



Offline Call Center

Quick Guide

LS Retail NAV 6.3

Author : GEG
Date : February 29, 2012

Contents

1	Introduction.....	1
1.1	Functional Overview	1
2	Setting Up the Offline Call Center Module.....	1
2.1	Updating Order Status	1
2.2	Setting Up the Call Center Database.....	2
2.2.1	Setting Up Call Center Web Services	2
2.2.2	Call Center Is Local Store	3
2.2.3	Defining the Call Center and its Restaurants.....	3
2.2.4	Setting Up Web Server and Web Service URI for the Restaurants.....	4
2.2.5	Scheduling Jobs per Restaurant to Be Run by the Job Scheduler.....	5
2.2.6	Configuring the Offline Call Center Setup.....	6
2.2.7	Restaurant Station Printing in the Call Center	7
2.3	Setting Up the Restaurant Databases	8
2.3.1	Setting Up Call Center Web Services	8
2.3.2	Defining the Call Centers that the Restaurant Belongs to	9
2.3.3	Configuring the Offline Call Center Setup for the Restaurant.....	11
2.4	Setting Up Web Service Monitor	16
2.5	Controlling when Changes are Allowed	17
2.5.1	Copying when Changes are Allowed from One Restaurant to Another	17
3	Operating the Offline Call Center and Restaurant	18
3.1	Monitoring Web Services	18
3.1.1	Using the Web Service Monitor in the Call Center	18
3.1.2	Using the Web Service Monitor in the Restaurant.....	20
3.1.3	Typical Errors	21
3.2	Creating a New Order	22
3.2.1	When Sending the Order Is not Successful.....	22
3.3	Looking Up, Changing and Cancelling an Existing Order	23
3.3.1	Looking Up Status on an Order	23
3.3.2	Changing an Order (Contact Info, Order Type)	24
3.3.3	Changing Order Lines.....	24
3.3.4	Cancelling an Order in the Call Center	24
3.3.1	When Sending the Order Is not Successful.....	25
3.3.1	Cancelling an Order in the Restaurant	25
3.4	Sending Finalized Orders to Call Center	25
3.5	Sending Status Changes Automatically to Call Center	26
3.6	Sending Converted Pre-Orders to Call Center	26
4	Opening Hours, Restaurant Load and Production Time	27
4.1	Setting Up the Restaurant Order Taking Calendar	27
4.2	Setting Up the Restaurant Default Load Schedule	29
4.3	Setting up a Current Load Schedule for the Restaurant.....	30
4.4	Setting Up Restaurant Production Timing Schemes	30
5	Appendix	32

1 Introduction

The purpose of this document is to give a quick overview of Offline Call Center in LS Hospitality NAV 6.3.

1.1 Functional Overview

The **Offline Call Center** module handles the flow of delivery and takeout orders between the databases of offline call centers to the databases of the restaurants that belong to them.

In the call center, creating orders, changing and cancelling orders take place in the **Delivery & Takeout Order** window. The dataflow to the restaurants is automatically controlled. There is only one manual function in the window, namely requesting the status of the order shown in the window.

To monitor the web service communication, you use the **Web Service Monitor** that gives an overview over the communication between the offline call center and restaurant databases. The monitor window shows the latest result of the various processes going on and from here you can run the processes directly and check whether a call center or a restaurant are online through web services.

2 Setting Up the Offline Call Center Module

Before you can start running your offline call center, you need to enter certain basic information:

- The **Offline Call Center Setup** contains specifications on which jobs run automatically in the call centers and restaurants.
- You need to select which restaurants are operating as call centers and for each call center, you select which restaurants belong to it. Restaurants can belong to more than one call center.
- You set up a schedule for the jobs that you want to run in the call centers and the restaurants.
- You need to set up web services for the call centers and the restaurants.

The setup is different for a call center database and a restaurant database.

2.1 Updating Order Status

You need to decide how order status is updated in your system before starting to set up the system. This will depend on how much you want to limit the transfer load of data between the databases. There are three stages of order status updating you can select to use in your call center:

1. Automatic update on status change

You can let the restaurants send the Call Center status changes on orders automatically. You don't need to run the Get Estimated Timing or Request Status Update on Orders in Process jobs in the Call Center since the status of the orders is up-to-date. The transfer load of data between the databases is the greatest with this method.

2. Status update requested regularly by call center

In the Call Center, you regularly request status update on orders in process from the restaurants. You don't need to run the Get Estimated Timing job in the Call Center. The transfer load of data between the databases is the medium with this method.

3. Status update only when customer calls in. Estimated timing requested regularly by Call Center.

You only request status updates on orders when the customers calls in again. To have information on the load of each restaurant, you run the get estimated timing job in the call center. The transfer load of data between the databases is the least with this method.

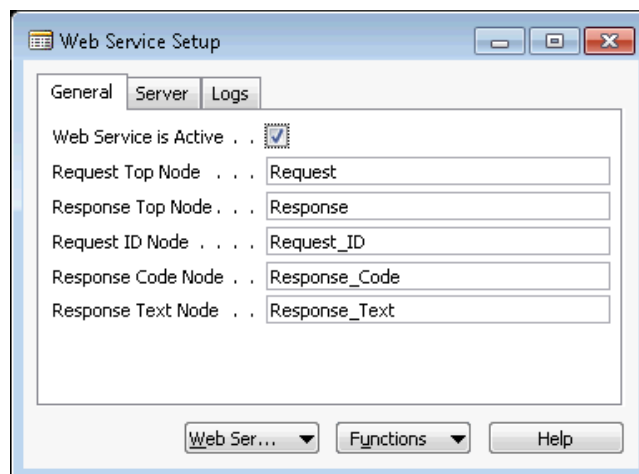
2.2 Setting Up the Call Center Database

You must carry out the following tasks for each call center database in your business.

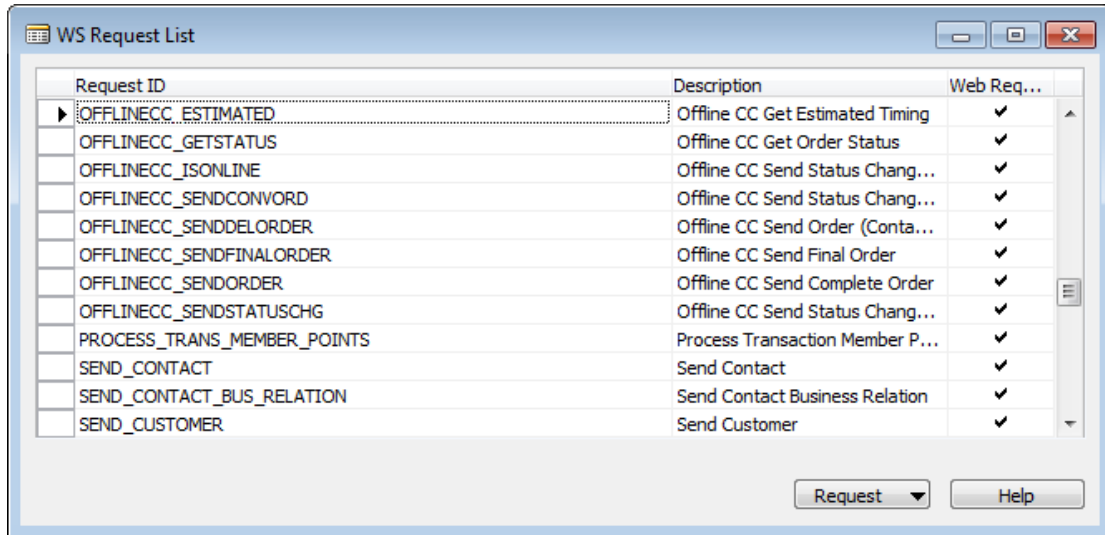
2.2.1 Setting Up Call Center Web Services

1. Open the **Web Service Setup** window (under **LS Hospitality, Setup, Offline Call Center, Web Service Setup**).
2. On the **General** tab, place a check mark in the **Web Service is Active** field (if there was already a check mark, remove it first).

The program sets up automatically all default requests.



3. Click **Functions, Insert Offline Call Center Requests**.
4. Click **Web Service, Web Requests** to view the requests that have been inserted. They all start with OFFLINECC:



- For each offline call center request, place a check mark in the **Web Request Is Active** field.

2.2.2 Call Center Is Local Store

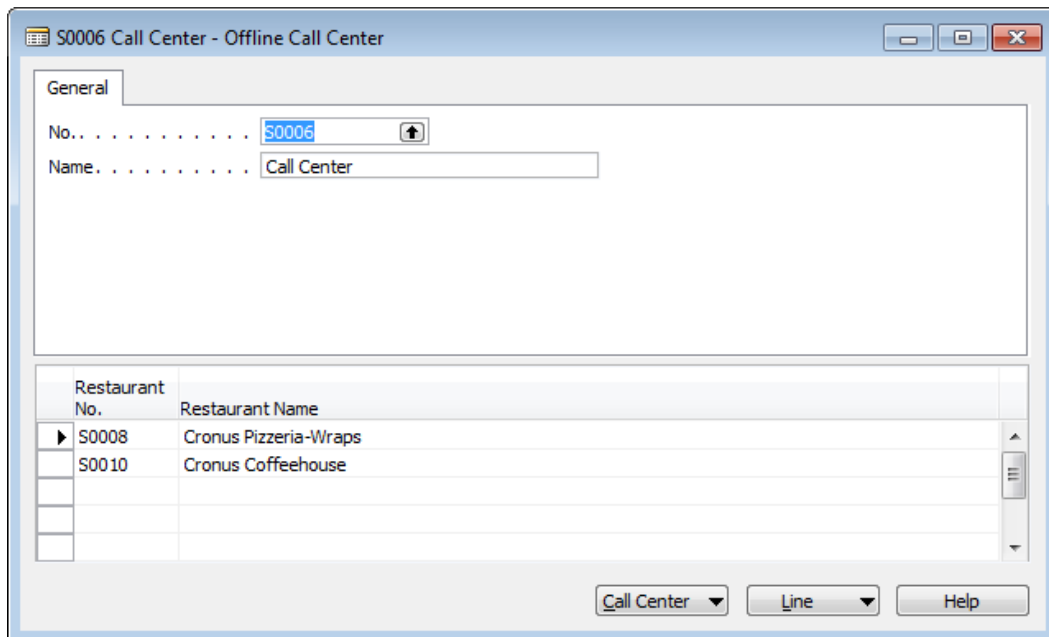
The local store in the Call Center database must be the Call Center.

In the **Retail Setup** window (under **LS Retail - Back Office, Setup, Retail Setup**), make sure the Call Center is selected as the **Local Store No.**

2.2.3 Defining the Call Center and its Restaurants

When you set up a call center database, you need to designate the current restaurant as a call center and select which restaurants belong to it. Restaurants can belong to more than one call center.

- Open the **Offline Call Center** window (under **LS Hospitality, Setup, Offline Call Center, Offline Call Center**).



2. In the **No.** field, enter the number of the current restaurant that operates as a call center.
3. On a new line, enter the number of a restaurant that belongs to the call center.
4. Repeat for all the restaurants belonging to the call center.

2.2.4 Setting Up Web Server and Web Service URI for the Restaurants

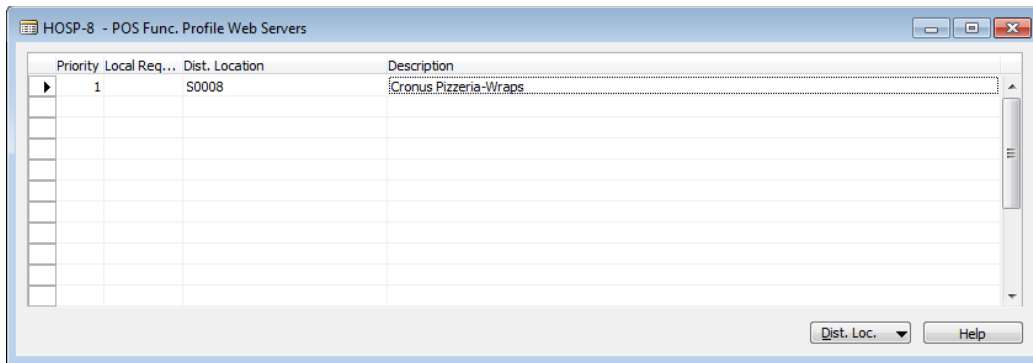
The Web Server and Web Service URI are unique for each restaurant. The Web Service Setup follows the same principles as the general LS Retail web services. There, this setup is controlled by the functionality profile. Distribution locations are assigned to the functionality profile and the distribution location contains the Web Server and Web Service URI.

Attention

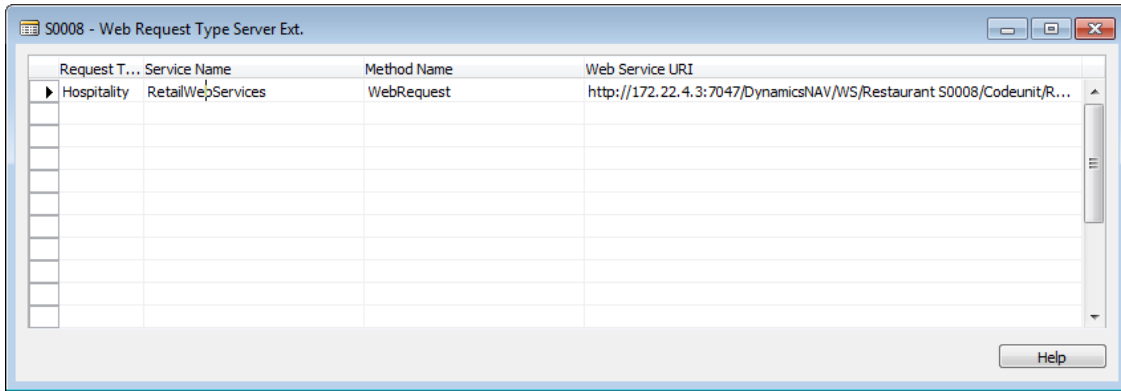
Each restaurant with its own database must use a unique functionality profile.

To Set Up Web Server and Web Service URI for Restaurants

1. In the **Offline Call Center** window, select the first restaurant.
2. Click **Line, Func. Prof. Distr. Loc.**



3. Enter 1 in the **Priority** field.
4. In the **Dist. Location** field, select the distribution location for the restaurant (the same number as the restaurant).
5. Click **Dist. Loc., Card.**
6. On the **Replication** tab, make sure the name of the company of the restaurant database is correct.
7. On the **Web Server** tab, enter the name of the Server running for web services for the restaurant.
8. Close the window.
9. Click **Dist. Loc., Web Request Type Server Ext.**
10. Select *Hospitality* (using the Dropdown arrow) in the **Request Type** field.
11. Click in the **Service Name** field to insert the record.
12. The program automatically enters the correct names in the **Service Name** field and the **Method Name** field and builds a Web Service URI for the call center database web service using the information on the **Distribution Location Card** window.
13. Click **Dist. Loc., Web Request Type Server Ext.**



14. Repeat for all the restaurants that belong to the call center.

2.2.5 Scheduling Jobs per Restaurant to Be Run by the Job Scheduler

There are two web service processes that you can let the job scheduler run periodically in the Call Center. Either you run neither or only one of them. See Updating Order Status for which one to run:

Getting Estimated Timing

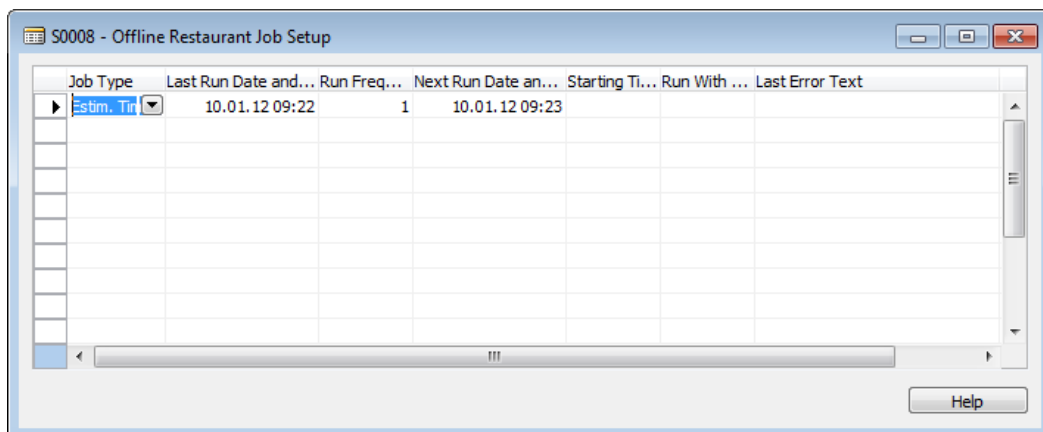
- This process requests estimated timing information on orders from restaurants. This information includes how many orders are in progress in the restaurant and the current average production time of orders in the restaurant.
- If the restaurants are not running a job that updates order status automatically in the call center and the call center is not requesting status update on orders in process from the restaurants, you need this estimated timing info to be able to estimate how long it takes to process an order in each restaurant.

Requesting Status Update on Orders in Process

- This process requests status information on orders in process from restaurants.
- If the restaurants are not running a job that updates order status automatically in the call center, you can use this job to have your orders up-to-date in the call center.

If you are running the *Get Estimated Timing* job or the *Get Status on Orders in Process* job in the call center, you need to set up a schedule for the job for each restaurant belonging to the Call Center. See Updating Order Status for choosing which jobs to run.

1. In the **Offline Call Center** window, click **Restaurant, Job Setup**.

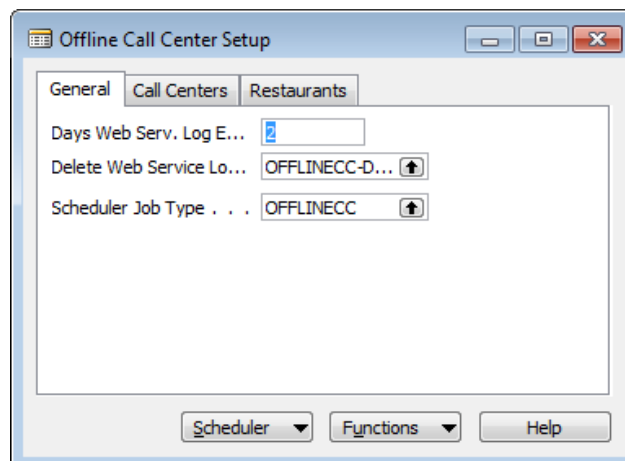


2. In the **Job Type** field, select *Estim. Timing* or *Status on Orders* to set up a schedule for requesting estimated timing information on orders or requesting status updates on orders in process from this restaurant.
3. In the **Run Frequency (Min.)** field, enter the frequency by which the job should run in minutes.
4. In the **Next Run Date and Time** field, enter the date and time the job should next run.

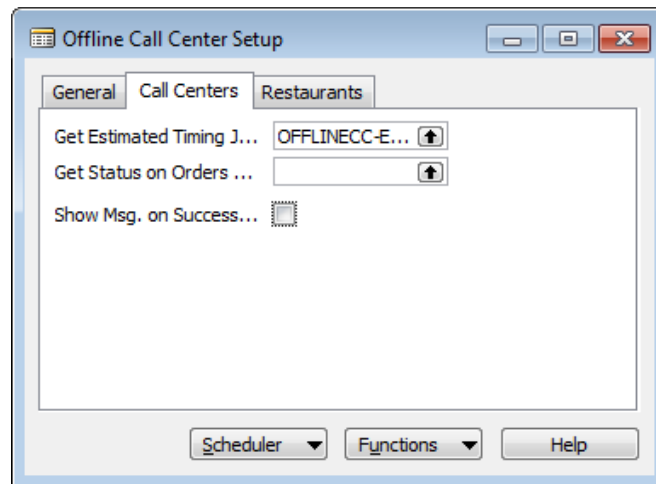
2.2.6 Configuring the Offline Call Center Setup

Now you need to create the actual scheduler jobs. Besides the *Get Estimated Timing* and *Get Status on Orders in Process*, the only other process you need to run regularly in the call center databases is the process that deletes from the **Offline Call Center Web Service Log** table. The log stores the result of each request performed through web services and helps you monitor the web services processes. You let the job scheduler run this process on a daily basis.

1. Open the **Offline Call Center Setup** window (under **LS Hospitality, Setup, Offline Call Center, Offline Call Center Setup**).
2. Click **Functions, Insert Scheduler Jobs**, to insert automatically the jobs to be run by the scheduler (the program creates jobs to be run in the call center only). It creates a scheduler job type for the offline call center jobs.
3. On the **General** tab, in the **Days Web Serv. Log Entr Exist**, enter the number of days you want the entries to exist.

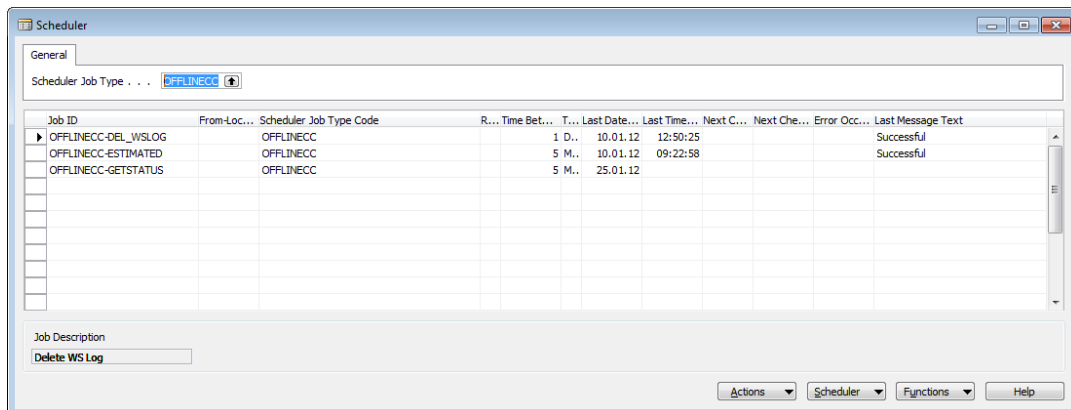


4. Click the **Call Centers** tab.



By default, the program has selected the appropriate job to be run for getting estimated timing and getting status on orders in progress. The job scheduler does not run these jobs until you set a next date and time for them to run. If you are not running the Get Estimated Timing job or Get Status on Orders job, clear those fields.

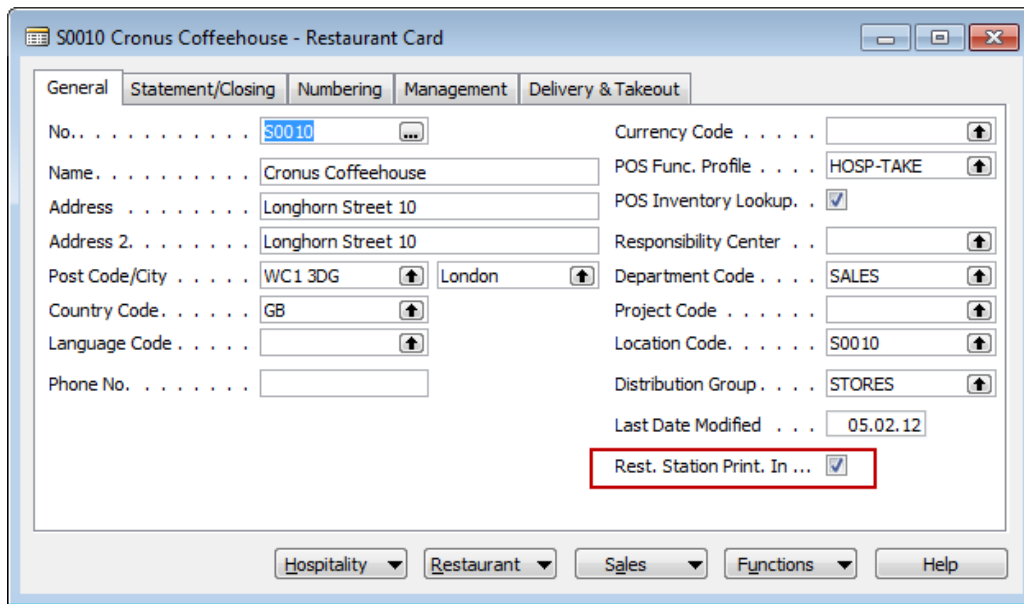
5. If you want the program to show a message when it has successfully sent a new or changed order to the restaurant, place a check mark in the **Show Msg. on Successful Send** field. The program always displays a message on an unsuccessful send.
6. To schedule the jobs, click **Scheduler, Offline Call Center Job Scheduler**.
7. Schedule the deletion of the Offline Call Center Web Service Log once a day by filling in the **Next Check Date** and **Next Check Time** fields. This will be the time the job scheduler will first run this job.



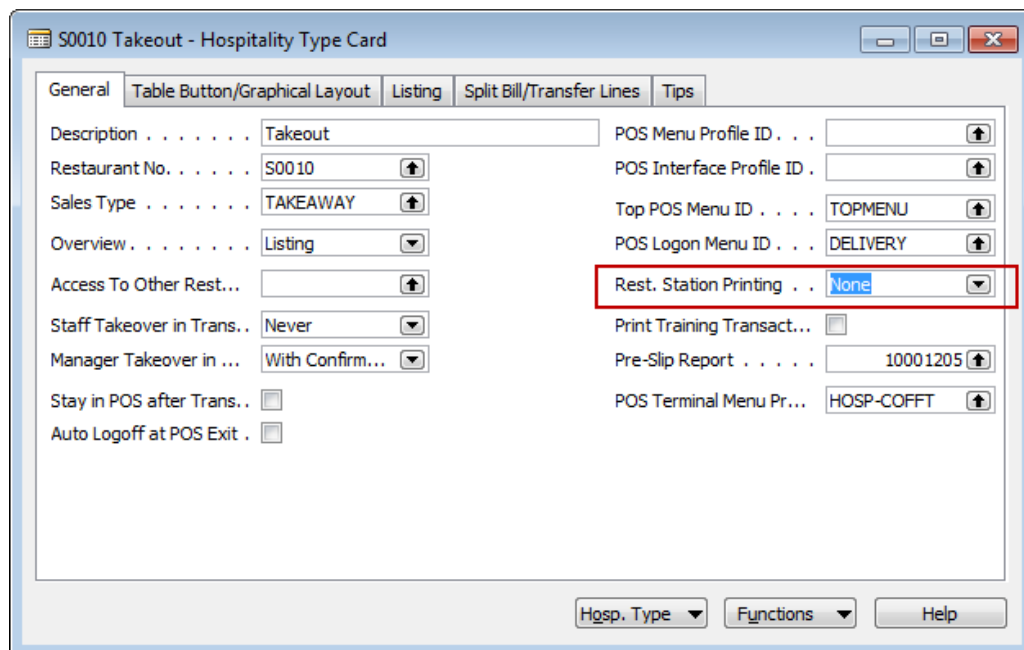
8. If you are running the Get Estimated Timing job, fill in the **Next Check Date** and **Next Check Time** fields. This job should run every 5 minutes or so.
9. If you are running the Get Status on Orders job, fill in the **Next Check Date** and **Next Check Time** fields. This job should run every 5 minutes or so.

2.2.7 Restaurant Station Printing in the Call Center

Call Center must have a check mark in the **Rest. Station Print. in Use** field in the **Restaurant Card** window for all of its restaurants. This is necessary to ensure that voiding works properly.



However, for the delivery, takeout and pre-order hospitality types for all of its restaurants, there must be no station printing since restaurant station printing takes place in the restaurants, not in the call center.



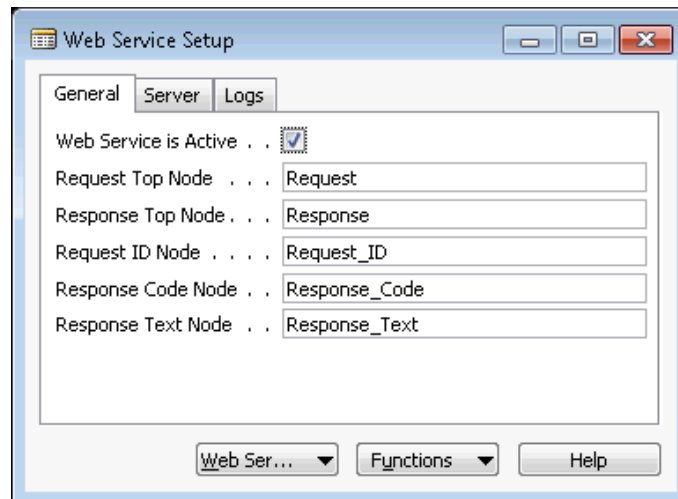
2.3 Setting Up the Restaurant Databases

You must carry out the following tasks for each restaurant database in your business.

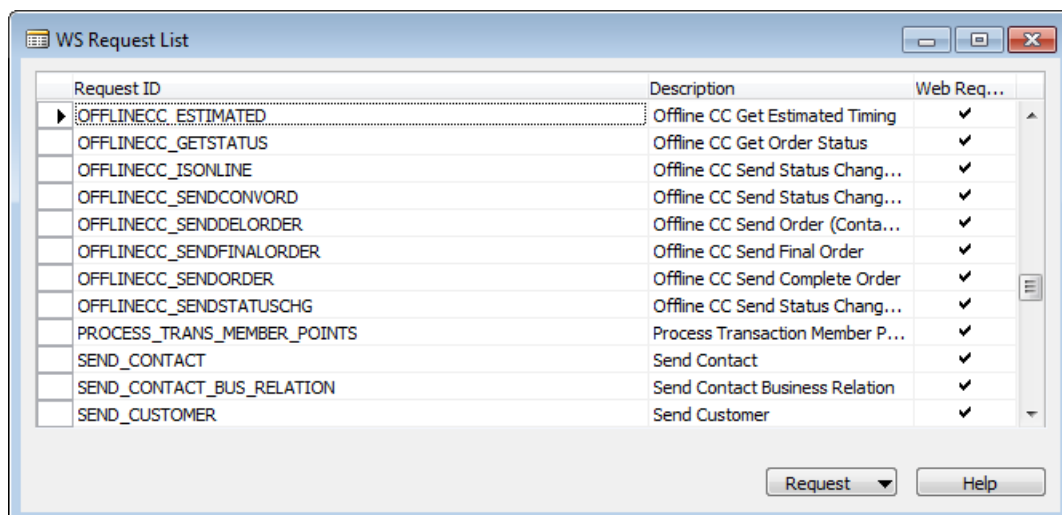
2.3.1 Setting Up Call Center Web Services

1. Open the **Web Service Setup** window (under **LS Hospitality, Setup, Offline Call Center, Web Service Setup**).
2. On the **General** tab, place a check mark in the **Web Service is Active** field (if there was already a check mark, remove it first).

The program sets up automatically all default requests.



3. Click **Functions, Insert Offline Call Center Requests**.
4. Click **Web Service, Web Requests** to view the requests that have been inserted. They all start with OFFLINECC:

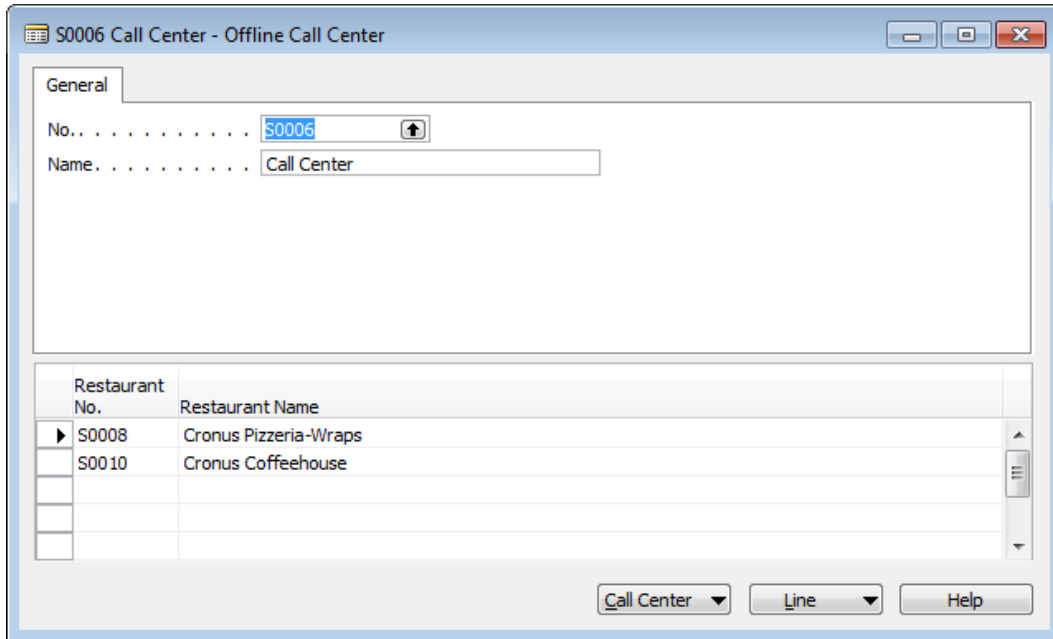


5. For each offline call center request, enter a check mark in the **Web Request Is Active** field.

2.3.2 Defining the Call Centers that the Restaurant Belongs to

When you set up a restaurant database, you need to define which call centers the restaurant belongs to.

1. Open the **Offline Call Center** window (under **LS Hospitality, Setup, Offline Call Center, Offline Call Center**).



Restaurant No.	Restaurant Name
S0008	Cronus Pizzeria-Wraps
S0010	Cronus Coffeehouse

2. Press **F3** to insert a new record.
3. In the **No.** field, enter the number of a call center the restaurant belongs to.
4. On a new line, enter the number of the current restaurant.
5. Repeat 2-4 for each call center the restaurant belongs to.

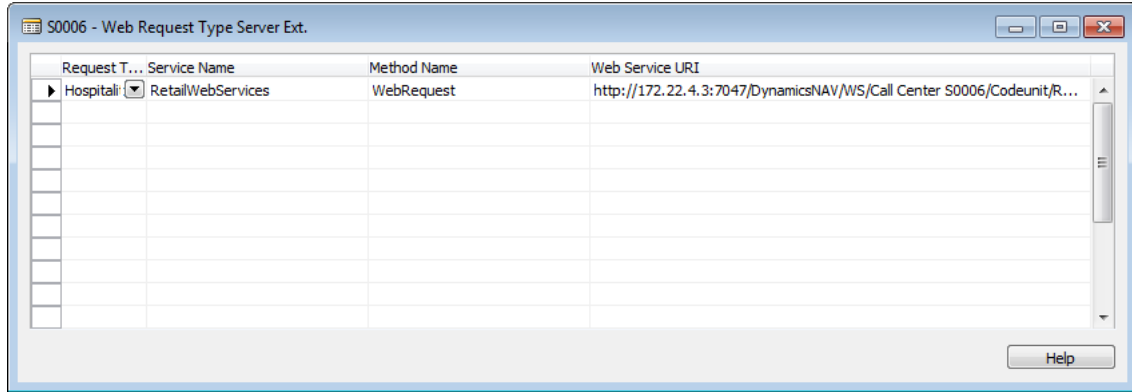
Attention

Each call center must use a unique functionality profile.

To Set Up Web Server and Web Service URI for Call Centers

1. In the **Offline Call Center** window, select the first call center the restaurant belongs to.
2. Click **Call Center, Func. Prof. Distr. Loc.**
3. Enter 1 in the **Priority** field.
4. In the **Distr. Location** field, select the distribution location for the call center (the same number as the call center).
5. Click **Distr. Loc., Card.**
6. On the **Replication** tab, make sure the name of the company is correct.
7. On the **Web Server** tab, enter the name of the Server running for web services for the call center.
8. Close the window.
9. Click **Distr. Loc., Web Request Type Server Ext.**
10. Select *Hospitality* (using the Dropdown arrow) in the **Request Type** field.
11. Click in the Service Name field to insert the record.

The program automatically enters the correct names in the **Service Name** field and the **Method Name** field and builds a Web Service URI for the call center database web service using the information on the **Distribution Location Card** window.



Repeat for all the call centers that the restaurant belongs to.

2.3.3 Configuring the Offline Call Center Setup for the Restaurant

There are several required jobs you need to run in your restaurant databases. Three of them are directly related to the Offline Call Center module. The others are necessary for delivery & takeout orders in general.

You must let the job scheduler run the following processes periodically in the restaurants:

Processing Orders Sent from Call Center – Required (Offline Call Center)

- This process runs through orders that have been sent from the call center. They have the Web Service status *New-Not Processed*, *Changed-Not Processed* and *Canceled-Not Processed*. The process updates the kitchen printing for these orders in the restaurant and changes their Web Service status to *Processed*.

Deleting the Offline Call Center Web Service Log – Required (Offline Call Center)

- This process deletes entries from the Offline Call Center Web Service Log table.
- The log stores the result of each request performed through web services and helps you monitor the web services processes.
- You specify how many days the entries should exist.
- The process should run once a day.

Sending Converted Pre-Orders to Call Center – Required (Offline Call Center)

- This process sends back to the call center orders that have been converted (they are marked as *Converted*) from a pre-order to either a delivery or a takeout order in the restaurant.
- If the process is successful, the orders get marked as *Converted-Sent*. If not, they will be sent the next time the process runs. Therefore this process must run regularly during the day in the restaurant to make sure the pre-order to sales type change of the transactions changes also in the call center.

Delivery & Takeout processes that should also be run with the job scheduler in the restaurants:

Convert Pre-Orders – Required (Delivery & Takeout with Pre-Orders)

- This process converts pre-orders to either delivery or takeout orders on the day they are due. They are marked as *Converted*.
- When to run this job depends somewhat on the opening hours of the restaurant. Running it once a day should be enough.
- If the restaurant is open passed midnight, the jobs needs to run just after midnight, thereby letting the pre-orders today get the right sales type. The process converts all

the pre-orders with today's date plus pre-orders tomorrow that are due just after midnight (midnight plus the minutes in the Adv. Pre-Ord. Print (Min.) field). If the restaurant is not open through midnight, the job needs to run before the restaurant opens up (in time for pre-orders that are due just after opening the restaurant get printed and thus prepared in time).

- If you don't specify a scheduler job for this process, the program will run the process as a part of the command DELRESET that is set up as a POS action on the Staff Logon trigger. This is however not recommended since you don't have enough control over when it is run.

Reprint Pre-Orders – Required (Delivery & Takeout with Pre-Orders)

- This process reprints pre-orders that are due soon to the restaurant stations.
- This process needs to run every few minutes.
- If you don't specify a scheduler job for this process, the program will run the process on timer when you are running the POS terminal specified as POS Terminal Print. Pre-Orders. That is not recommended. The scheduler is a much easier, more reliable way of running the process.

Delete Bom Printing and Monitor Tables – Required (Hospitality with Kitchen Printing)

- This process deletes the BOM printing and monitor tables for the restaurant stations. It needs to be run once a day and by running this process with the job scheduler, you can schedule the run during the hours the restaurant is closed. The fields **Days BOM Print Exist** and **Days BOM Monitor Exist** set for how many days these entries exist in the system.
- If you don't specify a scheduler job for this process, the program runs this function once a day from the Hospitality POS Client window. That is not recommended since deleting the entries can take time and is best done when there is no activity in the restaurant.

Delete Driver Trips – Required (Delivery & Takeout with Pre-Orders)

- This process deletes Driver Trips entries.
- It should be run once a day
- You specify how many days the entries should exist.
- If you don't specify a scheduler job for this process, the program runs this function once a day from the Hospitality POS Client window. This is not recommended since deleting the entries can take time and is best done when there is no activity in the restaurant.

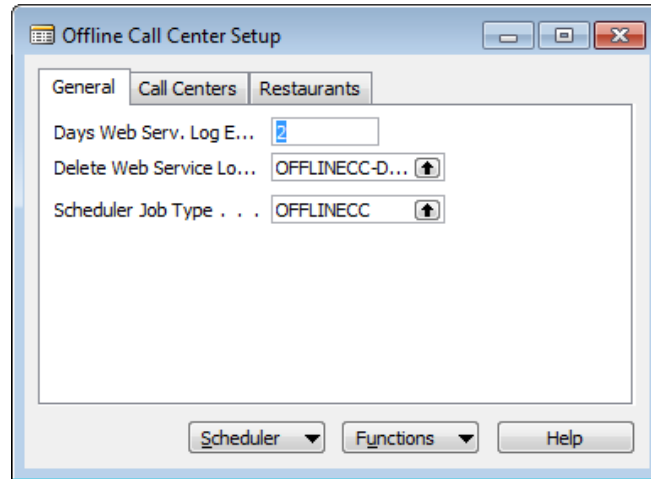
System Preconditions

- You need to have set up which call centers the restaurant belongs to.

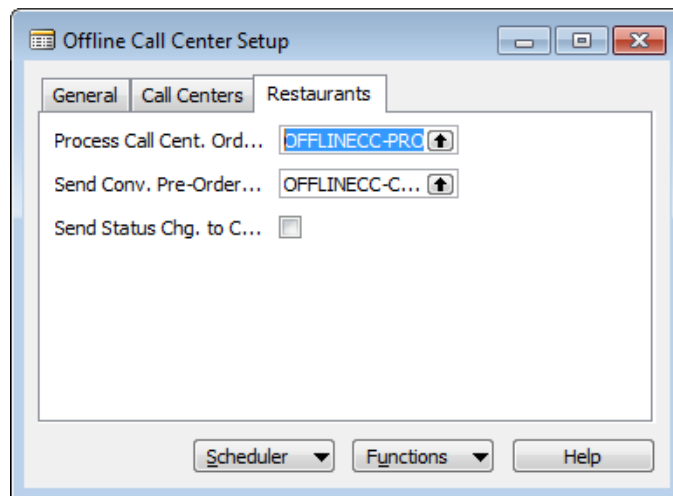
Inserting Scheduler Job and scheduling offline call center jobs

1. Open the **Offline Call Center Setup** window (under **LS Hospitality, Setup, Offline Call Center, Offline Call Center Setup**).
2. Click **Functions, Insert Scheduler Jobs**, to insert automatically the jobs to be run by the scheduler (the program creates jobs to be run in the restaurant only, both jobs related to the offline call center module and to the delivery & takeout process in

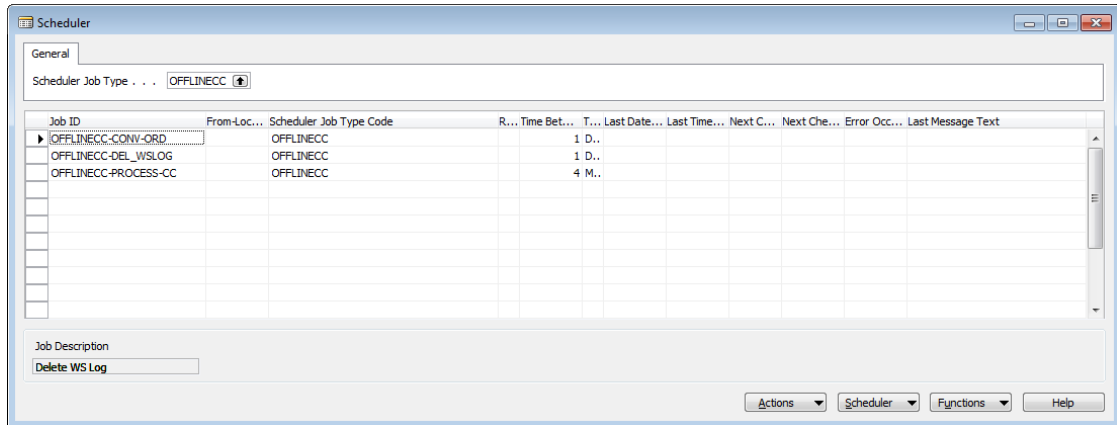
- general). It creates a scheduler job type for the offline call center jobs and for the Hospitality jobs.
3. On the **General** tab, in the **Days Web Serv. Log Entr. Exist**, enter the number of days you want the entries to exist.



4. Click the **Restaurants** tab.



5. Enter a check mark in the **Send Status Chg. to Call Cent.** if you want the program to send status changes automatically back to the call center.
6. To schedule the jobs, click **Scheduler, Offline CC Job Scheduler**.
7. Schedule the deletion of the Offline Call Center Web Service Log once a day by filling in the **Next Check Date** and **Next Check Time** fields. This will be the time the job scheduler will first run this job.



8. Fill in the **Next Check Date** and **Next Check Time** fields for sending converted orders. This job should run once a day.

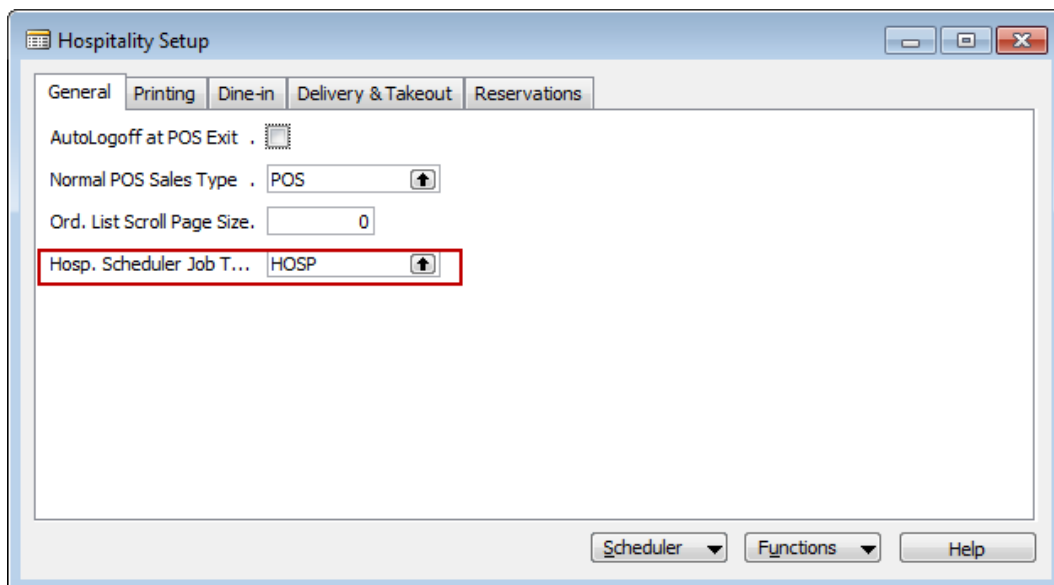
Note

This jobs needs to be run shortly after the Convert Pre-Orders job in the **Hospitality Setup** window (see the next session). If it runs with error, you need to run it again from the Web Service Monitor window.

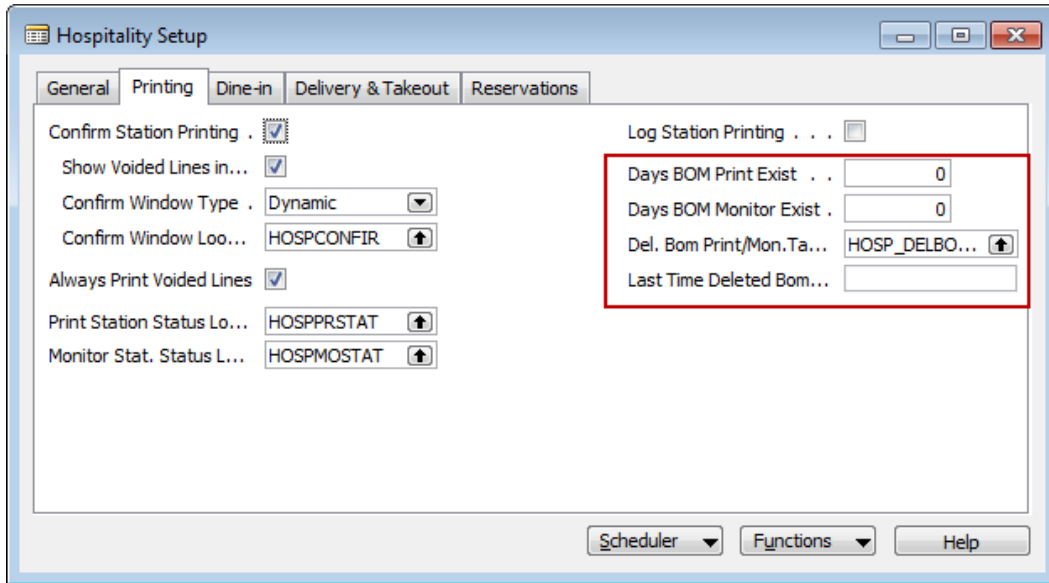
9. Fill in the **Next Check Date** and **Next Check Time** fields for processing orders sent from the call center. This job should run every 2-3 minutes or so.

Inserting Hospitality and Delivery & Takeout Jobs for Restaurants

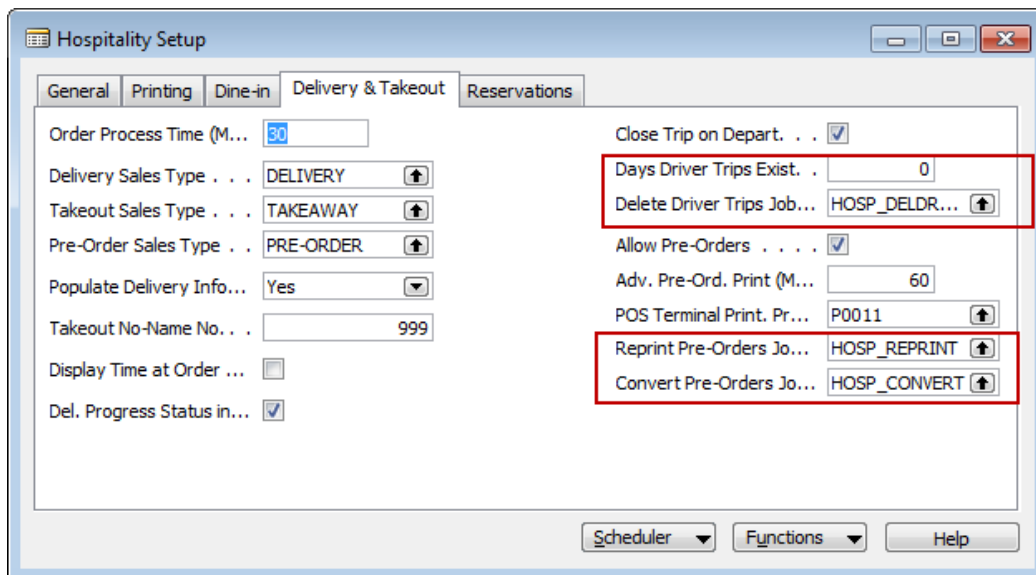
1. Open the **Hospitality Setup** window (under **LS Hospitality, Setup, Hospitality Setup**). When you inserted the scheduler jobs from the **Offline Call Center Setup** window, the program created the necessary jobs and assigned them to the appropriate fields in the **Hospitality Setup** window. It also created a Hospitality scheduler job type.



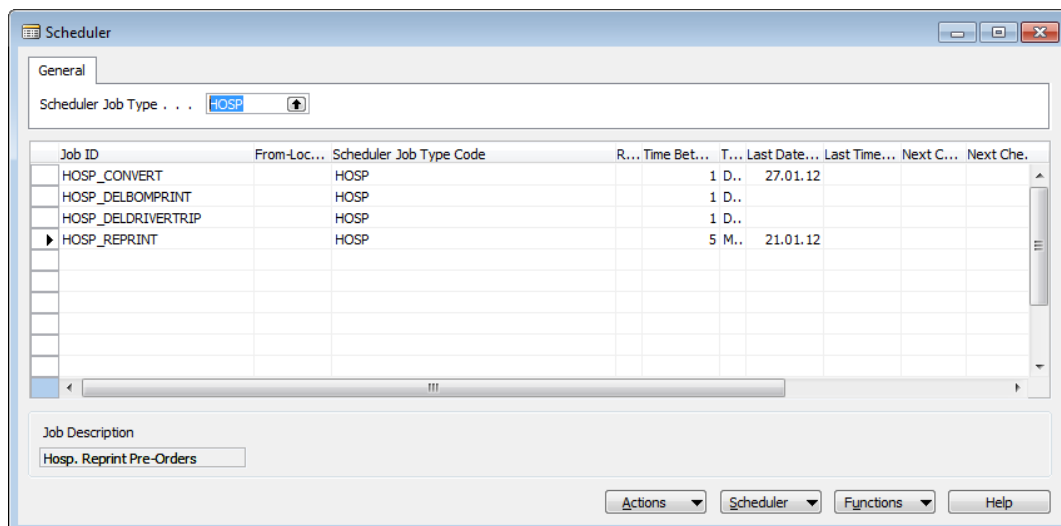
2. Click the **Printing** tab. It contains the job for deleting BOM printing and monitor tables.



3. Click the **Delivery & Takeout** tab. It contains the jobs for deleting driver trips and reprinting pre-orders and converting pre-orders.



4. To schedule the jobs, click **Scheduler, Offline Call Center Job Scheduler**.
5. Fill in the **Next Check Date** and **Next Check Time** fields for each job. This will be the time the job scheduler will first run this job.



- **Deleting BOM printing and monitor tables** needs to be run once a day.
- **Deleting Driver Trips** needs to be run once a day.
- **Reprinting Pre-Orders** needs to run every few minutes.
- **Converting Pre-Orders** needs to run once a day.

Note

This jobs needs to be run shortly before the send converted pre-orders in the **Offline Call Center** window (see the previous session). If it runs with error, you need to run it again from the Web Service Monitor window.

2.4 Setting Up Web Service Monitor

You need to set up a Web Service Monitor in the Call Centers and Restaurants. You use the monitor to have an overview over the communication between the databases. The monitor window shows the latest result of the various processes going on and from here you can run the processes directly.

You set up the Web Service Monitor on the Logon menu of the Hospitality POS client with the POS Command WEBSERV_MONITOR registered with the Delivery POS Commands codeunit.

To register the Delivery POS Commands

1. Open the **Retail Setup** window (under **LS Retail – BackOffice, Setup, Retail Setup**).
2. Click **Functions, Insert Default Data**.
3. Click **Clear All**.
4. Place a check mark in the **Hospitality Commands, Profiles, Menus** field.
5. Click **Insert**.

To set up the Web Service Monitor

1. Start the Hospitality POS Client.
2. Log in.
3. Right-click on the Logon menu (you need to have super user privileges) and select **Menu Editor**.
4. On the **Attributes** tab, increase the number of rows by one.
5. On a new line, enter a number one higher than the previous line in the **Key No.** field.
6. In the **Description** field enter a description of the monitor, such as Web Serv. Monitor.

7. In the **Command** field, select the WEBSERV_MONITOR command.

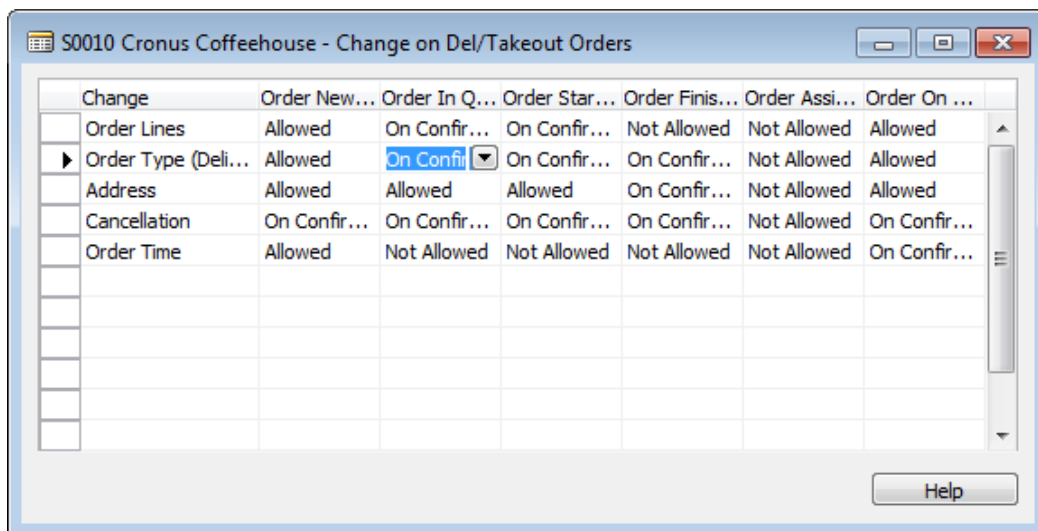
2.5 Controlling when Changes are Allowed

You set up for each restaurant what changes are allowed depending on the order status. You need to do this in both the restaurant and the call center databases. You control when changing order lines is allowed, when order type change (delivery to takeout) is allowed and when address change is allowed. A type of change is either allowed, allowed if confirmed by the user, or not allowed.

Note

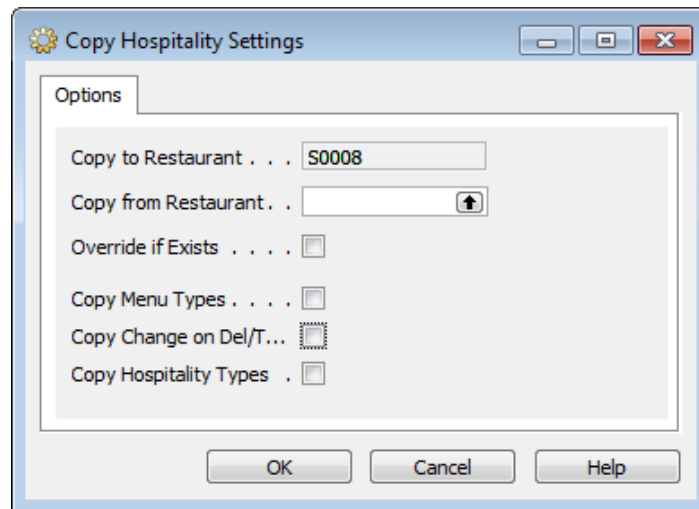
You cannot change the order restaurant after you have ordered the items for it without cancelling the order and creating a new order. You can only change the time of the order when it is new and has not been sent to the restaurant or is on hold as a pre-order.

1. Open the **Restaurant Card** window (under **LS Hospitality, Setup, Restaurant**).
2. Click **Hospitality, Change on Del/Takeout Orders**.
3. On a new line, select a type of change in the **Change** field.
4. In the other fields, select whether the change is allowed, allowed with confirmation or not allowed.
5. Repeat for the other change options.



2.5.1 Copying when Changes are Allowed from One Restaurant to Another

1. Select the restaurant you want to copy to.
2. On the **Restaurant Card** window, click **Functions, Copy Hosp. Settings to Curr. Rest.**



3. In the **Copy from Restaurant** field, enter the number of the restaurant you want to copy from.
4. If you want to override existing settings, place a check mark in the **Override if Exists** field.
5. Place a check mark in the **Copy Change on Del/Tak. Orders**.
6. Click **OK** to run the batch job.

3 Operating the Offline Call Center and Restaurant

3.1 Monitoring Web Services

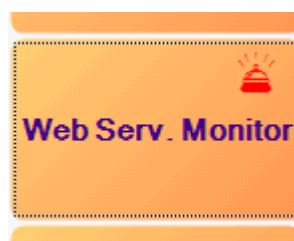
You use the monitor to have an overview over the communication between the call center and restaurant databases. The monitor window shows the latest result of the various processes going on and from here you can run the processes directly.

3.1.1 Using the Web Service Monitor in the Call Center

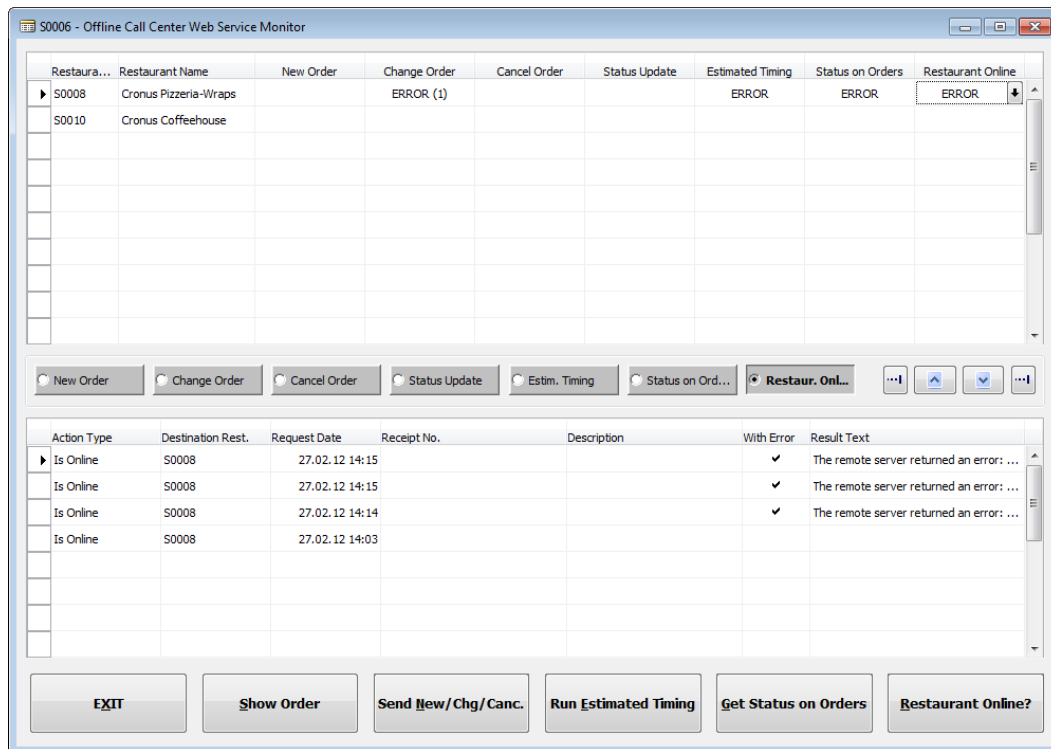
To View the Monitor in the Call Center

1. In the Call Center database, start the Hospitality POS Client.
2. Log in.

When there are web service processes with errors, the Web Serv. Monitor button on the Logon menu looks like this to notify you that there are currently errors:



3. On the Logon menu, press **Web Serv. Monitor**. The monitor window appears:



The Web Service Monitor in the Call Center is divided into two parts:

- The top part shows the restaurants that belong to the call center with fields that show the web service processes from the call center to the restaurants. If an error occurred last time a process ran, the process field contains the text ERROR followed by the number of orders waiting to be sent (if applicable). If the process ran without error the last time, the fields are blank, except when there are still orders waiting to be sent (an error occurred previously), the field contains the text WAITING followed by the number of orders waiting to be sent (if applicable).
- The bottom part shows for the selected restaurant the results of the last runs of the selected process. In the picture, the selected process is Checking if the Restaurant is Online and the restaurant is S0008. The Result Text field contains a description of the error that occurred. Once you have taken steps to correct the errors, you can run a process with an error from this window to see whether the process now runs with no errors.

To select a process

- Click on the fields in the top part
- Or click on the process buttons in between the two parts.

The processes are:

- Sending a New order (automatic)
- Sending a Changed order (automatic)
- Cancelling an order (automatic)
- Status Update on an order (automatic or manual)
- Requesting Estimated Timing from a restaurant (scheduler job)
- Requesting Status on all orders in process (scheduler job)
- Checking if the Restaurant is Online

To run a process manually from the monitor

- Press the appropriate button at the bottom of the window.

You can run the following processes:

- Resend of New, Changed and Cancelled orders
- Request of Estimated Timing
- Get Status on orders in process
- Check if restaurant is online.

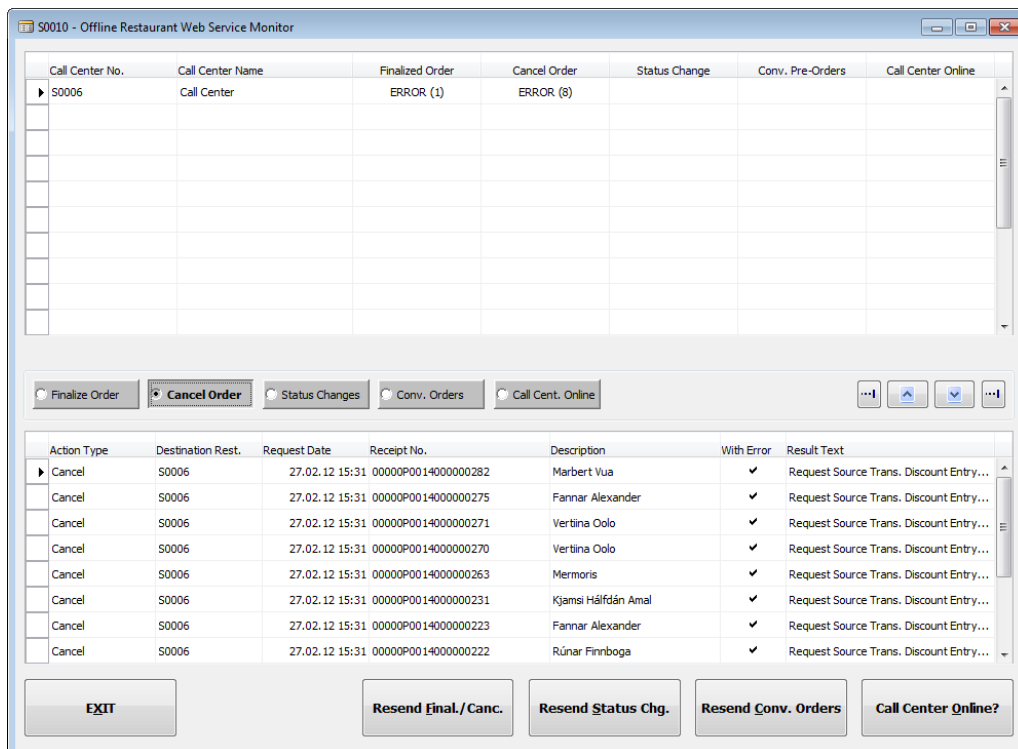
To view an order

1. For processes that deal with one order (Sending New, Changed, Cancelled and Status update), select a line in the bottom part containing the order you want to view.
2. Press **Show Order** to view the order in question. The **Delivery & Takeout Order** window appears with the selected order.

3.1.2 Using the Web Service Monitor in the Restaurant

To View the Monitor in the Restaurant

1. In the Call Center database, start the Hospitality POS Client.
2. Log in.
3. On the Logon menu, press **Web Serv. Monitor**. The monitor window appears:



The Web Service Monitor in the Restaurant is divided into two parts:

- The top part shows the call centers that the restaurant belongs to with fields that show the web service processes from the restaurant to the call center. If an error

occurred last time a process ran, the process field contains the text ERROR followed by the number of orders waiting to be sent (if applicable). If the process ran without error the last time, the fields are blank, except when there are still orders waiting to be sent (an error occurred previously), the field contains the text WAITING followed by the number of orders waiting to be sent (if applicable).

- The bottom part shows for the selected restaurant the results of the last runs of the selected process. In the picture, the selected process is Cancel Order and the call center is S0006. The Result Text field contains a description of the error that occurred. Once you have taken steps to correct the errors, you can run a process with an error from this window to see whether the process now runs with no errors.

To select a process

- Click on the fields in the top part
- Or click on the process buttons in between the two parts.

The processes are:

- Sending a Finalized (automatic)
- Sending a Cancelled order to Call Center (automatic)
- Sending a Status Change on an order (automatic)
- Sending Converted Pre-order to Call Center (scheduler job)
- Checking if the Restaurant is Online

To run a process manually from the monitor

- Press the appropriate button at the bottom of the window.

You can run the following processes:

- Resend of Finalized and Cancelled orders
- Resend status changes
- Resend Converted Pre-orders
- Check if call center is online.

3.1.3 Typical Errors

When you are in the process of setting up your system, you may run into errors like these:

- The remote server returned an error: (500) Internal Server Error. - There is something wrong with the web server URI address of the destination restaurant or call center. Check if the restaurant or call center is online after you have made changes to the web service setup.
- Request Node xLoyalty_Scheme in table 99008980 not found in request - This means that the web requests and web responses for the offline callcenter system are not identical in the call center databases and the restaurant databases. This can be fixed by running the Insert Offline Call Center Requests from the Web Service Setup window.

3.2 Creating a New Order

When you open up the **Delivery & Takeout Order** window to create a new order, the flow is the following:

1. Enter the contact information
2. Take the order by opening up the **Sales POS** window.
3. Press **Exit** to return to the **Delivery & Takeout Order** window.
4. Make any changes you want to the order except the restaurant. You may also change the order items. If you do that the Sales POS window opens up again and you press Exit to return to the **Delivery & Takeout Order** again.
5. Press **Confirm**.

At this point the program transfers the order to the restaurant in question.

3.2.1 When Sending the Order Is not Successful

If the transfer was not successful, a message appears notifying you of a communication error and giving you the opportunity to open the **Delivery & Takeout Order** window again with the same order. If you select to open the window, you can press the **View Comm. Log** button to see the resulting error text.

444666 Rúnar Finnboga - Delivery & Takeout Order

Delivery Location: Takeout Home Work Other

Pickup Date: 27.02.12 17:08
 Production Time: 60 Delivery Time: 20

Order Details:
 Phone No.: 444666
 Name: Rúnar Finnboga
 Street: MAIN STREET
 Street No.: 800
 Address 2:
 Post Code: N12 5XY
 City: London
 Directions:
 Map Grid: X3

Restaurants:

No.	Name	Orders in Progress	Estim. Prod. Time (Min.)
S0006	Call Center	0	0
S0007	Cronus Electronics S...	0	0
S0008	Cronus Pizzeria-Wraps	3	6.057
S0009	Cronus Home Furniture	0	0
S0010	Cronus Coffeehouse	28	10.184

Restaurants: -22:00
 Select: **Cronus Pizzeria-Wraps**

Current Order:

Number	Description	Quantity
	Cash	0
32030	Grilled Chicken	1
R0006	Broccoli Chicken	1

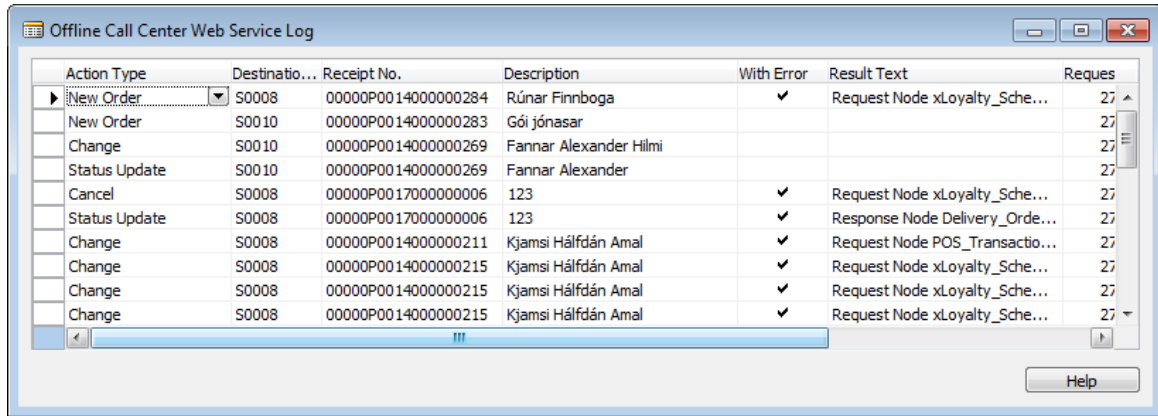
Payment Method: CASH CARD INVOICE
 Get Order Status

TOTAL . . . 23,00

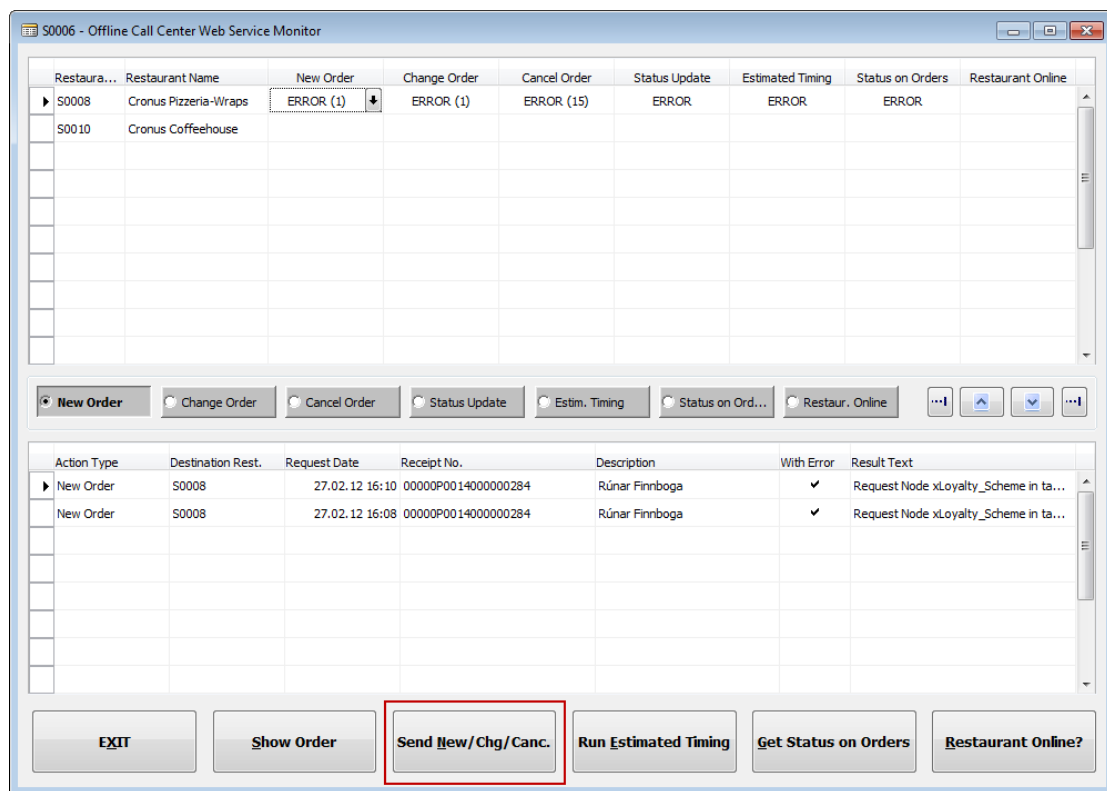
View Comm. Log

000000284 New, Not Sent

CONFIRM CANCEL ORDER CANCEL, CREATE NEW MODIFY ORDER LINES



The order receives the **General Status Error**. After fixing the error, you need to run the Resend of New, Changed and Cancelled orders from the **Web Service Monitor** window.



3.3 Looking Up, Changing and Cancelling an Existing Order

When you open up the **Delivery & Takeout Order** window with an existing order, the status of the order is shown in the bottom left corner. If you have cancelled the order in the restaurant, the status shows To Be Cancelled. Otherwise the status shows the last status of the order.

The actions you can do are the following:

3.3.1 Looking Up Status on an Order

1. Press **Get Order Status**.

The program sends a status request on the order to the restaurant in question. The resulting status is:

- **Status not Found** – The order was not found in the restaurant
- **New, Not Sent** – The order is new and has not been sent to the restaurant
- **On hold** – The order is pre-order, still on hold
- **In queue** – The order has been sent and is in queue in the restaurant
- **Started** – The order has been started in the kitchen monitor
- **Finished** – The order has been finished in the kitchen monitor
- **Assigned to driver** – The order has been assigned to a driver
- **Posted in Rest.** – The order has been posted in the restaurant (will be sent back to call center)
- **Cancelled in Rest.** – The order has been cancelled in the restaurant (will be sent back to call center)
- **To Be Cancelled** – The order has been cancelled in the call center and a request has been sent to the restaurant. The order will be sent back to call center.

3.3.2 Changing an Order (Contact Info, Order Type)

1. Change a part of the order in the **Delivery & Takeout Order** window such as contact name, address (without changing the restaurant) and comments.
2. Press **Confirm**.

The program sends the contact info to the restaurant in question. It does not send the order line information again.

3.3.3 Changing Order Lines

1. Press Modify Order Lines in the **Delivery & Takeout Order** window.
2. In the **Sales POS** window, make changes to the order by voiding or adding items.
3. Press **Exit**.
4. Press **Confirm** in the **Delivery & Takeout Order** window.

The program sends the contact info along with the order line information to the restaurant again.

3.3.4 Cancelling an Order in the Call Center

You can cancel an order in the call center at three different points in time, as long as the setup allows cancelling (depends on the order status):

1. **Before opening the Sales POS:** Press CANCEL in the **Delivery & Takeout Order** window. If you cancel the order before you take down the order items, the program simply does not create a delivery order.
2. **After ordering items but before the order has been sent to the restaurant:** Press CANCEL ORDER in the **Delivery & Takeout Order** window. If you cancel the order after you take down the order items but before pressing the **Confirm** button (the status of the order is New, Not Sent), the program sends a request to the restaurant in question to create and cancel the delivery order and void the POS transaction. The restaurant creates and cancels the order that will be sent to the call center next time an order is finalized or the Send Finalized Orders process is run from the **Web Service Monitor** window.
3. **After pressing Confirm:** Select to edit the order again or press **Show Order**, then press CANCEL ORDER. The program sends a request to the restaurant in question and if that request returns with a go ahead on cancel (the order has then been

cancelled in the restaurant), the program cancels the delivery order and voids the POS Transaction in the call center. If cancelling was not possible in the call center (not allowed because of status), you cannot cancel the order in the call center either. If a communication error occurred, you need to run the Resend Finalized/Changed/Cancelled process from the **Web Service Monitor** window

The same procedure takes place when you press **Cancel, Create New**.

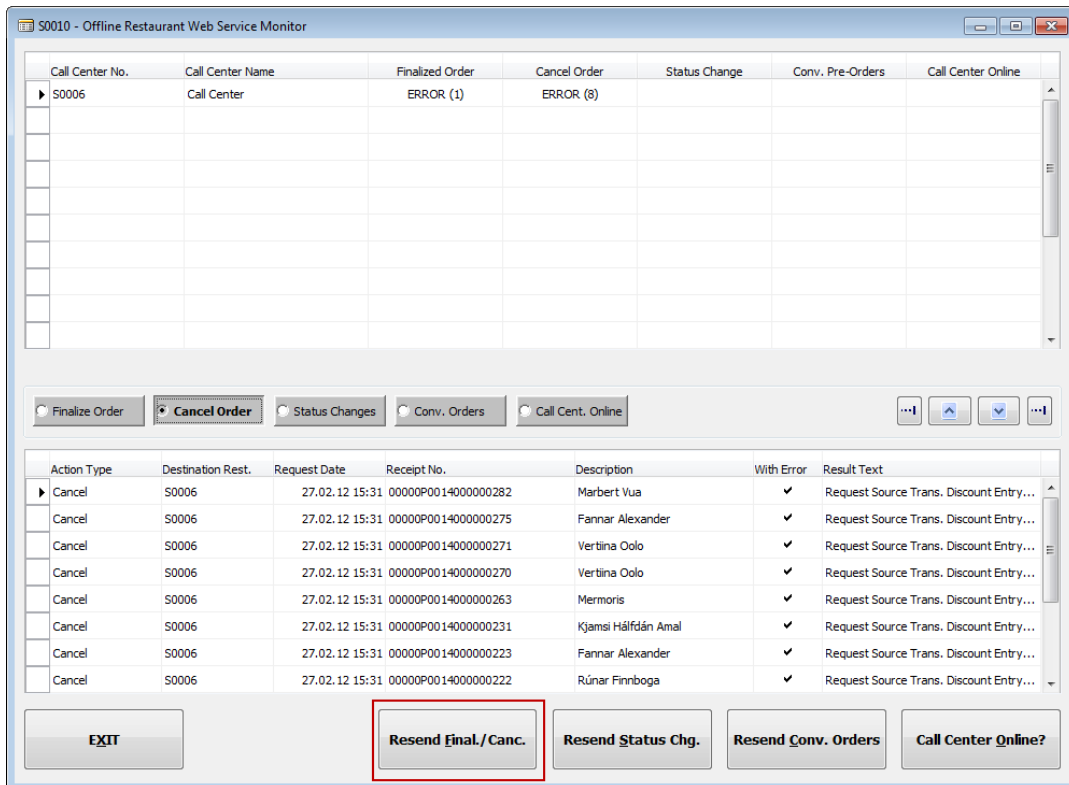
3.3.1 When Sending the Order Is not Successful

When a communication error occurs when sending an order to the restaurant, the same procedure applies as when sending a new order unsuccessfully.

3.3.1 Cancelling an Order in the Restaurant

You can cancel an order in the restaurant under the same conditions as you can cancel it at the call center. If cancelling is allowed, the program voids the POS transaction and cancels the order and then checks whether to send the order as a cancelled, finalized order back to the call center. In the call center, the handling is the same as when a finalized order is sent. In this case though, the **General Status** of the posted delivery order is *Cancelled* and the posted transaction entries are voided.

If sending the cancelled order back to the call center returned an error, the **Rest. Web Service Status** of the order is set to *Cancelled-Not Sent*. The program tries to resend the cancelled transaction the next time an order is finalized in the restaurant. You can also run the Resend Finalized/Cancelled process from the **Web Service Monitor** window.



3.4 Sending Finalized Orders to Call Center

The program takes care of sending finalized orders to the call center they originate from. The procedure is as follows:

- Once the transaction is posted, the program checks whether it originates from an offline call center.
- If so, it tries to send the transaction with the related data and the posted delivery order to the call center.
- If this procedure returns an error, the **Rest. Web Service Status** of the order is set to *Finalized-Not Sent*.
- Then the next time you post a transaction, the program tries to send the posted transaction to the call center and then tries to resend all posted delivery orders with *Rest. Web Service Status Finalized-Not Sent* or *Cancelled-Not Sent*.
- If the sending is successful, the **Rest. Web Service Status** of the posted delivery order is changed to *Finalized-Sent* or *Cancelled-Sent*.

3.5 Sending Status Changes Automatically to Call Center

If you have selected to let the program automatically send status changes in the restaurant back to the Call Center (the **Send Status Chg. to Call Cent.** field in the **Offline Call Center Setup** window is filled in in the Restaurant database), the program checks whether to send the status change when the following takes place:

- Order is marked as *Started* in the Kitchen Monitor
- Order is marked as *Finished* in the Kitchen Monitor
- Order is assigned to a driver

If the sending of status changes was not successful, you can view the error in the **Web Service Monitor** window and run the Resend Status Chg. process after fixing the error.

3.6 Sending Converted Pre-Orders to Call Center

After pre-orders are converted into takeout or delivery orders in the restaurants on the day they are due, they need to be sent back to the call center to let the conversion take place there also.

You need to let the job scheduler to run a job that sends back to the call center converted pre-orders.

If the job is successful, the orders get marked as *Converted-Sent*. If not, they will be sent the next time the job runs.

If the sending of converted pre-orders was not successful, you can view the error in the **Web Service Monitor** window and run the Resend Conv. Orders process after fixing the error.

4 Opening Hours, Restaurant Load and Production Time

The opening hours of restaurants may vary for each weekday. They change for holidays and there may also come times when the restaurant has to be temporarily closed.

The working load in each restaurant varies during a day and from one weekday to another. The order production time depends on the working load; the greater the load the longer is the production time. The load may also change around holidays.

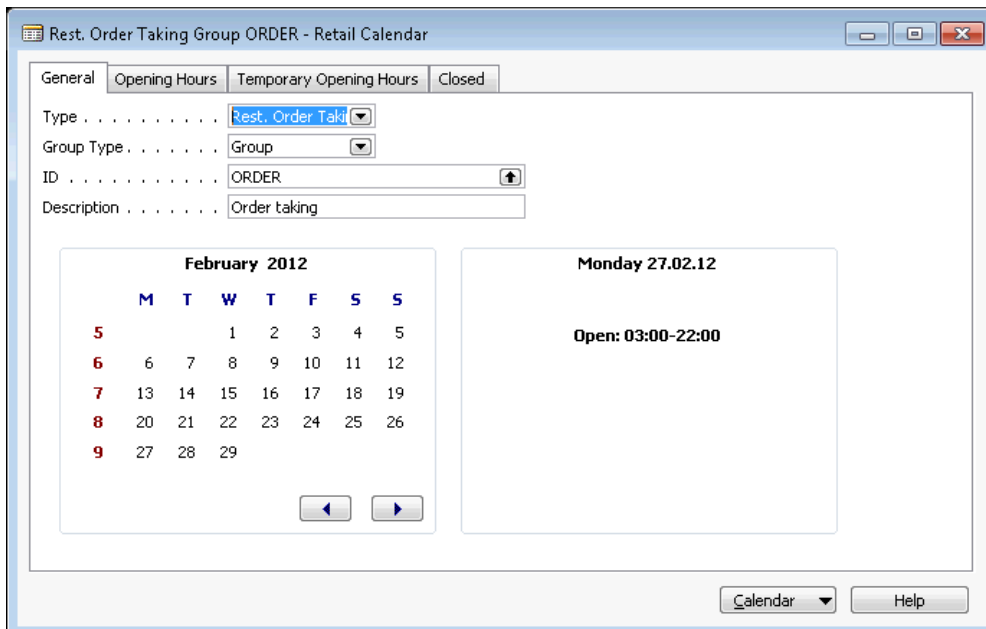
With the **Restaurant Order Taking Calendar** you can specify the hours that are open for order taking in the restaurant. You can set the hours in general and for specific days. You can also specify a closed period during normal opening hours.

With the **Restaurant Default Load Schedule** you can set up a default load schedule of the restaurant for every weekday where you specify how much the load is for periods during the day. You can also set up a **Current Load Schedule** to change the default schedule on a specific date, like a holiday.

With the **Restaurant Production Timing Schemes** you can specify how long it takes to produce orders when the load is low, medium, high or intense.

4.1 Setting Up the Restaurant Order Taking Calendar

1. Open the **Retail Calendar** window (under **LS Hospitality, Setup, General, Retail Calendar**).
2. Press F3 to insert a new calendar.
3. In the **Type** field, select *Rest. Order Taking* or *All*. If you are going to have for example the same calendar for Order taking and Opening Hours, select *All* here.
4. In the **ID** field, enter text as an ID for the calendar.
5. In the **Description** field, enter a description of the calendar.



6. On the **Opening Hours** tab, enter the general opening hours for each weekday by entering a date in the **Starting Date** field and a time in the **Time From** and **Time To** fields.

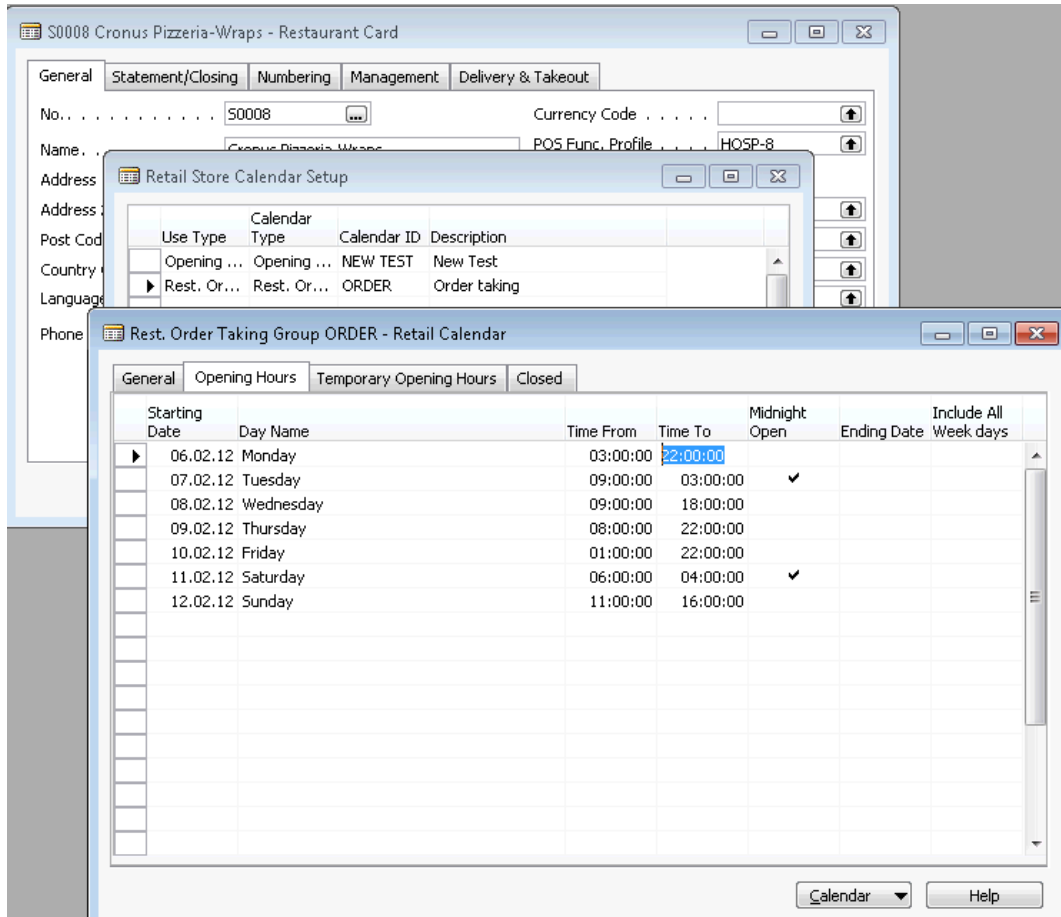
Rest. Order Taking Group ORDER - Retail Calendar

General Opening Hours Temporary Opening Hours Closed

Starting Date	Day Name	Time From	Time To	Midnight Open	Ending Date	Include All Week days
06.02.12	Monday	10:00:00	22:00:00			
07.02.12	Tuesday	10:00:00	22:00:00			
08.02.12	Wednesday	10:00:00	22:00:00			
09.02.12	Thursday	10:00:00	23:59:00			
10.02.12	Friday	10:00:00	01:00:00	✓		
11.02.12	Saturday	10:00:00	01:00:00	✓		
12.02.12	Sunday	10:00:00	23:59:00			

Calendar Help

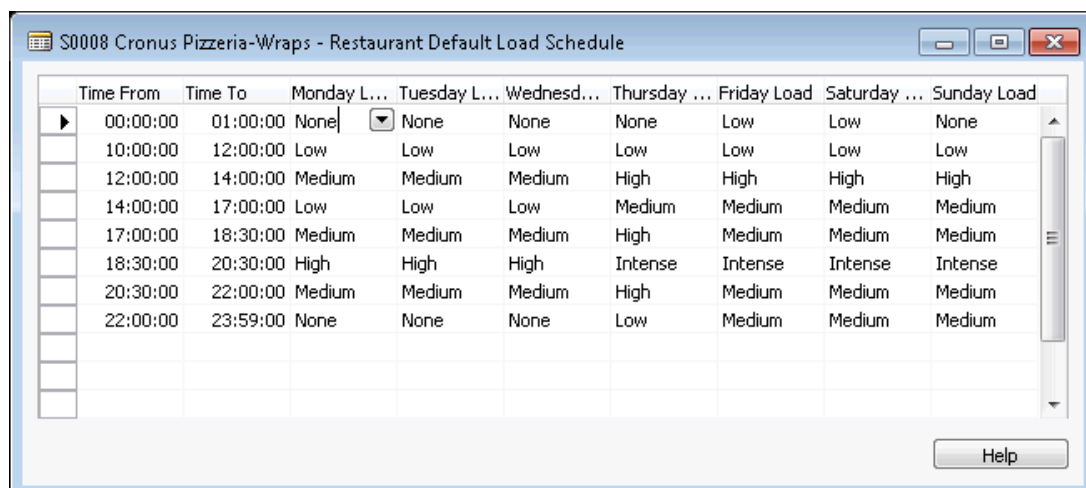
7. Open the **Restaurant Card** window (under **LS Hospitality, Setup, Restaurants**).
8. Click **Restaurant, Calendars**.
9. In the **Use Type** field, select *Rest. Order Taking*.
10. In the **Calendar Type** field, select either *All* or *Rest. Order Taking*. If you are going to have for example the same calendar for Order taking and Opening Hours, select *All* here.
11. In the **Calendar ID** field, select the calendar you have set up for order taking.
12. Click **Calendar, Group Calendar**, to see the calendar (used for a group of restaurants).
13. To make changes to the calendar for this restaurant only, click **Calendar, Private Calendar**.



4.2 Setting Up the Restaurant Default Load Schedule

Before you start setting up a default load schedule, you need to decide which periods are suitable for the restaurant. You can have long and short periods as long as they don't overlap.

1. Open the **Restaurant Card** window (under **LS Hospitality, Setup, Restaurants**).
2. Click **Hospitality, Rest. Load Schedule, Default Schedule**.
3. On a new line, enter a period in the **Time From** and **Time To** fields. The following window shows a default schedule with periods ranging from 1 hour to 3 hours.



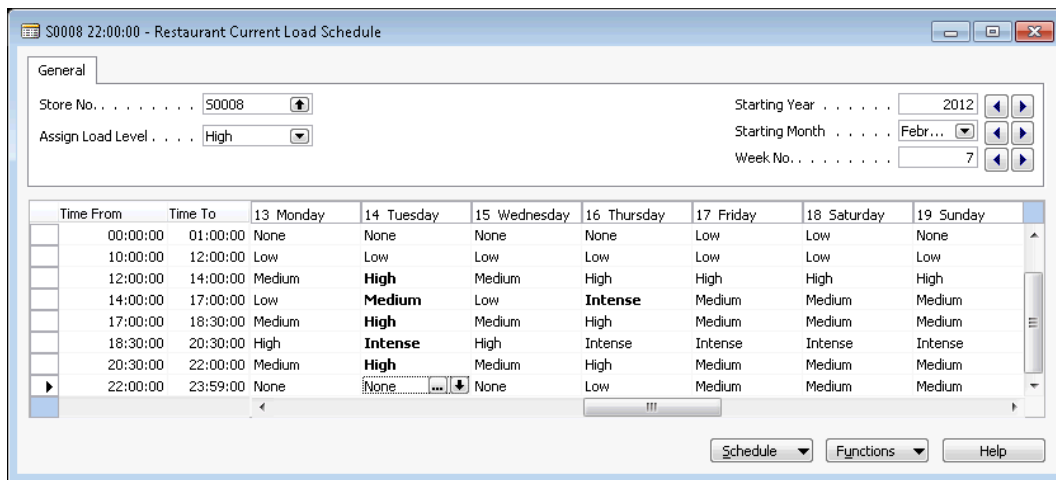
4. For each weekday, change the load as appropriate.

Note

Selecting *None* indicates that the restaurant is closed at the time. The restaurant order taking calendar controls when the opening hours for order taking are and if the load schedule for an open time is None, the program uses the **Order Process Time (Min.)** field in the **Hospitality Setup** window to decide the production time at that moment.

4.3 Setting up a Current Load Schedule for the Restaurant

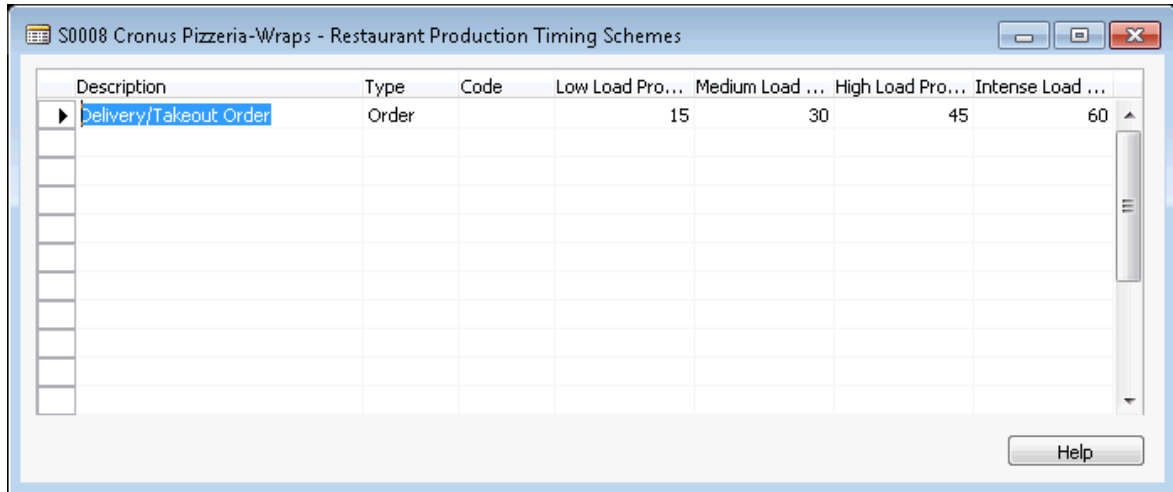
1. Click **Hospitality, Rest. Load Schedule, Default Schedule** in the **Restaurant Card** window.



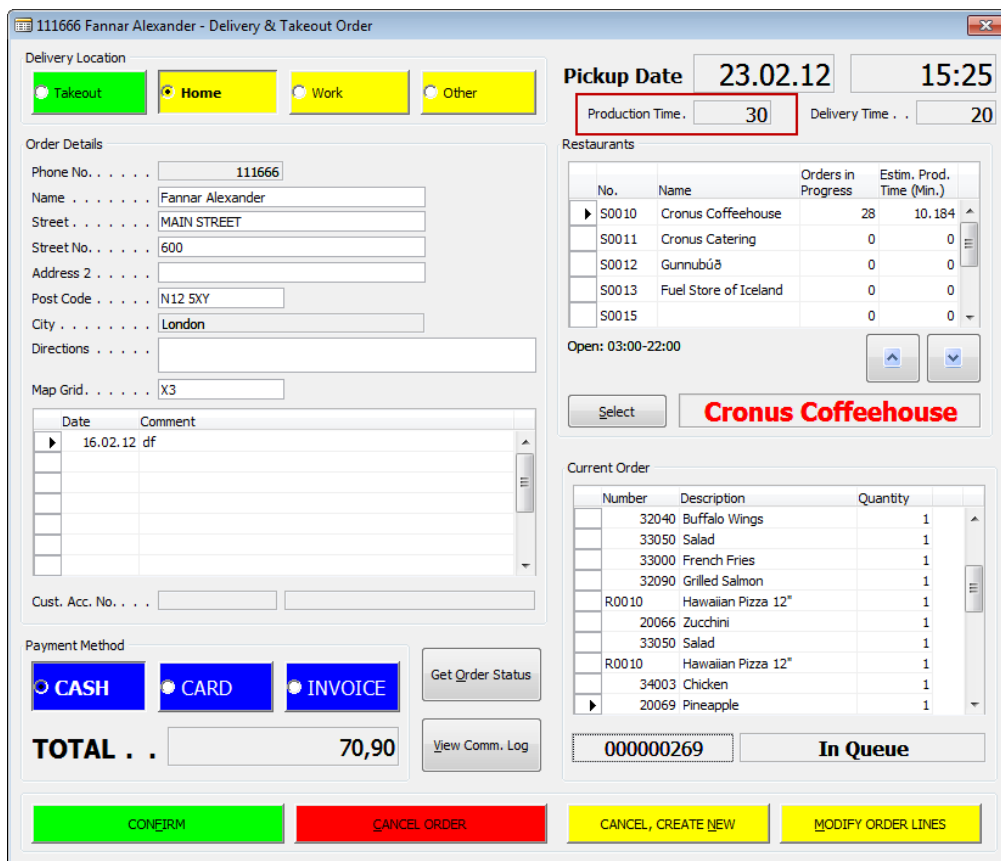
2. In the **Assign Load Level** field, select the load you want to assign to a period.
3. On a specific day, in the period you want to assign the load level, click the AssistEdit button. The load level becomes bold to indicate that it differs from the default load level.

4.4 Setting Up Restaurant Production Timing Schemes

1. Click **Hospitality, Rest. Prod. Timing Schemes** in the **Restaurant Card** window.
2. In the **Description** field, enter a description of the scheme (such as Delivery/Takeout order).
3. In the **Type** field, select *Order*.
4. In the **Low, Medium, High and Intense Load Prod. Time (Min.)** fields, enter the time in minutes that takes to prepare an order taking the load level in question into consideration.



The production time from the scheme is used to give the customer an estimated pickup time (the time the order will be ready for pickup or delivery). If no production timing schemes exist, the program uses the **Order Process Time (Min.)** field in the **Hospitality Setup** window to decide the production time.



5 Appendix

Offline Call Center - Call Center and Restaurant are on different domains

The firewall has to be open on both domains for port 7047. Use Telnet to check if port is open.

The Windows user on each domain has to have the *super* role in the database. The NAV client has to be run by using the "other domain" user

- Use: "runas /noprofile /netonly /user:*domain\user* finsql.exe" to run the Navision client in the Classic folder. This can be set up as a .bat file.

It is not possible to have a Call Center take orders for more than domain, as the client is started with the other domain's logon credentials.

Issues if the Navision clients are not started with the other domain's logon credentials:

When testing the connection string in the browser:

- From Domain 1 the Domain 2 user login was required to get a reply
- From Domain 2 the Domain 1 user login was required to get a reply

In Navision:

- In Call Center: "Connection Error" when taking order and sending it to restaurant
- In Restaurant: "Unauthorized User" when checking if the Call Center is online