is no longer available and instead a Z report can be generated.

X and Z Reports are also available in the OMS in **Orders | Reports**, if the logged-in user has access to reporting (as defined by their user access level in the Users section).

Returns & Refunds

Returns and refunds may be made in Engage for orders that were placed in Engage. To process a return and refund in Engage, the cashier may either identify the customer first (as described in [Identifying a Customer](#)) and then select the **Orders** tab, or search for the order number by clicking the **Return** icon at the top of the screen:



Once the order has been identified, click on it to expand the order details and select the **Process a Return** button on the right side of the screen above the line items.

Order #102953 ✕

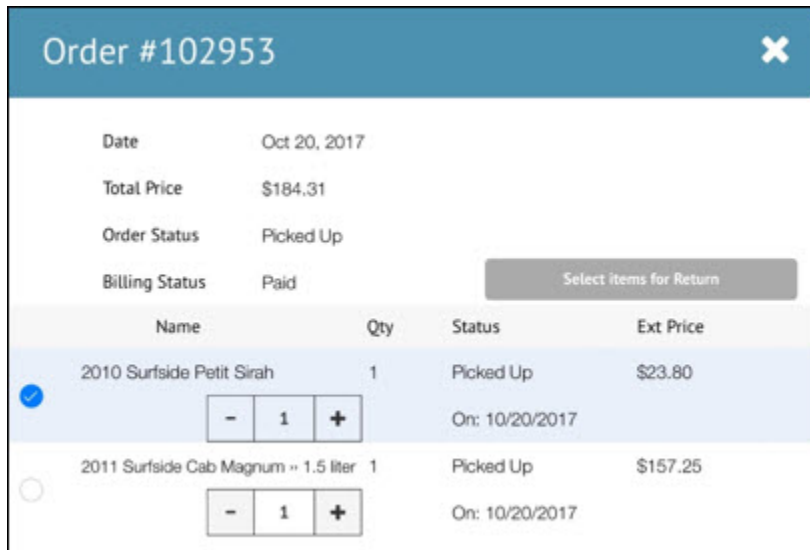
Date	Oct 20, 2017	
Total Price	\$184.31	
Order Status	Picked Up	
Billing Status	Paid	<input type="button" value="Process a Return"/>

Name	Qty	Status	Ext Price
2010 Surfside Petit Sirah	1	Picked Up	\$23.80
<input type="button" value="-"/> <input type="text" value="1"/> <input type="button" value="+"/>		On: 10/20/2017	
2011 Surfside Cab Magnum - 1.5 liter	1	Picked Up	\$157.25
<input type="button" value="-"/> <input type="text" value="1"/> <input type="button" value="+"/>		On: 10/20/2017	

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Next, select the items to return by clicking the circle to the left of the item.



The refund will be calculated as items are selected for return and the calculated amount will be displayed at the bottom of the screen.

If you wish to refund money and return the selected items back into inventory (if you're using inventory), click **Refund & Return Items**. In the OMS, the amount refunded will accurately be recorded on the order within the Credit Card Terminal (button at the bottom of the Order Detail screen in the OMS). The items selected for return will be indicated as Canceled, and the status of the order will be Return-Customer or, if all items in the order are returned, the order status will be Canceled. The billing status of the order will become Refunded-Partial or, if all items in the order are refunded, the billing status will be Canceled.

If you wish to return funds only, select **Refund Only**. If you do this the items will NOT be returned into inventory (if you're using inventory). Line item status will therefore not be affected, and the billing status will reflect Partial Refund.

If you wish to refund a custom amount, then prior to processing the refund, you may override the calculated amount of the refund by clicking into the calculation box at the bottom of the screen. This new custom refund amount will be reflected accurately in the Credit Card Terminal. However, you may need to manually update the order in the OMS to reflect the new order total on the order.

Bar Tabs

To begin a bar tab, click on the person icon at the top of the screen. Select **New Pending Order**. If the customer already exists in the database, you may search for them. Alternatively, assign a nickname to the customer in the box (i.e., green shirt guy), and click save.

Now you may add items to the customer's order as normal. To check out, click the cart icon and proceed as usual.

If you wish to leave the tab and process an order for a different customer, click the nickname icon, and then click Switch Order. Now you may process an order for a different customer, or create a new tab for a different customer.

To return to a customer's tab, click the person icon, then click **Select Pending Order**. A list of tabs should be displayed. Click on the order you wish to modify, or check out.

Splitting a Tab

This functionality is useful when, for example, one person leaves a group early, or when two parties want to split a case of wine (6 bottles each) in a tasting room.

A tab must contain more than one item to be eligible to split. Open the tab (identify the pending order), and select the item(s) you wish to split off into a new order by clicking on them. A checkmark will appear to the right of the item. Next, click Split Pending Order. Enter the name of the new Pending Order in the popup. Click ok, and the item(s) selected will be removed from the original order, as the new Pending Order is created under the new name.

Optional Additional Hardware

Compatible Cash Drawer:

[APG Cash Drawer, LLC: Black 16 x 16 Vasario Series Cash Drawer VB320-BL1616](#)

Thermal Receipt Printer

[Star Micronics, TSP654IIBI-24 GRY US, Thermal Receipt Printer, Bluetooth for iOS, Auto Cutter, External Power Supply Incl.](#)