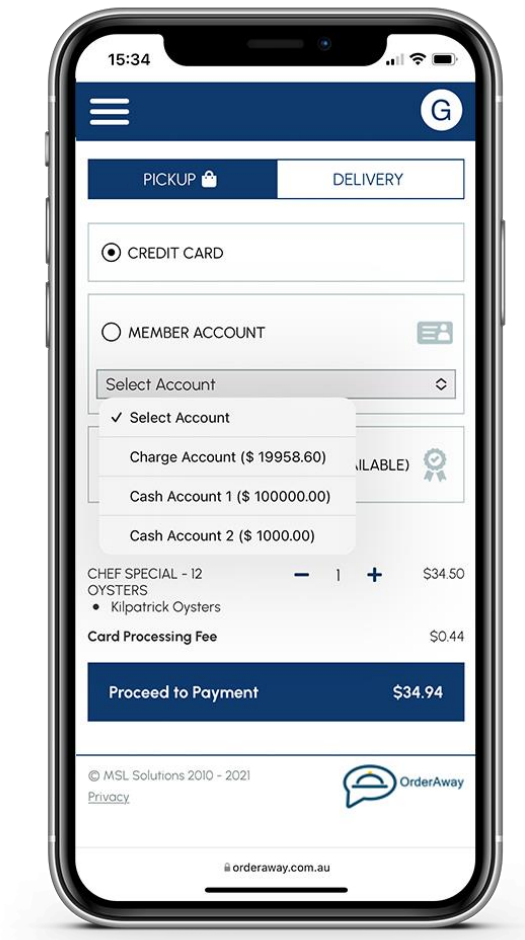


OrderAway Account Charge & ePurse Cash

OrderAway Account Charge (House Accounts) & ePurse Cash allows SwiftPOS Members to use their SwiftPOS Member Accounts for purchasing Products through OrderAway. This feature allows Members to utilise more of their membership benefits giving them greater payment options, while still allowing for Member pricing and points earn and spend.

Important Notes

1. Sites must be registered for the Accounts & Members module.
2. Only available to Members that are synced and configured in SwiftPOS Back Office.
3. For a Member to use either Account Charge or ePurse Cash they must have available credits and funds in their respective SwiftPOS Member Accounts to ensure they can finalise an order in OrderAway.
4. ePurse Points are NOT available.



Setup & Configuration

ePurse Setup

For Members to access their ePurse Cash Accounts they must be set to **Cash** and **Enabled**.

- In Back Office > Administration > Global Preferences > Members > ePurse Ledger Type
 - i. Select the relevant ePurse ledgers from the list and make sure they are configured to **Cash** and are **NOT Disabled**.
 - ii. The **Override Name** can be used to customise the name of the ePurse Cash Account. However, this will be applied to all ePurse Cash accounts for all Members.

The screenshot shows the NetPOS configuration interface. The top section is titled 'Member Options' and includes fields for 'Default Credit Limit (\$)' (0.00), 'Last Member No' (44), 'Last Alternate ID' (7), 'Aged Balance Format' (30-60-90 Days), 'Points Calculation' (Points Per \$), 'Barrel Draw' (<< None >>), 'Record Birthdays By' (By Location), and 'Record Entry Validation By' (By Location). There are also checkboxes for 'Use Alternate ID for Legacy NetPOS, QUEST Sales and FBI', 'Auto Allocate POS A/C Payment', 'Hide Back Office Invoice Points', 'Legacy Membership Receipting', 'Max. Member Image Size' (<Default>), 'Save Changes' (checked), and 'Allow Points Pay Per Product' (unchecked). The 'Default Account Active Range' is set to 20 Years.

The bottom section is titled 'ePurse Ledger Type' and contains a table with columns: Override Name, Liability, Expense, Cash, Points, and Disabled. The rows are:

Override Name	Liability	Expense	Cash	Points	Disabled
ePurse1: Epurse Points	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
ePurse2: Cash Account 1	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
ePurse3: ePurse3	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
ePurse4: Points	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
ePurse5: Cash Account 2	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Blue arrows point to the 'ePurse2' and 'ePurse5' rows. The 'NetPOS.Net' section on the right includes fields for 'Hostname/IP Address' (127.0.0.1), 'Port Number' (10101), 'Secured' (unchecked), and 'Timeout' (5).

NetPOS Configuration

The Account Charge and ePurse Cash Accounts need to be configured in NetPOS so OrderAway has access to allow Members to use these Accounts during Checkout.

- In Back Office > External Applications (top right-hand corner of application) > select NetPOS.Net Tray Icon from the list
- A green man Icon will appear in the Windows task bar (bottom right) - Right click the icon and select Settings
- The application to the left will appear. Select SwiftPOS Back Office from the left-hand column and make sure the **Get Charge Account** and **Get ePurse Account** options are selected.

The screenshot shows the 'SwiftPOS Back' configuration window. The left-hand navigation pane has 'SwiftPOS Back Office' selected. The main area is titled 'Member Details' and contains the following settings:

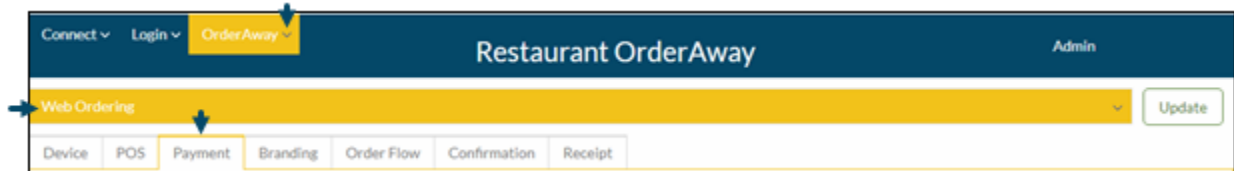
- Get Points Account
- Get Charge Account
- Get Member Photo
- Get ePurse Accounts
- Default Points per Dollar: 100
- Default Classification: 1
- Points Account Name: Points Account
- Cash Account Name: Charge Account

- Select Save & Close.

ORDERAWAY PORTAL (VENUE MANAGER) CONFIGURATION

In SwiftPOS Back Office > Administration > OrderAway > Select the relevant OrderAway Location and select OrderAway Portal.

- In OrderAway > Devices > Web Ordering > Select the Payment tab.



- Ensure the **Enable Member Account Payment** option is selected.
- Ensure the **Enable SwiftPOS Account Payment Processing** option is selected. This will ensure that Account payments are processed via SwiftPOS/NetPOS.
- Set the **Media** to the Account Charge ID. The default Media ID is **90**. If this has been changed then the ID will need to be set to the new Media ID set in SwiftPOS.
- Enter **Account Charge** as the **Media Description**.
- Enter an appropriate **Order Description**. For example, Sales Invoice or Tax Invoice.
- Enter the ID of the Location that will be used when posting the payment in the **Invoice Location No** field.
- **Delete** any existing **Member Account** records.

Enable Member Account Payment
 Enable SwiftPOS Account Payment Processing
Defers processing of account payment to order submission in SwiftPOS. Only enable this setting when processing account payment via SwiftPOS/NetPOS.

Account Number:
Account number to use for loyalty system

Media:
The Payment Type Id to charge the order to.

Media Description:
The payment description sent to the POS system with the web order.

Order Description:
The description attached to the invoice sent to the financial system.

Invoice Location No:
The Location Id to post the invoice against in the financial system

Member Account Id	Show Account Balance (Credit Accounts Only)	
1	false	<input type="button" value="Delete"/>

- Select **Update**, to update the configurations for OrderAway.