As of 1/11/22

Cart Features – Existing – Ask Brandon or someone else who know carts, if more info is needed.

- Start new carts through selection (drop-downs) or quick buttons or links - <https://data0.adilas.biz/top_secret/help.cfm?id=144&pwd=cart>

- Start new carts through the quick search using keyword new - <https://data0.adilas.biz/top_secret/help.cfm?id=376&pwd=quick>

- Start new cart - quote

- Start new cart - counter sale (no customer assigned)

- Start new cart - customer invoice

- Start new cart - transition invoice (work in progress, layaway, pre-paid, special, etc.). Requires a special permission.

- Start new cart - internal transfer (items from location a to location b). Requires at least two active locations.

- Start new cart - internal repair (adding something to a stock/unit – this invoice type uses a stock/unit instead of a customer – once completed, the results are applied directly to the stock/unit) – This invoice type is started directly from a stock/unit detail page. You may also start it from the start new cart page. If done this way, you have to provide a stock/unit number, once inside the view cart. The classic cart works best for this invoice type.

- Start new cart - wholesale (multi stock/units) - <https://data0.adilas.biz/top_secret/help.cfm?id=352&pwd=wholesale>

- Start new cart - normal stock/unit (serialized items) - Carts may be started from stock/unit detail pages - <https://data0.adilas.biz/top_secret/help.cfm?id=61&pwd=stock>

- General cart help file for the main view cart page (body of the cart) - <https://data0.adilas.biz/top_secret/help.cfm?id=143&pwd=cart>

- Carts may be started with no customer and the customer is added later on

- Carts may be started with a customer directly

- Carts may be started from the customer queue - <https://data0.adilas.biz/top_secret/help.cfm?id=400&pwd=queue>

- Carts may be duplicated from older finished quotes and invoices - <https://data0.adilas.biz/top_secret/help.cfm?id=149&pwd=print>

- Carts may be started from an item or part search – adding single item or multiple items - <https://data0.adilas.biz/top_secret/help.cfm?id=137&pwd=parts>

- Carts may be started by scanning parent barcodes, QR codes, sub inventory barcodes, etc. – This is super important and is one of the major features of the cart. It needs to be able to scan normal UPC barcodes, custom barcodes, sub inventory barcodes, and custom sub inventory barcodes. This can get very deep. If more info is needed, please ask. This is a huge part of the system. - <https://data0.adilas.biz/top_secret/help.cfm?id=413&pwd=cart>

- Carts may be started from doing advanced item or part searches – one or more items at a time - <https://data0.adilas.biz/top_secret/help.cfm?id=138&pwd=search>

- Carts may be started from viewing sub inventory details -

- Carts may be started from doing a recipe/build - <https://data0.adilas.biz/top_secret/help.cfm?id=309&pwd=build>

- Carts may be started from item detail page - <https://data0.adilas.biz/top_secret/help.cfm?id=139&pwd=view>

- Carts may be started from my cart favorite buttons - <https://data0.adilas.biz/top_secret/help.cfm?id=367&pwd=favorites>

- Carts may be started from the advanced add to cart page (price haggle tool) - <https://data0.adilas.biz/top_secret/help.cfm?id=365&pwd=cart>

- Carts may be started as a quote, internally or out in eCommerce, and then restored to cart for changes and completion - <https://data0.adilas.biz/top_secret/help.cfm?id=191&pwd=print>

- This may not apply here, but both quotes and invoices may be created using external API sockets. Those same quotes and invoices need all the same features and settings as a native quote and invoice.

- If the company uses recipe/builds, they may be applied either before or after a cart has been created. This is multiple preset items, with user input, added to the cart as kit, package, or build. - <https://data0.adilas.biz/top_secret/help.cfm?id=304&pwd=recipe>

- Carts are held in session scope variables and structures. If you leave the view cart page, it will still retain all of your cart information until you return, regardless of what other pages you visit. The only exceptions are if you logout, your session expires, or you clear the cart.

- If you clear the cart, it will store a history note (3rd party error log record) of what was in the cart. This is only viewable if a user has a certain admin permission. However, it is recorded regardless of the user’s permissions.

- There are tons of corp-wide settings for shopping carts – both internal (secure) and external (eComm)

- There are page level settings as well as user level settings for shopping carts

- Currently, the internal cart has an option for showing split cart which includes my cart favorite buttons. As a note, there are multiple different button types. You can have normal buttons, photo buttons, and three types of group buttons. They are: button groups (layered or stacked), advanced grid (multi with user input options), and smart groups (multiples with tiered pricing). You can use your own buttons or view/use another person’s buttons. Please make sure and check all of the different kinds of buttons and options.

- Going along with buttons, they can do simple searches, directly add to cart, prompt for advanced add to cart settings, show item details, be tied to recipe/builds, and tons of custom settings. Very flexible.

- If using smart group buttons for tiered pricing, there is a special page that allows for specific rules and assignments to help the buttons and their functions know what is tied in and part of the tiered pricing matrix. - <https://data0.adilas.biz/top_secret/help.cfm?id=407&pwd=smart>

- The current carts (all of them) allow for black box custom headers, top mini’s, bodies, bottom mini’s, and customer footers. One of the biggest ones is top and bottom mini’s. Steve has used these for his gram controllers and other customer options.

- Dealing with black box, it isn’t used very much, but there is also a way to inject custom logic using a black box option called a “full” takeover or simply some custom logic. This could be completely hidden or it may actually have it’s own visible output. Just a heads up on this one. It does exist, and has been used in the past.

- Each line item may be removed from the cart

- Each line item may be edited in either a simple view or an advanced view – This is currently a separate page – This includes prices, discounts, campaigns, tax settings, descriptions, and other edits on a per line item level - <https://data0.adilas.biz/top_secret/help.cfm?id=148&pwd=line>

- Depending on settings, each line item may have options for custom labels – maybe even multiple different labels. - <https://data0.adilas.biz/top_secret/help.cfm?id=361&pwd=barcode>

- In the carts, the user may update the quantity per line. They do have to click the update cart button or the checkout button to make the changes stick.

- In the carts, there is a way to change the tax category per line. There is also a bulk change tax categories option if there are more than 3 lines. This option is hidden until the cart gets a line count greater than three.

- In the carts, you are allowed to save a cart as a quote at any time. You may restore a quote to a cart as many times as needed as well. The only thing that stops that is if the quote is turned into an invoice. You would then need to duplicate the invoice to cart. Going back to quotes, if it has already been saved, you may save the current cart over the top of the existing quote or you may do a save as (create a new quote) and leave the old one alone and create a new copy (multiple versions if needed).

- Currently, there is a printable cart option. There has been some debate on this function. It servers a purpose, but has been abused before. For example: someone prints the cart, gets the money, and then clears the cart. Other than the hidden logs we record, no other database records hit the actual database. Possible chance for dishonesty. Having said that, there is some value in being able to print out something without saving it.

- There are settings that control the main search field inside the cart. By default, it is set to search the general or parent items. You can also add options to search items, flex grid tie-ins, recipe/builds, cart favorite buttons, mixed barcodes, sub inventory barcodes (specific to subs). If the general parent items is the only thing selected, the drop-down option is hidden and the page only shows a search field. If more options are selected, the user must choose which way they are using the search field. Once a way or method is selected, it remembers that until it gets physically changed by the user. This is help per session per user.

- Currently, there are a number of sub pages and sub sections accessed by buttons. Each button goes to a different page and each one has special functionality. For example: Bulk print labels, Add Item, Bulk Edit Lines, Discount Calc, etc.

- Bulk print labels – Special page where you can choose which labels to print, how many, and even what kind (standard or custom). This is bulk printing and often has a custom label that has been uploaded and tied in for printing and compliance. - <https://data0.adilas.biz/top_secret/help.cfm?id=493&pwd=bulklabels>

- Add item – Special page that has a number of sub functions. They are add a unit as a line item (stock/unit stuff), add a item by searching (vendor, category, and item filters), add a special line item quick form (labor, fees, cart as whole, other special items), and a percentage calculator to help with special math. More help is available on that page. <https://data0.adilas.biz/top_secret/help.cfm?id=146&pwd=cart>

- Bulk edit lines – Special page that shows all line items and has a number of bulk tools and fields for editing multiple lines at the same time. More help is available there as well. <https://data0.adilas.biz/top_secret/help.cfm?id=477&pwd=bulk>

- Discount Calc – Special page that has three different discount tools or sections. The top has preset campaigns, the next section has a custom apply to cart as a whole options. The bottom allows for multiple updates on a per line level. More help is available on that page. <https://data0.adilas.biz/top_secret/help.cfm?id=484&pwd=discount>

- The classic cart allows for all kinds of changes to dates, salesperson assignments, cart types, sub cart types, printable notes, non-printing notes, and even possible customer PO tie-in fields. Lots of high level changes that affect the main invoice or quote. The Kush cart has some of these same options, but spread around the page and not all options exists in the Kush cart. – Main view cart help file - <https://data0.adilas.biz/top_secret/help.cfm?id=143&pwd=cart>

- If you are dealing with sub inventory, there is an option that allows you to change out the subs. This only shows up if you put a sub in the shopping cart. This is a separate page currently. - <https://data0.adilas.biz/top_secret/help.cfm?id=507&pwd=swap>

- If you are dealing with transitional invoices (the name may change as it is a setting), there is an option to restore this invoice type back to the cart. Most invoices are one and done. If edits are needed, they are done on the main invoice pages (main, line items, payments). The transition invoice is an exception. It may be brought back into the cart to keep tweaking on it. As an additional note, the transition invoice is kind of in a flux state while it has the invoice type of transition. Once it is finished, it will become a real or normal customer invoice. The system is setup to skip it from certain reports while it is in transition. This is great for things like layaways, pre-paid invoices, work in progress, invoices that take a while to complete. Basically, there is a window while it is in flex before it is really real and ready to be taxed and collected on. The transition invoice is able to virtually hold or claim inventory before it is really real (hence the transition window or flex period). - <https://data0.adilas.biz/top_secret/help.cfm?id=296&pwd=qti>

- Reoccurring invoices are allowed and used in the system. They only go through the cart one time and then get setup as reoccurring to show up in a processing queue later on. Imagine a master invoice (that is finished and has gone through the full cart process) and then you duplicate it based off of the original. If you want more info about reoccurring invoices, check the help file. - <https://data0.adilas.biz/top_secret/help.cfm?id=292&pwd=reoccurring>

- Once a cart is ready for checkout, there is a separate page that deals with payment options. Up to five payments may be applied to a single cart from inside of the checkout process. Corp-wide settings control a number of options including number of payments, default money types, calculating change due, and much more. It is also important to note that there is a separate page for credit card processing and other outside 3rd party payment solutions. This page also allows for payments on account or invoices that get pushed over to accounts receivables for later payment actions. Payments on account have some special requirements in order to pass validation. - <https://data0.adilas.biz/top_secret/help.cfm?id=152&pwd=cart>

- As noted above, if the user is checking someone out with a credit card payment, there are a number of possible options. You can manually enter a card, use a mag stripe swiper or reader, or even use an EMV chip reader (special hardware). There are also a number of known 3rd party solutions that have custom flow, API socket connections, custom pages, and special validation processes. This note is here specifically so that we cover a number of merchant processing type options (enter card, swipe card, insert chip, custom 3rd party payment solutions). - <https://data0.adilas.biz/top_secret/help.cfm?id=348&pwd=payment>

- If for some reason, more than the allotted payments are needed for a specific invoice, an unlimited number of payments may be added by going to the edit line item details page for the specific invoice. This allows for things like monthly payments, instalments, down-payments, deposits, and other bill pay options (apply payments and multi payments). - <https://data0.adilas.biz/top_secret/help.cfm?id=155&pwd=line>

- Currently, every invoice, after the payments have been recorded goes through a review cart page. This page may be skipped (at least the showing or visual part of it) by changing a corp-wide setting. If it is skipped, it does make the process seem faster. Some companies like it (choose to show the review cart), so that they get a final preview before they commit things.

- As an option, there are customer loyalty points that may be turned on, calculated, monitored, and redeemed from inside the classic and kush carts. You need to set this up with special rules and settings. Then once it starts into the program, you can do normal transactions, manual updates and edits, view totals, and redeem points and values inside of the cart payment or checkout pages. You do need to be an admin user to turn things on for internal loyalty points. They use a special sub section called special accounts (behind the scenes). They are almost like mini bank accounts per customer that may be loaded (added to or earned) and unloaded (redeemed or used). As a future note, these same sort of special accounts will end up helping with other things like gift cards, in-store credits, punch cards, etc. - <https://data0.adilas.biz/top_secret/help.cfm?id=519&pwd=transactions> or <https://data0.adilas.biz/top_secret/help.cfm?id=518&pwd=special>

- The eCommerce cart has a bunch of features, settings, and flow options. This is almost a whole separate project. Just know that it exits. Certain features are more developed on the internal secure cart for certain things and more developed outside for things like PayPal, shipping, referrals, like or associated items, parent attribute searches, and tons of custom options.

- Still need to add notes on the following… they exist, just haven’t finished yet…manager approval for discounts, gift cards, coupons and promotions, discount engines, smart cart logic, backend logic and models, validation, bulk, settings, updating, mini units for sub inventory, special calculators, more options, thresholds, stock/unit sales process, wholesale carts for stock/units, etc. Add help files where needed, to help document things.