Online ordering

Activation and Configuration Wizard

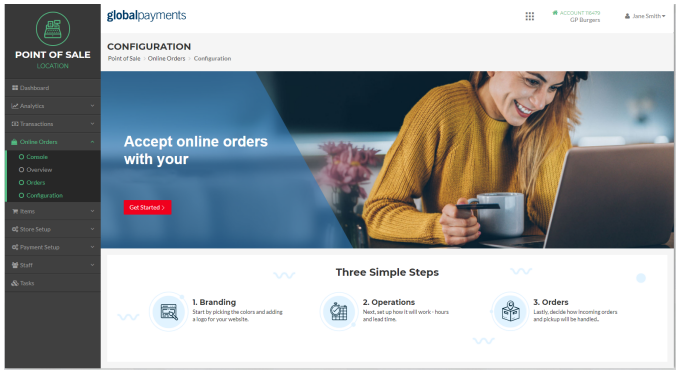
To make the online ordering setup experience as quick and easy as possible, we suggest using the Activation and Configuration Wizard. The Activation and Configuration Wizard will guide you through a systematic setup process for getting started with your Online Ordering solution. The process is user friendly and can easily be completed in a short time, without the help of a support technician.

1 – Using the Activation and Configuration Wizard

To use the **Activation and Configuration Wizard**, begin by logging into the Global Payments POS Back Office, which can be accessed at posportal.globalpaymentsinc.com.

Once you have logged into the Global Payments POS Back Office, follow the steps detailed below.

From the **Dashboard**, select the **Online Ordering** tab using the navigation pane, located on the left side of the screen. Then, choose **Configuration** from the options that become available. On the Configuration page, select the **Get Started** button to begin.

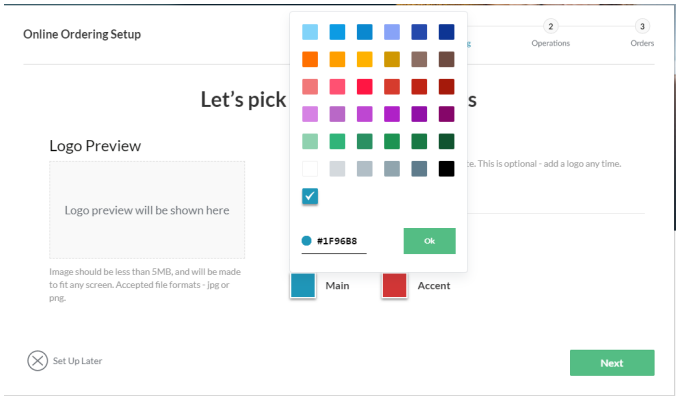


2 – Branding

The first step in the Online Ordering setup process is to configure your brand settings. You can upload your brand's logo, as well as choose the colours that represent your brand.

Logo: You can upload a logo by selecting the **Choose File** button, and then browsing for an image. Once selected, the logo can be reviewed using the **Logo Preview** box. The preview automatically populates once the logo is selected.

Colours: Select the **Main** and **Accent** colours for your brand by clicking on the colour tiles and choosing one of the standard colours that appear, or by inputting a custom colour code.



Once complete, select the **Next** button to continue.

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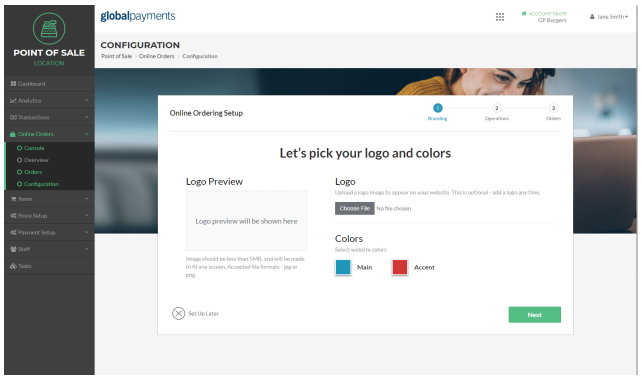
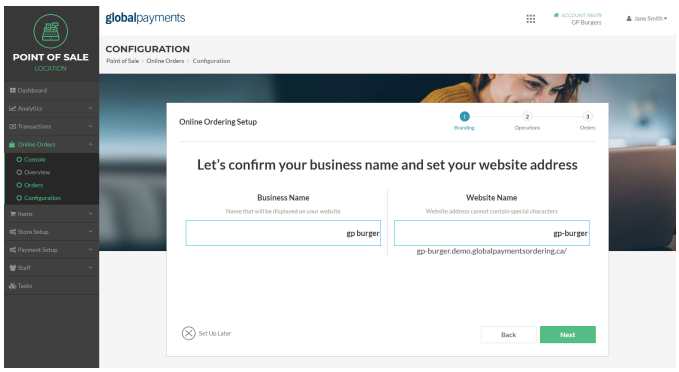


3 - Website address

Enter your website address through which your customers will access your Online ordering page. Customers accessing the website can place orders, enter promo codes, and perform self-checkout.

Using the textbox, enter a name for the website address. A green checkmark will appear if the name is valid. Be sure to use a name that is suitable for your business. Please be aware that the website address is **NOT** editable after the configuration process is complete and launched.

Once complete, select the **Next** button to continue or select the **Back** button to return to the previous section.



4 - Hours of operation

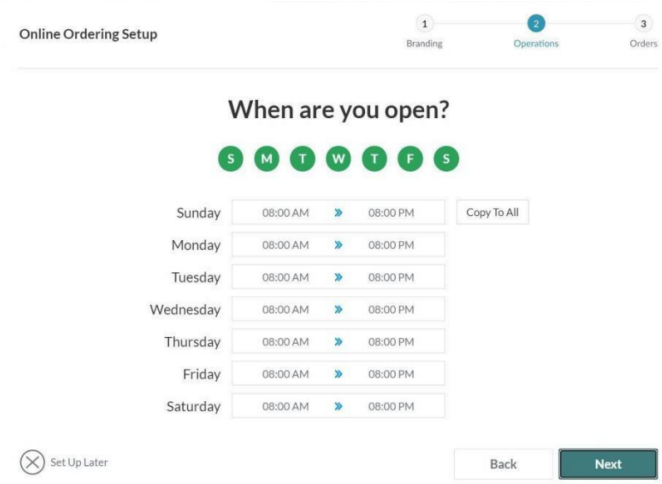
NOTE: If your business' hours of operations have been set up previously (Store Setup > Store Operations), the wizard will automatically skip to step 5.

You can set the days and hours that your business is open for placing orders. This allows you to control what days of the week your online ordering is available for placing orders and what times of the day.

Days: Choose the days your business is open and closed by selecting and deselecting the different day markers. Days that your business is closed will be removed from the times list.

Times: Set the times your business is open each day by selecting the time boxes and entering both an open and close time for your business.

Once complete, select the **Next** button to continue or select the **Back** button to return to the previous section.



5 - Customer pickup times

You can customize the hours for customer pickup times. This allows you to decide how early after opening and how late before close, customers can pick up their orders.

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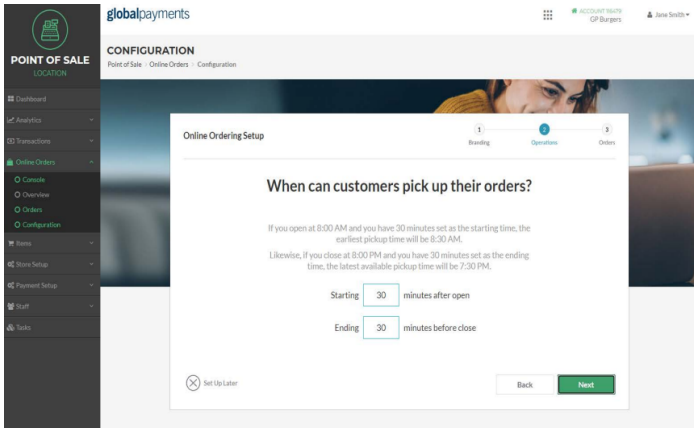
Starting Time: To set a start time for customer pickup, select the **Starting** textbox and enter a time.

Ending Time: To set an end time for customer pickup, select the **Ending** textbox and enter a time.

Once complete, select the **Next** button to continue or select the **Back** button to return to the previous section.

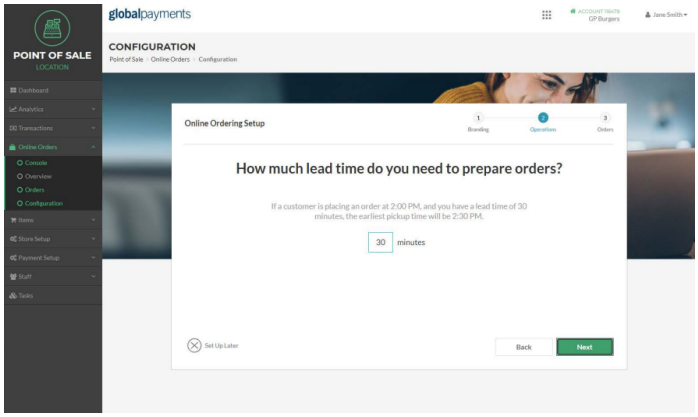


6 - Lead times for customer orders

You can set a lead time for how soon an order will be ready. A lead time gives your business an allotted amount of time before an order is ready. This will reflect on customer orders to give an estimated time when their order will be ready for pickup.

To add a lead time, select the **Minutes** text box and enter a sufficient lead time for your business. You will want to keep this number reasonable to make pickup times most accurate for customers.

Once complete, select the **Next** button to continue or select the **Back** button to return to the previous section.

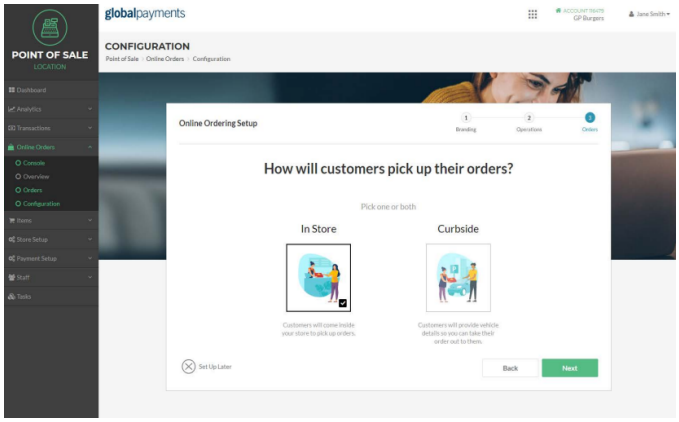


7 - Customer pickup

Decide what options a customer has for picking up their order. You have three options to choose from: **In Store pickup**, **Curbside pickup**, or **both**. Selecting both options will allow customers to choose one option when placing their order.

To choose what pickup options are available for your business, simply select or deselect the relevant option(s). An active option is displayed with a border and a checkmark to signify that it is active.

Once complete, select the **Next** button to continue or select the **Back** button to return to the previous section.



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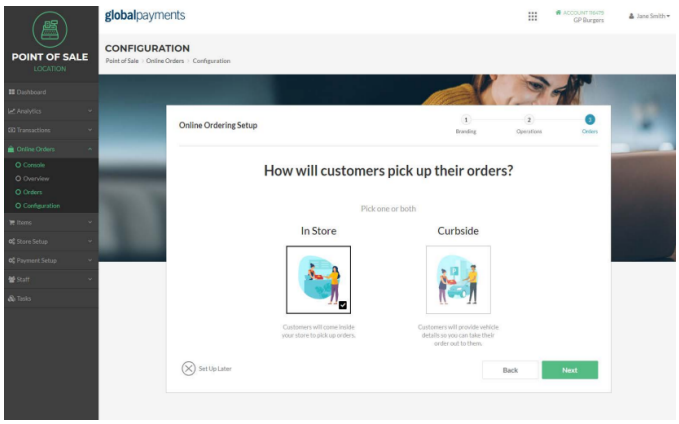
8 - Incoming orders

Decide how you prefer to handle incoming customer orders placed through online ordering. You can choose from one (1) of the following two (2) options listed:

Option 1: Review before accepting	Option 2: Automatically accept
Incoming customer orders are held and receipts will only be printed after the order is manually accepted. The user has the ability to reject orders as they are submitted.	Customer orders are automatically accepted when submitted. Users will not be presented with the ability to reject orders and receipts will not print automatically.

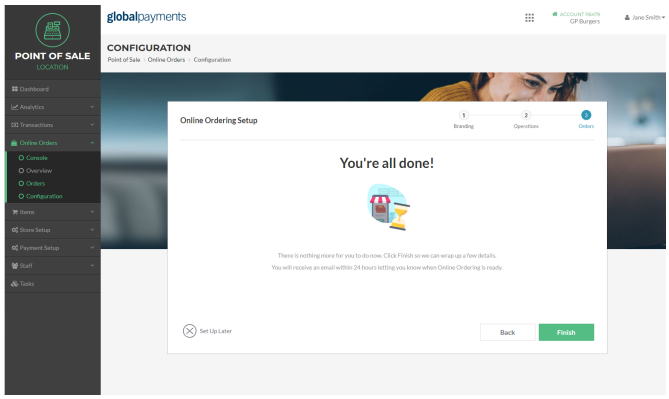
Once your selection is complete, select the **Next** button to continue or select the **Back** button to return to the previous section.



9 - Ready to start

After completing all the steps, you can now launch your online ordering processing profile.

Select the **Finish** button to proceed.



10 - Complete

Once the online ordering Activation and Configuration Wizard is complete, you will see the "Congratulations! You're all done!" message.

You will then be given the option to review the **Console** or to view the **Item Library**.

- **Console:** View incoming orders, as well as pause and resume online ordering.
- **Item Library:** View and edit items that are available for online ordering from your inventory.

You may choose to view either option or simply exit the Online Ordering module by selecting another option from the navigation pane on the left side of the screen.

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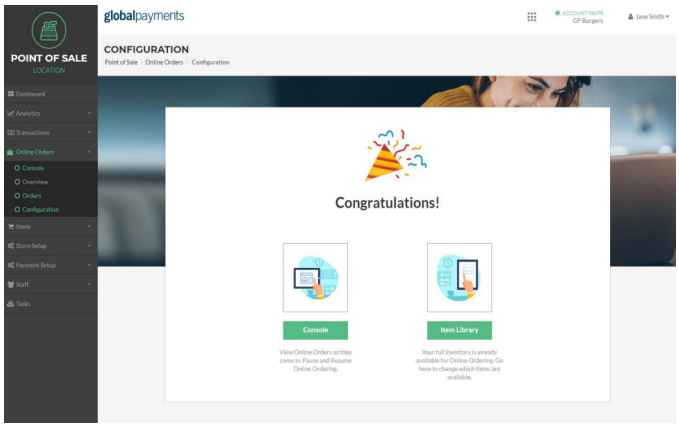

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