

Click & Collect - Shipping Settings

Overview

The Click & Collect functionality allows administrators to set order delivery/pickup modes and add freight restrictions against specific products.

Depending on the product type and your business requirements and rules, order fulfillment modes available are:

- 'delivery/freight' - when orders are dispatched to the purchaser's delivery address,
- 'pickup' - when the buyer collects their order at your store (or an alternate location such as a warehouse), and
- 'email delivery' - when items are electronically delivered, e.g., gift cards.

As your business will have its own unique requirements and rules and these options are often integrated with Product Availability rules, consult with [Commerce Vision](#) to configure your site correctly.

On this page:

- [Overview](#)
 - [1. Configure Store Locator](#)
 - [2. Place Store Availability Locator Widgets](#)
 - [3. System Settings](#)
 - [4. Messaging settings](#)
 - [Quick Reference Guide](#)
 - [5. Adding Cart 'Delivery Options' box](#)
 - [6. Forcing User to Include Delivery /Pickup Instructions](#)
- [Additional Information](#)
- [Related help](#)
 - [Related widgets](#)

Implementation and Maintenance

1. Configure Store Locator

Before Click & Collect can be implemented, Store Locator must have valid pickup locations added. For a guide, see: [Store Locator Maintenance](#).

<< < Prev Next >> Record 1 of 5 Modify New Delete Cancel OK

Store Details

Active : ☒

Store Name : Commerce Vision Head Office

Address Line 1 : 30 Lisburn St

Address Line 2 :

Suburb : East Brisbane

State : QLD

Postcode : 4152

Email :

Website :

Phone : 07 3369 3733

Fax :

Latitude : -27.4873570000

Longitude : 153.0426340000

Warehouse Code : SYD

Shipping Lead Time : 1

Is Pickup Enabled : ☒

Store Name For Pickup Click And Collect : Please Select ..

Click And Collect Product Availability Buffer : 0

Opening Hours HTML :

Update Lat/Long

☐ Apply Custom Field values to all store locations

Show Map Shows the map for the above address. Note: Latitude/Longitude must be filled in.

2. Place Store Availability Locator Widgets

When Click & Collect is enabled on your site, the Website User can set their preferred location ('My Store') at any time during their visit. Setting a preferred store will display delivery and pickup availability for a product and also for their entire order (if this feature has been configured). If the User changes their preferred store, availability will be recalculated and the page updates. Letting Users set 'My Store' is provided by adding the [Store Availability Locator Widget](#) in relevant places on your site.

1. Add the **Store Availability Locator Widget** to a header zone of the **Theme Layout** template. This places the 'My Store' feature in the site's header area, where it is visible to the User at all times during browsing and searching.

Store Availability Locator Widget added in the Header zone in Theme Layout

E-COMMERCE

Users

Products & Categories

Campaigns & Promotions

Reporting

CONTENT

Content

Advanced Content

Style Guides

SETTINGS

Settings

Advanced Settings

Edit Template: Theme Layout Template

Zone HeaderColumn3

Section Menu Feature Navigation

Store Availability Locator

Add Widget

'My Store' in the Header

Shopping Cart

Please review your cart before checkout.

My Store: Commerce Vision Head Office

Change Store

Delivery Options

Delivery Pickup

Product

BIC Grip Rollerball Pens, Fine

Code: CV251

Unavailable for Delivery

2. Add the **Store Availability Locator Widget** to the main zone of the **Cart** template. This lets the User change the pickup location during checkout.

Store Availability Locator Widget added in Main zone of Cart template

Zone: Main

Cart Delivery Options Store Click And Collect Where user selects Delivery or Pickup

Store Availability Locator

Order Lines B2B B2B

Order Lines B2B Test B2B

Order Lines B2C B2C

Cart Fast Order Entry

Alternates Popup Alternate Products substitution

Add Widget

Placeholder Widget

'My Store' in the Cart

News Store Locator

My Store: Commerce Vision Head Office

BRISBANE CITY QLD 401

CV Brisbane Warehouse

10/1 Lauriston Terrace

Paddington

QLD

4064

Commerce Vision Head Office

90 Lindsay St

East Brisbane

QLD

4152

CV Sydney Warehouse

100 George Street

Sydney

NSW

2000

3. System Settings

There are several system settings to configure for Click & Collect. These are located in the CMS in **Settings** menu **Settings**.

1. Enable Click & Collect

Find **Enable Store Availability Click And Collect** and tick to enable the feature for your website.

 **Enable Store Availability Click And Collect :** ☒

Click And Collect Delivery Available Qty :

Click And Collect Pickup Call Qty :

Order Shipped Pickup Ready Email Template :

Store Avail Click And Collect Deliv Display Mode :

Pronto Stock Warehouse Transfer Zone Field :

Click And Collect Can Order If Deliv Indent Item :

Click And Collect Can Order If Pickup Unavailable :

Click And Collect Can Order If Pickup Indent Item :

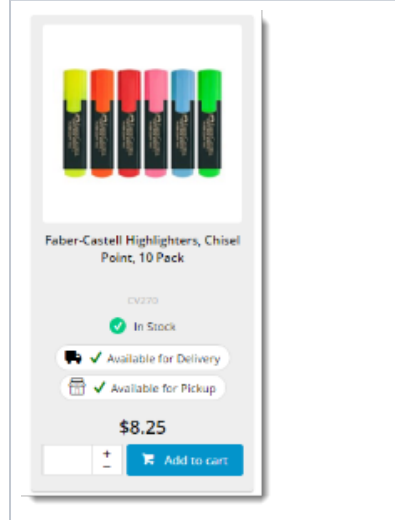
2. Product Availability

Product availability icons can be displayed in the Product Detail, Cart, and Product List pages. (**NOTE** - Examples where the Product List page are displayed include Search results, a product category, and the My Favourites page.)

Products may show a different availability status for delivery vs pickup, depending on whether the store or an alternate location such as a warehouse has been used to calculate delivery availability. A B2B user who switches to another account may see different delivery availability if the new account code has a different warehouse setting. (The rules that govern product availability for 'delivery' depend on how your site has been configured for Click & Collect and availability calculations. See the [Store/Warehouse Locator](#) guide for more details.)

Availability calculations will be specific to your site's implementation, but in all cases a 'product buffer' may be employed. This adds a safety net to the availability logic, to account for stocktake errors, for example. The buffer value is subtracted from the available quantity, for both Delivery and Pickup. The buffer can be set at the system level or by warehouse location override (see the [Store Locator](#) guide).

A Product List with availability icons



3. Stock level calculation settings

The following System Settings define stock levels for availability calculations. These values are set in the CMS under **Settings Settings**.

- **Click And Collect Product Availability Buffer** - this value is subtracted from the available quantity, for both Delivery and Pickup. The system level buffer is the fallback value, which can be overridden at a warehouse level. Example: Your ERP calculates 10 available for sale, the product buffer of 2 is deducted, so there are 8 available for sale.
- **Click And Collect Pickup Available Qty** - if available stock in User's pickup warehouse is greater than or equal to the value (after buffer), the product = 'Available for Pickup'.
- **Click And Collect Delivery Available Qty** - if available stock in User's default delivery warehouse is greater than or equal to this value (after buffer), the product = 'Available for Delivery'.
- **Click And Collect Pickup Call Qty** (Low Stock, Call to Order) - if available stock in User's pickup warehouse is less than the 'Pickup Available Qty' value, but greater than or equal to this value (after buffer), the product = 'Low Stock - Call to Order'.

Click And Collect Product Availability Buffer :

Click And Collect Pickup Available Qty :

Click And Collect Delivery Available Qty :

Click And Collect Pickup Call Qty :

i Available stock values for each product are drawn from the **ProntoStockWarehouse** table. Available stock = 'QtyOnHand' minus 'QtyCommitted' for the specified warehouse.

4. Order Restrictions

Define how orders containing 'unavailable' or special products are handled at checkout. You may choose to either take the order even when the product is unavailable or prevent checkout if backorders are not permitted. Order Restriction fields can be set to: **YES** (Always allow) / **NO** (Never allow) / **DEFAULT** (Standard behaviour as per existing business rules).

- **Click And Collect Can Order If Deliv Unavailable** - the delivery order contains a product which is 'Unavailable for Delivery'
- **Click And Collect Can Order If Deliv Spec Ord Item** - the delivery order contains a product which has no Pronto Stock Warehouse record, and is therefore 'Special Order'.
- **Click And Collect Can Order If Deliv Indent Item** - the delivery order contains a product classed as 'Indent'
- **Click And Collect Can Order if Pickup Low Stock** - the pickup order contains a product which is 'Low Stock - Call to Order'
- **Click And Collect Can Order If Pickup Unavailable** - the pickup order contains a product which is 'Unavailable for Pickup'
- **Click And Collect Can Order if Pickup Indent Item** - the pickup order contains a product classed as 'Indent'

Click And Collect Can Order If Deliv Unavailable :

Click And Collect Can Order If Deliv Spec Ord Item :

Click And Collect Can Order If Deliv Indent Item :

Click And Collect Can Order if Pickup Low Stock :

Click And Collect Can Order If Pickup Unavailable :

Click And Collect Can Order if Pickup Indent Item :

5. Check Other Stores

This allows the User to check product availability at nearby store locations. If this option is enabled, the 'Check Other Stores' button will display in the Product Detail and Cart pages. This button launches a popup window showing the pickup availability of the product at stores close to the user's 'My Store' location. Only nearby stores with stock available will appear in this popup - if there are no locations within X kilometres, a message will display to indicate that no nearby stores have stock available.

- **Enable Nearby Stores Availability for Products** - tick to enable Check Other Stores functionality
- **Store Location Max Distance for Alternate Stores** - sets the max distance from the user's currently selected store (system defaults to 50km if no value is set)

Enable Nearby Stores Availability For Products : ☒

Store Location Max Distance For Alternate Stores :

Button on Product Detail page

Availability

Starter Acoustic Guitar

Product Code: CV174



\$69.95 inc GST

Available for Delivery
 Available for Pickup
 Check Other Stores

Qty: 1

Qty in cart: 0

Technical Specifications

Ages: 4 years +

Description

A value guitar that plays sweetly. This small-bodied Starter Acoustic Guitar is an amazing deal for a starter guitar. Its smaller profile (7/8" scale) makes it very playable for kids or aspiring guitarists with smaller body frames and hands. It has a maple neck and rosewood fretboard and Martin strings which help give you a nice tone.

- Smaller body style ideal for kids
- 7/8 scale
- Maple neck
- Rosewood fretboard
- Martin strings
- Case sold separately

In-Store At

CV Brisbane
 107 Latrobe T
 Paddington
 QLD
 4064

Commerce Office
 30 Lisburn Str
 East Brisbane
 QLD
 4169
 073369373

6. Delivery Availability Display Mode

Determines whether delivery availability is based on the user's default delivery warehouse (standard) or includes transfer zones.

'Store Avail Click and Collect Deliv Display Mode' should be set to either:

- **Standard** - delivery availability is calculated per the method outlined in Step 2.
- **Transfer Zone** - delivery availability takes into account nearby warehouses in the same 'transfer zone' group. If stock is present and can be transferred for delivery, the product will display an 'X - X days to delivery' status, depending on core logic vs transfer stock. (Contact Commerce Vision for more detailed information on this option)

'Pronto Stock Warehouse Transfer Zone Field' - set to 'TransferZone' if using Transfer Zone display mode, otherwise leave at 'Please Select'.

Store Avail Click And Collect Deliv Display Mode :

Pronto Stock Warehouse Transfer Zone Field :

7. Email Settings

Pickup orders trigger an email to the user once their order is ready for collection. This notification is the equivalent of the Order Shipped email for Delivery orders.

- **Order Status for Shipped Pickup Ready** - defines the PRONTO status that will indicate a pickup order is ready to collect.
- **Order Shipped Pickup Ready Email Template** - defines the email template used when an order has reached Pickup Ready status and the Integrator triggers the 'Pickup Ready' email to the user. The default template is called 'Order Shipped Pickup Ready'. You can edit this template via **Content Emails**.

Order Status For Shipped Pickup Ready :

Order Shipped Pickup Ready Email Template :



Don't forget to add the 'Order Status for Shipped Pickup Ready' to the list of 'Order shipped statuses' in the Integrator Advanced Settings. See [Integrator Settings - Advanced](#) for information.

Site 'CSSDemoToBPDUAT' Integration Settings

OK Cancel Apply

Local Cache Data Filters

Timing ERP Internet Custom Tables Custom Fields **Advanced** Notifications Images Discounts & Special Pricing Documents Timing Items

Serial Number Import

☐ Enable serial number import from file

File Prefix : SerialNumberRange

Other Settings

Alternate Product Category Field :

Alternate Sort Code :

Invalid Condition Codes (default: DIYNT) :

Default Country :

System Table Types to Send : XM

Order Shipped Statuses : 80, 57

Reviewed Quote Field :

Order Delivery Email Address Set Field :

StockPrice Field For Product Integrated Price : Please select...

Archive Orders From Override Date : 01-03-2002

Online Receipting Fields :

Address Validation Field :

File Upload Filename Character Mapping Settings

CSSNET 3.63# Required for this functionality

☐ Enable

Escape Character : ~

Mappings

~/ +\ :: \$* @? (< > ||

Reset Mappings and Escape

8. Google Merchant Settings

- 'Store Location Google Api Maps Uri' - set to <https://maps.googleapis.com/maps/api/js?key=>
- 'Google API Key' - populate with the website's unique API key.

Google Merchant Settings

Google Tag Manager ID : STM-VH000000

Google API Key : AIzaSyA4wG2PnF-a2NqL3mR8Chcy1rE0b0Qw

Store Location Google Api Maps Uri : <https://maps.googleapis.com/maps/api/js?key=>

Enable Google Trusted Stores : ☐

Enable Google Shopping : ☐

Default Shipping Lead Time : -1

Default Delivery Lead Time : -1

Google Account Number :

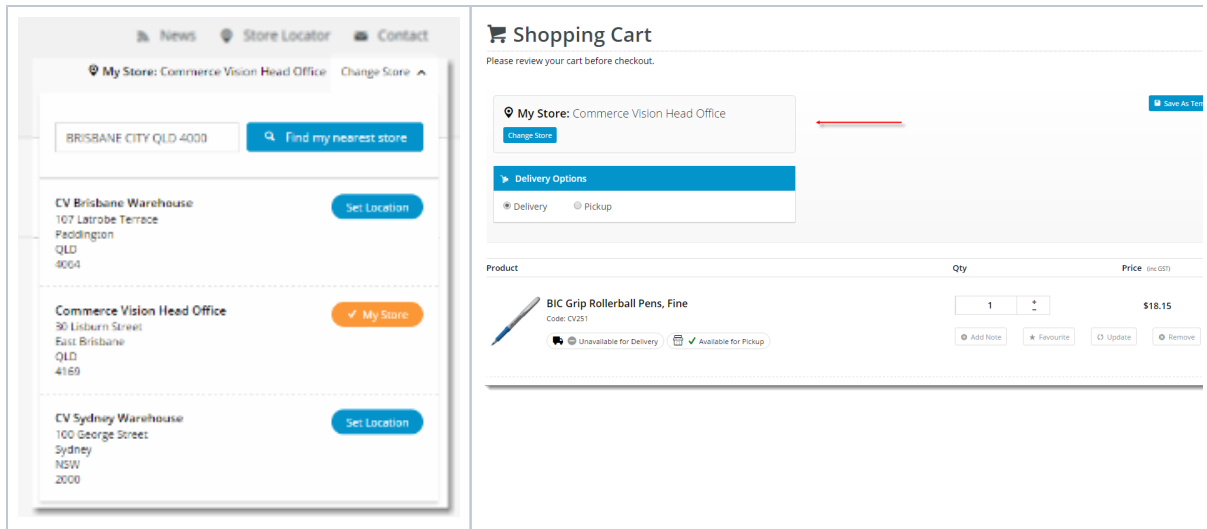
4. Messaging settings

Text related to pickup displayed on your site may be customised as required. Widget template locations are noted for each.

1. 'My Store' interface

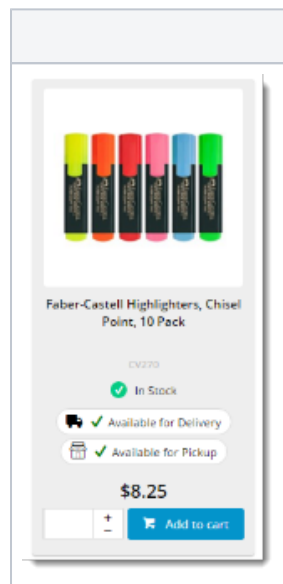
1. Store Availability Locator Widget

Location 1 - Theme Layout template	Location 2 - Cart template
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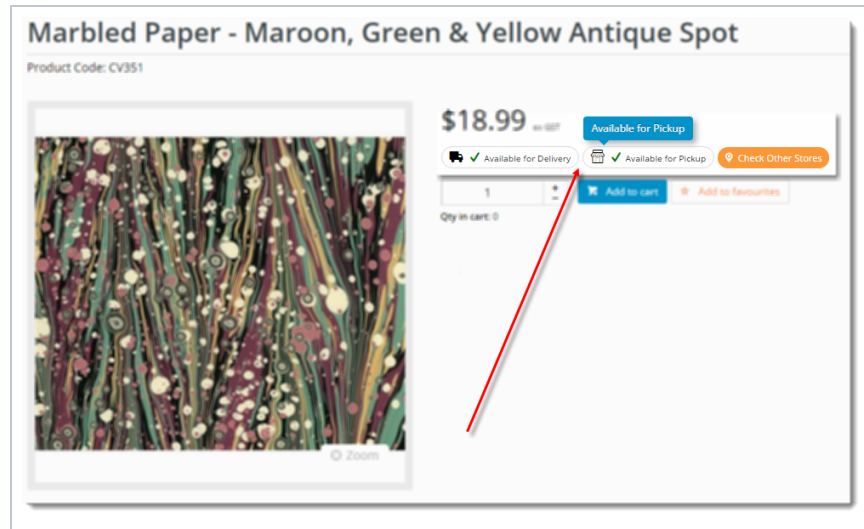
2. Availability Icons - Text & Tooltips

- a. **Product List Click & Collect Widget** (for Campaigns/Search Results/Browsing/Favourites)

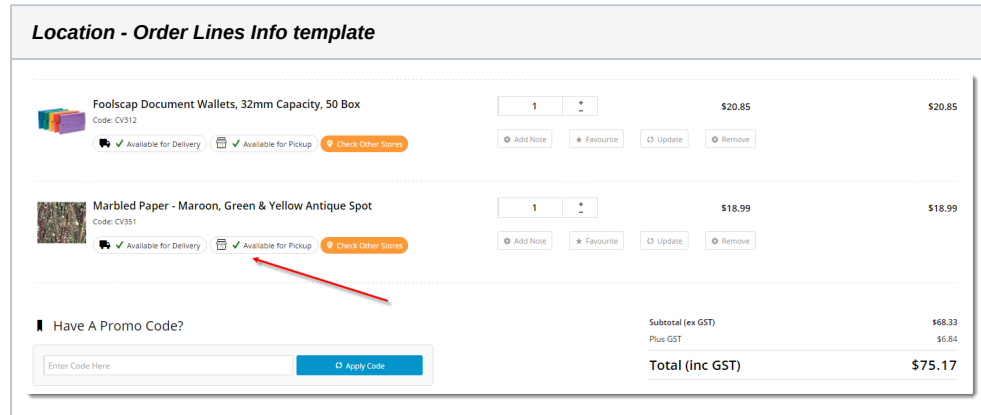


- b. **Product Purchase Details Widget** (also includes 'Check Other Stores' messaging)

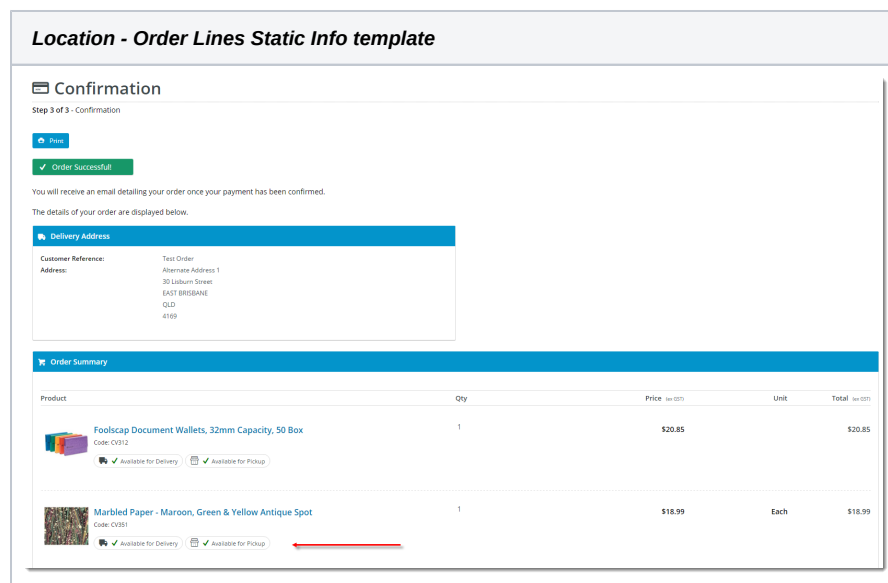
Location - Product Detail template



c. **Order Line Click & Collect Widget** (for shopping cart lines)



d. **Order Line Click & Collect Static Widget** (for Order Confirmation page, IF you choose to display availability here)



Quick Reference Guide

The below table outlines calculation logic and resulting (default) icons + messaging displayed to the user in different scenarios. These examples are based on a site using the Standard delivery display method.

Product Status	Calculation	Icon	Wording	Tooltip
Pickup - Available	Stock in selected store Pickup Available Qty + Buffer		Available for Pickup	Available for Pickup
Pickup - Low Stock	Stock in selected store Pickup Call Qty + Buffer		Low Stock - Call To Order	Low Stock - Call To Order
Pickup - No Stock	Stock in selected store < Pickup Call Qty + Buffer		Unavailable for Pickup	Unavailable for Pickup
Pickup - Indent	Stock type 'I'		Call To Order	Call To Order
Delivery - Available	Stock in default warehouse Delivery Available Qty + Buffer		Available for Delivery	Available for Delivery
Delivery - No Stock	Stock in default warehouse < Delivery Available Qty + Buffer		Unavailable for Delivery	Unavailable for Delivery
Delivery - Indent	Stock type 'I'		Call To Order	Call To Order
Delivery - Special Order	The product has no Pronto Stock Warehouse records, so availability can't be calculated.		Special Order	Special Order
Store Not Set	The user has not set 'My Store', so pickup availability can't be calculated.		Not Set	Not Set



Keep in mind that actual icons will vary by site design, and wording and tooltip values are completely configurable in the CMS.

5. Adding Cart 'Delivery Options' box

The 'Delivery Options' box in the Cart allows Website Users to select the delivery mode for their order.

Home > Cart

Shopping Cart

Please review your cart before checkout.

My Store: Banksmeadow NSW (2019) [Change Store](#)

[Update Order](#) [Remove All](#)

Delivery Options

☐ Delivery ☒ Pickup

Product	Qty	Price (inc GST)	Unit	Total (inc GST)
 BIC Velocity Retractable Ballpoint Pen, Medium Point Code: CV221 Available for Delivery Available for Pickup Check Other Stores	1 + -	\$14.99	DOZE	\$14.99
Add Note Update Remove				

It is rendered by adding the [Delivery Options - Click and Collect Widget](#) to the Cart template. This will have been added by Commerce Vision for your site. However, you can edit the text displayed in the widget. See [help](#) for this widget for more details.

6. Forcing User to Include Delivery/Pickup Instructions

Available for versions 4.36+.

To make the user enter delivery and/or pickup instructions if either or both options are selected, toggle on 'Pickup Instructions Are Mandatory?' / 'Delivery Instructions Are Mandatory?' in the [Delivery Address B2B](#) and [Delivery Address B2C](#) widgets.

The screenshot shows a checkout process with a progress bar. Step 3 is 'Payment' and Step 4 is 'Summary'. A red error message box is displayed, stating 'Please enter delivery instructions.' with a 'Confirm' button. Below the progress bar, there is a section titled 'Delivery Instructions*' with a red border, indicating a required field.

The user cannot continue checking out unless instructions are entered.

Additional Information

Minimum Version Requirements	03.82.00
Prerequisites	--
Self Configurable	Yes
Business Function	Freight & Delivery
BPD Only?	Yes
B2B/B2C/Both	Both
Third Party Costs	n/a

Related help

- [Click and Collect - Email Delivery](#)
- [Store Locator Maintenance](#)
- [Backordered Products & Ordering](#)
- [Product Restriction Enquiry](#)
- [Click & Collect - Shipping Settings](#)

Related widgets

- [Product Click And Collect Widget](#)
- [Delivery Options - Click And Collect Widget](#)
- [Product List Click And Collect Widget](#)
- [Order Line Click And Collect Widget](#)

- [Order Line Availability - Click and Collect Widget](#)
- [Order Line Click And Collect Static Widget](#)
- [Store Availability Locator Widget](#)