



B2C IN-STORE

This document contains information about the B2C In-Store functionality in TRIMIT 2017

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INTRODUCTION

The in-store functionality gives possibility for the physical shop assistants to provide help to their customers. The customer assistance can be in form of ordering items, which are no longer available in the shop, searching colors, sizes or suggesting alternatives, additional items or accessories. The in-store functionality is for brand store concept only.

The functionality described is the functionality in **TRIMIT 2017 W1**

The pictures in this White Paper are based on the demo database for **TRIMIT 2017 W1** (based on Microsoft Dynamics NAV 2017) in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. from Microsoft Dynamics NAV 2017).

IN-STORE SETUP

This chapter contains information about the Modelyn (former CPO) and TRIMIT Setups that you need.

DOMAIN SETUP IN MODELYN

It is required to set up a subdomain called “Instore” (e.g. “*instore.trimit.com*”) in the Modelyn admin via the following path **System/Setup/Domains**. It is important to use exactly this name as it is matched in the view file. Then create a new binding in IIS. Read more about domain setup in **Installation Guide for TRIMIT 2017 ConnectPortal Domain Setup**.

INSTORE SETUP IN NAV

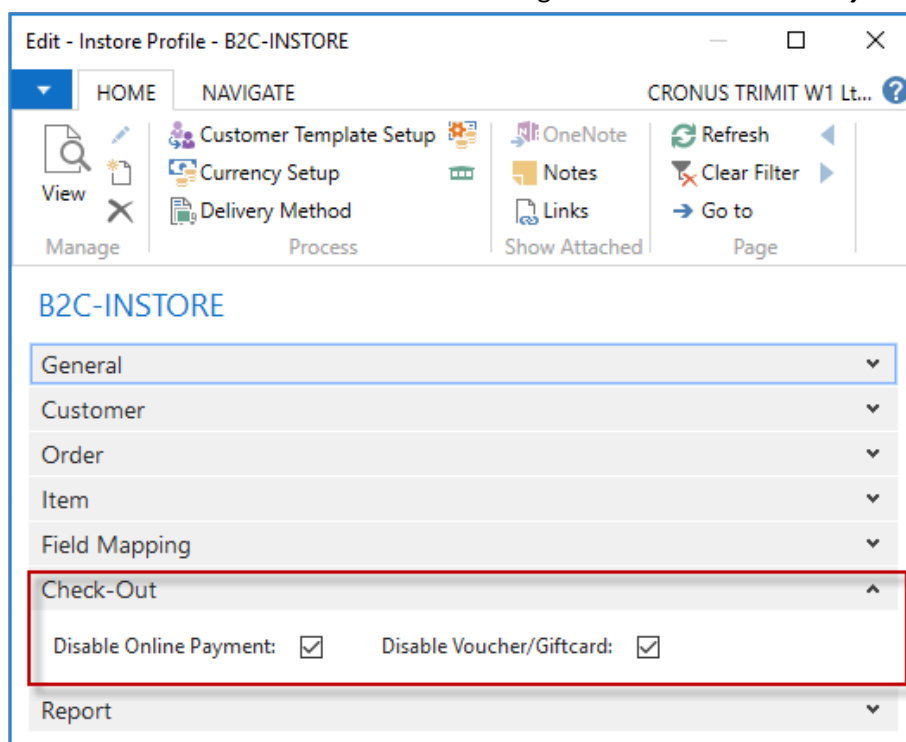
In order to register the in-store shop in NAV - it is needed to create a new customer and provide all required data on the customer page in NAV. Then the instore shop must be added to the store locator list and marked as parcel store – because in this way we enable the pick-up in store option.

IN-STORE PROFILE SETUP

The in-store shop must refer to a portal profile with type **InstoreB2C**. An in-store shop can have a relation to its own specific InstoreB2C profile if it is required. If this is not the case, then one InstoreB2C profile can serve multiple in-store shops. In-store profile can be anonymous and not anonymous. Anonymous profile is used for a landing page when shop assistant first enters the in-store site. This profile is also used for the situations, when a screen is hanging on the wall within a physical shop with open in-store site for personal customer service.

Portal Profiles ▾		
Profile	Type	Description
AGENT	SalesAgent	Sales Agent Basic Setup
B2B	BusinessTo...	B2B Basic Setup
B2C	BusinessTo...	Webshop Basic Setup
B2C-INSTORE	InstoreB2C	B2C Instore Basic Setup
SUPPLIER	BusinessTo...	Supplier Basic Setup

The in-store B2C profile card contains an extra fast tab, comparing to normal B2C profile. The fast tab is called *Check-Out* and it contains the following fields: **Disable Online Payment** and **Disable Point/Voucher**.



Edit - Instore Profile - B2C-INSTORE

HOME NAVIGATE CRONUS TRIMIT W1 Lt... ?

View Manage Process Show Attached Page

Customer Template Setup Currency Setup Delivery Method OneNote Notes Links Refresh Clear Filter Go to

B2C-INSTORE

General Customer Order Item Field Mapping **Check-Out** Report

Disable Online Payment: ☒ Disable Voucher/Giftcard: ☒

InstoreB2C profile does not contain field **Show Where to Buy** comparing to B2C profile.

NOTE: make sure **Disable Order Blocking** in fast tab Order is set to **FALSE** in B2C-INSTORE profile. In this way orders will go through the Advanced Sales Integration table.

DESCRIPTION OF THE FIELDS

DISABLE ONLINE PAYMENT

This is a Boolean field. If it is set to **TRUE**, then direct payment in in-store website will be disabled. The in-store payment page will only have **Confirm and pay at the register** button. If this field is set to **FALSE**, then

the in-store payment page will display payment provider buttons together with **Confirm and pay at the register** button. The payment with a credit card can be enabled in in-store when the screen hangs on the wall and customers browsing the in-store site without assistance from the shop assistants.

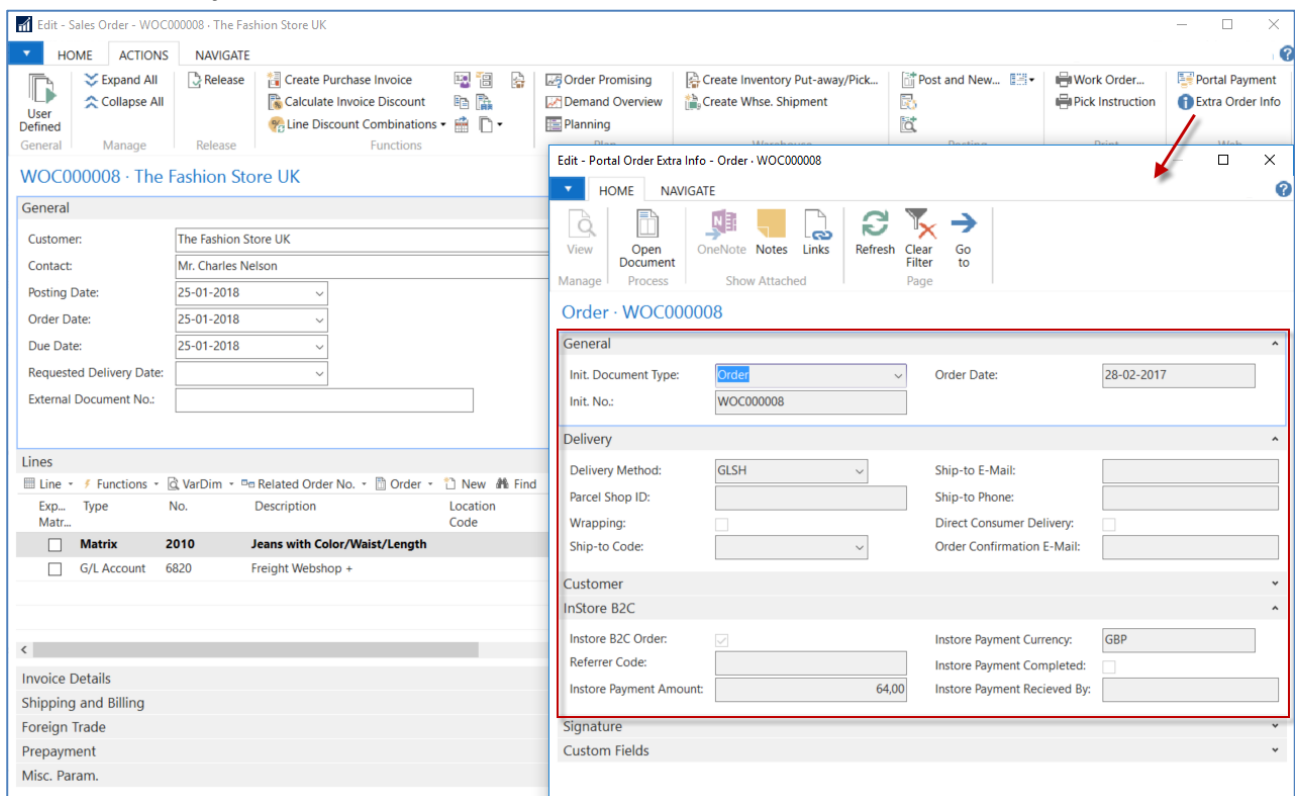
DISABLE VOUCHER/GIFT CARD

This is a Boolean field. If it is set to *TRUE*, then using vouchers and gift cards on in-store website will be disabled. If this field is set to *FALSE*, then the in-store payment page will display **Vouchers and gift cards** field. The **Vouchers and gift cards** field can be enabled in in-store when the screen hangs on the wall and customers browsing the in-store site without assistance from the shop assistants.

All the other fields in the *InstoreB2C* profile can be copied from the B2C anonymous profile.

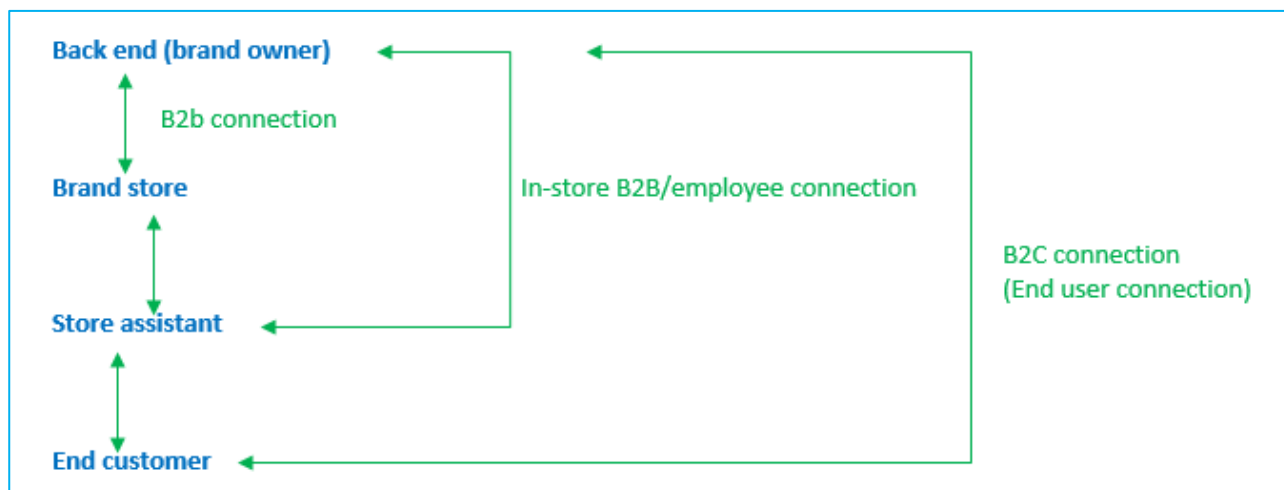
PORTAL ORDER EXTRA INFO

Additional in-store related information can be found in page **Portal Order Extra Info** which can be opened via **Extra Order Info** function under ribbon **Actions** on **Sales Order** card.



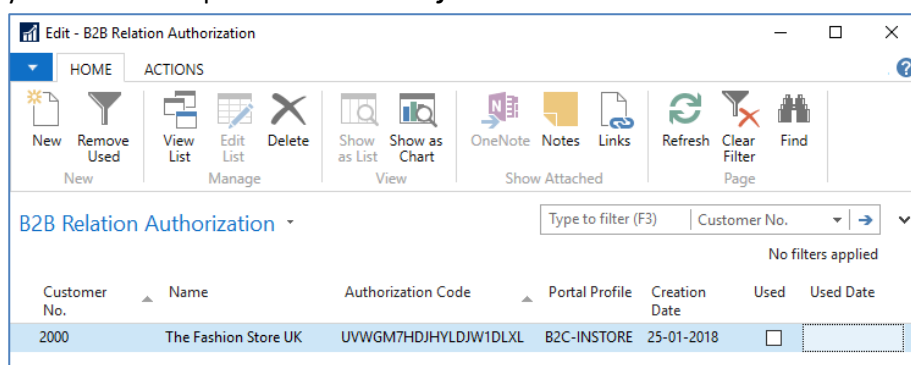
USER SETUP

Registered in-store user can order items, which were sold out. When ordering items in this way the system works as B2B shop i.e. the main office (the whole seller) sells items to its brand store as to a B2B customer. Here is a relational diagram:



In order to register an in-store shop assistant for the first time – the back-end office should provide the shop assistant (by means of email etc.) with customer number (i.e. the shop number) and authorization code. This is alike a B2B customer registration.

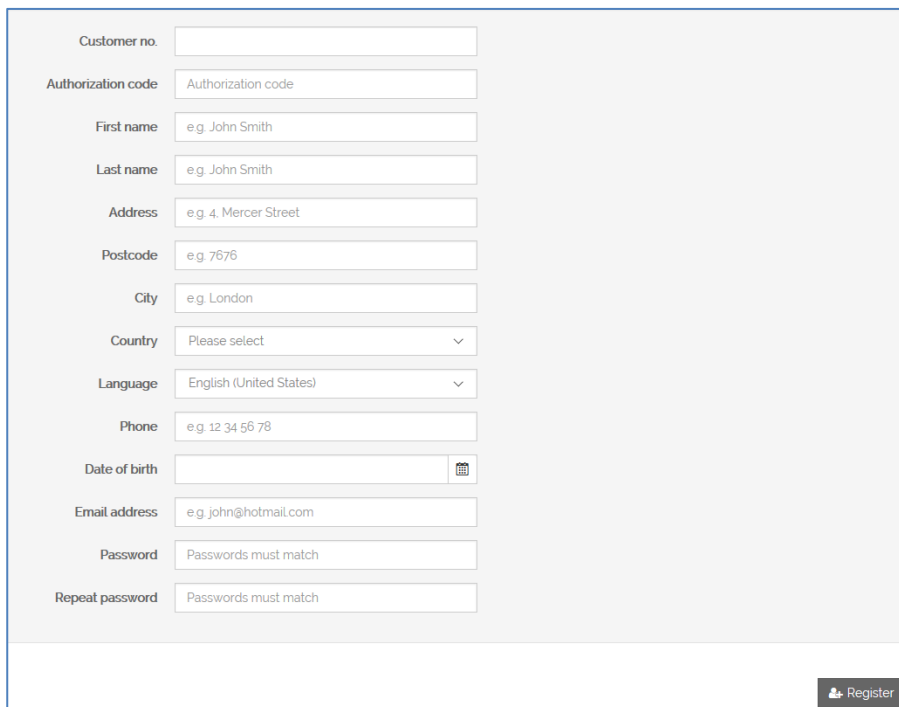
The customer number can be obtained as described in previous paragraph. The authorization code can be generated as follows: navigate in NAV to **/Departments/Portals/Setup/Portals** click **B2B Relation Authorization**. On **B2B Relation Authorization** page, click **New**. Fill in **Customer No.** field and leave this field or click Enter. The Authorization code (in field **Authorization code**) will be generated automatically. Select your **InstoreB2C** profile in **Portal Profile** field.



Now authorization code and customer number are ready to be passed to a shop assistant for registry. Together with this data the shop assistant must be provided with an in-store registration URL, which should look as follows (can vary depending on your domain setup):

<http://instore.<your domain>/b2c/instore/register-employee.html>

The in-store registration page is hidden and not available from in-store web site for non-authorized users. When the registration page is opened by a non-registered user (from the link above) and the user is not active for some time (this time is adjustable in soft admin), then the registration page will be changed to in-store home page automatically. This is done for security reasons.



Customer no.

Authorization code

First name

Last name

Address

Postcode

City

Country

Language

Phone

Date of birth 

Email address

Password

Repeat password

 Register

DESCRIPTION OF THE FIELDS

CUSTOMER NUMBER

Customer number provided by the back end

AUTHORIZATION CODE

Authorization code provided by the back end

FIRST NAME

Shop assistants first name

LAST NAME

Shop assistants last name

ADDRESS

Address of the shop where shop assistant is registered

POSTCODE

Postcode of the shop where shop assistant is registered

CITY

City of the shop where shop assistant is registered

COUNTRY

Country of the shop where shop assistant is registered

LANGUAGE

Shop assistant's language

PHONE

Phone of the shop where shop assistant is registered

DATE OF BIRTH

Shop assistant's day of birth

EMAIL ADDRESS

Shop assistants work email address

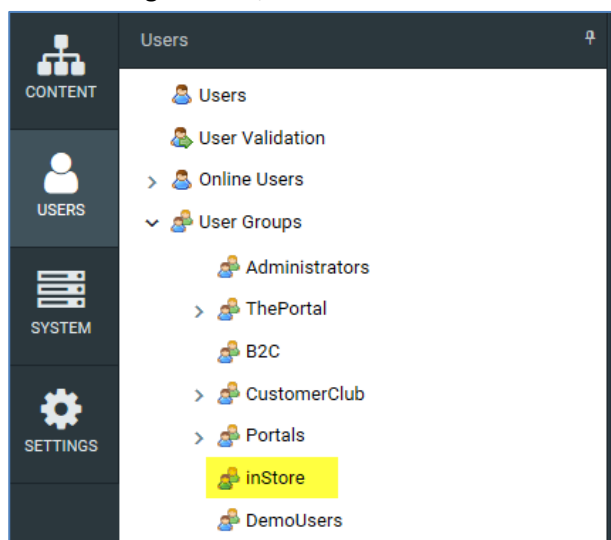
PASSWORD

Shop assistant's password to access in-store site

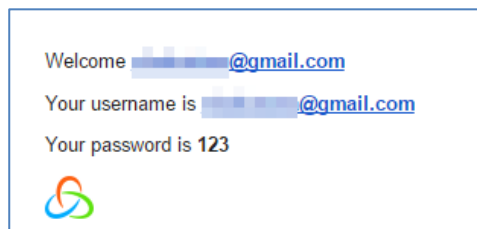
REPEAT PASSWORD

Shop assistant's password to access in-store site

After the registration, the in-store user is added to **inStore** user group in Modelyn admin.



After in-store user clicks **Register** on register employee page – a new in-store user is created in Modelyn and related in **User Relationship Management** in TRIMIT. The in-store employee receives an email from the portal with the following content:

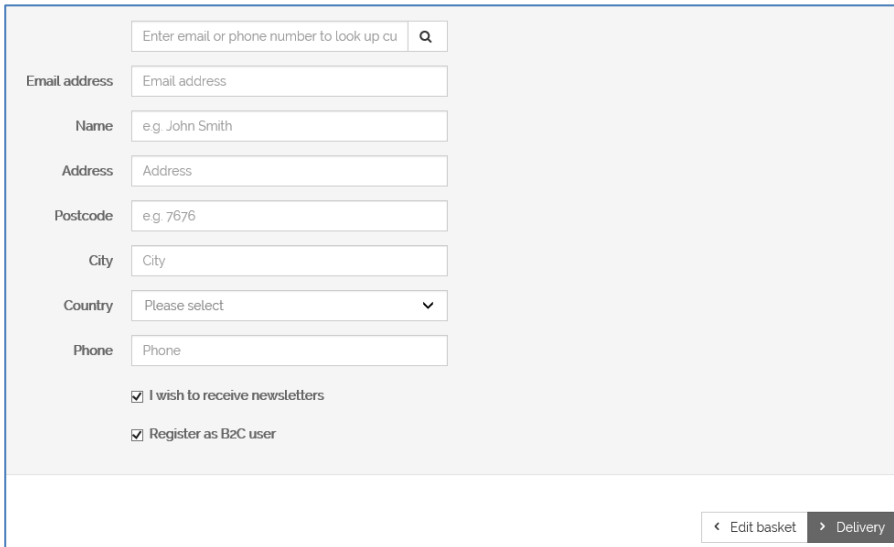


The register employee page is updated and all the fields are cleared and ready to register eventual additional in-store employees. After the registration process is finished the in-store employee can log in to the in-store web site.

When logged in, the in-store user cannot see which user is he/she is logged in as. This is made by design.

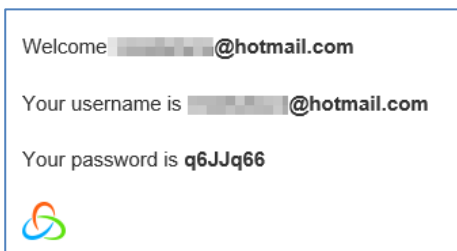
REGISTRATION OF B2C CUSTOMER IN IN-STORE

Payment address page within in-store has an option to register a B2C customer. This works in the following way. Customer or sales assistant makes sales order in the in-store website. Then it is required to fill in all the fields on payment address page and set a check mark in **Register as B2C user**:



Clicking button **Delivery** will activate the customer registration sequence. New customer will be created in Modelyn Users and added to B2C user group. New customer is created in NAV in **Customers, User Register List** and in **User Relationship Management** with relation to B2C profile.

New customer will receive an email with user name and password on email address specified on payment address page. Email confirmation when B2C customer is registered will look as follows (this is customizable in email templates in B2C soft admin):



Now customer can log in to B2C using credentials from the email and, if needed but not required, customize the password.

When customer is created from the in-store then the basic information is taken from customer template, which is specified in field **Customer Template for Registry** under *Customer Registration* fast tab on *InstoreB2C* profile.

NOTE: order made in in-store is not reflected under *Your orders* on **My Page** when customer logs in to B2C shop. That is because the in-store order is created as B2B order.

Order made in in-store can be reflected under *Your orders* on **My Page** when customer logs in to B2C shop if customer pays with credit card on in-store payment page.

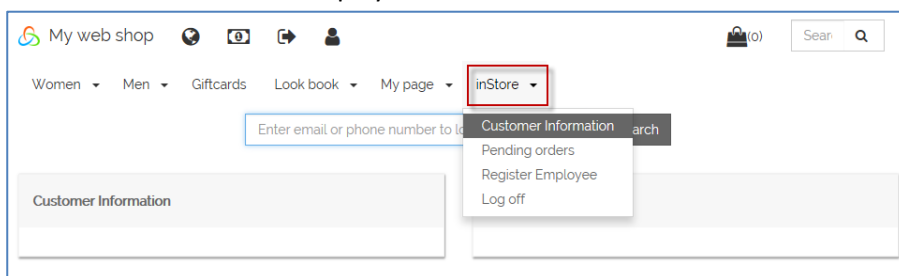
IN-STORE NAVIGATION

After registration, shop assistant does not have to confirm the email address used under registration.

After the login to in-store user sees the same category structure as on B2C. In addition, there is an **inStore** menu on the top of the page. The menu has the following submenus:

CUSTOMER INFO

Search for customer and display customer information.



On this page, it is possible to search and view customer information by entering email address or a phone number in a search field and clicking **Search**. If customer is found in the system then there will be displayed customer information such as customer number, name, address, postcode, city, phone number, email, customer club level, amount of points and subscription for the newsletter. Latest customer purchases in form of items is also shown on this page in column **Latest 10 purchases**. This column shows items, which are bought both from the B2C shop and from the in-store B2C. Items are shown only from posted sales invoices.

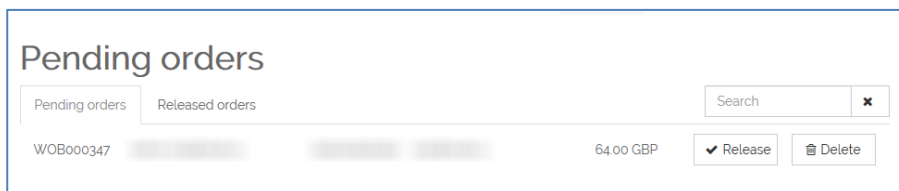
PENDING ORDERS

Divided on **Pending orders** and **Released orders**.

PENDING ORDERS

Contains a list of orders, which are created by customer with help of in-store shop assistant. Orders are still not paid by customers at the register. The order information contains the following data: order number, customer's name, phone number and email address, order's amount and currency. All this data is searchable in the Search field.

The list of orders contains two buttons per each row. The buttons are **Release** and **Delete**.

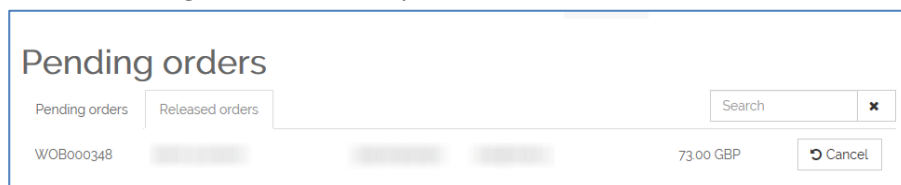


The shop assistant at the register must press **Release** when customer successfully accomplishes payment. After this – the order is moved to **Released orders** (under **Released orders** tab). If order is no longer needed, for various of reasons – the shop assistant can click **Delete** and order will be deleted from in-store and from NAV backend.

NOTE: pending orders are marked as **Blocked** in the back end. As soon as order is released the block is removed.

RELEASED ORDERS

Contains a list of orders, which have been paid by customer and released from pending by sales assistant. The list contains one button **Cancel** per row. Clicking this button removes an order from **Released orders** back to **Pending orders**. It is also possible to search for released orders in Search field.



The order stays in the **Released orders** list until it is posted in the backend.

REGISTER EMPLOYEE

On this page shop assistant can register a new in-store worker. Registration requires customer number and authorization code obtained from the backend. All the other data is described in paragraph *User setup*.

NOTE:

B when an employee logs in the first time the IP address is tracked. The IP is then mapped with the B2B customer. In this way, the physical address of the store can be determined and then used for delivery to the shop.

LOG OFF

By clicking this menu, the in-store user will be logged out.

HOW IT WORKS

Consider the following scenario:

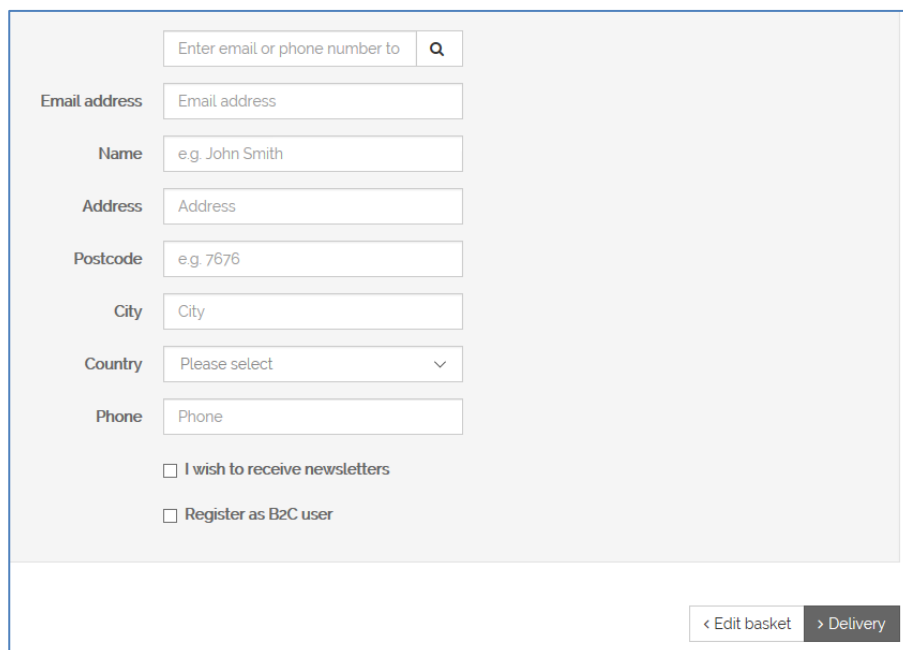
End customer registered in B2C shop

Customer comes into the brand store and wants to buy an item but the needed size/color happens to be sold out. Customer refers to shop assistant. The assistant logs in to in-store site, finds a customer in the system by email or phone number. Then assistant finds a needed item, size and color in the in-store B2C.

NOTE:

B2C in-store and B2C Webshop share the same inventory profile, so, if item is sold out on B2C Webshop then the same item will be unavailable in the B2C in-store as well.

Adding to basket and navigating to payment address page is identical to B2C shop. The payment address page is though different – it has a search field in the top. If customer is registered on the B2C shop beforehand then sales assistant types in customers email or phone number and clicks search button. Payment address page:



Enter email or phone number to

Email address

Name

Address

Postcode

City

Country

Phone

☐ I wish to receive newsletters

☐ Register as B2C user

[< Edit basket](#) [> Delivery](#)

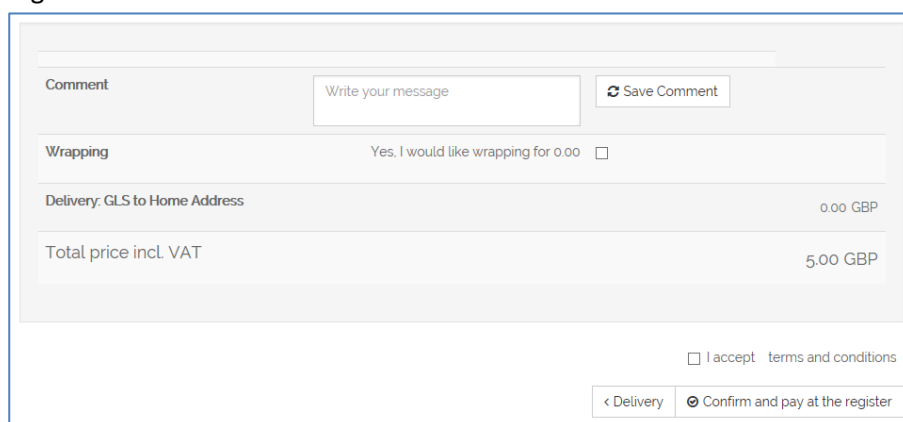
If customer is found, then corresponding customer data will be displayed in the fields. Field **Register as B2C user** will not be displayed for a known customer.

Customer is not registered in B2C shop

If customer is not registered yet, then shop assistant enters all the needed data into the fields. If customer wants to be registered on the B2C shop, then shop assistant can click check box **Register as B2C user**. In this case, new B2C customer will be created in Modelyn together with new customer in NAV.

The *Delivery address* page is the same as on B2C shop.

The *Payment* page in in-store does not contain customer club points field like in B2C. Though field Vouchers and gift cards can be enabled from B2C-Instore profile. Payment can also be enabled from B2C-Instore profile. Button **Confirm and pay at the register** is always shown on Payment page. When the shop assistant clicks on this button then the order is placed in **Pending orders** and ready for customer payment at the register.



Comment

Write your message

[Save Comment](#)

Wrapping ☐ Yes, I would like wrapping for 0.00

Delivery: GLS to Home Address 0.00 GBP

Total price incl. VAT 5.00 GBP

☐ I accept terms and conditions

[< Delivery](#) [Confirm and pay at the register](#)

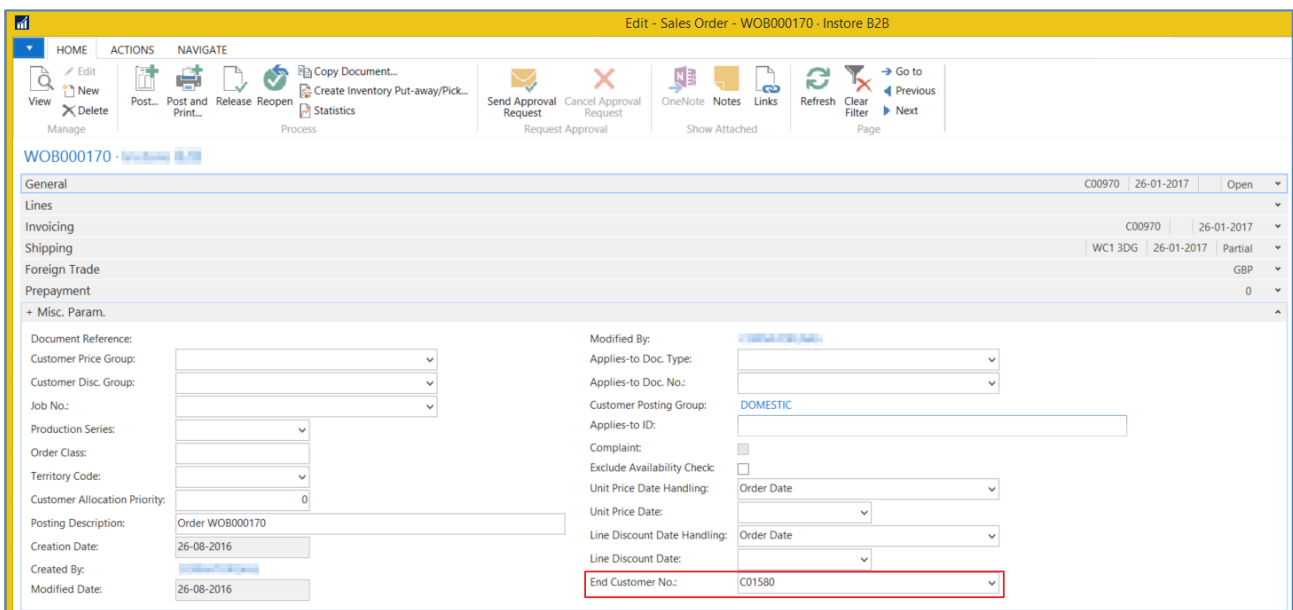
The shop assistant can create an order for the customer in in-store shop without logging in. This methodology can be used when the monitor is hanging on the wall in the physician shop and customers can order items without assistance.

NOTE: if sales order is created in in-store then the order confirmation will be sent to B2B customer, which the shop assistant is related to in NAV. The end customer will not get an order confirmation on email address. Therefore, it is important that the end customer saves the receipt from the shop.

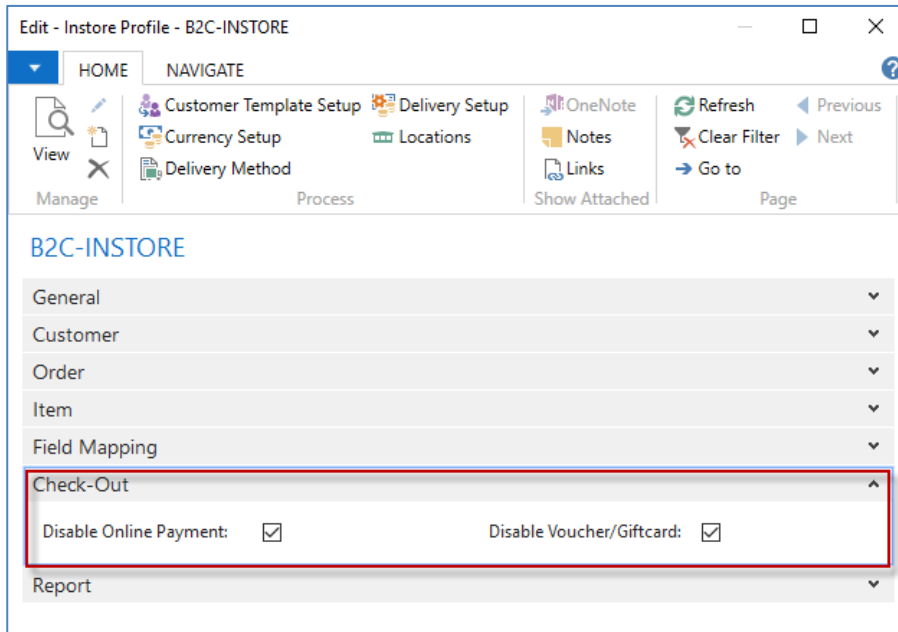
In case when payment with a credit card is enabled in in-store and the end customer pays for the order with a credit card, then the order is handled as a B2C order and order confirmation is sent to the end customer's email address. The end customer will see the B2C prices in the sales order attached to the email.

NEW FIELDS IN NAV

New field on sales order page – **End customer number**. This is because when shop assistant makes an order in in-store – this is a B2B order from the brand store to the main office. Therefore, besides bill to, ship to and send to we introduce the forth part – the end customer.



New fields on the in-store profile



DESCRIPTION OF THE FIELDS

DISABLE ONLINE PAYMENT

If set to **TRUE**, then payment page in in-store web shop will not show payment provider payment buttons. Only button **Confirm and pay at the register** will be displayed.

DISABLE VOUCHER/GIFTCARD

If set to **TRUE**, then field Vouchers & Gift Cards will not be shown on in-store payment page.

IN-STORE ORDER HANDLING

In-store uses Advanced Sales Integration (ASI). In-store order is stored in ASI as a B2C order. When automatically posted from ASI to ordinary NAV sales order (tables 36 and 37) the order is converted from B2C to B2B order. All in-store orders are coming to NAV through the ASI by default and this cannot be changed.

NOTE: field Disable Order Blocking on Order fast tab on in-store B2C profile should always be set to FALSE. Otherwise in-store orders will not be converted to B2B orders.

IN-STORE PRICE HANDLING

Prices on in-store website are B2C prices – specified in **Default Price Group** and **Campaign Price Group** on the *InstoreB2B* profile. When order is created in in-store and opened in NAV – prices on sales lines are listed as for B2B customer.

SOFT ADMIN

It is possible to adjust log off timeout in soft admin. Log in as admin to B2C shop and navigate to Soft admin/inStore:

Amount of seconds to accept idling before logging user off and returning to home page

Timeout (seconds)

120

Change