

Personal Equipment Assistant (PEA) - Ordering screen

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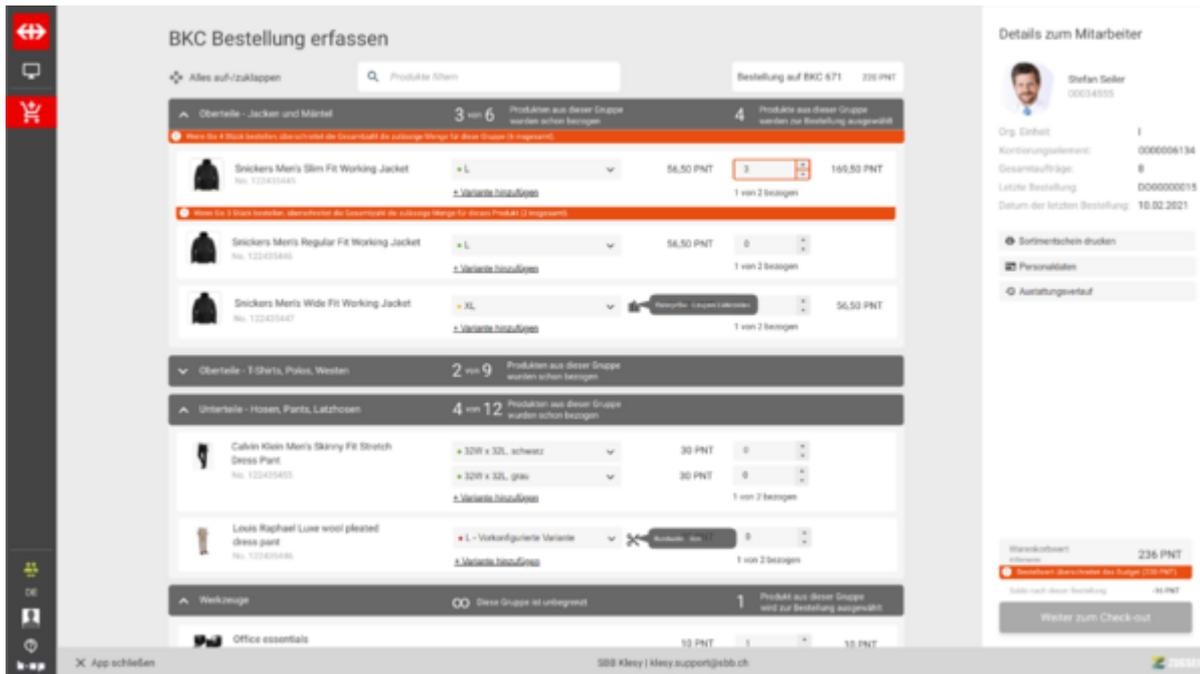
Card design

- [Regular product card \(no sizes\)](#)
- [Regular product card \(no sizes\) and modifications](#)
- [Product with variants \(1D\)](#)
- [Regular product card \(1D\) and modifications](#)
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- Configurable products
- Configurable products with product modifications

- Configurable products
- Configurable products with bespoke option
- Configurable products with bespoke option and product modifications
- [Subscribable product with just one plan and no subscription options](#)
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- [Subscribable product with multiple plans](#)

Warnings

OUTDATED // NEEDS REWORK



Prerequisites for the personal equipment assistant to open is that the ordering is allowed. The following shopping purpose settings can influence this:

- If SP setting "Ordering during period of notice is limited" is on and the number of days until the exit date of the employee is less than SP setting "Number of days before exit date", the user should not be able to go to the product selection
 - error message: product-selection.shopping-forbidden.exit-date
- If SP setting "Number of orders per time frame is limited" and the current date falls into one of the "Yearly time frames" and the number of existing orders in this time frame (for the same shopping purpose) has already reached the limit, the user should not be able to go to the product selection
 - error message: product-selection.shopping-forbidden.max-number-of-orders

Layout

Central panel

Auxiliary controls

- Expand / collapse all
 - see [Expand / collapse all](#)

- Filter products
 - see [Filter products](#)
- Account balance
 - if SP setting **Account balance is displayed is on**, this section is displayed

Products and groups

This section displays all products available to the target person, based on their entitlement. Products are distributed into groups.

Important info:

Products are further filtered by availability per **gender**. If the target person is classified as male, they will see men's and unisex products. If the target person is classified as female, they will see women's and unisex products. If they do not have an assigned gender, they will see all products in the entitlement, regardless of which gender they are intended for.

If SP setting **Products which are not on stock (zero available quantity) are displayed** is off, such products will not appear. If SP setting **Products which are not on stock (zero available quantity) are displayed** is on, the out-of-stock products will appear, but only there is an incoming shipment, if the SP setting **Only when there are incoming expected shipments** is on.

If SP setting **Products without price information are displayed** is off, and there is no price in either the default price list of the entitlement, nor in the Fallback price list, such products are not displayed.

If there are no products to display, the text from SP setting **Custom message to be displayed when there are no items to display** is displayed.

Groups

The screenshot shows the 'BKC Bestellung erfassen' (BKC Order Entry) interface. The main area displays a list of products grouped into categories. The first group is 'Oberteile - Jacken und Mäntel' (3 of 6 products), with 4 products selected for the order. The second group is 'Oberteile - T-Shirts, Polos, Westen' (2 of 9 products). The third group is 'Unterteile - Hosen, Pants, Latzhosen' (4 of 12 products). The fourth group is 'Werkzeuge' (1 product). Each product entry includes a name, number, size/color options, price in PNT, and quantity. A right sidebar shows 'Details zum Mitarbeiter' (Employee Details) for Stefan Seiler, including Org. Einheit, Kontierungselement, Gesamtaufträge, Letzte Bestellung, and Datum der letzten Bestellung. At the bottom, a summary shows 'Warenkorbwert' (236 PNT) and 'Saldo nach dieser Bestellung' (-16 PNT). The interface is in German and includes a search bar and navigation icons.

Each group acts as a container for the products within it. It can be expanded and collapsed by

clicking on the header (a suitable icon is displayed for expanded and collapsed state.)

Allowed group quantity is calculated for each group, if the maximum quantity is limited on the group level in the entitlement. If no product of the group in question has ever been ordered based on this entitlement, allowed group quantity is equal to the max group quantity for initial order. Otherwise, allowed group quantity is calculated as max group quantity for reorder - number of owned items (this excludes products that have been returned, lost, expired, etc.) from this group.

If maximum group quantity is not defined, the allowed product quantity is infinite.

If the maximum group quantity has been overridden, the override value is used.

The following content is displayed

- icon
 - expanded
 - collapsed
- Group title - group title as administered in the entitlement
- Group limitations - shows how many products of this group have already been ordered vs how many are available for the employee
 - if there are limitations defined for this group: <number of owned items> product-selection.group.of <allowed group quantity> product-selection.group.limitations
 - if there are no limitations defined for this group: product-selection.group.unlimited
- Items of this group in current order
 - <total desired quantity> product-selection.group.desired-quantity - summed desired quantities of all variants of all products in this group
- Errors appear below the group header, if the group is expanded. If multiple errors should be displayed, they are displayed one below the other. If the group is collapsed, the group header goes into error state (see image.)
 - Exceeded quantity
 - If total desired quantity is larger than allowed product quantity, error message is displayed product-selection.group.quantity-exceeded
 - If SP setting **Exceeding entitlement quantities is enabled** is on, the message is displayed as warning message
 - Product errors - if the group is collapsed and some of the products are in error state, the group goes into error state so that the user is aware of why they cannot click the Check-out button

Product

For each product, different parameters are displayed, depending on shopping purpose, user rights or product administration.

Allowed product quantity is calculated for each product, if the maximum quantity is limited on the product level in the entitlement. If the product in question has never been ordered based on this entitlement, allowed product quantity is equal to the max product quantity for initial order. Otherwise, allowed product quantity is calculated as max product quantity for reorder - number of owned items (this excludes products that have been returned, lost, expired, etc.)

If maximum product quantity is not defined, the allowed product quantity is infinite.

If the maximum product quantity has been overridden, the override value is used.

Stock quantity is calculated for every variant as the total available quantity across all suppliers and local stock. In addition, the date of the first upcoming delivery can be shown. Stock quantity of a product with multiple variants is a sum of all quantities of all variants. First upcoming delivery is the first delivery across all variants.

If SP setting **Suppliers' stock quantity is displayed** is on, the stock quantity is displayed for a product and its variables. Depending on SP setting **Stock quantity display mode**, the quantity is displayed as: a) <SP setting **Default "in stock" indicator text**>: <calculated quantity if more than 0> or **Default "not in stock" indicator text** if calculated quantity is 0 b) colored dot with **Default "in stock" indicator text** if calculated quantity is more than 0 on hover, or **Default "not in stock" indicator text** if calculated quantity is 0 The dot is colored green if product is on stock, red if product is out of stock.

If SP setting **Expected shipments are displayed on hover** is on, the date of upcoming

shipments is visible on hover, additionally.

Products and variants can have various attributes which can be interesting to the user. **Indicators** of these attributes are displayed, depending on SP settings. Visualization is similar: an icon and an info tooltip which appears on hover. Possible indicators are:

- Customization
 - displayed if the product / variant is customized for the target person
 - icon: scissors
 - tooltip: <customization name>: <customization value> for each customization
- Border variant
 - displayed if the variant is marked as a border variant
 - icon: factory
 - tooltip: product-selection.product.border-variant
- Sell-out: if SP setting "**Sell-out**" indicator is displayed is on
 - icon: attention
 - tooltip: SP setting "**Sell-out**" indicator text
- Blocked: if SP setting "**Blocked**" indicator is displayed is on
 - icon: block
 - tooltip: SP setting "**Blocked**" indicator text

Estimation of expected delivery date should be checked w/ @RSchneider

- Image - the first *gallery* picture
 - see [Open product details](#)
- Title
- Number
- Stock quantity for product
- Product ordering text (with **formatting** from the administration)
- Indicators for product are displayed next to the product name
- Variants (not visible if product has only the standard variant)
 - Stock quantity for variants
 - Variant (dropdown)
 - if SP setting **Selecting a non-default variant is enabled** is off, the dropdown is disabled, with the target-person's default variable selected
 - if SP setting **Selecting a non-default variant is enabled** is on, the dropdown is enabled and displays all variants, with possible limitations:
 - if SP setting **User must have sufficient rights** is on, currently logged-in user's rights are checked
 - if SP setting **Only if default variant is not yet set** is on, the dropdown is enabled only if the target person does not have a default variant
 - if SP setting **Maximum number of sizes away from the default variant** is defined, all variants more than that number up and down from the default variant are not selectable
 - if SP setting **Ordering "Made-to-measure" products is enabled** is off, any variant which has made-to-measure data is not selectable
 - Indicators for variants are displayed next to the variable dropdown
 - Unit price (price label)
 - if SP setting **Product prices are hidden** is on, this section is not displayed, and neither is the total price

- if quantity based prices are configured, display indicator next to the unit price, update price when quantity is changed
 - icon: info
 - tooltip: for each level <limit> <unit sg/pl>: <price> <currency>
 - product-selection.product.price-range.up-to
 - product-selection.product.price-range.more-than - if open end
 - Quantity - number box, updates the unit price, if unit price is quantity dependent, **disabled if product is blocked for ordering**
 - if product quantity is limited: <owned items> product-selection.product.of <allowed product quantity> product-selection.product.taken
 - otherwise: <owned items> product-selection.product.taken
 - Total - unit price * quantity
 - Order another variant
 - if SP setting **Selecting a non-default variant is enabled** is on, this button is displayed: product-selection.product.add-variant
 - see [Order another variant](#)
 - Error messages appear based on user rights and shopping purpose that have previously been configured and they are displayed at the bottom of the product box. If multiple errors should be displayed, they are displayed one below the other.
 - Exceeded quantity
 - If desired quantity is larger than allowed product quantity, error message is displayed product-selection.product.quantity-exceeded
 - If SP setting **Exceeding entitlement quantities is enabled** is on, the message is displayed as warning message
 - Sold out
 - if the product is marked as sell-out and desired quantity is larger than the available quantity, error message is displayed product-selection.product.sold-out
 - Not on stock
 - if SP setting **Products which are not on stock (zero available quantity) are available for ordering** is off, error message is displayed product-selection.product.not-on-stock
 - Minimum orderable quantity
 - if product setting **Minimum orderable quantity** is larger than the desired quantity, error message is displayed: product-selection.product.minimum-quantity
 - Order stepping
 - if desired quantity is not divisible by product setting **Order quantity stepping**, error message is displayed: product-selection.product.quantity-stepping
 - Add new product
 - if SP setting **Manual adding of products that are not in the entitlement is enabled** is on, this button is visible
 - see [Add new product](#)

Right panel

Right panel contains useful information about the target person, links to other apps and pages and details about current order.

- Employee details - *product-selection.target-person.details*
 - Default image
 - First name - *product-selection.target-person.first-name*, last name *product-selection.target-person.last-name*
 - Employee number - *product-selection.target-person.employee-number*
 - Company name - *product-selection.target-person.company-name*
 - Organizational unit - *product-selection.target-person.organizational-unit* **name**
 - Account assignment element - *product-selection.target-person.account-assignment-element*
 - Total orders - *product-selection.target-person.total-orders*
 - Last order number - *product-selection.target-person.total-orders*
 - Date of last order - *product-selection.target-person.date-of-last-order*
- Buttons
 - Print entitlement slip
 - if SP setting **Entitlement slip printing is enabled** is on, this button is displayed
 - see [Print entitlement slip](#)
 - Personal data
 - if SP setting **Personal data link is displayed** is on, this button is displayed
 - see [Open employee data](#)
 - Product customization
 - if SP setting **Product customization link is displayed** is on, this button is displayed
 - see [Open product configuration](#)
 - Equipment history
 - if SP setting **Entitlement limit editing is enabled** is on, this button is displayed
 - see [Open equipment history](#)
 - Override maximum quantities
 - if SP **Entitlement limit editing is enabled** is on, this button is displayed
 - see [Override entitlement limits](#)
 - Edit account balance. The button

- is visible if SP Setting "**Equipment history link is displayed**" is on and the user has the user permission "**Can edit account balance**".
- links here --> [Edit account balance](#)
- Shopping cart value
 - Shopping cart value - total price of all products/variants which have been selected for ordering - *product-selection.shopping-cart.value*
 - Number of items - total quantity of all products/variants - *product-selection.shopping-cart.number-of-items*
 - If the estimated account balance after this order is less than 0 and
 - if SP setting **Exceeding equipment account balance is enabled** is off, an error message appears in the shopping cart - *product-selection.shopping-cart.account-balance-exceeded*
 - if SP setting **Exceeding equipment account balance is enabled** is on, the message is displayed as just a warnign
 - Estimated account balance after this order - *product-selection.shopping-cart.est-remaining-account-balance*
 - displayed only if SP setting **Account balance is displayed is on**
- Check-out button - *product-selection.shopping-cart.check-out*
 - If any error messages are visible, check-out button is disabled
 - Warning messages do not disable the check-out button

Footer

Footer settings are taken from the Service Descriptor, similarly to all other apps. However, if there are footer-related SP settings, those settings have a higher priority

- If SP **Footer is displayed** is on, the footer is displayed, otherwise hidden
- ZUGSEIL logo is displayed based on SP setting **ZUGSEIL logo is displayed**
- Text in the center of the footer is take from SP setting **Footer text (dict)**

Functionality

General options

Expand / collapse all

Clicking on expand / collapse all button toggles the product groups view: expands all groups and collapses all. The user can then change the state of each of them one by one.

This functionality is useful when the target person has an extensive entitlement.

Filter products

Filtering group items is a bit trickier than filtering a flat structure. If the filter query matches the content of a group name, the user expects to see all items in that group. If the filter query matches only some of the items in the group, but not the group itself, the group remains visible with only those items which match the criteria. If the filter query doesn't match neither the group name nor any of the items within it, the whole group is not displayed.

Parameters which are considered for matching are:

- group name
- product name
- product number
- variant name

Product options

Open product details

Opens the [product details page](#).

Order another variant

Adds another dropdown with variants, including the data like stock quantity, indicators, price, desired quantity, total.

The user can add the same variant multiple times. This enables the user to, e.g. order 1 piece customized and 1 piece default.

Customize product

Opens [Product customization app](#) for the target person and the selected variant.



Internal shop has to supply the product customization app with all the required data in order to create a customized variant and select it upon coming back to the main screen.

Add new product

As soon as the user clicks the button, it turns into an autocomplete box, which is automatically focused, so that the user can immediately start typing. Until the user types their search, a watermark is displayed:

- product-selection.product.search-and-add

Adding product manually:

The user can search by product name and product number, and, if SP setting **Search by aliases and search tags is enabled** is on, by aliases and search tags.

Autocomplete box shows only those products which are configured in SP under **Allowed catalogs**, further filtered as specified in **Product pool is limited based on rightssetting**. If SP setting **Products without price information are displayed** is off, such products will not appear in the search. The price is looked up in the default price list of the current entitlement, and, if not found, in the **Fallback price list**.

After selecting the product, it appears in the **Other products** group (product-selection.group.other), which hosts all products which do are not connected to any group. A new button for adding products appears immediately and the user can continue adding products.

If SP setting **Products are persisted for future orders** is on, the selected product will appear in the product selection for this target person in the future orderings.

Manually added product can be removed by clicking on the bin icon, in case it was added by mistake.

Manually added product:

Employee options

Print entitlement slip

Same behavior as in current Zugseil.

Open employee data

Opens [Employee details app](#) for the target person. Depending on user rights, a portion or all of the data is editable. Upon returning to Internal shop, the fresh data is displayed.

Open equipment history

Opens [Equipment history app](#). Upon returning to Internal shop, the fresh data (e.g. updated allowed quantity) is displayed.

Open product configuration

Opens [Product customization app](#) for the target person.

Override entitlement limits

This functionality allows the user to override the entitlement limitations for products and product groups, for the target person.

By clicking on the button, the page changes in the following way:

- New maximum quantity number box in group headers, instead of the information about current order quantity `product-selection.group.limit-override.new-max-quantity`

- New maximum quantity number box in product boxes *product-selection.product.limit-override.new-max-quantity*
- Product price information is not displayed
- Ordered quantity box is replaced by info label <desired quantity> *product-selection.limit-override.desired-quantity*
- In the right panel, instead of proceed to checkout, 3 new buttons are displayed:
 - Save new maximum quantity *product-selection.limit-override-save.new-maximum-quantity*
 - Once the new maximum quantity is saved it reverts the user to the initial page layout, but with updated maximum values
 - If the entitlement has been overridden, an info icon with a message appears- *product-selection.limit-override.message*
 - Reset to standard *product-selection.limit-override.reset.to.standard*
 - This functionality allows the user to annul all previous entries that have been made and to revert everything to the initial state as it was by entitlement.
 - Cancel *product-selection.limit-override.cancel*
 - This functionality allows the user to discard all current changes

Overriding entitlement limits:

The screenshot displays the 'Kundenbestellung' (Customer Order) interface. The main area shows a list of products grouped by category. The 'Oberteile - Jacken und Mäntel' group is expanded, showing three items: 'Snickers Men's Slim Fit Working Jacket', 'Snickers Men's Regular Fit Working Jacket', and 'Snickers Men's Wide Fit Working Jacket'. Each item has a 'Neuer Maximalwert' button. Below this, the 'Oberteile - T-Shirts, Polos, Westen' group shows 2 of 9 items, and the 'Unterteile - Hosen, Pants, Latzhosen' group shows 4 of 12 items, including 'Calvin Klein Men's Skinny Fit Stretch Dress Pant' and 'Louis Raphael Luxe wool pleated dress pant'. A 'Werkzeuge' section at the bottom indicates the group is unlimited. On the right, the 'Details zum Mitarbeiter' (Employee Details) panel shows information for Stefan Seiler, including his ID, unit, and last order date. At the bottom right, there are buttons for 'Neue Maximalmengen speichern', 'Auf Standard zurücksetzen', and 'Abbrechen'. The footer includes the SBB logo and contact information.

Manually overridden entitlement limits:

Kundenbestellung

Alles auf/zuklappen Bestellung auf BKC 671 220 PNT

Oberteile - Jacken und Mäntel 3 von 7 Produkten aus dieser Gruppe wurden schon bezogen 2 Produkte aus dieser Gruppe werden zur Bestellung ausgewählt

- Snickers Men's Slim Fit Working Jacket No. 122435445 L 56.50 PNT 1 (1 von 2 bezogen)
- Snickers Men's Regular Fit Working Jacket No. 122435446 L 56.50 PNT 0 (1 von 2 bezogen)
- Snickers Men's Wide Fit Working Jacket No. 122435447 XL 56.50 PNT 1 (1 von 2 bezogen)

Oberteile - T-Shirts, Polos, Westen 2 von 9 Produkten aus dieser Gruppe wurden schon bezogen

Unterteile - Hosen, Pants, Latzhosen 4 von 12 Produkten aus dieser Gruppe wurden schon bezogen

- Calvin Klein Men's Skinny Fit Stretch Dress Pant No. 122435455 32W x 32L, schwarz 30 PNT 0 (1 von 2 bezogen)
- Louis Raphael Luxe wool pleated dress pant No. 122435446 L - Vorkonfigurierte Variante 0 (1 von 2 bezogen)

Werkzeuge ∞ Diese Gruppe ist unbegrenzt 1 Produkt aus dieser Gruppe wird zur Bestellung ausgewählt

+ Produkt hinzufügen

Details zum Mitarbeiter

Stefan Seiler
00034555
SBB

Org. Einheit: I
Kontierungselement: 0000006134
Gesamtaufträge: 8
Letzte Bestellung: DO00000015
Datum der letzten Bestellung: 10.02.2021

Warenkorbwert: 236 PNT
4 Elemente
Saldo nach dieser Bestellung: 113 PNT

Weiter zum Check-out

SBB Klesy | klesy.support@sbb.ch

Edit account balance

Opens edit account balance screen in [Equipment history app](#). Upon returning to Internal shop, the fresh data (e.g. updated account balance) is displayed.

Related articles

- [Dev:Equipment Management Assistant \(EMA\)](#)