



[Omnichannel Configurations and Setup](#)

This page outlines Omnichannel configurations available. KWI customers who wish to introduce omnichannel configurations or make changes should reach out to their Customer Success Manager to enable Omnichannel functionality.

Supported Fulfillment Methods

The following fulfillment methods are supported. Orders that are assigned to a store will be available to action via the KWI Omnichannel Dashboard (POS or Back Office). Orders that need to be fulfilled by a warehouse can be sent to an external system via API or EDI (integration is required):

- Store to store fulfillments

- Store to warehouse fulfillments

- Web store to store/warehouse (includes Buy online ship from store, Buy online pick-up in store (BOPIS), Local Delivery, and Curbside pick-up)





KWI POS Store Originating Fulfill It Processing

When the stores place orders that need to be fulfilled, the order can be assigned in the following 2 ways:

- System selects the fulfilling store
 - The system will select the fulfilling location based on configured order routing system logic and inventory thresholds.

- User selects the fulfilling store (default)
 - The user placing the order at the POS will have the option to select the fulfilling location.

Order Routing Rules (Web & Stores)

KWI can configure separate order logic depending on order origination:





- **Order Complete** - The system will look for a location where all the items in the order and their respective quantities are available.
- **Item Complete** - The system will look for the location where the full quantities of each item are available. May result in a split order.
- **Location** - The system will look to fill as much as possible in preferred location order. May result in a split order.
- **Preferred** - The system will prefer order/item fulfillment at a single location but defer to fulfillment by any means and may result in a split order.

Tie-breaker Rules (Web & Stores)

- Highest inventory, lowest store number
- Highest inventory, shortest distance
- Shortest distance, highest inventory
- Shortest distance, lowest store number





Note: Orders with multiple items will prioritize the location which offers the highest inventory
of any single item on the order.

Other Order Routing Rules

- Option to set priority locations for store originating orders before order routing system logic applies.
- Option to set priority locations for web originating ship orders before order routing system logic applies.
- Option to set “last chance” locations, which will fall to the bottom of the store list and will only fulfill orders when there are no other locations available to fulfill.
- If charge send store groups have been set up, a transaction can only be fulfilled by a store in the same charge send store group as the initiating store.

Inventory Thresholds Rules

When calculating available on hand, the store threshold and company threshold configurations can be used, eliminating stores that don't meet the threshold from consideration.





- Store Level Thresholds
- Company Level Thresholds
- Item Level Thresholds (via a maintenance screen in the KWI Back Office)

Order Expirations by Type

Each order type has its own set of expiration times:

- Store orders
 - Store expiration time
 - Order expiration time
- Curbside pickup transactions
 - Curbside pickup store expiration time
 - Curbside pickup order expiration time





- Local delivery orders
 - Local delivery store expiration time

 - Local delivery order expiration time

- Buy online pickup in store orders
 - Buy online pickup in store, store expiration time

 - buy online pickup in store order expiration time

- Web orders
 - Web store expiration time

 - Web transaction expiration time

Note: Warehouses can be set as non-expiring locations.





Omnichannel Dashboard Configurations

- Option to access Omnichannel Dashboard from KWI POS
- Option to enable scanning for pick/pack accuracy

Customer Communications and Notifications

- Customer email order complete with tracking
- Customer email order cancellation/expiration
- Store email notifications
- Corporate communication for expired orders





Shipping

- FedEx and UPS integrations
- Other non-integrated shipping
- Configure shipping methods and amount

Tax Calculations

- Real-time tax calculation for fulfill it orders using a 3rd party tax software based on shipping destination by location.
- Tax Data Services via flat file
- Option to apply taxes on shipping.





Integrations with 3rd Party Systems for Order Fulfillment

KWI offers two methods of sending orders and receiving orders to and from a 3rd party system for order fulfillment: EDI 850/856 and Order & Notifications files. KWI provides SFTP information to connect to our servers for file transmission and pick up. Configuration options are available for both methods. File formats are provided upon request. Contact KWI to learn more.

[Notification File](#)

[Order File](#)

Full List of Omnichannel Configurations

[TSR-OMS-and-FFIT-ConfigurationsDownload](#)

Consideration Questions

System Integrations will require an SFTP to transmit Order and Notification files for API or EDI. Separate SFTP credentials are required for production and UAT.

A KWI phantom store for Fulfill It is required to virtually move inventory. You will need the Phantom Store number ready.





Do you have shipping rates already set up in the back office? If not you can provide shipping methods and rates to display on POS. Shipping methods are required to be mapped to UPS or FedEx shipping accounts for shipping carrier integrations.

Will you integrate into FedEx UPS or both? If so we will need store level account information for Fulfill It and Store and/or Global Account information for Ship It. FedEx requires certification in your test environment prior to deployment to Production.

Inventory Thresholds - What inventory level do you want for an order to be processed at a company level, store level or both? Do you want 1 to exist somewhere but need 2 or more in a certain location for that location to be chose for example.

Customer Profile Updates - We recommend you add Email and Phone as a requirement for shipping addresses. If you would like to add that indicate on the form.

Order Expiration times - You will set a STORE level expiration and ORDER level expiration, so if you are giving 24 hours to the store and 72 to the order the order will be "rerouted" 3 times before expiring and not being fulfilled. The standard is 24 hours and 72 Hours

BOPIS, Curbside, and Local Delivery expirations- What is the maximum amount of time (in hours or days) will the assigned store have to process the order? If this time expires, the order will be expired. Default is 240 hours

Do you want to require the associates in the store to scan each item before processing the order? This is recommended.





On the POS Receipt you can combine the orders that are shipping to the same destination. This is recommended for a cleaner view for the customer.

Would you like the system to send customers email notifications on their order?

IF USING SYSTEM GENERATED EMAILS

Return Policy updates

Adding Logos to Header and/or Footer

Email Alias you wish to use (CustomerService@Client.Com for example)

Email Subject

What type of notifications?

- Store - Shipping
- Customer - Shipping



- Customer - Expired Order
- Customer - Cancelled
- Corporate- Expired Order

What do you want the content of each email to be? We create a template for each scenario, a sample is provided below.

Order Confirmed:

🗑 Delete
📄 Rules
↶ Undo
↷ Redo
📅 Create a Meeting
📁 Move
⋮

No Brand Order Update

↶ ↷ →



customerservice@SJP.com <customerservice@SJP.com>
 To: ● Alondra Espinal

Today at 11:34 AM

SJP

BY SARAH JESSICA PARKER

03/22/2021

EMILY JONES
 24 RUSSELL STREET
 ROSLYN HEIGHTS NY 11577
 Home Phone: 516-621-2400

Customer No: 1001000012
 Tracking No: 785035434929
 Web Order #: 110

Fulfilled by SJP Boutique - NYC

Summary for Transaction 700

665 Fifth Ave
 New York NY 10022
 Store Phone: 212-755-5252

EMILY,
 Your item below has shipped!

Item	Description	Color	Size	Price
8888100775	Guest	Eleanor Fabric	37	\$ 425.00
Discounts Applied				0.00
Sales Tax(0.000%)				0.00
Shipping Charge				15.00
Total				440.00
Credit Card Number ending with				2356
Form of Payment				HOUSE ACCT



Order Expired:

03/29/18

Dear **FRANK GRIMES**:

Thank you for your recent **TEST** order.

Unfortunately, we are unable to fulfill your request for the style **987123**.

We apologize for any inconvenience this may have caused. If you have any questions, or would like to inquire about another style please contact your local **TEST** store.

Sincerely,

TEST

Order Canceled:





10/13/2022

Customer No: 1001000116

JOHN SCHUYLER
99 SEAVIEW BOULEVARD
PORT WASHINGTON NY 11050
Home Phone: 516-621-2400

JOHN,
Unfortunately, the following item(s) that you ordered are now out-of-stock:

Item	Description	Color	Size	Price
8881987227	Harmon Drapey Slip Tank	Midnight Bouquet	S	\$ 225.00
Discounts Applied				0.00
Sales Tax(0.000%)				0.00
Shipping Charge				1.00
Total				226.00
Credit Card Number ending with				7890
Form of Payment				HOUSE ACCT

Please accept our apologies for this inconvenience.
Thank you for shopping KWI_REPLACE!
www.KWI_REPLACE.com

What are KWI Location numbers for warehouses and/or Web Store the KWI System will be sending orders to?

Order Files from Web: Will you be sending personalization details in the order file? This will be sent to the KWI system in the form of a JSON string.

Will you use order note files or EDI? Note files are most common





Tax Considerations

Real-time Tax Calculation for Fulfill It Orders: You can use a 3rd party tax software (such as Avatax) to calculate real-time tax based on the shipping destination by Location. Note that this will incur a fee. If you are interested, please speak to your Customer Success Manager.

TDS (Tax Data Services): Outside of a tax software integration, KWI can provide tax data services that will apply a tax rate based on the zip code and state of the shipping destination. This is achieved via flat file which will feed into our geocode tables. There is some back office set up required and an fee associated to this service. If you are interested, please speak to your Customer Success Manager.

Store Tax Rate on Shipping: If you are not using dynamic tax lookup, would you like to apply the store tax rate on the shipping only? (This only applies to ship it and fulfill it shipping charges and not the items)

Note: Tax rules on non-merchandise items (such as shipping) are set up and controlled via Tax Zone Maintenance and Tax Hierarchy Category Maintenance.

Required Back Office Setup

- Enabled Fulfill It stores in store maintenance (Send Store Fill = Y)
- Created phantom store for Fulfill it





- Set Fulfill It options in the Security Setup application in the KWI Back Office (see Access Controls section below)
- Enable Security for store employees on KWI POS
- If using a warehouse or web store for order fulfillment, create a 6 digit store number for both the warehouse and web store.
- Set up an email group to receive any error notifications resulting from an order

Access Controls

The Omnichannel Dashboard has a corporate view and a store view.

Omnichannel Dashboard corporate view:

- Corporate users will have access to cancel any order and reassign any order in the Omnichannel Dashboard. They will also have full visibility into all orders company-wide.
- Set up the corporate user to have access to all stores in Employee File Maintenance (POS) and/or User Maintenance (Back Office) by assigning Store = 0-N/A for all stores.





This can be done in the KWI Back Office.

Omnichannel Dashboard store view:

- Store users will have visibility to orders that have been assigned to the employee's home store. They can forward orders and cancel orders that the home store has placed (in case the customer changed their mind, for example). They cannot cancel orders that have been assigned to their home store for fulfillment. They will also not be able to reassign an order. A store user can forward orders that have been assigned to their store in the event they are unable to fulfill the order.
- Set up the store user to only have access to fulfill orders that have been assigned to their home store by assigning a home store to that employee in Employee File Maintenance (POS) and/or User Maintenance (Back Office). This can be done in the KWI Back Office.

Additional Permissions

- Additional permissions for Omnichannel are assigned at the user group level for both POS and Back Office Users (in the Security Setup screen in the KWI Back Office). Permissions include the following:
 - Access to the Omnichannel Dashboard
 - Access to edit the Ship To Details





- Access to edit the Ship From Details
- Access to edit Shipping Details

Additional Questions?

Name(required)

Company Name(required)

Email(required)

Write your question below(required)

By submitting your information, you're giving us permission to email you.

Contact Us



