

NRS Order Management - User Manual

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Introduction

The **NRS Order Management System** (also referred to as NRS Order Management) is designed to help you easily manage orders received from different sources all in one place.

It brings together orders from your store's online platform, delivery apps, and in-store kiosks, so you don't have to switch between different systems or devices to handle orders coming in from multiple places.

The Order Management merges orders from the following sources:

- **NRS Ecommerce Orders:** Orders made on your store's website or the BOSS Local app.
- **Delivery Platform Orders:** Order Management currently connects to **DoorDash**, and in the future it will also integrate with **Uber Eats** and **Grubhub**.
- **NRS Kiosk:** Orders placed through the kiosk in your store are also processed in NRS Order Management.

In this way, **NRS Order Management** helps you keep track of all your orders in one place, making it easier to get them ready and out to your customers on time.

Key Benefits

The key benefits of **NRS Order Management** include:

- **All your orders in one place:** **NRS Order Management** brings together orders from your website, kiosk, and delivery services. This makes it easier for you to manage everything and keep on eye on which orders need to be fulfilled first.
- **Live updates:** You can see the status of every order in real-time. This gives you a real-time overview of what's happening currently with your Ecommerce orders.
- **Easy workflow:** NRS Order Management provides a simple interface where you can see which orders are new, which are currently being picked and which are waiting for an extra action, like ID verification or payment.

Getting Started

Accessing Order Management

You can access **NRS Order Management** from three different platforms:

- **Point of Sale (POS):** **NRS Order Management** can be accessed directly from your in-store POS system.
- **Merchant Portal:** You can access **NRS Order Management** via the Merchant Portal, this allows you to view the status of orders in your store from anywhere with Internet access.
- **My NRS Store App:** You can also access **NRS Order Management** on a mobile phone by using the My NRS Store App. This is especially useful for employees who need to check order details, manage picking, and prepare orders while they're moving around the store.

Point of Sale (POS) System

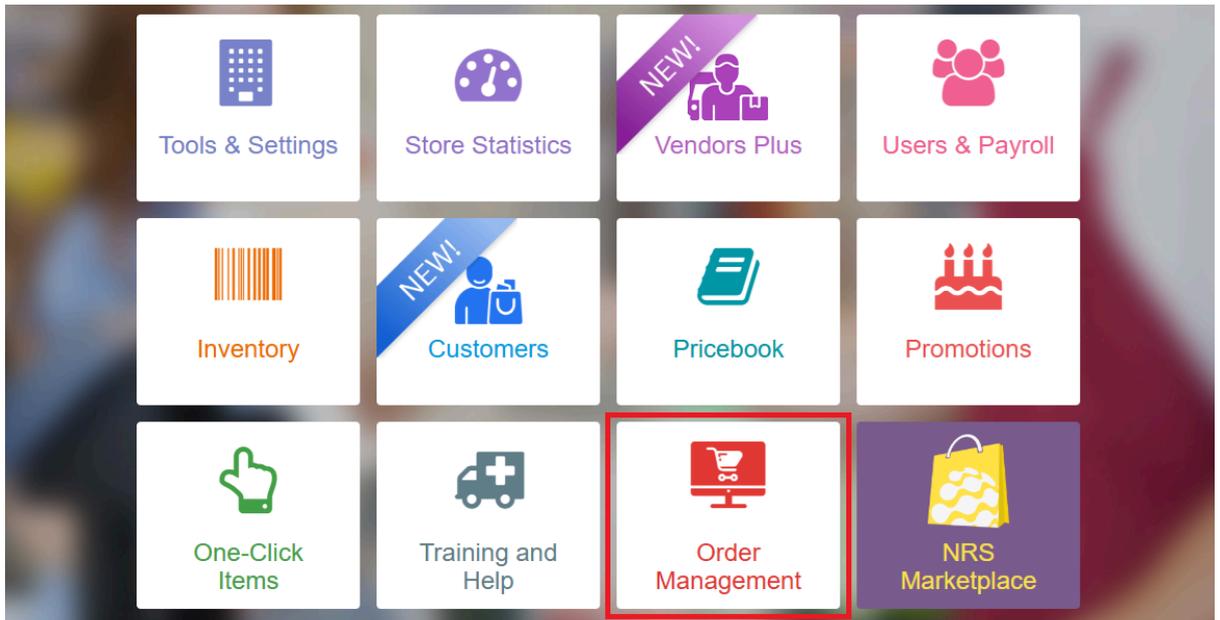
Perform the following steps to access NRS Order Management via your Point of Sale (POS) system.

1. **Navigate to Order Management:** From the POS home screen, tap the **Register** tile, then select the "**Orders**" button.

Accessing NRS Order Management via the Merchant Portal

Perform the following steps to access **NRS Order Management** via the Merchant Portal:

1. **Login:** Navigate to the Merchant Portal and login to your account.
2. **Access NRS Order Management:** Once logged in, select the **Order Management** tile on the dashboard to open the **NRS Order Management** interface.



Accessing NRS Order Management via the My NRS Store App

Perform the following steps to access NRS Order Management via the Merchant App.

1. **Login:** Open the My NRS Store App and login to your account.
2. **Access NRS Order Management:** From the app's main menu select "**Order Management**".

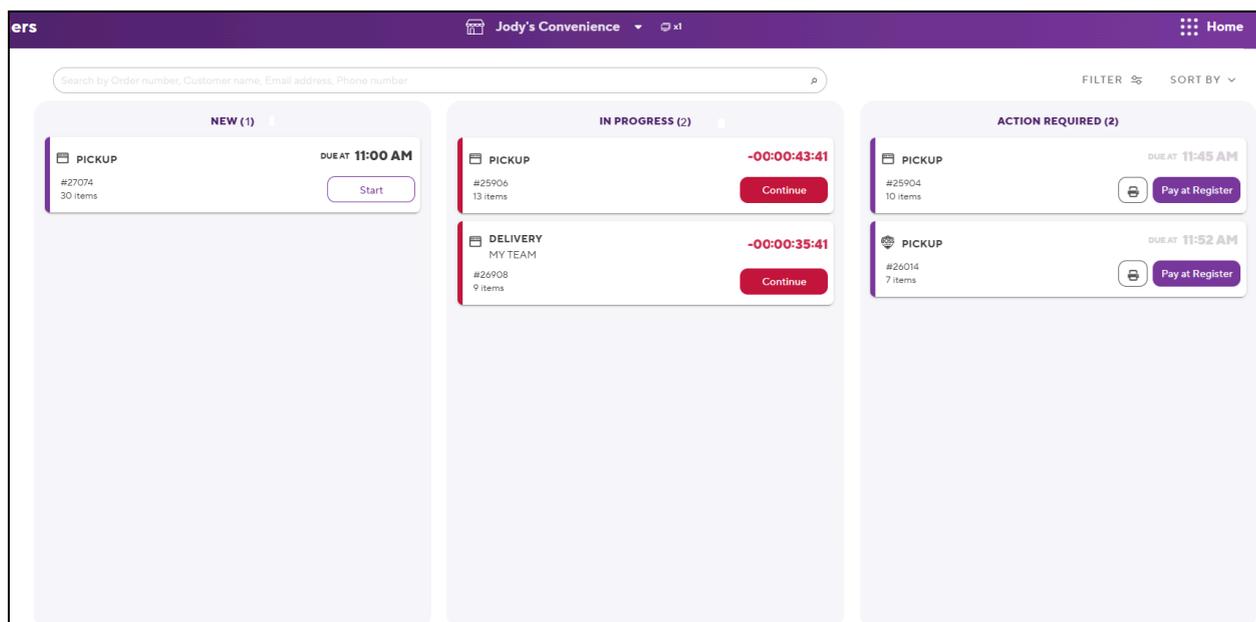
Order Management

Manage Orders Screen

The main screen that shows your active open orders is called the **Manage Orders** screen. This screen is like a to-do list; it shows all the currently active orders that you or a shop employee need to take action on.

In the Manage Orders screen, orders are organized into three columns:

- **New:** Orders in this column have been received from the NRS kiosk, NRS website, or other ordering platform and have not yet been started.
- **In Progress:** A staff member has started picking the items needed to fulfill these orders.
- **Action Required:** These orders have already been picked, but an extra action such as ID verification or payment is needed before the order can be handed to the customer.



To understand how orders progress through these columns, it is important to understand the idea of **order statuses** in NRS Order Management.

Order Statuses

In the NRS Order Management System:

- Each order has a specific **order status** that reflects its exact state in the fulfillment process.
- These statuses are grouped into three columns in the **Manage Orders** screen.

The following table shows all the order statuses and the corresponding columns in the Manage Orders view.

“Manage Orders” Column	Order Status	Definition	Condition
New	Ready to Prepare	Order has been received and is ready to be picked or prepared.	
In Progress	Preparing	Order is currently being picked or prepared by staff.	
Action Required	Action Required: ID Verification Needed	Order requires ID verification due to age-restricted items.	Prepaid Pickup with ID Required
	Action Required: Awaiting Payment	Order requires payment before it can be completed.	Pickup Pay in Store
	Action Required: ID Verification & Payment	Order requires both ID verification and payment.	Pickup Pay in Store with ID Required

Orders that no longer require an action by store staff will automatically move to the **Order History** page and no longer appear on the **Manage Orders** screen.

Statuses for orders in the **Order History** page include:

Order Status	Definition
Order Ready	Order is prepared and ready for the delivery driver to collect.
Completed	Order has been fulfilled, including delivery or pickup, and payment has been received, if applicable.
Canceled	Order has been canceled by the store.
Out for Delivery	Order has been picked up by the delivery service and is en route to the customer.

Order Cards and Actions

In the **Manage Orders page**, each order is shown as an **Order Card**. These cards make it easy for your staff to quickly see important details about the order without having to open it fully.

Card Information

Each order card has the following information:



Fulfillment Method	Shows if the order is for Pickup , Delivery , or another delivery method (like My Team Delivery for some NRS Ecommerce orders).
Order Number	A unique number for the order, including numbers from delivery services like DoorDash or UberEats.
Number of Items	The number of items in the order.
Countdown Timer/Due Time	The time by when the order needs to be ready. If the time is getting close, it will show a countdown timer instead. If the due time is still far away, it shows the date and time.

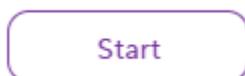
Action Buttons

Each order card also has an **Action Button** based on the current status of the order:

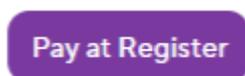
Start	For orders in the New column, this button lets the picker start preparing the order. When this button is clicked, it moves the order card to the In Progress column and opens the Picking Feature.
Continue	This button appears for orders that are In Progress , letting the staff continue picking or preparing the order.
Print	Allows the staff to print a packing slip.
Pay at Register	For orders that the customer will pick up and pay for in the store. Payment can only be accepted on the POS.
Verify ID	For orders containing items that require ID verification.

The look of these action buttons change based on how urgent the order is.

- When the order is not needed soon, the background color of the button will be white.



- As the due time approaches, the button will turn a solid color to make it stand out, so your staff knows to prioritize it.



- Once an order becomes urgent, the button and side of the card will turn red.



Canceling an Order

Managers and authorized staff have the ability to cancel orders if necessary. The **Cancel** action button is available on the Order Card for orders in the **New** or **In Progress** columns, depending on the permissions set by the manager.

How to Cancel an Order

1. **Locate the Order:**
 - Navigate to the **Manage Orders** screen.
 - Find the order you wish to cancel in either the **New** or **In Progress** column.
2. **Select the Cancel Button:**
 - Click the **Cancel** button on the Order Card.
3. **Confirm Cancellation:**
 - A confirmation prompt will appear asking you to confirm the cancellation.
 - Read the prompt carefully to ensure you are canceling the correct order.
4. **Confirm the Action:** Click **OK** to proceed with the cancellation.

Effects of Cancellation

- **Order Status Update:**
 - The order status changes to **Canceled**.
 - The order moves to the **Order History** section.
- **Customer Notification:** The customer is notified of the cancellation.

Important Note

Cancelling an order is an irreversible action; once an order is canceled, it cannot be reinstated.

Visual Indicators and Searching in the Manage Orders Screen

The following visual indicators in the **Manage Orders** screen are designed to provide immediate insights into the status and urgency of each order.

Countdown Timers

Countdown timers help you track the remaining time before an order is due, allowing you to prioritize tasks effectively.

Countdown timers work as follows:

- **Initial Display:** When an order is first received, the order card displays the **due time**,

e.g., DUE AT 11:00 AM.

Note: If an order is received within the countdown-timer timing, then the order will display the countdown time immediately.

- **Countdown Activation:** As the due time approaches (determined by the countdown-timer timing), the display switches from the due time to a **countdown timer** showing the time remaining (e.g., "14:59", when there are 14 minutes and 59 seconds left until an order needs to be ready).

Note: The amount of time before the **due time** when the display switches to a countdown timer is set in the **Time to Start the Countdown Timer** setting in the Order Management Settings.

Example:

If the **Time to Start the Countdown Timer** is set to 10 minutes:

- For an order due at 3:00 PM, the countdown timer will start displaying at 2:50 PM.
- The timer will count down from "10:00" to "0:00".

Urgent Orders

When an order becomes urgent because it is almost time for the order to be completed, the **order card** changes to red, prompting you to make sure the order is actioned as soon as possible.

Note: The time before an order is due when it changes red is set in **Order Management Settings** under **Time to Change to an Urgent Order**. The default setting is 5 minutes

before the due time. If this setting is set to **0 minutes**, then the order is only marked urgent once it is already overdue.

Example:

If the **Time to Change to an Urgent Order** is set to 5 minutes:

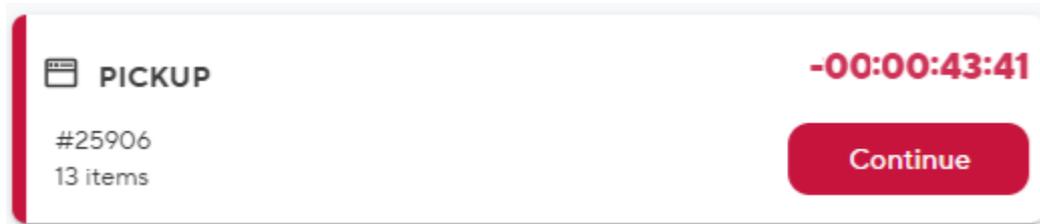
- An order is due at 3:00PM; at 2:55 PM the order card turns red.
- The countdown timer continues to display the remaining time.

Overdue Orders

When an order passes its due time without being marked as ready, it becomes **overdue**.

In this case:

- The order card changes to a **red background** (if it wasn't already red from being urgent).
- The timer starts to flash.
- The timer displays **negative time** (e.g., "-1:00") to indicate how much time has passed since the due time.



Example:

Order Details:

- **Due Time:** 3:00 PM
- **Current Time:** 3:01 PM
- **Order Status:** Preparing (but not yet completed)

What Happens:

- At **3:00 PM**, if the order has not been marked as ready, it becomes overdue.
- The **order card** on the **Manage Orders** screen changes to alert you:
 - The background turns **red**.

- The timer starts flashing.
- The **countdown timer** begins to display negative time:
 - At **3:01 PM**, the timer shows "-1:00".
 - At **3:05 PM**, the timer shows "-5:00".

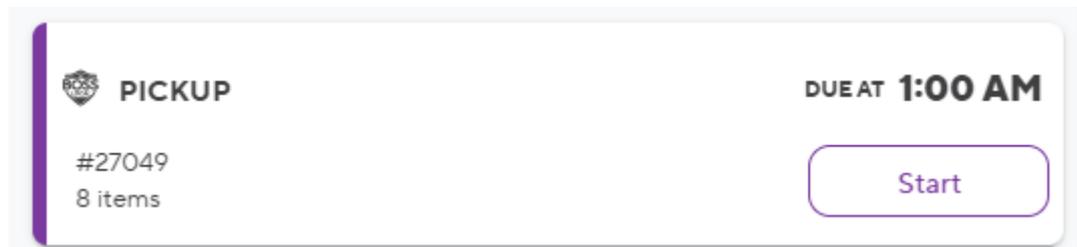
Example Scenario

1. Order Received:

- An order due at **3:00 PM** appears in the **New** column.
- The order card displays "Due at 3:00 PM".

2. 30 Minutes Before Due Time:

- At **2:30 PM**, the order card remains unchanged.



3. 10 Minutes Before Due Time: The Countdown Timer threshold is set to 10 minutes, so at 2:50 PM:

- The order card switches to display the countdown timer "10:00".
- The action button changes from a white background to a solid colored background.
- No color change yet.

4. 5 Minutes Before Due Time: The Urgent Order threshold is set to 5 minutes, so at 2:55 PM:

- The order card changes color to red.
- Countdown timer continues, now showing "5:00".

5. Order Becomes Overdue: At 3:00 PM, if the order is not yet marked as ready:

- The timer displays negative time "-0:01", "-0:02", etc.
- The urgent visual indicators remain.
- The timer begins to flash.

Searching, Sorting, and Filtering Orders

The **Manage Orders** screen provides tools to help you quickly find and organize orders, this is especially useful when dealing with a large number of orders.

Search

The **Search Bar** is located at the top of the **Manage Orders** screen.

Search by Order number, Customer name, Email address, Phone number 

Enter keywords such as:

- **Customer Name**
- **Order Number**
- **Item Details**

As you type, the list of orders updates to show matches.

Sorting Options

Within each column, you can sort orders based on:

- **Due Time** (earliest to latest)
- **Order Number** (ascending or descending)
- **Customer Name** (alphabetical order)

How to Sort:

- Click on the **Sort Icon** next to the column header.
- Click again to reverse the sort order.

Filtering Options

You can narrow down the orders displayed by applying filters such as:

- **Fulfillment Method:** Pickup, Delivery
- **Payment Status:** Prepaid, Pay at Register
- **Order Source:** NRS eCommerce, Kiosk, DoorDash, etc.
- **Order Status:** Ready to Prepare, Preparing, Action Required

How to Apply Filters:

- Click on the **Filter Icon**.
- Check the boxes for the criteria you wish to filter by.
- The orders displayed will update accordingly.

Picking and Preparing Orders

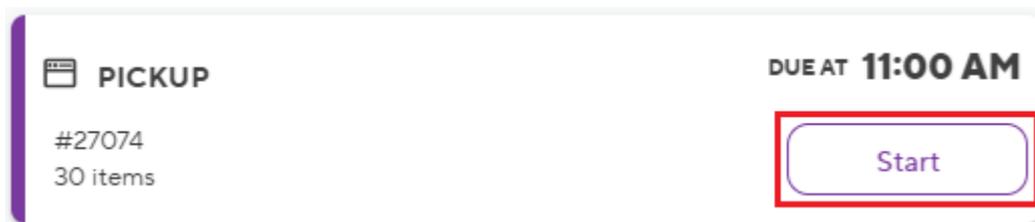
Actioning an Order

Follow these steps to start picking and preparing an order:

1. **Navigate to the Manage Orders page.**
2. **Find the Order in the “New” column.** Look in the **New** column for orders that are ready to be picked or prepared. The orders are sorted by when they need to be finished, with the soonest due ones at the top.

If an order needs to be worked on soon, it will show a red countdown timer to get your attention.

3. **Click the Start button on the Order Card.**



This will make the following happen:

- Changes the order status to **In Progress**.
 - Moves the order from the **New** column to the **In Progress** column.
 - Allows store staff to begin picking the order.
4. **Order Status changes to In Progress and the Picking Feature opens.** After you click **Start**, the order’s status will change to **In Progress**, and the Picking Feature will open. This lets you scan items, mark them as picked, or make substitutions if needed.

The Picking Feature also shows details like item descriptions, UPCs, any modifications, and customer preferences for substitutions or replacements.

Using the Picking Feature

The **Picking Feature** is built into NRS Order Management, this makes it easy for staff to pick items, make substitutions, and keep track of their work.

Orders Jody's Convenience x1 Home

ORDER #27074 Preparing

MARK ALL AS PICKED

UPC#	QTY	DESCRIPTION	PRICE	TOTAL	EDIT
041331039857	10	Goya Malta	\$1.50	\$15.00	⋮
081553121107	10	Malta India 12 oz	\$1.50	\$15.00	⋮
028200003577	10	Marlboro Red Filter Regular	\$99.99	\$999.90	⋮

Options Print Invoice Mark Order Ready

PREPARE BY 11:00 AM

ORDER DETAILS \$1,139.99

DUE DATE 11/08/2024
PREPARE BY 11:00 AM
SOURCE Merchant Store Front
ORDER TYPE Pickup
PAYMENT Pay at Register

SUBSTITUTION ACTION
Call Me

CUSTOMER DETAILS

Test
12025555555
customer@idt.net

Order Locking

As you pick items, the system locks the order, so no one else can make changes to it at the same time. If someone tries to open the same order, they'll see a message saying it's already being worked on.

Information Fields

The Picking Feature shows the following information:

- **Item Details:** This shows a list of all the items in the order. It includes information like UPCs, how many of each item to pick, descriptions, sizes, and prices.
- **Order Details Panel:** This panel displays key information about the order, it includes:
 - **Customer Information**
 - **Order Number:** The unique identifier for the order.
 - **Fulfillment Method:** Indicates whether the order is for Pickup, Delivery, or another method.
 - **Payment Status:** Shows if the order is Prepaid or Pay at Register.
 - **Special Instructions:** Any notes or instructions provided by the customer.
 - **Order Summary:** Items in the order, total quantity, and order total.
- **Customer Preferences:** This shows what the customer wants to happen if an item is out of stock. Options include whether the customer:

- allows substitutions,
- wants to be contacted before an item is replaced, or
- doesn't allow substitutions at all.

Note: For DoorDash orders, the customer preference is not given. Therefore, either call the customer to ask about their preferences when substituting an item or make your best judgement, e.g. if this is a common item that is often substituted for another.

- **Modifiers:** Customer-selected modifiers are displayed in the order details within the **Picking Feature**. Store staff **cannot** modify or remove customer-selected modifiers during the picking process.
- **Substitutions and Partial Fulfillment:** If an item is unavailable, you can mark it as unavailable, fulfill part of the order, or replace it with something similar. The system will guide you through either scanning the replacement or manually entering its UPC, and it will automatically update the total cost if needed.
- **Marking items as picked:** You can mark items as picked by either selecting them from the list or using the **Scan to Pick** feature if on the POS.

Item Management During Picking

During the picking process, NRS Order Management provides several management options to ensure accurate order fulfillment. To access these options for a specific item, tap or click on the item in the list to open the item's action menu. This menu allows you to perform the following actions:

- **Mark Item as Unavailable:** If an item is out of stock and cannot be substituted, select the item and choose **Item Unavailable**. The item will be grayed out on the list and marked with an unavailable icon.
- **Undo Unavailable Item:** If an item that was previously marked as unavailable becomes available, or if you marked an item as unavailable by mistake, select the item and choose **Mark Available** to restore it back to the order.
- **Adjust Quantity:** If only a portion of the ordered quantity is available, select the item and adjust the quantity accordingly. You can reduce the quantity but cannot increase it beyond the originally ordered amount.
- **Replace/Substitute Item:** If substitutions are allowed, select the item and choose **Replace Item**. Scan or enter the UPC of the replacement item, and the system will adjust the order total automatically.

Scanning Items

The OMS supports scanning functionality to simplify and streamline the picking process:

- **Mark Items as Picked:** Use a scanner to mark items as picked. The system will match the scanned item with the order and update the status to **Picked** for that item.
- **Replace Items:** When substituting an item, use the scanner to quickly input the UPC of the replacement product. Scanning improves accuracy and speeds up the picking process.

Note: Scanning is available on devices equipped with a camera or a connected scanner. For devices without scanning capabilities, manual UPC entry is also supported.

Completing the Picking Process

After all items in the order have been picked (or marked as unavailable/substituted), complete the following steps:

1. **Mark All Items as Picked:** If you have not yet marked all items as picked, you can use the Mark All Items as Picked option to quickly mark the entire order—or any remaining unpicked items—as picked.

How to Use

1. Select the Mark All Items as Picked button.
2. A confirmation prompt will appear to ensure you want to mark all unpicked items as picked.
3. Confirm the action to proceed.

Note:

- If you have already manually marked each individual item as picked, you do not need to select Mark All Items as Picked.
 - For partially picked orders, the system will automatically adjust the total quantity and update the order.
2. **Substitutions and Price Adjustments:** If substitutions were made, review the updated order total.
 3. **Mark order ready:** After picking all items, select **Mark Order Ready**. This button will only be available after all items are marked as picked or unavailable. Marking the order as ready updates its status to **Ready**, and NRS Order Management will trigger notifications to the customer or delivery partner, depending on the fulfillment method.
 4. **Handle Action Required Orders:** For orders that require additional actions (e.g., payment at the register or ID verification), these will move to the **Action Required** column once picked. Employees can then verify ID or initiate payment at the POS when the customer arrives at the store to pick up their order.

Setting an Order Back to 'New'

If you need to pause working on an order or return it to the **New** column, you can set the order back to **Ready to Prepare** status. This is useful if you cannot complete the picking process immediately or if another staff member needs to take over.

How to Set an Order Back to 'New':

1. **Access the Order** while in the **Picking Feature** for an order in progress.
2. **Select "Set Back to New"**.
3. **Confirm your action.**

Effects of Setting Back to 'New':

- **Order Status Update:**
 - The order status changes from **Preparing** back to **Ready to Prepare**.
 - The order moves from the **In Progress** column back to the **New** column.
- **Saved Progress:**
 - Any changes made during picking, such as items marked as picked, unavailable, or substitutions, will be **saved**.
 - When the order is reopened, it will reflect the previous changes, allowing you to resume where you left off.

Important Notes:

Setting the order back to **New** releases the order lock, allowing other staff to access and action the order.

Updating Orders

Recalculating Order Totals

When changes are made to an order, such as marking items unavailable or substituting items, NRS Order Management will automatically recalculate the order total. The recalculation process is triggered when you select the **Mark Order Ready** button after completing the picking process. This ensures that the order total reflects any adjustments made during preparation, including changes in item quantities or prices due to substitutions or unavailability.

- **Substitutions and Adjustments:** If an item is unavailable and a substitute is added, NRS Order Management will adjust the order total based on the price of the substituted item.

For NRS orders, if the new total exceeds 110% of the original order amount, the system will prompt a reauthorization of the customer's payment method.

- **Partial Fulfillment:** In cases where only part of an ordered quantity is available, the system will recalculate the total due based on the quantity available.

Promotions and Discounts

NRS Order Management also automatically adjusts promotions and discounts for NRS Ecommerce orders when relevant items are modified.

- **Promotion Adjustment:** If an item that is part of a promotion or discount is marked as unavailable or substituted, the promotion will be recalculated accordingly. For example if a "Buy One Get One Free" promotion is applied but one of the items is unavailable, the system will remove the promotion from the order, and the total will be updated to reflect the regular price for the remaining item.
- **Discount Removal:** If the customer qualifies for a percentage discount based on specific items (e.g., 10% off when buying a certain number of products), and some of those items are marked as unavailable, NRS Order Management will remove or recalculate the discount based on the remaining eligible items.

Printing Picking Lists and Packing Slips

Depending on the order's status, fulfillment method, and payment type, you can print different outputs from NRS Order Management.

Picking List

Before and during the picking process, you can print a **Picking List** to help staff gather the correct items. The **Picking List** includes the order number, customer information, a list of all items in the order, and any consumer notes or substitution preferences provided by the customer.

Packing Slip

Once an order has been marked as ready, you can print a **Packing Slip** to attach to the order that shows the order as fulfilled. The **Packing Slip** is similar to the Picking List, and includes the order number, customer information, and a list of all items fulfilled. If there were no changes to the order, there is no need to print a new packing slip; the picking list printed earlier can be used as the packing slip.

Unpaid Orders

For orders that have not yet been paid, like **Pay in Store** orders where the customer will pay upon pickup, the Picking List and Packing Slip display a **"NOT YET PAID"** message at the top to indicate that payment is pending.

Age-Restricted Items

For orders containing age-restricted items like alcohol or tobacco, a message stating **"VERIFY ID - [Age]+"** (for example, "VERIFY ID - 21+") will be printed on the Picking List and Packing Slip. This reminder helps staff comply with legal requirements by checking the customer's identification before completing the transaction.

Accessing the Print Option

You can access the print function either directly from the **Order Card** in the **Action Required** column or from the **Order Details** page within NRS Order Management. The print output varies based on the order's current status:

- **Before Order is Marked Ready:** In the **Order Details** view, the print button appears as " **Print List**".

Selecting this option will print the **Picking List**, which includes all the necessary details for staff to pick and prepare the order.

- **Orders Awaiting Payment:** Selecting **Print** will produce an **Invoice** with the "**NOT YET PAID**" message. If the order requires ID verification, the Invoice will also include the "**VERIFY ID**" message.
- **After Order is Marked Ready:** Once the order has been marked as ready (and moved to **Order History**), the print button in the **Order Details** view changes to show " **Packing Slip**".

Selecting this option will print the **Packing Slip**, which shows the fulfilled items and can be attached to the order package for the customer or delivery driver.

Marking Orders as Ready

When the user selects **Mark Order Ready** from the Order Details or Picking Feature, the order status changes based on the fulfillment type and payment method. Additionally, a pop-up with specific instructions for the next steps will appear, guiding the store employee on what actions to take next.

Actions Based on Fulfillment Type

Order Type	Order Status Change	Instructions Pop-Up
Third-Party Delivery (e.g., DoorDash, Uber Eats, GrubHub, NRS Delivery Network)	The order status changes to Order Ready , and the system triggers a notification to the third-party delivery service. The delivery driver is alerted to pick up the order.	Order Ready for [Delivery Service] Driver Pickup. Attach the packing slip and place the order in the designated driver pickup area."
Prepaid Orders (e.g., Prepaid Delivery or Prepaid Pickup)	For prepaid orders, once the order is marked as ready, the order status changes to Completed . The system charges the customer's payment method, and the order is considered fully processed.	Order Ready for Customer Pickup. Attach the packing slip and place the order in the customer pickup area.

Order Type	Order Status Change	Instructions Pop-Up
Orders Requiring ID Verification (e.g., age-restricted items)	<p>The order status changes to Action Required: Verify ID.</p> <p>The system will prompt store employees to verify the customer's ID upon pickup.</p>	<p>Order Requires Customer Proof of ID. Attach the packing slip and place the order behind the counter.</p> <p>Verify the customer's ID before handing over the order.</p>
Pay in Store Orders (Pickup)	<p>For orders that require payment at the register, the order status changes to Action Required: Pay at Register</p> <p>The store employee must process payment through the POS before handing over the order.</p>	<p>Order Requires Customer Payment at the Register. Attach the packing slip and place the order behind the counter.</p> <p>Collect payment from the customer at the register before handing over the order.</p>
Pay in Store Orders Requiring ID Verification	<p>The order status changes to Action Required: Awaiting Payment & Verify ID.</p> <p>However, the action button only shows "Pay at Register".</p> <p>Both ID verification and payment are required before the order can be completed. The employee is instructed to follow both steps.</p>	<p>Order Requires Customer Payment at the Register and Proof of ID.</p> <p>Attach the packing slip, verify the customer's ID, and collect payment at the register before handing over the order.</p>

Error Handling for Substitutions and Payment Reauthorization

If any substitutions were made during the picking process for an NRS order, and the new total exceeds 110% of the original order, the system will prompt for reauthorization of the customer's payment method. If the reauthorization fails, an error message will be displayed, requiring manual intervention from the employee to handle the payment.

Order History

Viewing Order History

Once an order is fully processed and there are no further actions required by the store (even if the customer hasn't picked up the order yet), it is moved to **Order History**. This ensures that orders shown in the **Manage Orders view** are only those requiring attention, while all completed, canceled, or processed orders are archived in **Order History**.

Within the **Order History**, users can:

- **Search for Past Orders:** The search bar at the top of the Order History page allows users to search past orders by entering keywords such as the customer's name, phone number, email, or order number.
- **Filter Orders:** To search for orders, you can apply filters such as:
 - **Order Status:** Filter orders based on whether they were completed, canceled, or are out for delivery.
 - **Order Source:** Filter by third-party services like DoorDash, Uber Eats, or in-store orders such as NRS Ecommerce and kiosk orders.
 - **Customer Name:** Narrow down orders to those related to a specific customer.
 - **Fulfillment Type:** Choose between orders for pickup, delivery, or pay in store.
- **Sort Orders:** Orders can be sorted by the following fields:
 - **Due Time**
 - **Order Number**
 - **Total Amount**
 - **Customer Name**

Order Details from Order History

Clicking on any order in the Order History will open the **Order Details** view, which provides a complete overview of the order's specifics. This includes a detailed record of all actions performed on the order, including any edits, cancellations, or substitutions made during fulfillment. Key functionalities include:

- **Item Details:** Displays a comprehensive list of all items included in the order, along with their quantities, prices, and any modifications made (e.g., substitutions). Items that were not fulfilled or substituted will also be noted here.
- **Show Edits/Hide Edits:** The **Show Edits** button allows users to toggle between viewing the original order and the modifications made (e.g., if items were substituted

or if quantities were adjusted). Once selected, the button label changes to **Hide Edits** to allow toggling back to the original view. You can set which view you prefer as your default view in Order Management Settings.

- **Available Action Buttons:**

- **Packing Slip:** Users can print a packing slip for the order from the history, showing the final transaction details.
- **Track Order:** For delivery orders fulfilled via the NRS Delivery Network, a **Track Order** button is available, which opens the tracking interface. This allows users to view the current status of an order that is out for delivery through integration with the NRS Delivery Network. The tracking screen provides a map showing the driver's location, expected delivery time, and customer details.

Note: The merchant will not have visibility to the DoorDash delivery tracking, since NRS Orders Management is not given the delivery address.

Status of Orders in Order History

Orders in the history view will show their current status, these include:

- **Order Ready:** This status is displayed for orders that are marked ready but have not yet been picked up or delivered.
- **Out for Delivery:** Indicates that the order has been picked up by a delivery driver and is en route to the customer. Users can track these orders through the **Track Order** button for NRS Delivery Network deliveries.
- **Completed:** These orders have been fully completed, including payment processing.
- **Canceled:** Orders that were canceled; the reason for cancellation will also be displayed (e.g., customer request, product not available).

Appendix A: User Roles, Permissions, and System Settings

User Roles and Permissions

NRS Order Management makes sure the right staff members do the right tasks by setting different levels of access for each role.

Manager

- Managers have full control of the system. They can access everything in the OMS, like changing system settings, checking order statistics, and managing who can do what (permissions).
- Managers can adjust the OMS settings to fit the store's needs, like automatically accepting orders from delivery services (such as DoorDash), setting order preparation times, choosing payment methods, and setting up ID checks for products that require an ID check.
- Managers can also track orders from NRS Ecommerce, Kiosk, and delivery platforms (like DoorDash or UberEats) to make sure everything runs smoothly.

Cashier/Picker

- Cashiers and pickers have more limited access based on what the manager sets up for them.
 - Cashiers handle payments at the register, including checking IDs for age-restricted items when needed.
 - Pickers are responsible for picking and packing orders, marking items as ready, and handling replacements or substitutions if an item is unavailable.
- Depending on what the manager decides, these roles may not be able to cancel orders, change system settings, or view order statistics. Cashiers and pickers can do things like scan items during picking or check IDs for specific orders if their role allows it.

Settings

NRS Order Management provides the following settings that allow you to tailor the system to your store's specific needs.

Order Prep Time

Set the default time required to prepare orders for pickup or delivery. This helps the system calculate accurate due times for new orders and informs customers when their orders will be ready.

- **Pickup:** Enter the average time (in minutes) it takes to prepare a pickup order.
- **Delivery:** Enter the average time (in minutes) it takes to prepare a delivery order.

Today's Ordering Hours

Override your regular ordering hours for the current day if needed. This is particularly useful for unexpected closures, special events, or holidays.

- **Start Time:** Set the time when you will start accepting online orders today.
- **End Time:** Set the time when you will stop accepting online orders today.

Note: This change only affects today's ordering hours and will revert to your regular schedule the next day.

Urgent Order Threshold

Define when an order is considered urgent, prompting visual indicators on the **Manage Orders** screen (e.g., the order card turns red). This helps you prioritize orders that are nearing their due time.

- **Time to Change to an Urgent Order:** Set the number of minutes before an order's due time when it becomes urgent.
 - **Default Setting:** 5 minutes before the due time.
 - **If set to 0 minutes,** the order will only be marked as urgent when it is overdue.

Countdown Timer Start

Set when the countdown timer appears on the order card before the due time. The countdown timer provides a visual reminder of the time remaining to fulfill an order.

- **Time to Start the Countdown Timer:** Enter the number of minutes before the due time when the countdown timer should start displaying.

Note: You can choose to use the **Order Prep Time** as the countdown start time.

Appendix B: DoorDash Integration with NRS Order Management System (OMS)

These instructions explain how to integrate DoorDash with the NRS Order Management System, allowing merchants to manage DoorDash orders seamlessly within the NRS environment.

Prerequisites and Required Resources

- **Active NRS OMS Account:** You must have an active NRS OMS account with administrative access.
- **DoorDash Integration Code:** An integration code provided by DoorDash.
- **DoorDash Merchant Account:** If you already work with DoorDash but do not have an Integration Code, then have your account information ready.

Integration Process

Accessing the NRS OMS for DoorDash Integration

Step #	Instructions
1	Log In to NRS OMS: Navigate to the NRS OMS and log in using your administrator credentials.
2	Navigate to Order Management Settings: From the dashboard, go to Order Management Settings .
3	Access the Integrations Tab: Click on the Integrations tab within the settings.
4	On the Integrations tab, you will find the Integrate with DoorDash button. <ol style="list-style-type: none">1. Click "Integrate with DoorDash": Click the Integrate with DoorDash button to begin the onboarding process.2. Respond to the Prompt A pop-up window will appear asking: "Do you have a DoorDash Integration Code?"

Step #	Instructions
5	<p>If you have a DoorDash Integration Code:</p> <ul style="list-style-type: none"> a) Select "Yes" b) Enter the Integration Code <ul style="list-style-type: none"> ○ An input field will appear. ○ Enter the code: Use the code provided by DoorDash. <p style="text-align: center;">Note: Be aware that the DoorDash code is case sensitive.</p> c) Consent to Data Sharing <ul style="list-style-type: none"> ○ Below the input field, read the consent statement: <ul style="list-style-type: none"> ▪ <i>"By entering the code provided by DoorDash, I consent to NRS sharing my data with DoorDash via the integration."</i> ○ Acknowledge this statement to proceed. d) Click "Apply"
Result	<p>If the Integration Code is valid:</p> <p>A success message will display:</p> <ul style="list-style-type: none"> a) <i>"Success! Your request to integrate with DoorDash was successfully submitted. Please note this process can take up to 30 days to complete. For information on your store's status, contact DoorDash Support."</i> b) The Integrate with DoorDash button will be replaced with a status message indicating your request has been submitted. c) If the Integration Code is invalid: <ul style="list-style-type: none"> ○ An error message will display: <ul style="list-style-type: none"> ▪ <i>"The Integration Code entered is invalid. Please try again. If the problem persists, contact DoorDash Support to obtain a new Integration Code."</i> ○ You can retry entering the code or close the pop-up.

Step #	Instructions
5b	<p>If you do not have a DoorDash Integration Code:</p> <ol style="list-style-type: none"> 1. Select "No" 2. Answer the Next Question <ul style="list-style-type: none"> ○ The system will ask: <ul style="list-style-type: none"> ▪ “Is your store new to DoorDash?” <p>If "Yes" (Your Store is New to DoorDash)</p> <ol style="list-style-type: none"> i. Instructions Displayed <ul style="list-style-type: none"> ○ <i>"To join DoorDash, open and submit the account request form, and a DoorDash representative will contact you."</i> ○ <i>"Note: If you have multiple locations, only one form needs to be submitted."</i> ii. Available Actions <ul style="list-style-type: none"> ○ Back: Returns to the previous question. ○ Open DoorDash Form: Opens DoorDash's NRS Referral Form. iii. Proceed <ul style="list-style-type: none"> ○ Click Open DoorDash Form to fill out the account request form on DoorDash's website. ○ Follow DoorDash's instructions to complete the onboarding process on their end.
5c	<p>If "No" (You Already Have a DoorDash Account but No Integration Code)</p> <ol style="list-style-type: none"> 1. Instructions Displayed <ul style="list-style-type: none"> ○ <i>"Please contact DoorDash Support to obtain your Integration Code."</i> 2. Next Steps <ul style="list-style-type: none"> ○ Reach out to DoorDash Support to request an Integration Code. ○ Once you receive the code, repeat the integration process and select Yes when asked if you have a code.

Important Notes

- **Status Updates:** After submitting the integration request, a status message will appear on the **Integrations** tab:
 - *"Your request to integrate with DoorDash was successfully submitted on <date>."*
 - *"Please note this process can take up to 30 days to complete. For information on your store's status, contact DoorDash Support."*
 - *"Current Status: Integration Code Submitted."*
- **Process Duration:** The integration process can take up to **30 days** to complete.
- **No Need to Resubmit:** If you have already submitted the integration request or the DoorDash form, you do not need to do it again.

Troubleshooting and Support

Common Issues During Setup

- **Integration Button Not Visible:**
 - Ensure you meet the prerequisites: appropriate licensing, administrative access, and participation in the pilot phase.
- **Invalid Integration Code:**
 - Double-check the code entered, remember that it is case-sensitive.
 - If issues persist, contact [DoorDash Support](#).
- **No Response After Submission:**
 - Remember that the process can take up to 30 days.
 - For status updates contact [DoorDash Support](#).

Appendix C: Related Documents

For more information about managing which items appear in your store, refer to the [NRS Manage Items User Guide](#).