M2

PWA POINT OF SALE

Manual

Updated January 2019

App-like user experience
POS

Online-offline
Sync

Multiple
Shipment

Assign
Permissions

Multiple
Payments

Connect
Devices
USB/Blutooth
Card reader, Barcode
scanner, Cash drawer
Receipt printer

Manage
Customer

Manage
Order

Manage
Refunds

Promotion
Discount

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1.   VERSION CONTROL

Updated Time	Changes
October 2018	• Add section How to configure customer attributes on POS • Add section How to configure label translation on POS • Add section How to add a Virtual Product to cart • Add section How to add a back-order item on POS
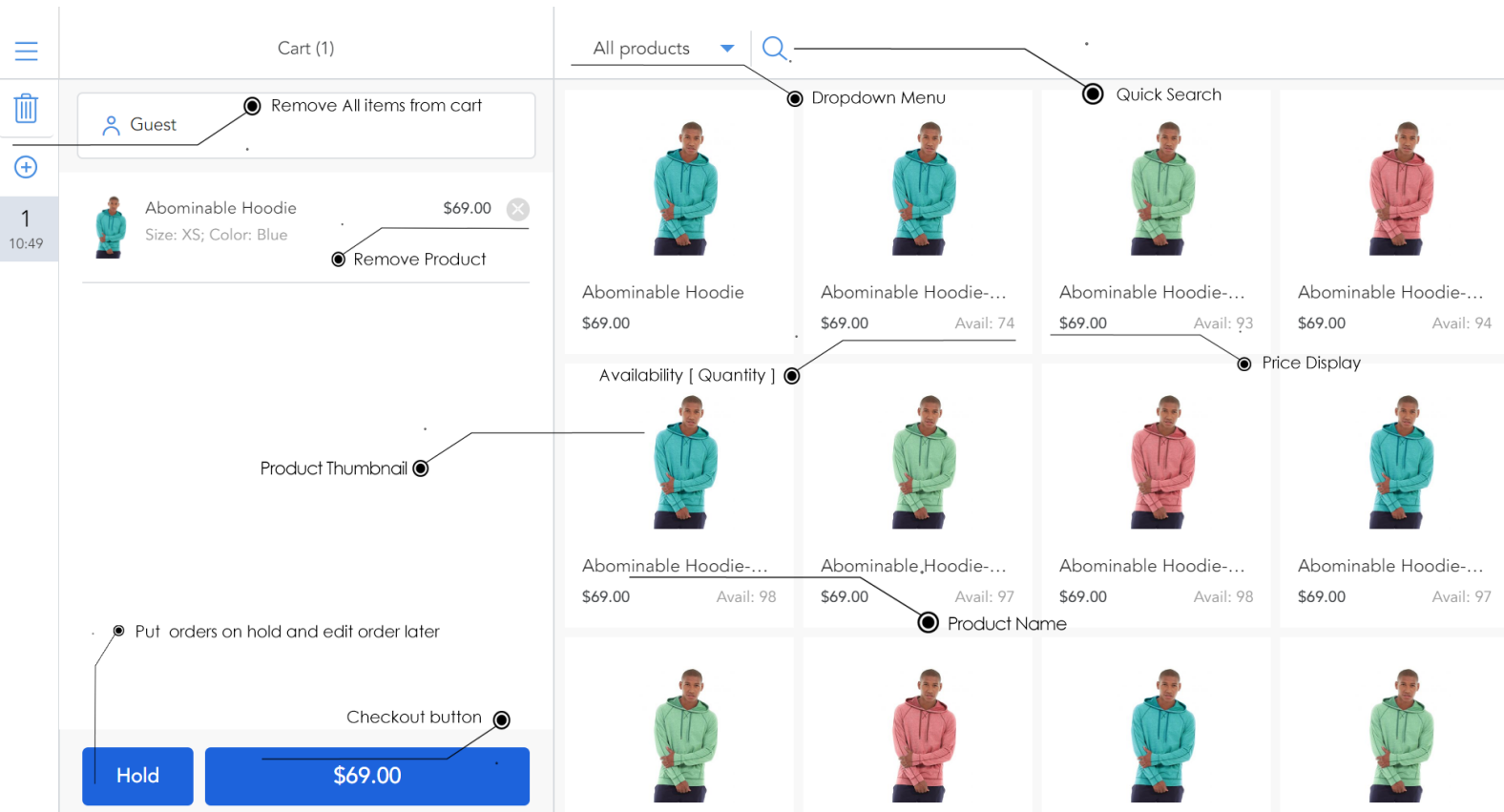
2. INTRODUCTION

Long lines at the checkout and unpleasant in-store experience will hurt both store owners and customers. Long wait times can actually dissuade customers from shopping within a particular business at all. That's exactly why we built and (continue to develop) Progressive Web App Point of Sale for Magento 2 (usually called PWA POS). It is the first and only point of sale system in the market that utilizes enhanced web abilities to deliver an app-like user experience. With the latest upgrade to PWA, now you can use Point of Sale seamlessly on PC/laptop like a native app with outstanding features, this includes...

- Exceptionally high speed
- App-like experience
- Unstoppable offline mode
- Mix of diverse payments

With the all-new progressive web app experience, we hope that every Magento retailer who is running an online-to-offline business would enjoy enhancing a performance in store.

Thanks and Best regards,

Magespacex Team

3. HOW TO SET UP MASTER DATA

Before you can use the PWA POS system, the following master data needs to be set up in advance.

- **Location**: which control the shipping origin of connected POS devices
- **POS**: each virtual POS in the system represents for a POS device in your store.
- **POS Product**: SKUs that is available to sell on POS.
- **POS User**: the account that your staff (cashier, store manager, etc.) will be provided with to log in and use the POS system.
- **POS Role & Permission**: a set of permissions assigned to each POS user account to perform specific tasks on POS (checkout, refund, check stock, etc.)

The next sections will guide you through step-by-step how to set up them from scratch.

3.1. How to Create and Manage Locations

A POS Location designates what address is used as the shipping origin to calculate tax for POS orders.

When you finish installing **PWA POS**, the system automatically creates the **Primary Location** by default.

This default location cannot be deleted but you can edit its information.

3.1.1. How to create locations

Path:

1. Go to **Admin Panel > POS > Manage Location.**
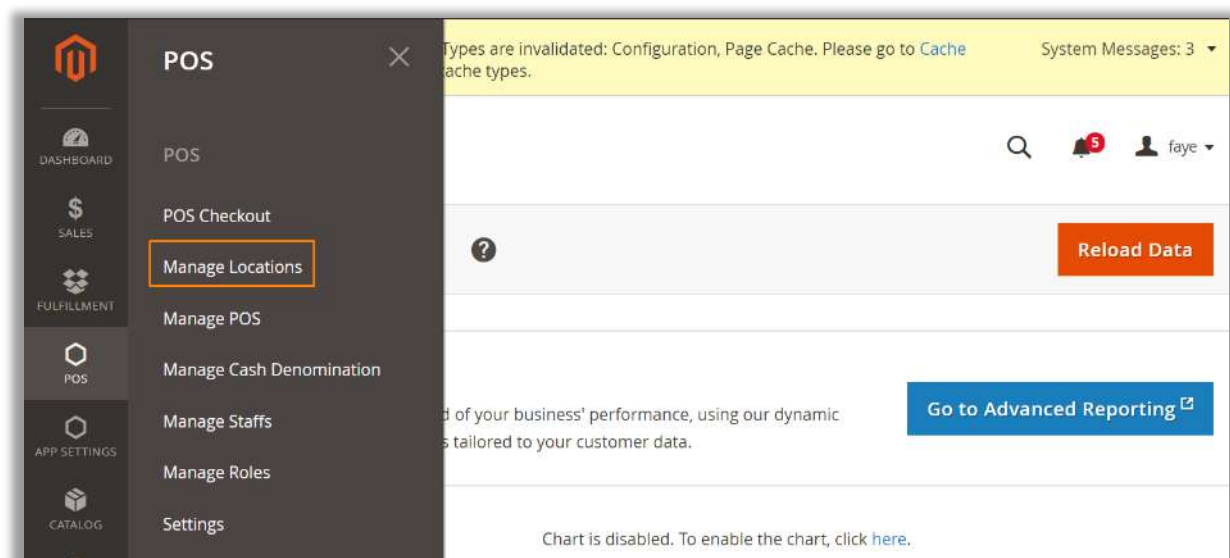
2. On the **Manage Locations** page, click on the **[Add a New Location]** button

3. On the **Add a New Location** page, enter required information:

Field Name	Type	Required	Description
General Information			
Location Name	String input	Yes	String entered here will be used as the location name, which will be displayed on POS orders, receipts and other grids, transactions, reports, etc.

Field Name	Type	Required	Description
			Validation Rule: you can use any alphanumeric or special characters & space but no more than 255 letters. Location name doesn't need to be unique (Many locations can use the same name).
Location Code	String input	Yes	String entered here will be used as the location code, which will be displayed on grids, transactions, reports, etc. **Validation Rule**: you can use any alphanumeric or special characters & space but no more than 255 letters. Location Code is an identification attribute and **must be unique** among locations. If you enter a location code that already exists & click on [Save] or [Save and continue editing] button, the system will not save data and show a notification message *The location code (location_code_entered) is existed.*
Contact Email	Text input	No	Enter an email address of a person in charge of the current POS location. Before saving, the system will check whether the format of email address inputted is correct or not. If it is invalid, a notification message will be displayed: **Please enter a valid email address (Ex: johndoe@domain.com)**
Telephone	Text input	No	Enter phone number of the current POS location, which will be printed on POS receipts.
Address			
Street	Text Input	Yes	Enter street name of the current POS location, which will be printed on POS receipts.
City	Text Input	Yes	Enter city name of the current POS location, which will be printed on POS receipts.

Field Name	Type	Required	Description
Country	Single Dropdown selection	Yes	Select a country of the current POS location, which will be printed on POS receipts and used to calculate taxes & shipping fees for POS orders.
State or Province	Single Dropdown selection or String Input	Yes	Select a state or provide of the current POS location, which will be printed on POS receipts and used to calculate taxes & shipping fees for POS orders. **Preconditions**: - If you select a country which requires state information (e.g. US), the "State or Province" field is a single dropdown selection and a required field. - If you select a country which does not require state information, the "State and Province" field becomes a string input field and not required.
Zip/Postal Code	Text Input	Yes	Enter a zip/ postal code of the current POS location, which will be printed on POS receipts and used to calculate taxes & shipping fees for POS orders.
Button			
Back	Button	N/A	On click, redirect back for the Manage Locations page even when there're still unsaved changes in the location details page
Reset	Button	N/A	On click, empty data entered in all fields
Save and Continue Edit	Button	N/A	On click, validate data entered in all fields. If validation rules are passed, save all changes and keep you stayed on the current Location Details page.
Save	Button	N/A	On click, validate data entered in all fields. If validation rules are passed, save all changes and redirect you back to the Manage Locations page.

4. Once finished, click on the **[Save]** or [**Save and continue edit]** button.

If any required field is blank, the system would show a notification message: **This is a required field**. and not process to save data.

3.1.2. How to view the list of locations and find yours

The Location List allows you to filter based on predefined conditions and then save the results so that you could find your location(s) quickly and manage the list better.

Path:

To view the list of all locations available in the system:

1. Go to *Admin Panel > POS > Manage Locations*

On the Manage Locations page, you can quickly capture the following info:

- Location ID
- Location Name & Location Code
- Contact email address of a location's manager
- Contact phone number of a location
- Location address

2. Click on the **[Filter]** button to enter your search criteria, which are:

- Location ID
- Location name
- Contact email
- Telephone
- Address

3. Click on the **[Apply Filter]** button. The matching results are returned in the Location List.

4. To save the current filter result to quickly access it in the next time, click on the **[View]** button > Save View As… > Enter the view name > click on the **[->]** button

3.1.3. How to view data and edit info of a location

The location details page centralizes a lot of insightful data for a manager.

Path:

To view data information of an existing location/ warehouse:

1. Go to *Admin Panel > POS > Manage Locations*

2. Click on a row (or the View link) to select an existing Location from the grid.

3. The Location Details page is displayed with 2 sections

4. Click on a section title to expand its details. Each section has their own action button(s) to perform specific tasks separately and also requires different permission types.

(1) General information:

This is the only section that you can input info when you first create a new location. With all permissions mentioned above, here you can edit the location name, contact info & address again.

The validation rules applied are as same as when creating a new location. (See section 2.1.1 for more details). Once you're done with editing, click on the **[Save General Information]** button.

View Location (Test123)

← Back   Duplicate Location

General Information

Save General Information

Location Name *	Test123
Location Code *	Test123
Contact Email	123@gmai.com
Telephone	093939
Street *	Lorem isump
City *	Lorem isump
Country *	United States
State or Province *	Michigan
Zip/Postal Code *	54325

(2) Linked POS: This section is only shown when you view/ edit an existing location and have all permissions mentioned above. It displays the list of all POS assigned to the location and their status (whether enabled or disabled).

Linked POS

Add POS

25 records found   20 ▼ per page   <   1 of 2   >

ID ↓	POS Name	Operating Status	Action
1	Primary POS	Enabled	Details
2	King POS - Don't Touch	Enabled	Details
3	Vincent POS	Enabled	Details

Here you can take the following actions:

• View details of a POS (*extra permission to manage POS is required*)

- Add a new POS to the location (see more details in section **4.1 – How to link POS to Location**)

3.1.4. How to delete a location

If you have a lot of unused locations or maybe some test ones, you can easily remove them to keep the location list tidy & to avoid confusion for other users.

Please note that **this action cannot be undone**. All of related transactions are also deleted completely or removed references to the location. Thus, you need to be careful before deleting a location to avoid data discrepancies.

Path:

To delete an existing location/ warehouse:

1. Go to *Admin Panel > POS > Manage Locations*

2. Click on a row (or the View link) to select an existing Location from the grid.

3. Click on the **[Delete Location]** button
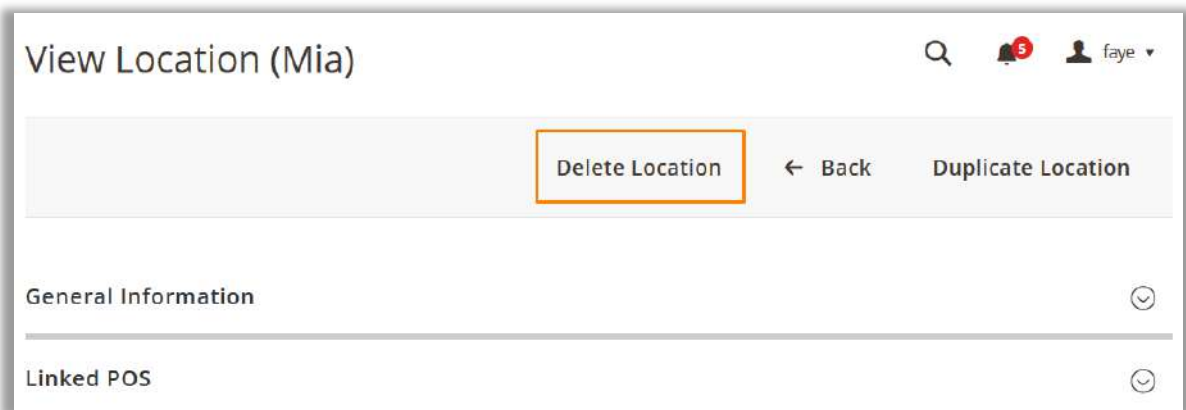
4. Click on the **[OK]** button in the confirmation pop-up
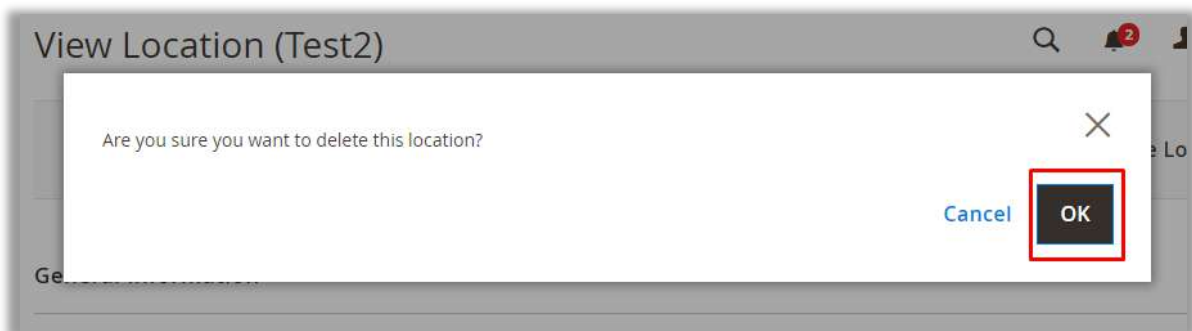
Then you will be redirected back to the Manage Locations page, where the location has been removed successfully.

3.1.5. How to duplicate a location
Path:

To duplicate a location:

1. Go to *Admin Panel > POS > Manage Locations*

2. Click on a row (or the View link) to select an existing Location from the grid.

3. Click on the **[Duplicate Location]** button
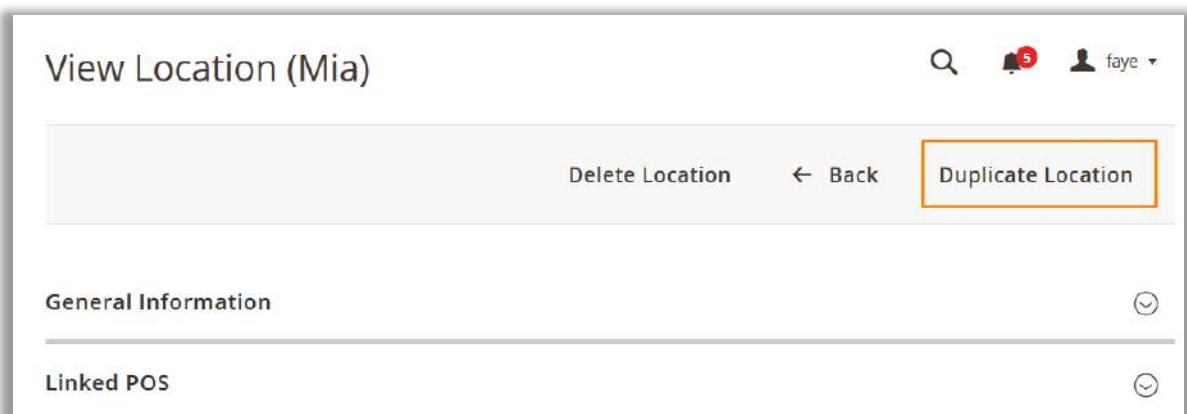
4. Click on the **[OK]** button in the confirmation pop-up.
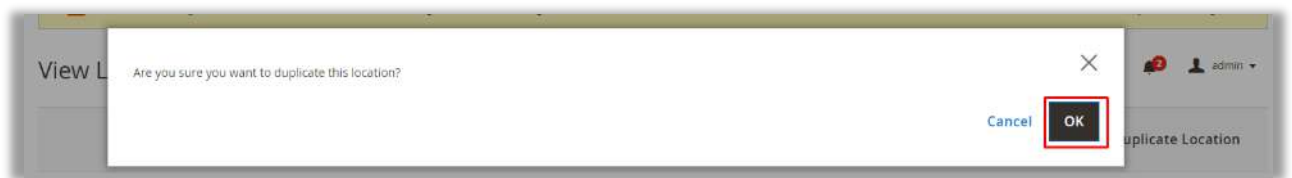
Then you will be redirected to the new location's detail page, which contains the followings:

- General Information:
  - Location Name is generated from the same field in the existing location/ warehouse. **[Existing Location Name][Duplicated date & time]**
  - Location Code is generated from the same field in the existing location/ warehouse. **[Existing Code Name][Duplicated date & time]**
  - Address fields are copied from the same fields in the existing location/ warehouse.
- Linked POS are reset to blank data. You need to assign new POS to the newly duplicated location.

3.2. How to Change a Product's Visibility on POS

For many reasons, you may want to have different catalog lists for online website an offline stores. In this case, a product may be available to sell on Magento website but not in POS and vice versa. POS PWA allows you to make this happen with ease.

3.2.1. How to change a product's visibility on POS

Preconditions:

- Admin user has all permissions or at least the permissions to Manage Catalog Product (defined in ***System > Permissions > User Roles > Create/ Edit Role > Role Resources > Catalog > Inventory > Products***)
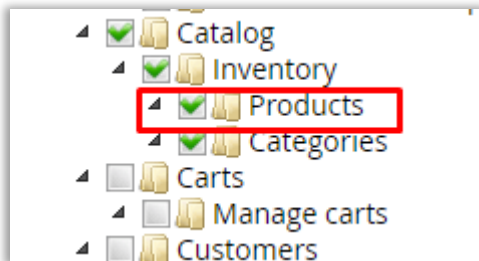
Steps:

- In Backend, go to ***Catalog > Inventory > Products***
- Select the product you want to change its visibility on POS & website
- On the Product Details page, navigate to the attribute **[Visible on POS]**. By default, all products have this configuration set to **[YES]** with **[Global]** scope.
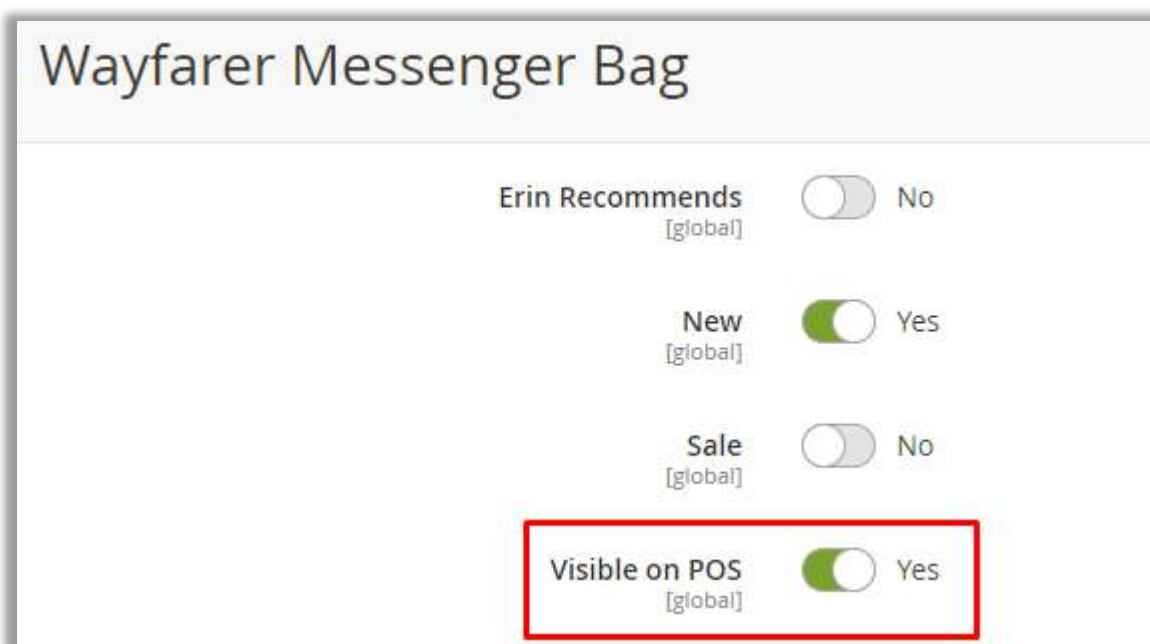
- o Visible on POS = **YES**, the product is available to view info and sell in all POS devices.
- o Visible on POS = **NO**, the product cannot be viewed and sold in all POS devices.

You can make use of this custom attribute and the default attribute **[Visibility]** of Magento to flexible customize the catalog lists in online website and offline stores (POS).

	Attribute Value	
Use Cases	**'Visibility' attribute**	**'Visible on POS' attribute**
Visible on website, not visible on POS	*Catalog, Search*	*Disabled*
Not visible on website, visible on POS	*Not visible individually*	*Enabled*
Visible on both website and POS	*Catalog, Search*	*Enabled*
Not visible on both website and POS	*Not visible individually*	*Disabled*

3.2.2. How to mass update products' visibility

Preconditions:

- Admin user has all permissions or at least the permissions to Import/ Export Data (defined in *System > Permissions > User Roles > Create/ Edit Role > Role Resources > System > Data Transfer > Import*)
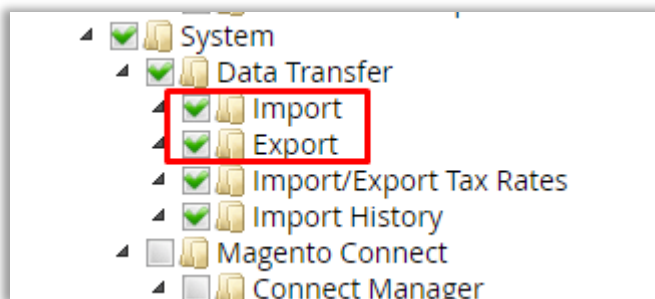
Steps:

Step 1: Prepare the import data

Since **[Visible on POS]** is a custom product attribute, you also can update it using import/ export feature of Magento or Magmi.

For example, you can use the export function of Magento to get the latest product data from the system. When examining the structure of the exported CSV file, you will find the **[pos_visible]** attribute in the **[additional_attribute]** column.

AT	AU
country_o additional_attributes	

color=Black,eco_collection=No,erin_recommends=No,new=No,performance_fabric=No,sale=No,pos_visible=Yes

activity=Gym|Hiking|Trail|Urban,erin_recommends=Yes,features_bags=Audio Pocket|Waterproof|Lightweight|Laptop Sleeve,material=Canvas|Cotton|Mesh|Polyester

activity=Gym|Hiking|Overnight|School|Trail|Travel|Urban,color=Black,eco_collection=No,erin_recommends=No,features_bags=Audio Pocket|Waterproof|Lightweight

activity=Gym|Overnight|Travel,color=Black,eco_collection=No,erin_recommends=No,features_bags=Waterproof|Lightweight|Reflective|Laptop Sleeve|Lockable,mate

activity=Travel|Urban,features_bags=Flapover|Lightweight|Laptop Sleeve,material=Leather|Nylon|Suede,new=Yes,strap_bags=Adjustable|Cross Body|Shoulder|Single

activity=Yoga|Hiking|School,features_bags=Hydration Pocket|Audio Pocket|Waterproof|Lightweight,material=Burlap|Nylon|Polyester,strap_bags=Adjustable|Double|

activity=Gym|Overnight|Travel,features_bags=Wheeled|TSA Approved|Lockable,material=Nylon|Polyester,strap_bags=Adjustable|Double|Telescoping,style_bags=Lug

activity=Yoga|Gym,features_bags=Waterproof|Reflective|Lockable,material=Nylon|Polyester,strap_bags=Double|Shoulder,style_bags=Exercise|Tote,pos_visible=Yes

And the **[visibility]** attribute has its own column.

K	L	M	N	O
product_c	tax_class_	visibility	price	special_pr
1	Taxable G	Catalog, Search	35	100
1	Taxable G	Catalog, Search	32	32
1	Taxable G	Catalog, Search	38	35
1	Taxable G	Catalog, Search	45	
1	Taxable G	Catalog, Search	45	
1	Taxable G	Catalog, Search	59	
1	Taxable G	Catalog, Search	74	
1	Taxable G	Catalog, Search	32	
1	Taxable G	Catalog, Search	32	
1	0	Catalog, Search	32	24
1	Taxable G	Catalog, Search	33	33
1	Taxable G	Catalog, Search	36	
1	Taxable G	Catalog, Search	45	
1	Taxable G	Catalog, Search	45	
1	Taxable G	Catalog, Search	7	
1	Taxable G	Catalog, Search	12	12

When you prepare your own CSV import file, you can change values of these attributes as desire. Once you're done, the rest of the product import process is similar to what you normally do using the Import function of Magento. Further details can be found here

3.3.   How to Manage POS

Each virtual POS in the system represents for a POS device or POS counter at your store. It requires to be linked to one location and doesn't allow more than one cashiers/ users to access at the same time.

Preconditions:

Admin user has all permissions or at least the permissions to manage POS, create POS Users & Roles (defined in *System > Permissions > User Roles > Create/ Edit Role > Role Resources > POS Admin > Manage POS*)
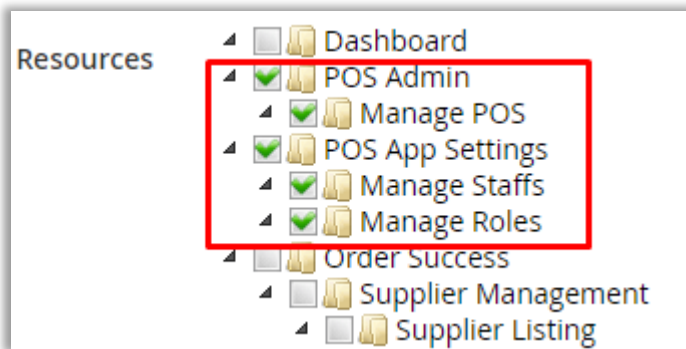
3.3.1. How to create a new POS and link it to a location

- In Backend, go to *POS > Manage POS*
- On the POS Listing page, click on the **[Add POS]** button
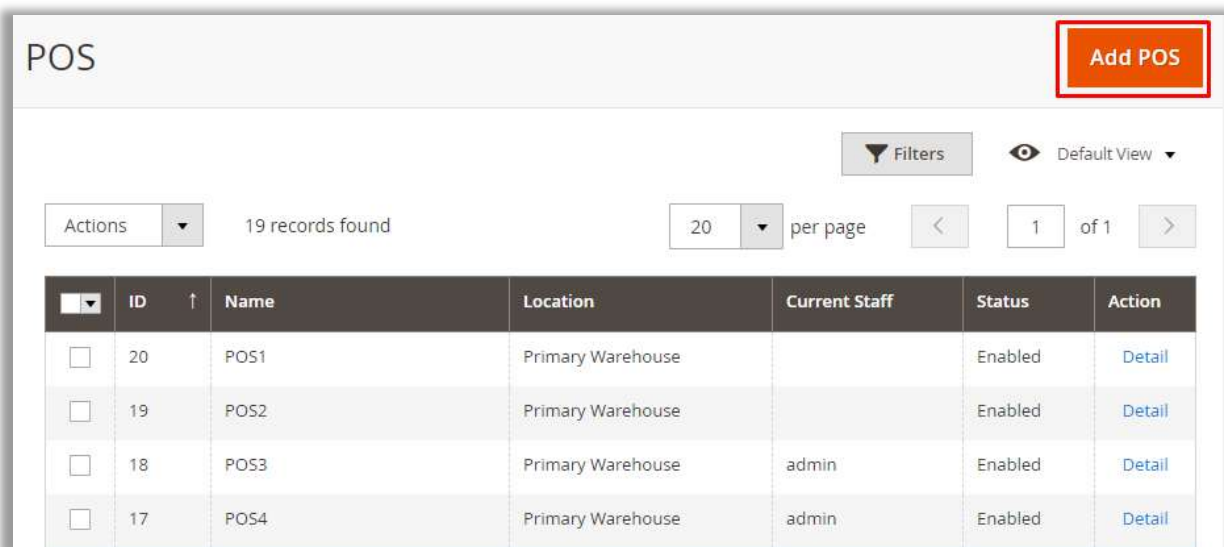
- On the Add New POS page, add required info of the new POS

Field Name	Type	Required	Description
POS Name	Input	Yes	Allow you to define the POS name here to distinguish it from other POS. Default value = blank
Location	Single Dropdown Selection	Yes	Allow you to select an existing location to assign to the current POS. The linked location will defines shipping origin of this POS.

Field Name	Type	Required	Description
			Locations in the dropdown list are sorted by the ascending value of theirs ID number.
			Advanced search function allows you to enter keyword (location name) directly on the Location dropdown list to quickly find the desire location.
			Default value = Primary Location
Status	Single Dropdown Selection	N/A	You can enable or disable a POS by selecting an option from the dropdown list. Two options listed in the dropdown list are: - Enabled: the POS is shown in the login screen of PWA POS for users to select & process transactions. - Disabled (vice versa).
			Default value = Enabled
Back	Button	N/A	On click, redirect back to the POS Listing page despite of unsaved changes on the Add New POS page
Reset	Button	N/A	On click, reset all fields to their default values
Save and Continue Edit	Button	N/A	On click, save all changes and stay on the current page
Save	Button	N/A	On click, save all changes and redirect back to the POS Listing page

When a POS is created and linked to a location successfully, your staff can select it from the POS list when logging in to PWA POS.

Primary Location

Primary POS

Primary POS

ENTER TO POS

← Logout

3.3.2. How to edit POS info

- In Backend, go to *POS > Manage POS*
- On the POS Listing page, select a POS to view its details
- On the POS Detail page, edit POS Name, Linked Location & Status of the POS as you want
- You also can see the current staff who is using PWA POS. If no one is logging in to the POS, it shows 'N/a' here.

- Click **[Save]** or **[Save and Continue Edit]** to apply your changes
- Click **[Delete]** to remove the POS from the POS List. Your staff no longer can access this POS.

3.3.3. How to manage POS list

- In Backend, go to *POS > Manage POS*
- On the POS Listing page, you can filter to search for specific POS by ID, name, location, current staff and status

- Click on the **[Apply Filter]** button. The matching results are returned in the POS List.
- To save the current filter result to quickly access it next time, click on the **[View]** button > Save View As… > Enter the view name > click on the **[->]** button

3.4.   How to Manage POS Users, Roles & Permissions

Preconditions:

Admin user has all permissions or at least the permissions to manage POS, create POS Users & Roles (defined in *System > Permissions > User Roles > Create/ Edit Role > Role Resources > POS App Settings > Manage Staff & Manage Roles*)
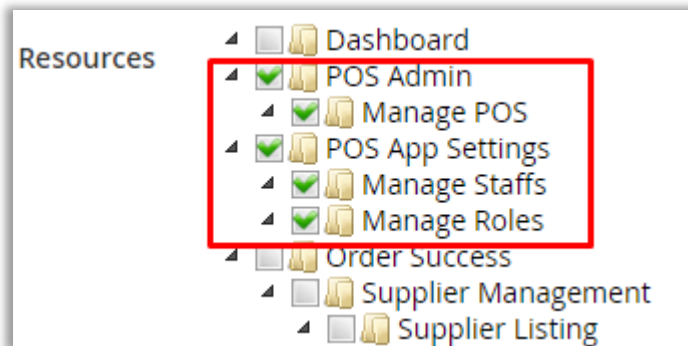
3.4.1. How to create a new POS role

A POS Role is a set of permissions to take certain actions on PWA POS. To create a new POS role:

1. In Backend, go to *POS > Manage Roles* or *App Settings > Manage Roles*.
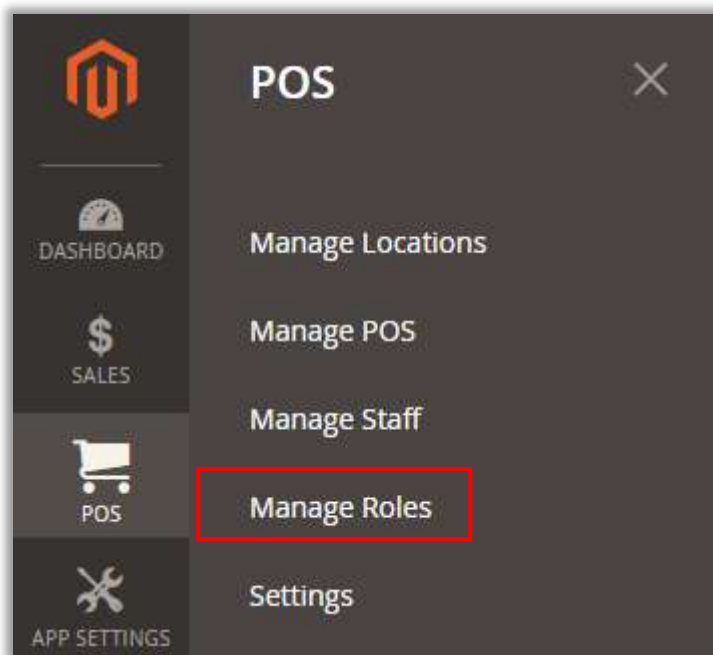
2. On the Role List page, click on the **[Add Role]** button.

3. On the New Role page, fill in Role Name & Description in the General tab.

4. Click on the Permission tab and select Role Resources

5. Enter maximum discount rate (0 – 100) that user can apply through custom discount on POS. Enter 0 or leave this field empty means this role can not apply custom discount for order.

6. Click on **[Save and Continue Edit]** or **[Save]** to create the new user role

Field Name	Type	Required	Description
Button			
Back	Button	N/A	On click, go back to the Role List page despite of unsaved changes.
Reset	Button	N/A	On click, reset data in the New Role Form back to the default values despite of unsaved changes.
Save and Continue Edit	Button	N/A	On click, save changes and stay on the current Role Details page to continue editing.
Save	Button	N/A	On click, save changes and go back to the Role List page.
General	Section	N/A	From the left menu, click [General] to view details
Role Name	Text	Yes	To input a role name here. Each role name must be unique. If the new role name is the same with an existing one, the system will notify you when saving.
Description	Multi-text	No	To input a role description which can be viewed and used for filtering on the Role List page.
Permission	Section	N/A	From the left menu, click [Permission] to view details
Resource Access	Dropdown	Yes	To grant access permissions to each role. There are 2 options: • **All**: this role has full permissions to take all actions on PWA POS • **Custom**: this role only has limited permissions to take specific actions on PWA POS. If this option is selected, the Resources tree-view checkbox will be shown for you to define which permission is enabled.

Field Name	Type	Required	Description

Resource	Tree view checkbox	Yes	Display all permissions of POS app as parent-child tree view:
			
			 • Click on a parent permission to expand or collapse children permissions
			 • Tick on a checkbox of a parent permission to select all children permissions
			 • If a child permission is not ticked, the parent permission & other children permissions are still remained ticked
			
			 POS App's permission list includes:
			 • **POS:** *allow users to process checkout, view order history and take payments on POS*
			    o **Refund**: *allow users to process refund on POS*
			
			    o **Manage order:** *allow users to manage order from his location or all locations*
			      ➢ POS Order Created at Staff's Location
			      ➢ POS Order Created at All Locations
			      ➢ Order Created at or Assigned to Staff's Location: including orders that is created at POS & other sale channel
			      ➢ All orders in system
			    o **Custom price on item:** allow users to set custom price for each item on cart before checkout

Role User List	Section	N/A	The list of user accounts assigned to this role. If you are creating a new role, the list is blank.

3.4.2. How to view, edit or delete a POS role
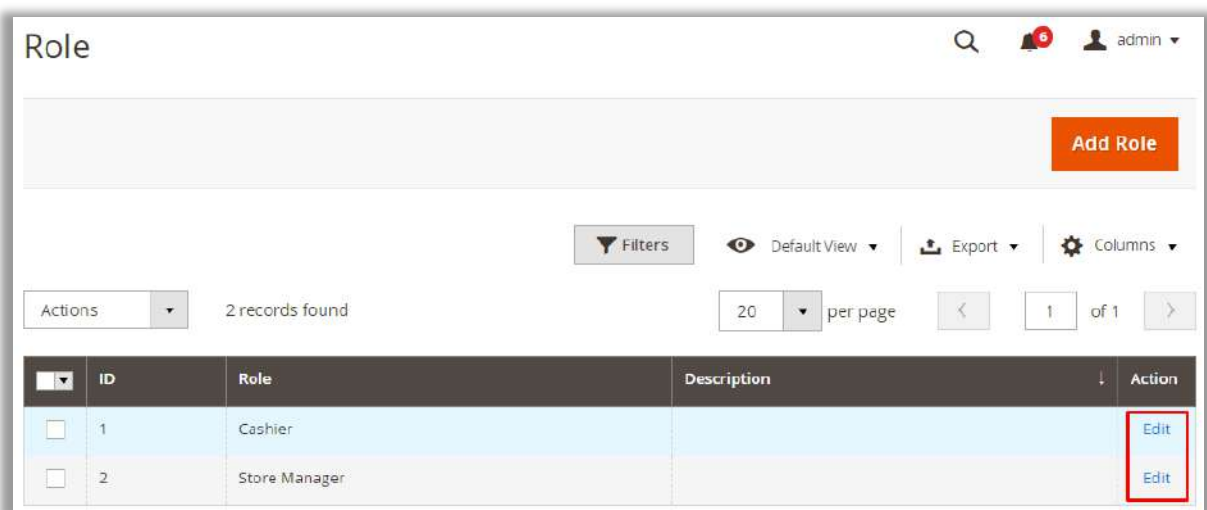
To view, edit or delete an existing POS role:

1. In Backend, go to *POS > Manage Roles* or *App Settings > Manage Roles*.
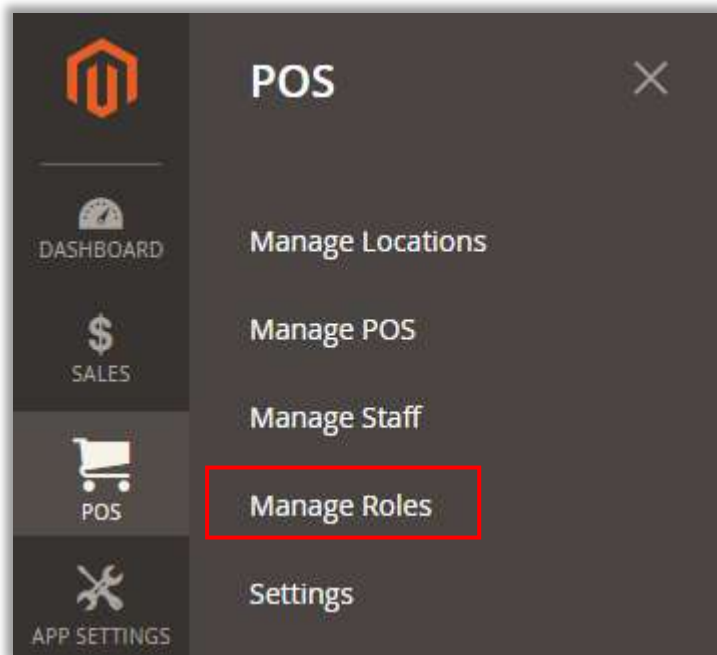
2. On the Role List page, click **[Edit]** of the role you want to update.

3. On the Role Details page, you can edit role name, description and resource permissions

4. Click on **[Staff List]**, you can view the staff currently assigned to this role.

5. Click on **[Save and Continue Edit]** or **[Save]** to apply your changes.

Field Name	Type	Required	Description
Button			
Delete Role	Button	N/A	On click, delete the current User Role. This button is only visible when you edit an existing Role.
Role User List	Section	N/A	The list of user accounts assigned to this role. If you are creating a new role, the list is blank.
Search section	Section	N/A	To search in grid of staff list by ID, user name, email, display name, status
User Name	Column (Text)	N/A	User name of staff that is used to log in on POS
Email	Column (Text)	N/A	Email address of staff registered for that user account
Display Name	Column (Text)	N/A	Display name of a user on POS
Status	Column (Text)	N/A	Display status of a user account, which can be disabled or enabled.

To delete many POS roles in mass:

- Go to *POS > Manage Roles*
- Tick on checkboxes of roles that you want to remove
- Select **[Delete]** Action
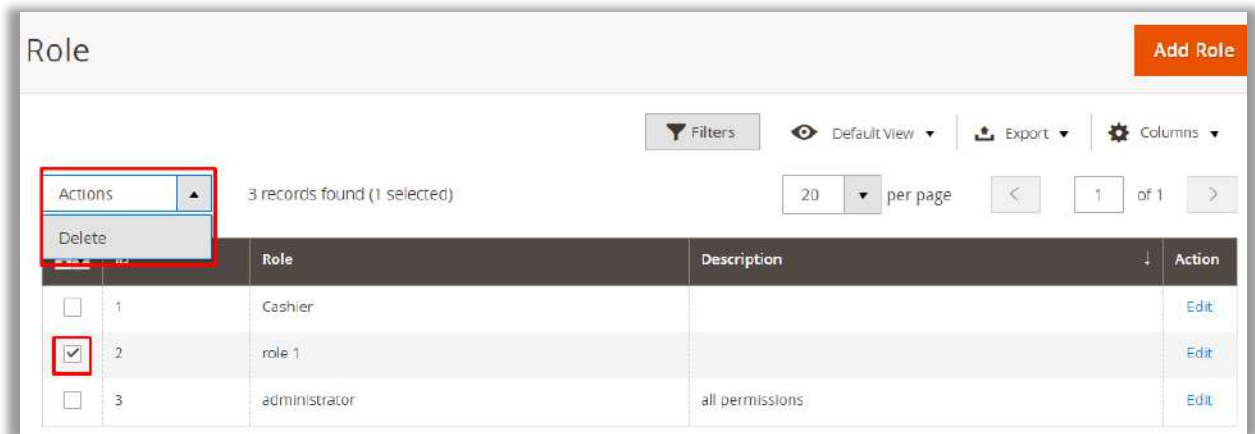
- Click **[OK]** to confirm

3.4.3. How to create POS users

POS users are accounts created for staff (cashiers, salesmen, store managers, etc.) to log in and use PWA POS. Each account is assigned to a specific POS Role and multiple Locations.

To create a new POS user account:

1. In Backend, go to *POS > Manage Staff* or *App Settings > Manage Staff*
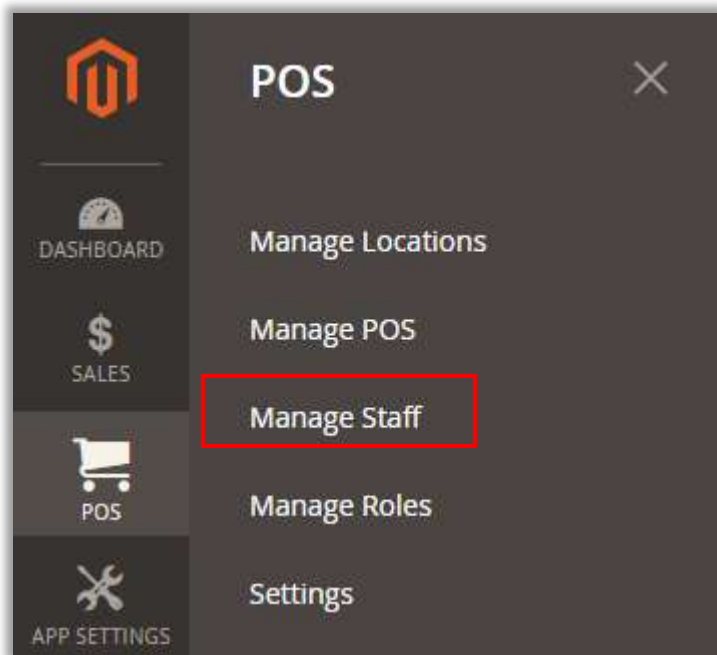
2. On the Staff List page, click on the **[Add Staff]** button
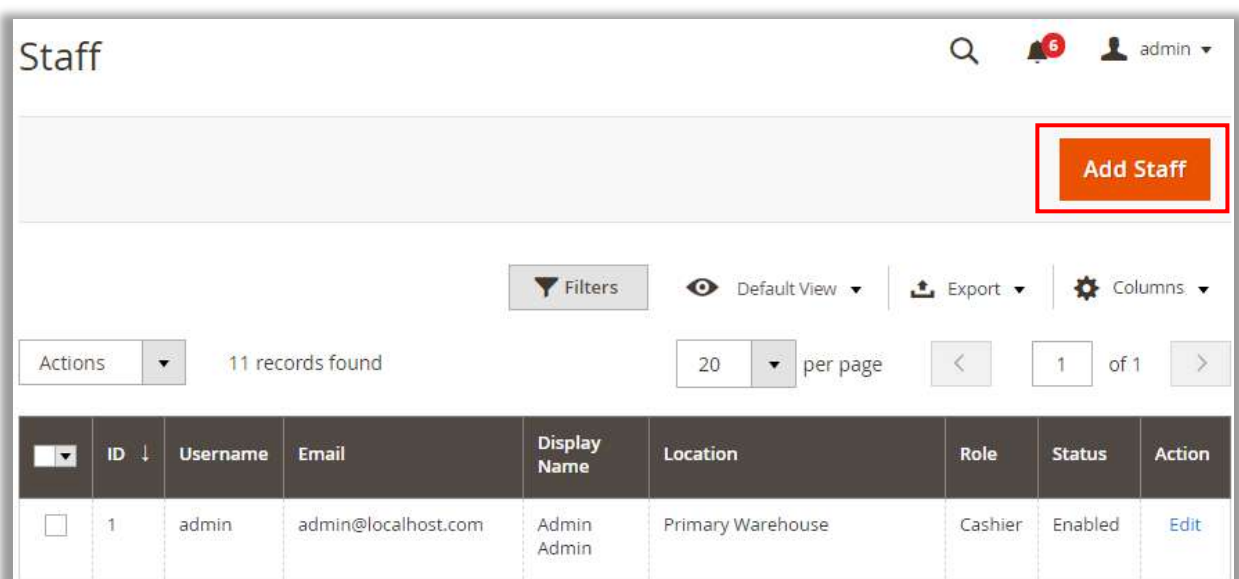
3. On the New Staff page, enter required fields and click on the **[Save]** or **[Save and Continue Edit]** button

Field Name	Type	Required	Description
Button			
Back	Button	N/A	On click, go back to the Staff List page despite of unsaved changes.
Reset	Button	N/A	On click, reset data in the New Staff Form back to the default values despite of unsaved changes.
Save and Continue Edit	Button	N/A	On click, save changes and stay on the current Staff Details page to continue editing.

| Field Name	Type	Required	Description
Save	Button	N/A	On click, save changes and go back to the Staff List page.
Staff Information			
User Name	Text	Yes	To input User Name which is used as ID to log in to PWA POS. User Name must be unique.
New Password	****	Yes	To input password that is used to log in to PWA POS. After saving, this field's value is saved in database but is displayed empty in form (format ****). This field is required when creating new user and not required when editing user.
Password Confirmation	****	Yes	To confirm password that is used to log in to PWA POS. Confirmed password must be same as the Password entered above. After saving, this field is saved in database but is displayed empty in form (format ****).
Email Address	Text	Yes	To register email address of staff using this account
Display Name	Text	Yes	To input display name of staff account on POS
Status	Single Dropdown Selection	Yes	To select the account status whether enabled or disabled. Default status: Enabled If an account is disabled, staff cannot log in to PWA POS or will be forced to sign out if user is currently logging in any POS.
POS Permission			

Field Name	Type	Required	Description
Role	Single Dropdown Selection	Yes	To assign this account to a specific role which will define access permissions of this user account in POS Application. Selection values are retrieved from list **POS > Manage Roles > Role List**
Location	Multi-selection	Yes	To select location(s) that this POS user allowed to access. Selection values are retrieved from list **POS > Manage Locations > POS Location**

3.4.4. How to view, edit or delete a POS user

To view, edit or delete an existing POS user account:

1. In Backend, go to *POS > Manage Staff* or *App Settings > Manage Staff*
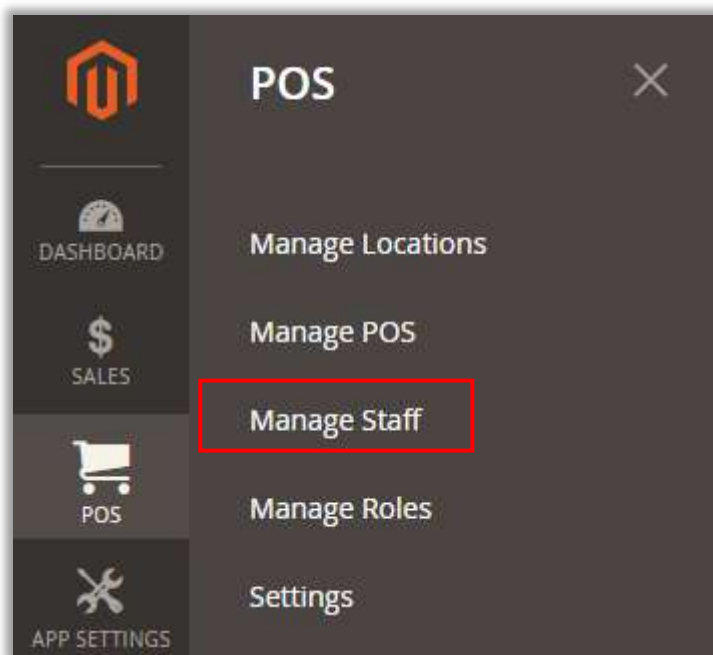
2. On the Staff List page, click **[Edit]** of the staff account you want to update.

3. On the Staff Details page, update desire fields and click on the **[Save]** or **[Save and Continue Edit]** button to apply your changes. Here you can:

- Change login user name & password
- Update user email address or display name

- Enable or disable the account
- Change permission role or assigned locations

4. If you want to delete a staff account, click on the **[Delete]** button (this button is only visible when you edit an existing user) and click **[OK]** to confirm.

To delete many POS staff accounts in mass:

- Go to *POS > Manage Staff*

- Tick on checkboxes of staff accounts that you want to remove
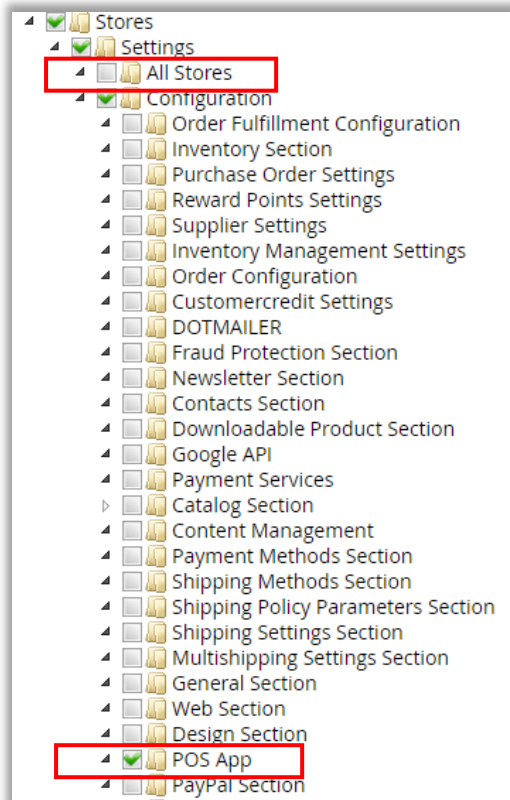
- Select **[Delete]** Action

- Click **[OK]** to confirm

4. HOW TO CONFIGURE

Preconditions:

Admin user has all permissions or at least the permissions to configure app settings (defined in *System > Permissions > User Roles > Create/ Edit Role > Role Resources > Store > Configurations > POS App*)

4.1. How to change POS logo

1- On the Admin sidebar, select **POS**, then navigate to **Settings.**

Alternative Path: On the Left Menu, go to **Store > Settings > Configuration > Magespacex > POS**

2- Expand the **General Configuration** section.

3- To upload a new logo, click **Browse**. Then, choose the file from your computer.

Supported file formats: jpeg, png.

The recommend size for logo is 250 x 50px.

4- When compete, click **Save Config**.

Logo uploaded will be displayed when user logs in to POS.

4.2. How to configure session timeout on POS

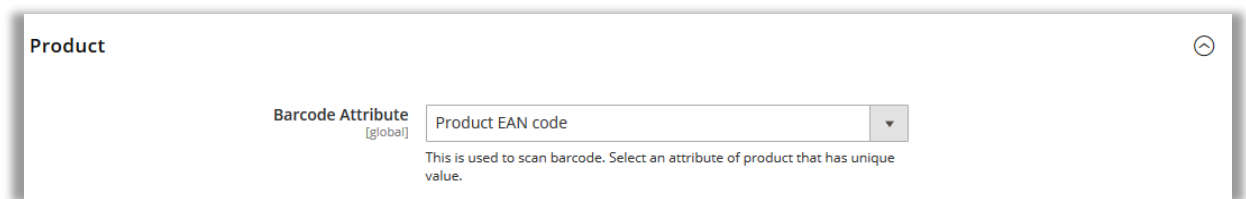1- On the Admin sidebar, select **POS**, then navigate to **Settings.**

Alternative Path: On the Left Menu, go to **Store > Settings > Configuration > Magespacex > POS**

2- Expand the **General Configuration** section.

3- Enter the time-out period for POS user, in seconds. Click Save Config.

If the user does not refresh POS or request a page within the time-out period, the session ends and user will be signed out of POS.

4.3. How to configure barcode attribute to scan on POS

1- On the Admin sidebar, select **POS**, then navigate to Settings.

Alternative Path: On the Left Menu, go to **Store > Settings > Configuration > Magespacex > POS**

2- Expand the **Product** section.
3- Select an attribute. This attribute will be used to scan barcode on POS.

Please note that you can only select unique attribute, which means attribute that has unique value for each product. You can create new attribute by following this path: **Stores > Attributes > Product > Add New Attribute** and set Unique Value = **Yes**.

4.4. How to customize POS's Order's ID prefix

The System gives you the ability to set different prefix for orders created on POS so that you can distinguish them from website's orders easily. To configure custom order ID for POS:

1. In Backend, go to *POS > Settings*
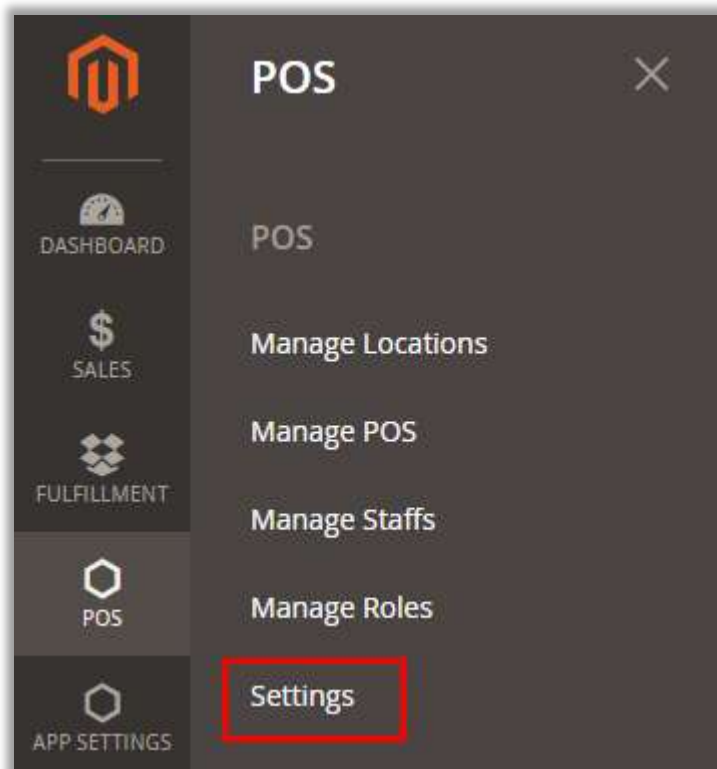
2. Navigate to the Checkout section and click to expand

Field Name	Type	Required	Description
Use Custom Prefix for POS Order ID	Dropdown	Yes	You can choose to whether set a custom prefix for increment ID of orders created on POS or not. **Values:** - No (default value): If **[No]** is selected: + Config **[Prefix for POS Order ID]** will not be shown. + The increment ID of orders created on POS will be numbered in sequence with website orders. - Yes: If **[Yes]** is selected + Config **[Prefix for POS Order ID]** will be shown. + The increment ID of orders created on POS will not be numbered in sequence with website orders anymore but rather using their own counter numbers. **Scope:** Global
Prefix for POS Order ID	Text	Yes (If **[Prefix for POS Order ID]** = Yes)	The prefix entered here is a fixed character string that will be added to the increment ID of POS orders. **- Default Value: '***POS'*** **- Validation Rules**: + Accept any combination of letters, numbers, space and special characters (such as - , . / *) + Restrict HTML tags or variables + Max length: 10 characters **- Scope**: Global

The increment ID of POS orders is auto generated based on the following formula:

POS Order Increment ID = {Prefix String} + {POS ID} + {Seperator} + {ID Number}

Formula components:

+ {Prefix String}: the character string entered in **[Prefix for POS Order ID]** field (default is 'POS').

+ {POS ID}: the ID number of POS from which orders are created (POS ID can be found in **backend > POS > Manage POS**)

+ {Seperator}: the charater '-' that seperates the prefix string & sequence number

+ {ID Number}: the identification number attached to a POS Order, which is determined by converting the order's created date & time to the UNIX Epoch format.

E.g. POS Order's Created Date & Time is May 9, 2018 3:28:23 AM => Its Unix Timestamp (in seconds) is 1525836503 => POS Order ID is 'POS1-1525836503'

After setting prefix for POS Order
ID successfully, the system does
not change any historical

data - only future orders created via POS will be changed to custom increment ID.

3. Click **[Save Config]** to apply your changes.

4.5. How to configure POS checkout options

1- On the Admin sidebar, select **POS**, then navigate to **Settings**.

Alternative Path: On the Left Menu, go to **Store > Settings > Configuration > Magespacex > POS**

2- Expand the **Checkout** section. You will see following settings:

Field Name	Type	Description
Add out-of-stock product to cart	Dropdown	Determine whether to enable or disable this function on POS. Options: - **Yes**: + out-of-stock items are displayed as normal products (no warning icon, not blurred) + user can click to add item to cart - **No** + out-of-stock items have warning icon and are blurred + no action when user does single click
Need to confirm before deleting cart	Dropdown	Determine whether to display warning message before deleting a cart. Options: - **Yes**: In POS, after cashier clickped button **Delete Cart**, if current cart has product/customer, system will display pop-up asking user to confirm the deletion. - **No** (default): no warning message
Automatically send email after completing order	Dropdown	Determine whether to automatically send email to customer after completing order. Options: - **Yes**: After cashier clickped button **Complete Order on POS**, system automatically sends an email to customer. - **No** (default): do not auto send email

4.6. How to configure Guest Checkout info

1- On the Admin sidebar, select **POS**, then navigate to **Settings**.

Alternative Path: On the Left Menu, go to **Store > Settings > Configuration > Magespacex > POS**

2- Expand the **Default Guest Checkout** section. You will see following settings:

Field Name	Type	Description
Enable Guest Checkout	Dropdown	Determine whether to enable or disable Guest Checkout on POS. Options: - **Yes** (default): - **No:** + Hide 3 fields to set up default information if order use guest checkout + If cashier does not select specific customer & click button **Charge**, system will display warning message.
First Name	Text	When using Guest Checkout, this will be used as default customer's first name in order details.
Last Name	Text	When using Guest Checkout, this will be used as default customer's last name in order details.
Email	Text	When using Guest Checkout, this will be used as default customer's email address in order details.

4.7. How to configure customer attributes on POS

Our POS supports all customer attributes that Magento core provides. If you want more or less customer attribute fields to be displayed on POS, please go to **Magento backend > Stores > Settings: Configuration**.
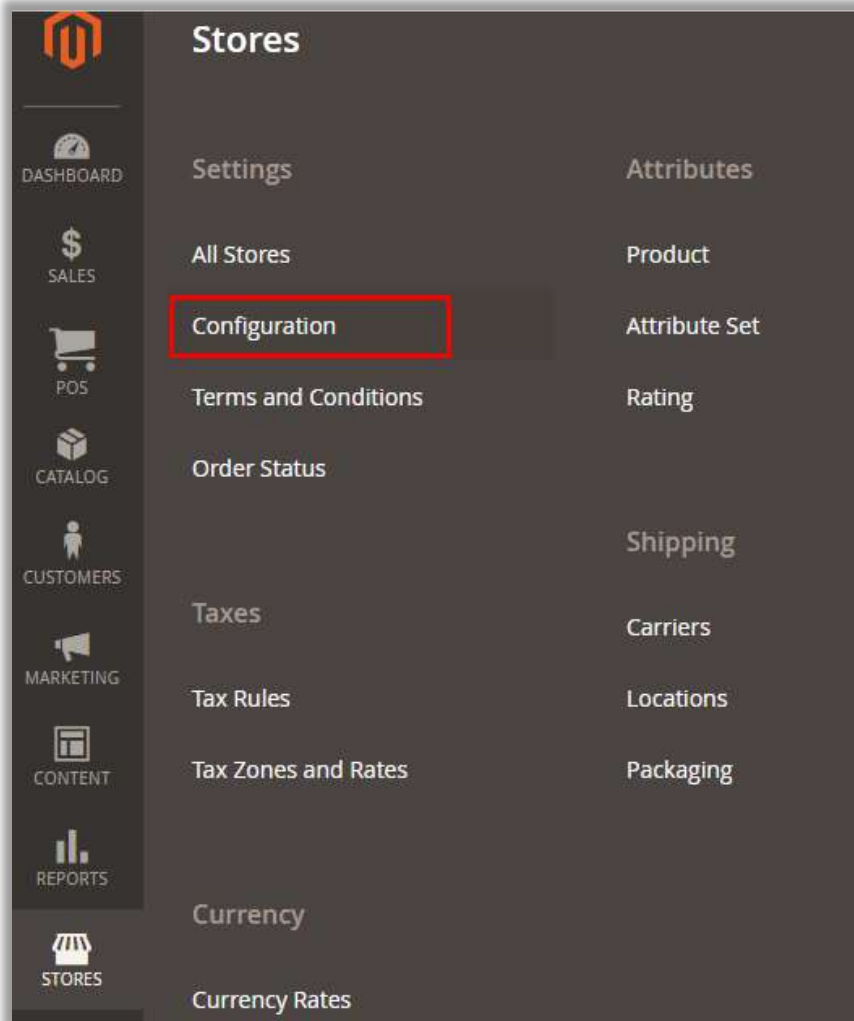
Then go to **Customers > Customer Configuration** on the left panel, expand the **Name and Address Options** section on the right. Here you can choose to show/ hide/ require among built-in customer attributes of Magento.
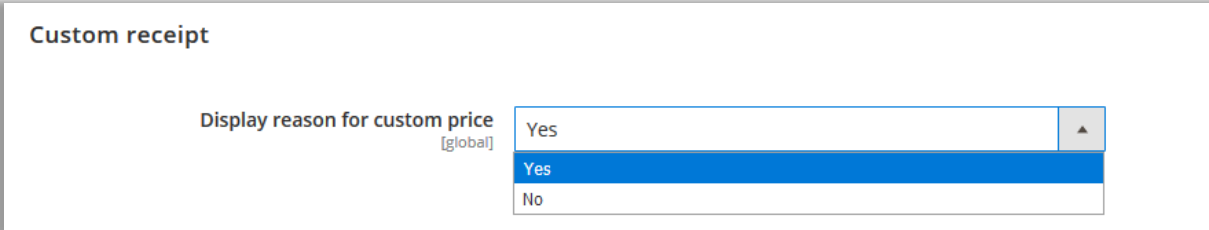
4.8. How to configure display reason for custom price on receipt

1- On the Admin sidebar, select **POS**, then navigate to Settings.

Alternative Path: On the Left Menu, go to **Store > Settings > Configuration > Magespacex > POS**
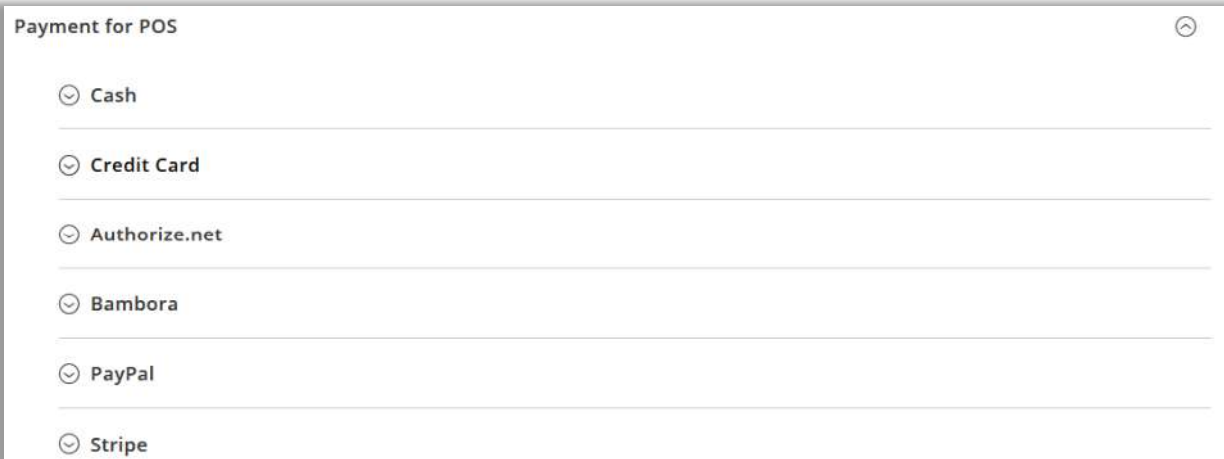
2- Expand the Custom Receipt section

3- If you choose Yes, the reason for custom price will be shown on POS receipt and vice versa.

4.9. How to configure payment methods used on POS

1- On the Admin sidebar, select **POS**, then navigate to Settings.

Alternative Path: On the Left Menu, go to **Store > Settings > Configuration > Magespacex > POS**

2- Expand the Payment for POS section. You will see settings for following payment methods. Click to expand settings for each payment method.

4.9.1. How to configure Cash

Field Name	Type	Description
Enabled	Dropdown	Determine whether to enable or disable this payment method on POS. Cash payment method will not be shown on POS if this is set as **No**.
Title	Text	This will be used as title for cash payment method on POS.
Sort Order	Text	Enter number to sort display order of payment methods on POS

4.9.2. How to configure Credit Card

This payment method can be configured similar to Cash.

4.9.3. How to configure PayPal

Field Name	Type	Description
Enabled	Dropdown	Determine whether to enable or disable this payment method on POS. PayPal payment method will not be shown on POS if this is set as **No**.
Title	Text	This will be used as title for PayPal payment method on POS. If you left blank, system will use PayPal as the name by default.
API User name	Text	Enter API's information. See below for more details
API Password	Text	
API Signature	Text	
Sandbox Mode	Dropdown	Determine whether your transaction will be record in Sandbox mode (test mode) or live mode.
Payment Action	Dropdown	Chose payment action that you want to use. For more details, please refer to this guide PayPal's guide
Sort Order	Text	Enter number to sort display order of payment methods on POS

Allow customer pay via Email	Dropdown	If you choose: - Yes: after order has been created in POS, customer will receive an invoice from PayPal to pay for merchant. If you choose Yes, section "Merchant information' will be opened below this section. - No: disable this function in POS
Your Application Client ID	Text	Enter Client's information. See below for more details.
Your Application Client Secret	Text	

You will need to copy & paste API information details from PayPal into PwA POS Settings section in your Magento backend, which are:

- **API Information**: API Username, API Password, API Signature.
- **Application Information:** Client ID, Client Secret.

Here are the detailed steps:

You can get **API Information** in **Accounts** section. From **PayPal Dashboard**, go to **Account** section, then click to **Profile** button to view.

API informations will be displayed in a pop-up as below:

Besides, in the PayPal App page, go to the **My Apps & Credentials** section, go to your app & get **Client ID & Client Secret.**
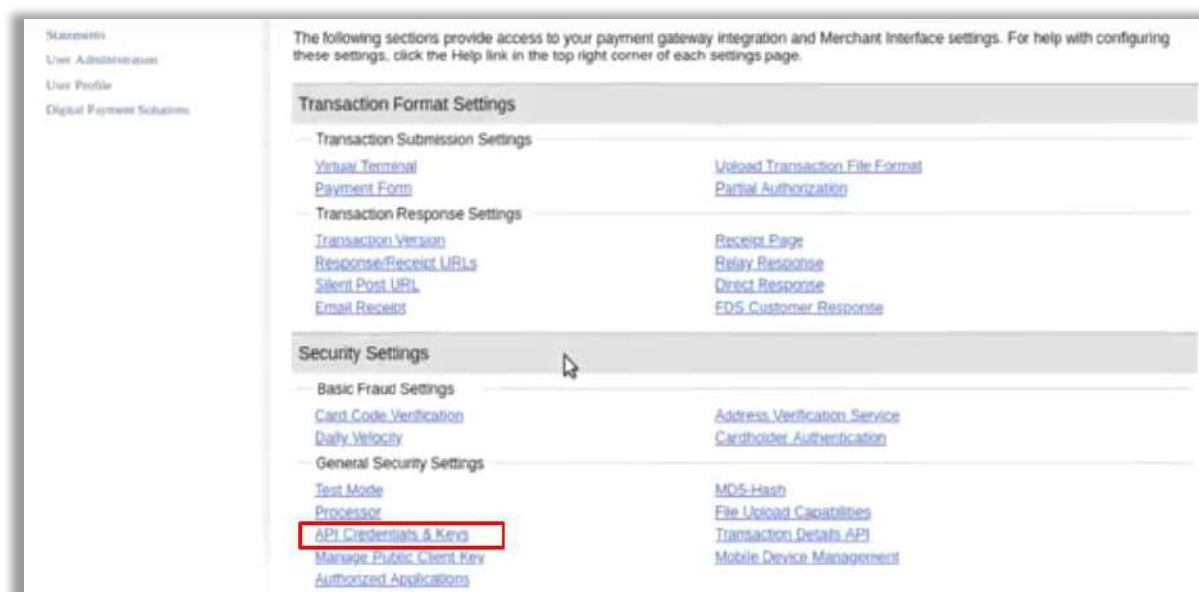
Moreover, if you want to use PayPal Email, you need to fill out all merchant's information as below:

For further information, read the Installation Guide below the configuration. You can click **Test API Connection** to check if PayPal is connected to POS successfully.

4.9.4. How to configure Authorize.net

Field Name	Type	Description
Enabled	Dropdown	Determine whether to enable or disable this payment method on POS. Authorize.net payment method will not be shown on POS if this is set as **No**.
Title	Text	This will be used as title for Authorize.net payment method on POS. If you left blank, system will use Authorize.net as the name by default.
API Login ID	Text	Enter API's information. See below for more details.
Transaction key	Text	
Client ID	Text	
Sandbox Mode	Dropdown	Determine whether your transaction will be record in Sandbox mode (test mode) or live mode.
Payment Action	Dropdown	Chose payment action that you want to use For more details, please refer to this guide Authorize's Guide
Sort Order	Text	Enter number to sort display order of payment methods on POS

From Authorize.net account, navigate to Account > Security Settings section. First, we will perform on the API Credentials & Keys page.

For further information, read the Installation Guide below the configuration. You can click **Test API Connection** to check if Authorize.net is connected to POS successfully

4.9.5. How to configure Stripe

Field Name	Type	Description
Enabled	Dropdown	Determine whether to enable or disable this payment method on POS.

		Stripe payment method will not be shown on POS if this is set as **No**.
Title	Text	This will be used as title for Stripe payment method on POS.
API Key	Text	Enter API Key of your Stripe (Secret key in image below)
Publishable Key	Text	Enter API Key of your Stripe
Sandbox Mode	Dropdown	Determine whether your transaction will be record in Sandbox mode (test mode) or live mode.
Sort Order	Text	Enter number to sort display order of payment methods on POS

You can get the information needed to integrate Stripe and PWA POS when logged in to your Stripe account, see Developer section.
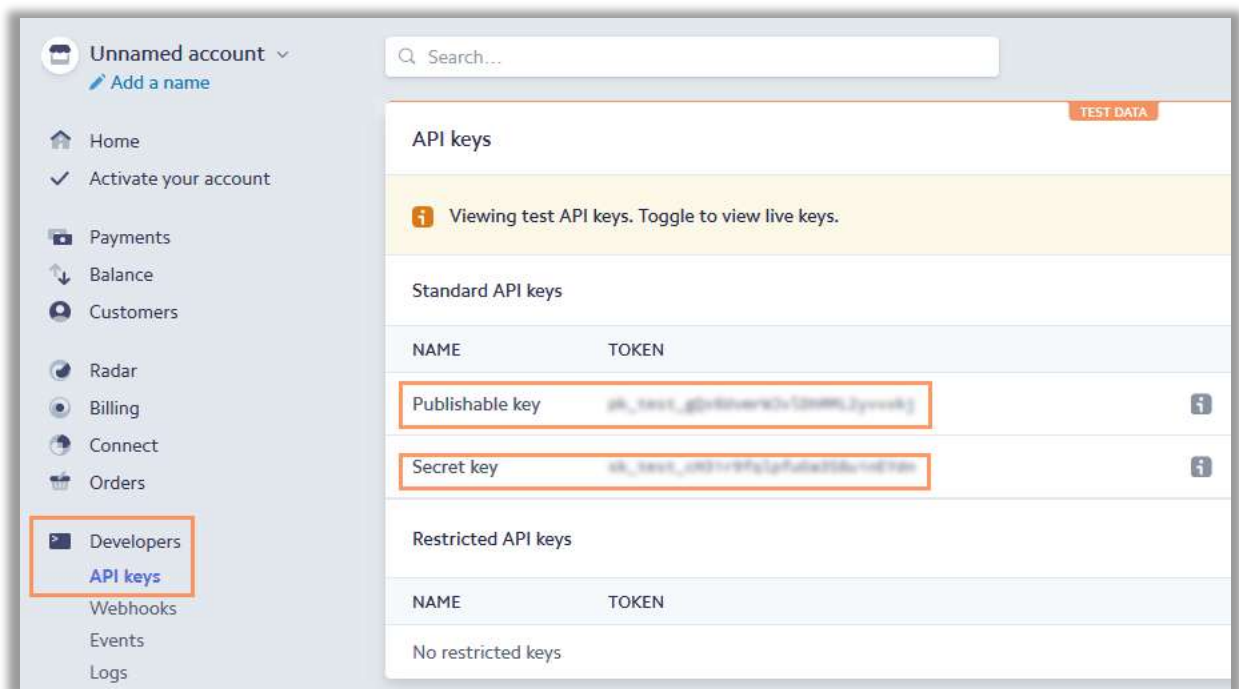
For further information, read the Installation Guide below the configuration. You can click **Test API Connection** to check if Stripe is connected to POS successfully.

4.9.6. How to configure Bambora

This payment method can be configured similar to Cash.

4.10. How to configure Shipping options used on POS
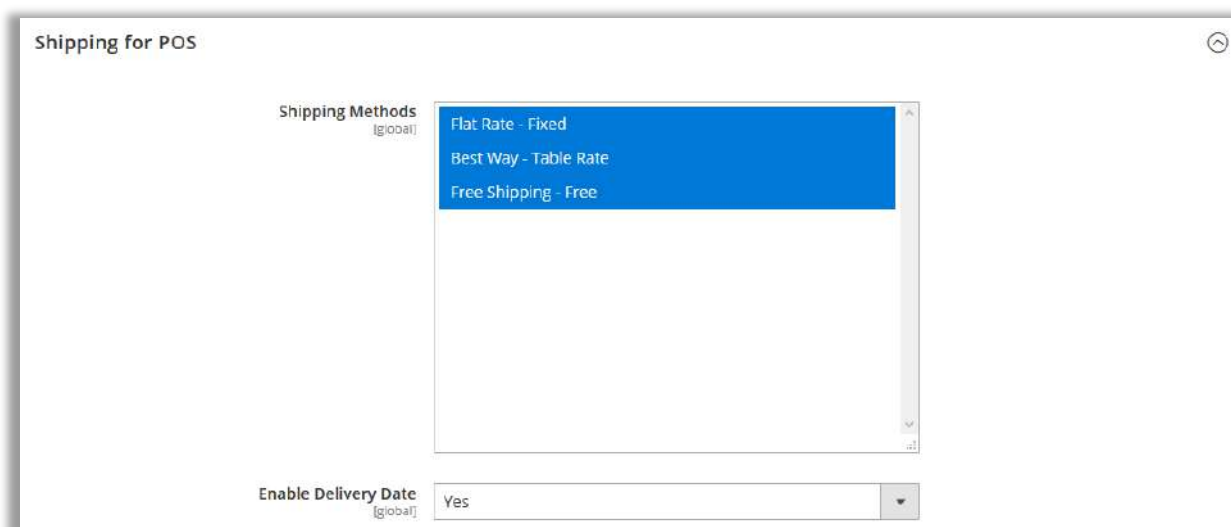
1- On the Admin sidebar, select **POS**, then navigate to **Settings.**

Alternative Path: On the Left Menu, go to **Store > Settings > Configuration > Magespacex > POS**

2- Expand the **Shipping for POS** section.
3- Select shipping methods to apply on POS.

Our POS currently have 4 shipping methods: Flat Rate, Table Rate, Free Shipping and Pick-up at Store.

Pick-up at Store is the default shipping method for order if a customer receives goods at store so you won't see it in this selection.

To configure each shipping methods (price, condition…), please refer to this guide

4- Choose to enable Delivery Date or not. If this setting is set as **Yes**, cashier can select delivery date for an order when placing order on POS.

4.11. How to configure Google API for POS

1- On the Admin sidebar, select **POS**, then navigate to **Settings.**

Alternative Path: On the Left Menu, go to **Store > Settings > Configuration > Magespacex > POS**

2- Expand the **General Configuration** section.

3- Enter Google API Key to use Google Street Suggestion on POS when creating/editing address (with internet connection)

You can click the reference to access Google Developer Documentation.

4.12. How to configure tax settings on POS

4.12.1. How to configure tax calculation settings for POS

PWA POS inherits Tax Classes, Tax Rates and Tax Calculation Rules of Magento. Basically, the tax calculation on POS works as same as your website. For settings that have scope is not **[global]** (e.g. **[store view]** or **[store]** or **[website]** scope), POS will use setting configurations of the Default Website/ Store/ Store View.

For more detailed instructions about how to configure taxes in Magento 2, please refer to this guide
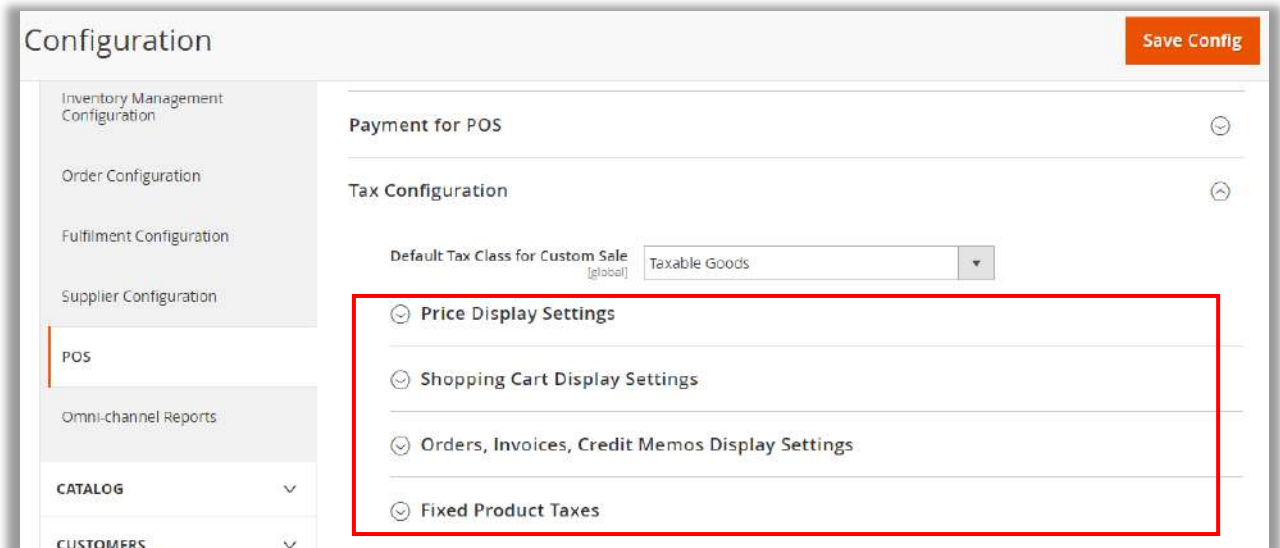
4.12.2. How to configure tax display settings for POS

PWA POS has its own tax display settings which are only applied to POS and not affected to your website. All POS settings have [global] scope.

To configure tax display settings for POS:

1. In Backend, go to *POS > Settings*
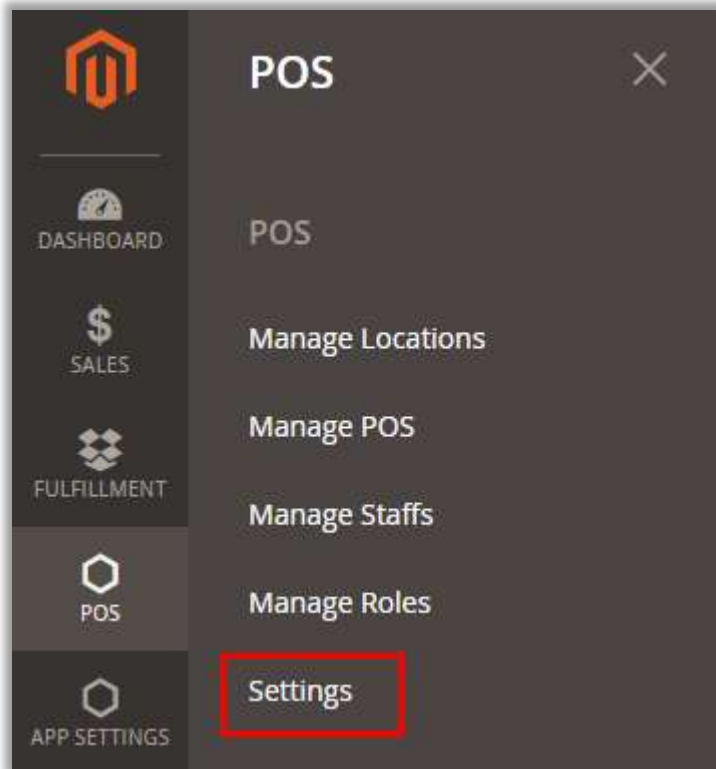
2. Navigate to the Tax Configuration section and click to expand

3. Click **[Price Display Settings]** to expand more details. The following settings are applied to tax display on catalog product page in PWA POS.

Field Name	Type	Required	Description
Display product price in product list	Dropdown	N/A	Display product price in product list - Including Tax - Excluding Tax (default value)
Display shipping price	Dropdown	N/A	Display shipping price of each shipping method (on shipping methods list on Add To Cart page) - Excluding Tax (default value) - Including Tax

4. Click **[Shopping Cart Display Settings]** to expand more details. The following settings are applied to tax display on cart page and checkout page in PWA POS.

Field Name	Type	Required	Description
Display Prices	Dropdown	N/A	Display products prices in shopping cart area (add to cart page & checkout page) **- Excluding Tax (default value)** - Including Tax
Display Subtotal	Dropdown	N/A	Display subtotal amount of an order in shopping cart area (add to cart page & checkout page) **- Excluding Tax (default value)** - Including Tax
Display Shipping Amount	Dropdown	N/A	Display total shipping amount of an order (on add to cart page, after users have selected a specific shipping method & specific shipping address) **- Excluding Tax (default value)** - Including Tax
Display Full Tax Summary	Dropdown	N/A	Display both total amount of tax and all tax rates applied in (on add to cart page & Checkout page) - Yes **- No (default)**
Display Zero Tax subtotal	Dropdown	N/A	On Add to cart page & checkout page: - Yes: Show "Tax $0.00" & full tax summary row when the subtotal amount of tax is 0 **- No: Hide tax row & tax summary when the subtotal amount of tax is 0 (default)**

5. Click **[Orders, Invoices, Credit Memos Display Settings]** to expand more details. The following settings are applied to tax display on Order Details page, Refund form & receipts *(coming soon)* in PWA POS.

Field Name	Type	Required	Description
Display Prices	Dropdown	N/A	Display products prices - Excluding Tax (default value) - Including Tax
Display Subtotal	Dropdown	N/A	Display subtotal amount of an order - Excluding Tax (default value) - Including Tax
Display Shipping Amount	Dropdown	N/A	Display total shipping amount of an order - Excluding Tax (default value) - Including Tax
Display Full Tax Summary	Dropdown	N/A	Display both subtotal amount of tax and all tax rates applied in an order - Yes - No (default)
Display Zero Tax subtotal	Dropdown	N/A	- Yes: Show the subtotal amount of tax when this amount is 0 - No: Hide the subtotal amount of tax when this amount is 0 (default)

6. Click **[Fixed Product Taxes]** to expand more details. The following settings are applied in PWA POS if FPT is enabled in Magento Tax Configuration.

Field Name	Type	Required	Description	Scope
Display Product Prices	Dropdown	N/A	- Including FPT = display product price including FPT on product list, cart page, checkout page, order history, refund and receipt - Excluding FPT = display product price excluding FPT on product list, cart page, checkout page, order history, refund and receipt (default)	Global
Include FPT in Subtotal	Dropdown	N/A	- **Yes** = display subtotal amount including FPT on cart page, checkout page, order history, refund and receipt - **No** = display subtotal amount excluding FPT on cart page, checkout page, order history, refund and receipt (default)	Global

7. Click **[Save Config]** to apply your changes in tax display settings to POS PWA. Please note that a POS needs to be refreshed to apply these new updates.

4.13. How to set up Promotion on POS

PWA POS inherits all Promotion Rules of Magento including Cart Price Rules; Catalog Price rules, Tier Pricing, Special Price for individual product. Basically, the discount calculation on POS works the same as your website. For more detailed instructions about how to configure these promotion program in Magento 2, please refer to these guides:

- How to create cart price rules
- How to set special product price
- How to create Catalog price rules
- How to set Tier pricing

4.14. How to configure data synchronization on POS

The system frequently **syncs data of products, stock levels, customers, orders** automatically between your POS App and your server. These data are saved to POS device's local storage so that the POS App can work smoothly even without the internet connection.

The next section will guide you how to configure the interval time of data synchronization between PWA POS and the server.

1. In Backend, go to *POS > Settings*
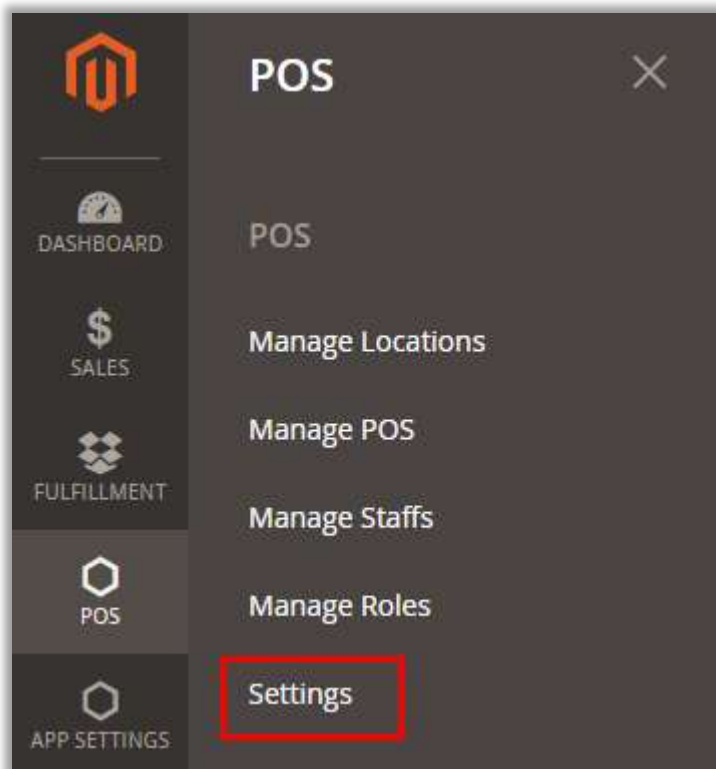
2. Navigate to the Synchronization section and click to expand

Field Name	Type	Required	Description	Scope
Configuration for products synchronization				
Product synchronization time	Single dropdown selection	N/A	Designate the interval time of product synchronization, POS App would auto send request syncing products to server every: + 1 minute + 5 minutes (default value) + 10 minutes + 30 minutes + 60 minutes	Global
Configuration for stock synchronization				
Stock synchronization time	Single dropdown selection	N/A	Designate the interval time of stock synchronization, POS client would auto send request syncing stock to server every: + 1 minute	Global

Field Name	Type	Required	Description	Scope
			+ 5 minutes (default value)	
			+ 10 minutes	
			+ 30 minutes	
			+ 60 minutes	
Configuration for customer synchronization				
Customer synchronization time	Single dropdown selection	N/A	Designate the interval time of customer synchronization, POS client would auto send request syncing customer info to server every: + 1 minute + 5 minutes (default value) + 10 minutes + 30 minutes + 60 minutes	Global
Configuration for orders synchronization				
Order synchronization time	Single dropdown selection	N/A	Designate the interval time of orders synchronization, POS client would auto send request syncing orders to server every: + 1 minute + 5 minutes (default value) + 10 minutes + 30 minutes + 60 minutes	Global
Sync order history since	Single dropdown selection	N/A	Designate which orders will be synced to POS's order history and accessed in offline mode based on the order created date & time. *(When the internet connection is ON, POS users can access all orders assigned to their permission role).* + Last 24 hours + **Last 7 days (default value)** + Current month	Global

Field Name	Type	Required	Description	Scope
			+ YTD (Year-to-Date) + 2YTD (2-Year-to-Date)	
Configuration for session synchronization				
Session synchronization time	Single dropdown selection	N/A	Designate the interval time of session synchronization, POS client would auto send request syncing session to server every: + 1 minute + 5 minutes (default value) + 10 minutes + 30 minutes + 60 minutes	Global
Sync session since	Single dropdown selection	N/A	Designate which session will be synced to POS's session list and accessed in offline mode based on the session created date & time. + Last 24 hours + **Last 7 days (default value)** + Current month + YTD (Year-to-Date) + 2YTD (2-Year-to-Date)	Global

3. Click **[Save Config]** to apply your changes. Please note that a POS needs to be refreshed to apply the new updates.

4.15. How to configure session management on POS

4.15.1. How to enable session management on POS

On the Admin sidebar, select POS, then navigate to Settings:

Alternative Path: From left menu, go to POS > Settings > Session Management

You will see following settings that may affect the use of Session management on POS:

Field Name	Type	Description
Manage Session	Dropdown	Determine whether to enable session management in your system. Options: - **Enable**: Cashier have to open session to begin selling product. Session Management section will be displayed in left menu of PwA POS - **Disable**: If this is set as Disable, cashier can begin to sell product immediately after logging into POS without opening session.
Cash Control	Dropdown	Determine whether cashier need to check the amount of the cash box at the beginning and the end of an session. Options: - **Enable:** Cashier have to check the amount of the cash box by input Coin/Bill value & number of Coins/Bills. See Configure Cash Denomination - **Disable**: If this is set as Disable, cashier just need to input opening balance.

4.15.2. How to configure Cash Denomination

To configure Cash Denomination suitable for your business, you need to follow the following steps:

1- On the Admin sidebar, select POS, then click to Manage Cash Denomination
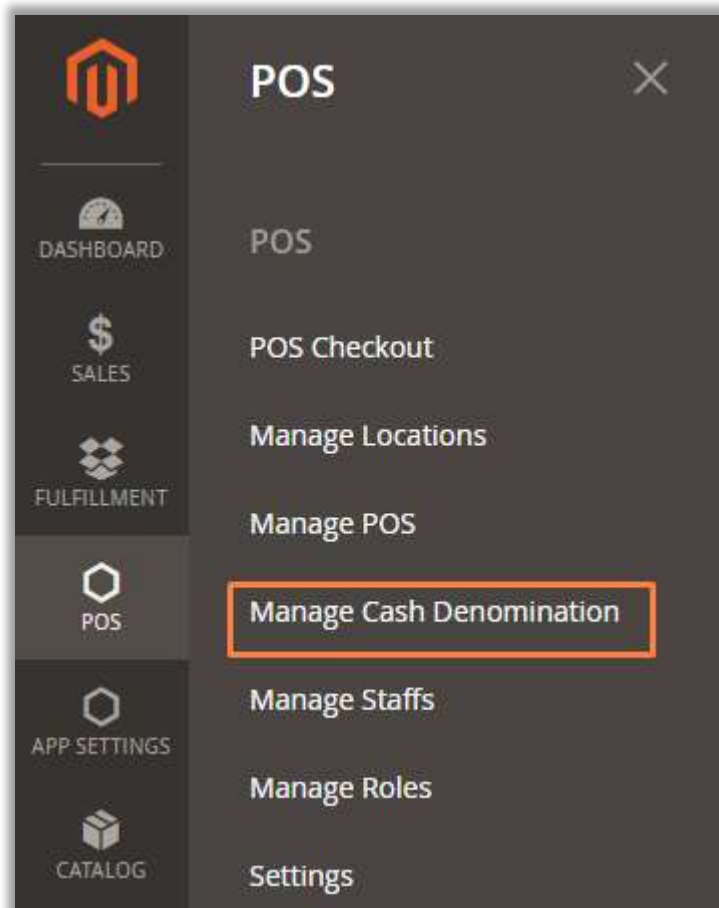
2- From Cash Denomination grid, press on Add Denomination
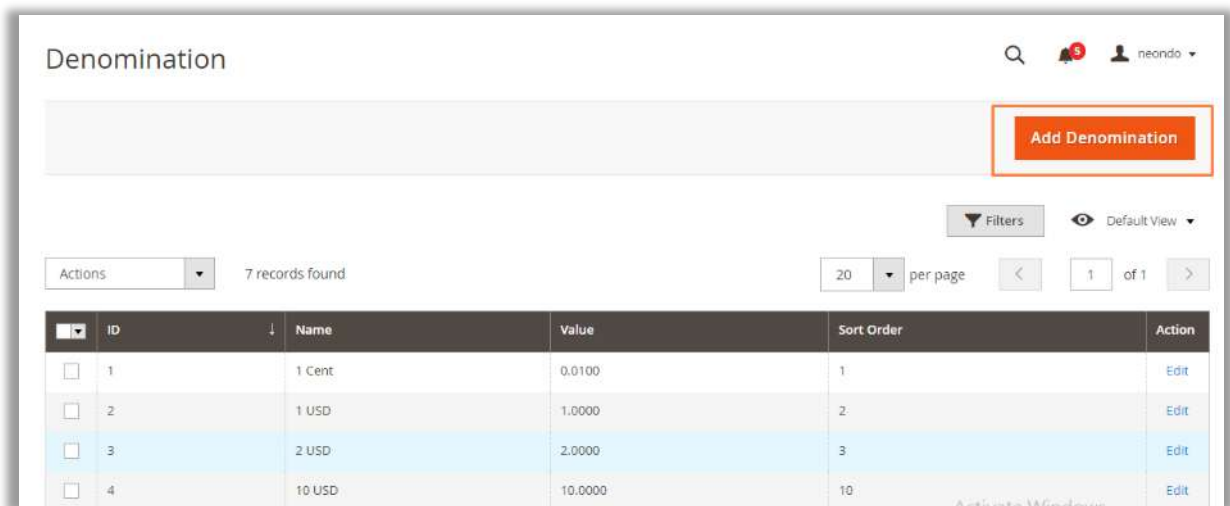
3- You need to input information for Cash Denomination & click Save to complete.

4.16. How to configure label translation on POS

When you use our POS for the first time, and the configurations are not synced yet, POS uses the locale provided by your browser to display the language of POS labels.

Now you can change the locale in Magento backend and our POS will base on that locale to translate POS labels.

To do this, go to **Magento backend > Stores > Configuration**
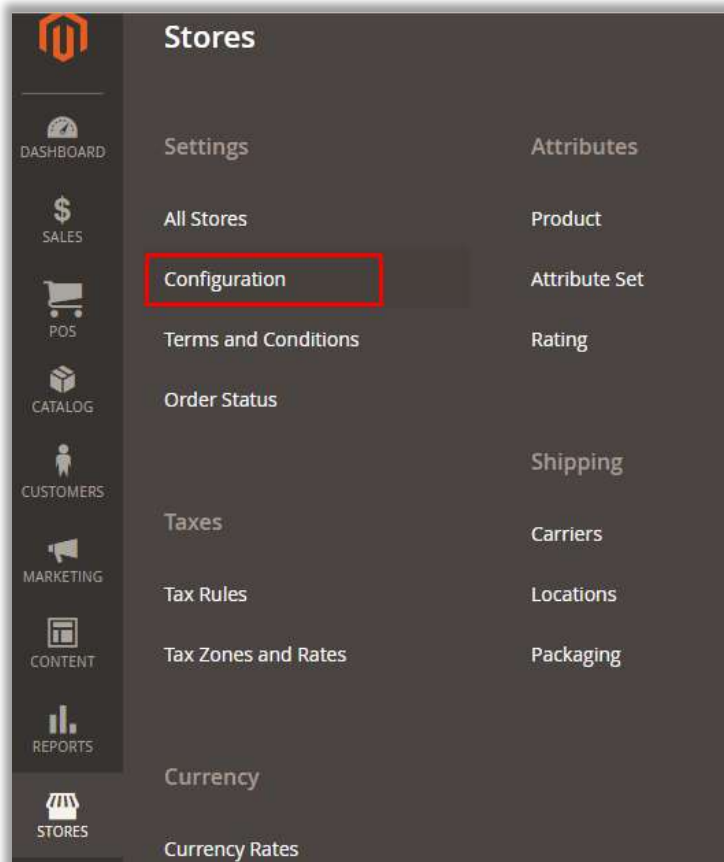
Then go to **General > General** on the left panel, change the **Locale** field on the right and click on **Save Config** button at the top right.
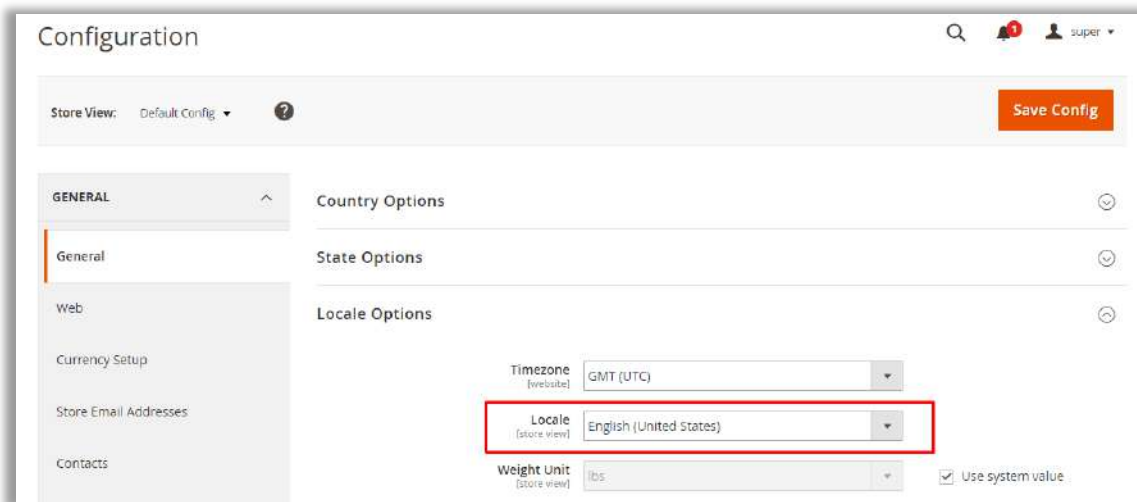
5. HOW TO SET UP DEVICES

5.1.   How to connect Barcode scanner to PC

For Barcode Scanner connected via USB port, simply plug in the USB into the computer and the scanner will connect automatically.

To test that it's all already to work, open up a notepad or word processing application and scan in a barcode. You can see the barcode number appear here.

5.2.   How to connect Receipt Printer to PC

Here you can take the following actions:

1- Download the Star driver

Firstly, we need to download the latest printer drivers for your computer. This is specialised software that helps the printer run correctly on your computer. Go to Star's website here and fill out the product information.

2- Install the Star driver.

When this download is completed, you need to install driver like normal application.

3- Connect to PC

Once you installed Star driver, you will connect printer with your PC by USB port or Ethernet that is depended on your printer type.

Your printer should now be all set up and ready to go.

5.3.   How to configure a printer to open cash drawer

The cash drawer connects to your receipt printer, and is triggered to open when you finish a cash or cheque sale order & the receipt printer is printed by the printer.

To set up your Printer to open Cash Drawer.

1- Plug connector cable from the cash drawer into the receipt printer
2- Next, go to 'Devices & Printers' window on your computer
3- Press on Receipt printer, select Printer properties > device settings
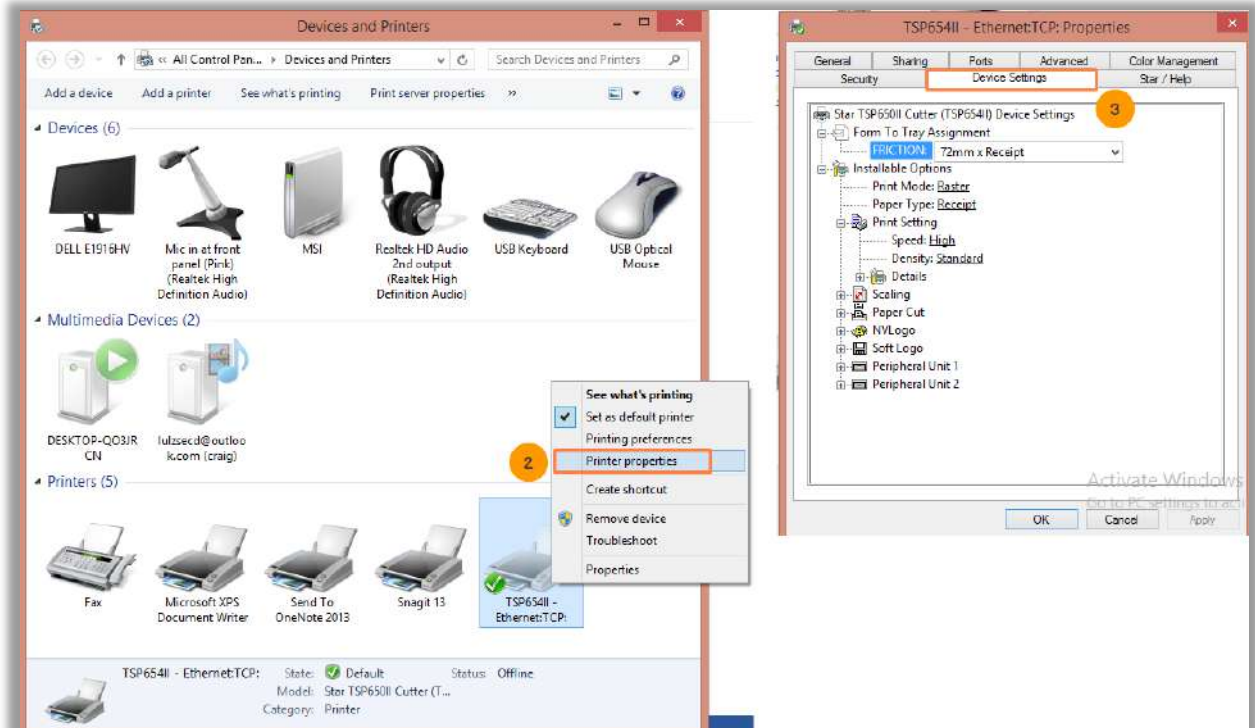
4- Once in here change the Peripheral Unit type to Cash Drawer. You can change timing to open Cash Drawer, such as: Document top (if you want your Cash Drawer to fire before the receipt prints), Document bottom (if you want your Cash Drawer to fire after the receipt prints)
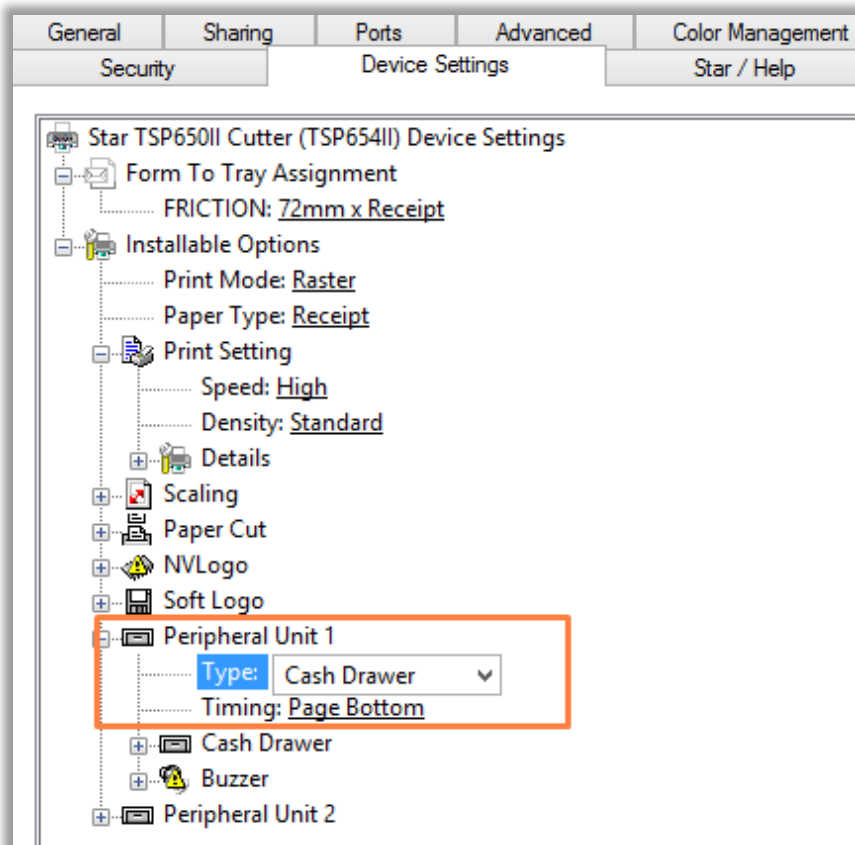
5- Save these settings & test it out.

5.4. How to connect Card Reader to PC

To set up your swipe card reader, connect it to your PC using the USB cable supplied with it. The device should be automatically detected. No device drivers are required. The green/red status light should light when the device is ready for use.

5.5. How to connect Bambora terminal to PC

1- Make sure **POS Hub** is running in your PC. You can check **Autostart with Windows** to run it automatically when Windows starts.

2- Plug power cord to electricity supply. Connect Bambora terminal and PC to the same LAN network.

3- On POS, from left menu, choose **Settings**, then choose **Bambora**
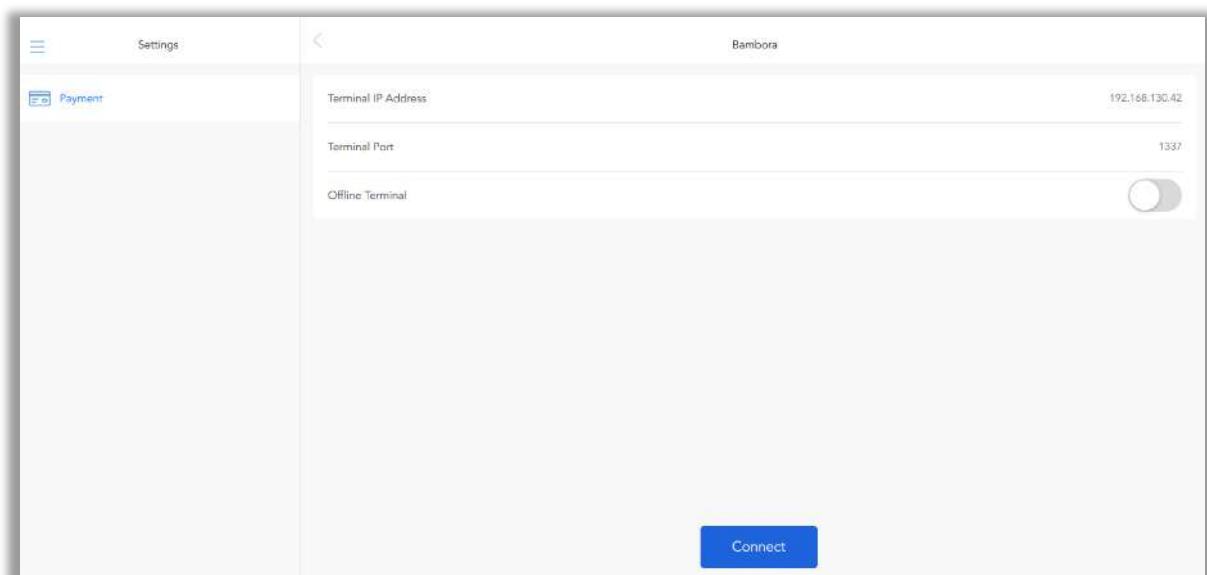
4- Enter the **Terminal IP Address**.

You can find terminal IP Address on Bambora device by these steps:

- Press **Menu**
- Enter password of Bambora device & press OK

- Select **Help** & press OK
- Type the **IP Address** in Bambora device in field Terminal IP Address on POS Settings. You may have to remove digit 0 in the last 3 digits when input IP Address (remove the third digit from right to left, keep the last 2 digits)

Default value for Terminal Port is 1337.

5- Click **Connect** to connect Bambora device to PC. System will show connection result.
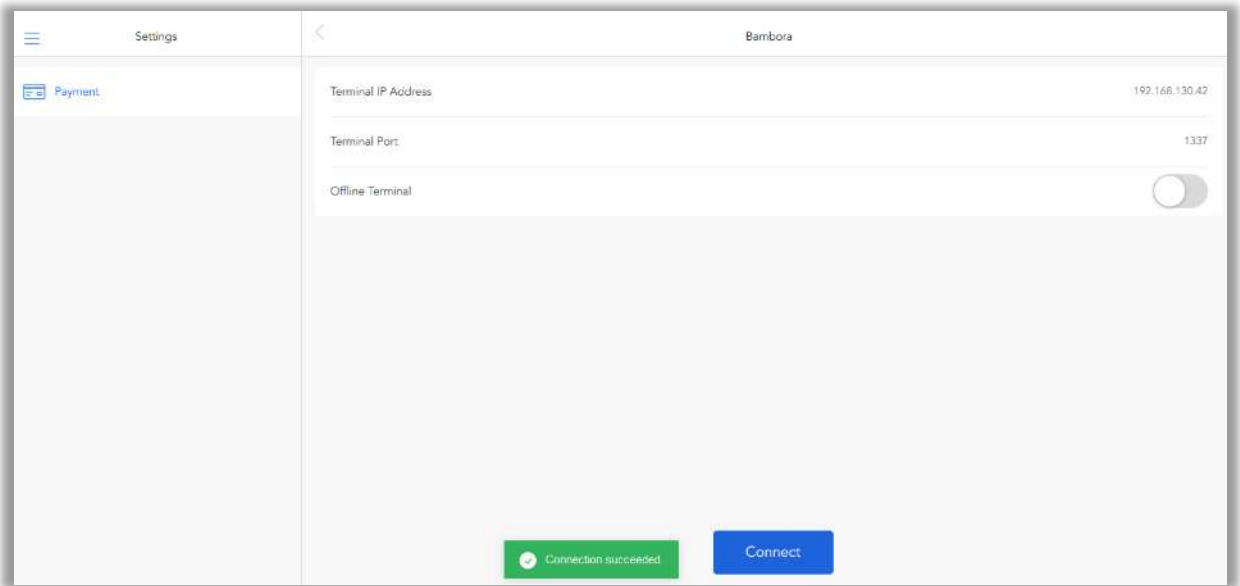
6- You can turn on **Offline Terminal** to set Bambora at offline mode.

In offline mode, all transactions are processed normally but not sent to Bambora server until switching to online mode (turn off Offline Terminal). You may have to make calls to authorize card while working in offline mode.

Please note that you need to clear transaction of previous day before start using terminal for current day. For more information, check Bambora's guide

6. HOW TO USE PWA POS

6.1. How to log in/ log out/ force sign out

6.1.1. Log in
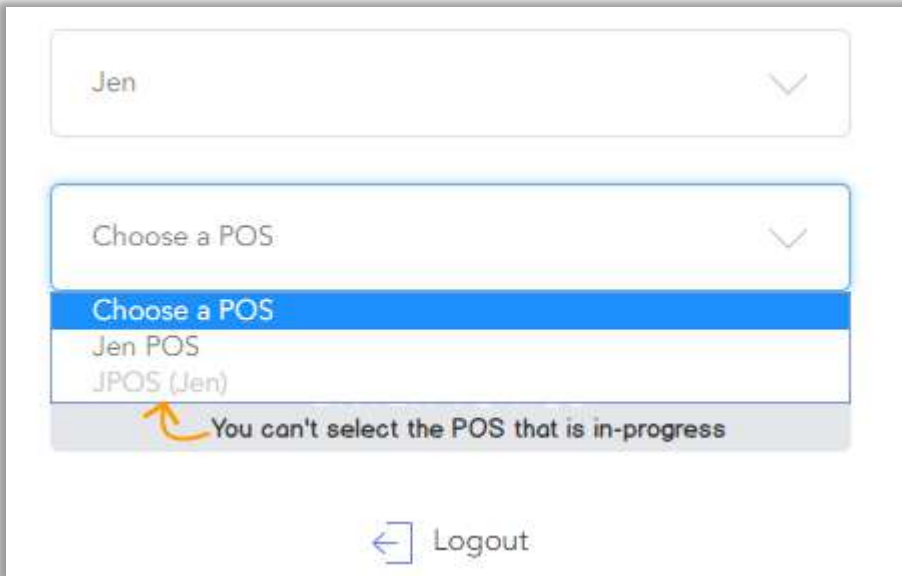
To access POS, you need to fill in required Username & Password field (that are created in backend). After the information is filled above, button **LOGIN** will be lighten up & you can click to log in.

Then, you need to choose a location & choose a POS to continue. After you chosen Location & POS, button **ENTER TO POS** will be lighten up & you can click to access POS.

In this step, you can also log out by click button **LOGOUT**. After that, you will be redirected to **LOGIN** screen.

In case you are assigned to 1 Location & 1 POS, you can skip this step & access to POS immediately.

When selecting POS to log in, you can't choose POS that is in-progress:

After you logged in to POS successfully, you can view your name, your location name & your POS name in the top of the left menu
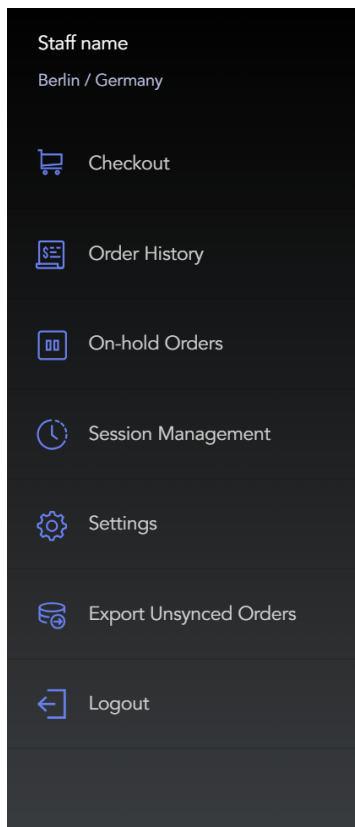
6.1.2. Log out

From left menu, you can click button to log out. System will display confirmation message, choose Yes if you really want to log out. If you choose No, pop-up will be closed & system will go back to previous page.
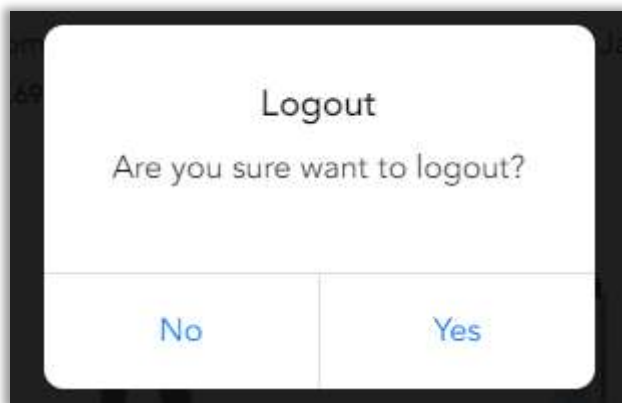
6.1.3. Force sign out

In some exception cases, you can be forced to sign out of the current POS. The reasons can be:

- Admin disable a POS while it's still being used

- Admin changes the location in POS configuration page while that POS is being used by a POS staff
- Admin force a POS account sign out of a POS while that POS account is currently logging on this POS
- Admin deletes a POS account while that user is still working on a POS
- Admin deletes POS roles (include permission for staff to active on POS) or remove the permission to active on POS while POS user is still working on a POS
- Admin removes the Checkout roles from a POS account while that user is still working on a POS
- Admin changes password of a POS user while that user is still working on a POS

Moreover, admin can force a POS account sign out of a POS while that staff is currently logging on this by press Force Sign-out (Path: **Magento> POS > Manage POS > View a POS**)

If you are working on it, you will be forced sign out & POS will notify you. You will be redirected to Login screen & recent action has not been saved (Example: when you are creating new customer, then access denied, customer information have not been saved in system yet)

6.2. How to manage session

If session management is enabled on POS, when the first shift of the day started, POS user need to open session in order to create the Opening Balance – the amount of cash in your store at the time.

6.2.1. How to open session

When you log into any POS, a pop-up of opening session will be opened automatically.

1- Choose value of currency contributing to Opening Balance (such as: 50 USD). The value is configured from Cash denomination in backend.

2- Select number of currency unit or use button (+) and (-) to increase & decrease. System will calculate Opening Balance automatically.

3- After checking all information above, click button Open session.
   Next step, after opening the session, you can create orders and start running cash flow in your store.

PWA POS provides another way to open session, without inputting number of each cash denomination on cash drawer (if the configuration Cash Control is disabled). The only thing you need to do is that counting exactly cash amount in cash drawer & fill it out opening balance.

After you open session successfully, you will be redirected to Checkout page to begin selling

6.2.2. How to make adjustment for Cash amount on POS

If you have permission to make adjustment, you can **Put money in** or **Take money out** (the permission is configured from Magento backend > POS > Manage Roles)

To put money in cash drawer, press on button Put money in & fill out amount & reason (required)

To take money out of cash drawer, press on button Take money out & fill out amount & reason (required)

The amount that is taken in & taken out will be recorded in system & report.

6.2.3. How to view session details

You can view session details by collapse/ expand Cash In & Cash Out section; therein:

 - **Cash In:** includes transaction from these action in this session: *checkout by cash/take payment by cash/put money in cash drawer*

- **Cash Out:** Section Cash Out includes transaction from these action in this session: *give change for customer/refund by cash/take money out of cash drawer*

Cash Out	-€28.02 ∧
September 27, 2018 1:18 PM	-€28.02
Give change for order #POS26-1538029132848	

6.2.4. How to close session

To close session, you need to follow these steps:

1- Press on Close Session button.
2- Set Closing Balance

Cancel   Set Closing Balance

Staff Neon   POS test3

Coin/Bill Value	Number of Coins/Bills	Subtotal
1 Cent	− 0 +	€0.00
1 USD	− 0 +	€0.00
$23	− 0 +	€0.00
10 USD	− 0 +	€0.00
Closing Balance		€0.00

Confirm

3- Click Confirm
4- After you set closing balance, you will be redirected to Session details page. In this page, you can edit closing balance

| Staff | Neon | | | Opened | September 18, 2018 4:53 PM |

| Put Money In | Take Money Out | Edit Closing Balance |

5- Press on Validate to confirm closing session.

Cancel   Close Session

Theoretical balance is not the same as real balance. Please enter reason for loss/profit if you want to continue closing session.

Theoretical Closing Balance   €500.74

Real Closing Balance   €3.00

Shortage   €497.74

Enter reason for loss/profit (required)

Confirm

6- In this step, you need to enter reason for loss or profit
7- Press Confirm to complete closing session

6.2.5. How to view X Report, Z Report

X Report cover everything from the session opening until when the report is run, and Z Report cover the entire session from open to close.

Press on button X Report when session is in progress or button Z Report when session is in closed status to view Report.

Field Name	Description
Net Amount	Display net amount in your session
Cash difference	Display the different amount between real closing amount & theoretical closing amount. See below for more details
#Cash	
Opening Balance	Display Opening Balance of session that inputted by Staff
Closing Balance	Display Closing amount of session that inputted by Staff (real closing amount

Theoretical Closing Balance	Display theoretical closing amount **-** Formula: **Theoretical Closing Balance = Opening Balance + Cash Sales + Pay Ins - Payouts - Cash Refund**
Cash Difference	Display the different amount between real closing amount & theoretical closing amount - Formula : **Cash Difference = Real Closing Balance - Theoretical Closing Balance**
Cash Sales	- Display Cash Amount that cashier has **received from customer except for Change Amount,** including **checkout process & take payment process** *Example : Customer give $200, then cashier get him $20 back => cash sales = $180*
Cash Refund	- Display Cash Amount that cashier refunded to customer, in **Refund Process**
Pay Ins	- Display the cash amount that cashier **PUT IN** cash drawer in his session - Display as **positive amount**
Payouts	- Display the cash amount that cashier **TAKE OUT** cash drawer in his session - This is **negative amount** & will be displayed as : **- {Amount}** *Example : Payouts: - $50.00*
#Payment Method	
Payment method name	- List all payment method name & its value that is occurred in session - Including in: + Checkout process + Take payment process + Refund process - Value of each payment method is calculated by formula: **Payment Method Amount = Sales Amount – Refund Amount**
#Sales	
Total Amount	The amount is sum of amount of all payment method that you received in your session
Refund Amount	The amount is sum of amount of all payment method that you paid back to customer according to Refund process in your session.
Net Amount	Formula:

	Net Amount = [Total Amount] – [Refund Amount]
Printed at	Display time the report is printed

6.3. How to checkout with Basic flow

1- Scan barcode or select product in product list to add this product to cart
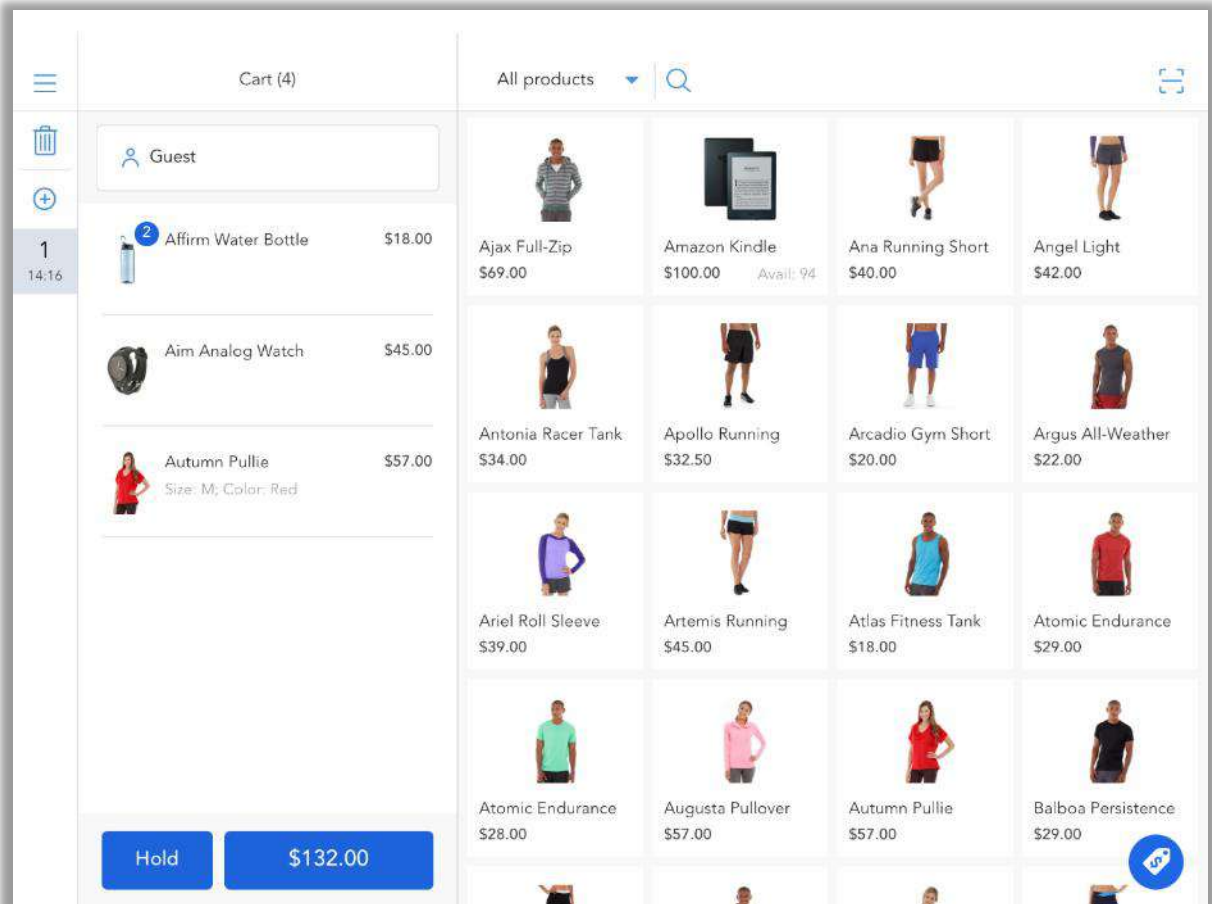
2- Assign customer for order

3- Click button display subtotal of order to process to payment page
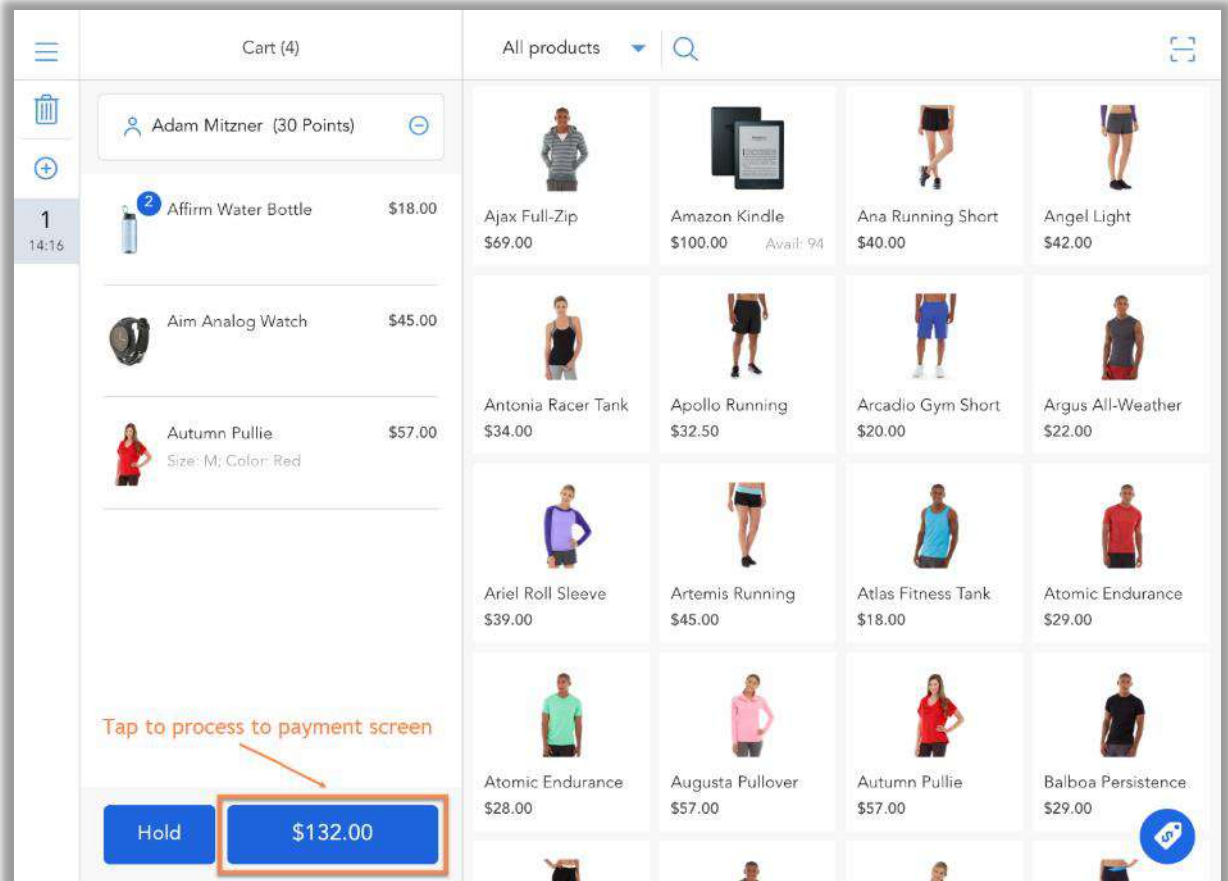
4- Select payment method(s)
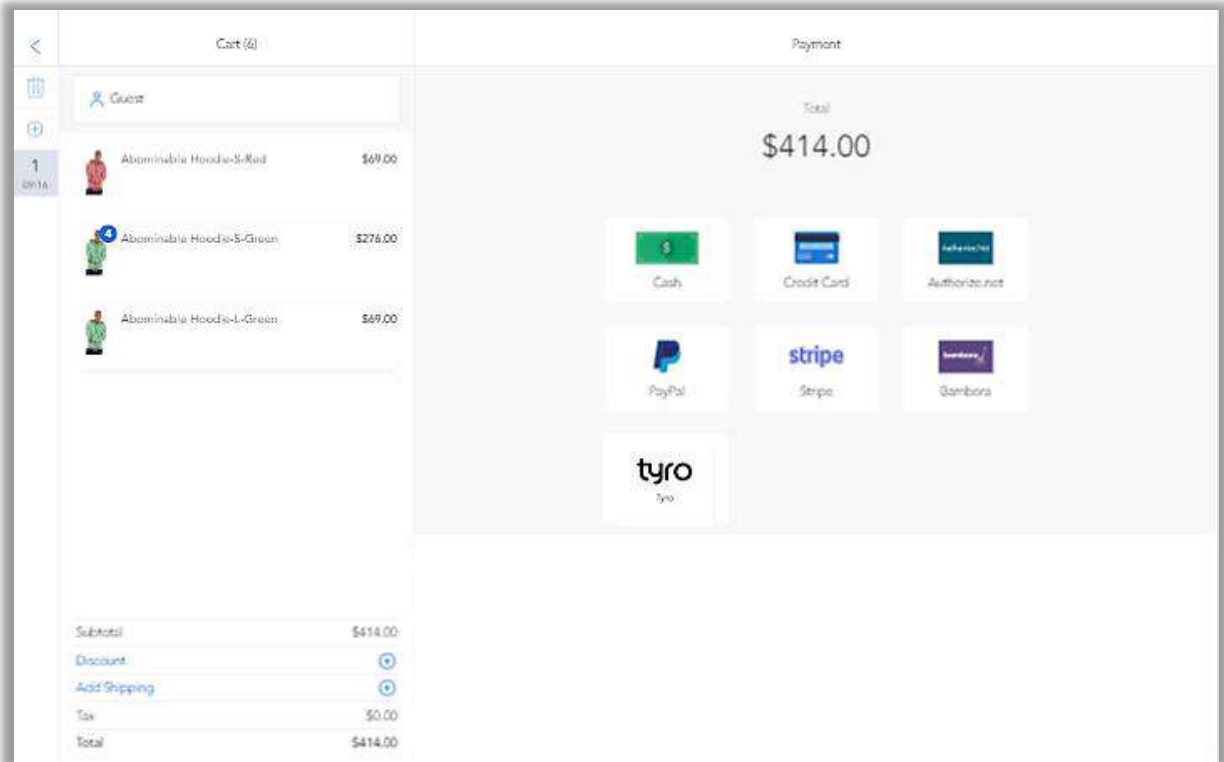
5- Click Complete Order/Mark as Partial to place order. After order is placed successfully, order receipt will be printed.
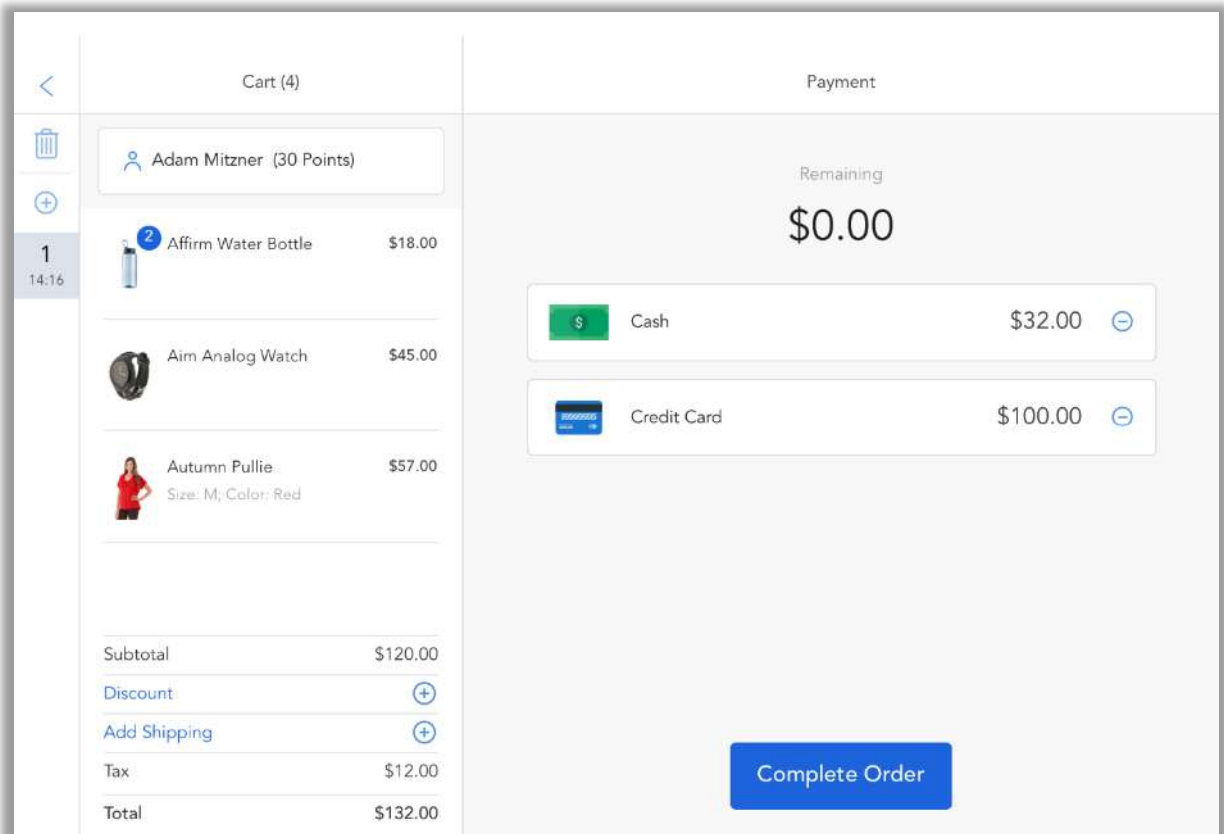
6.4. How to browse product categories

1- Click on **All products** ▼ to open list of categories.
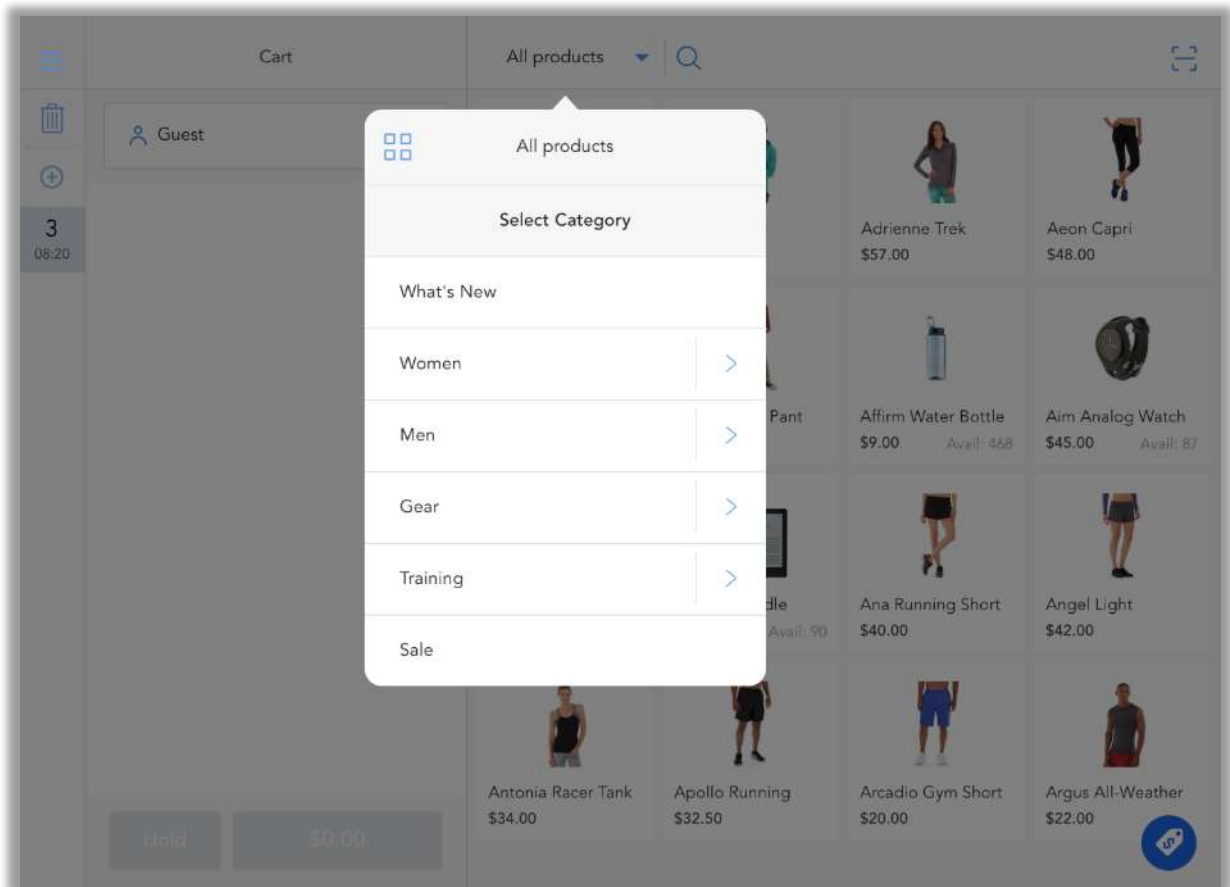
2- Click **>** to expand child categories or **<** to back to parent category
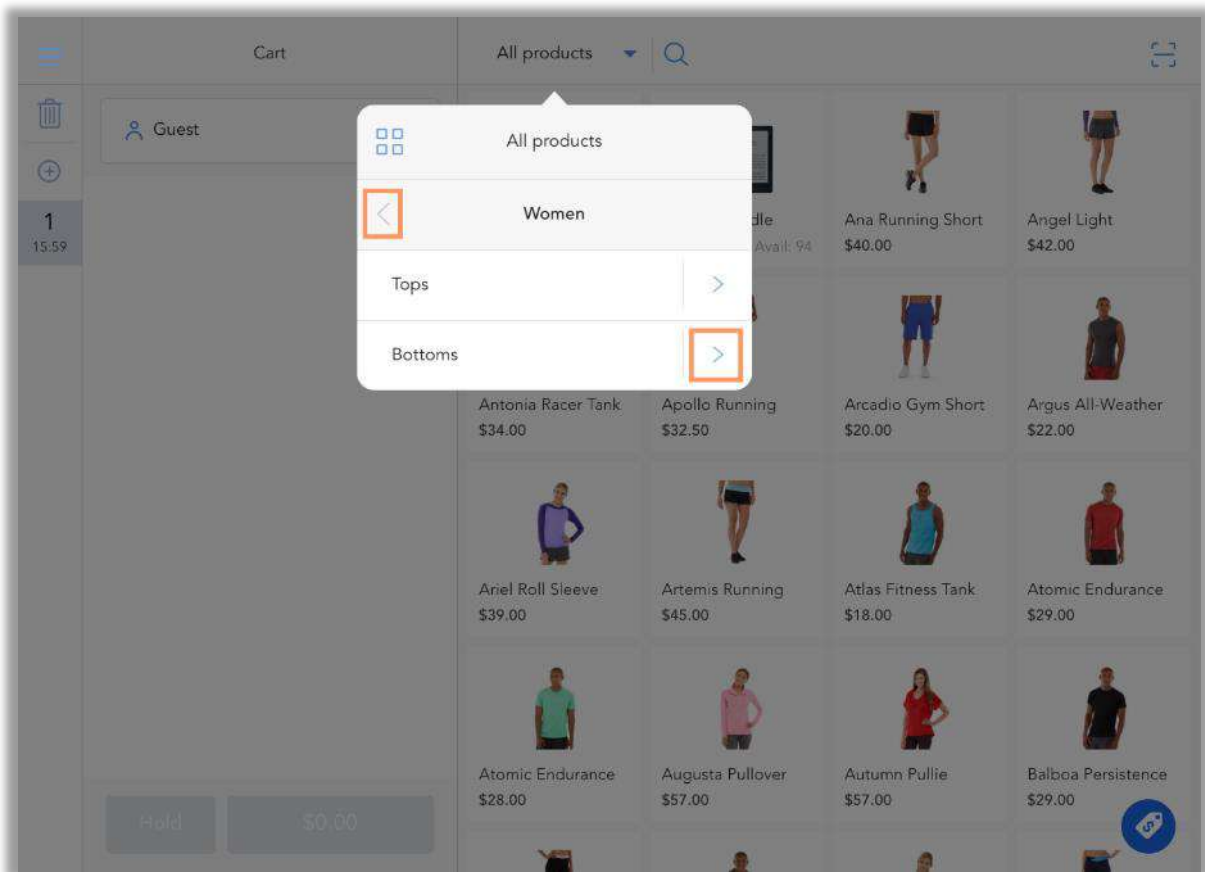
3- Select a category to view list of products inside this category
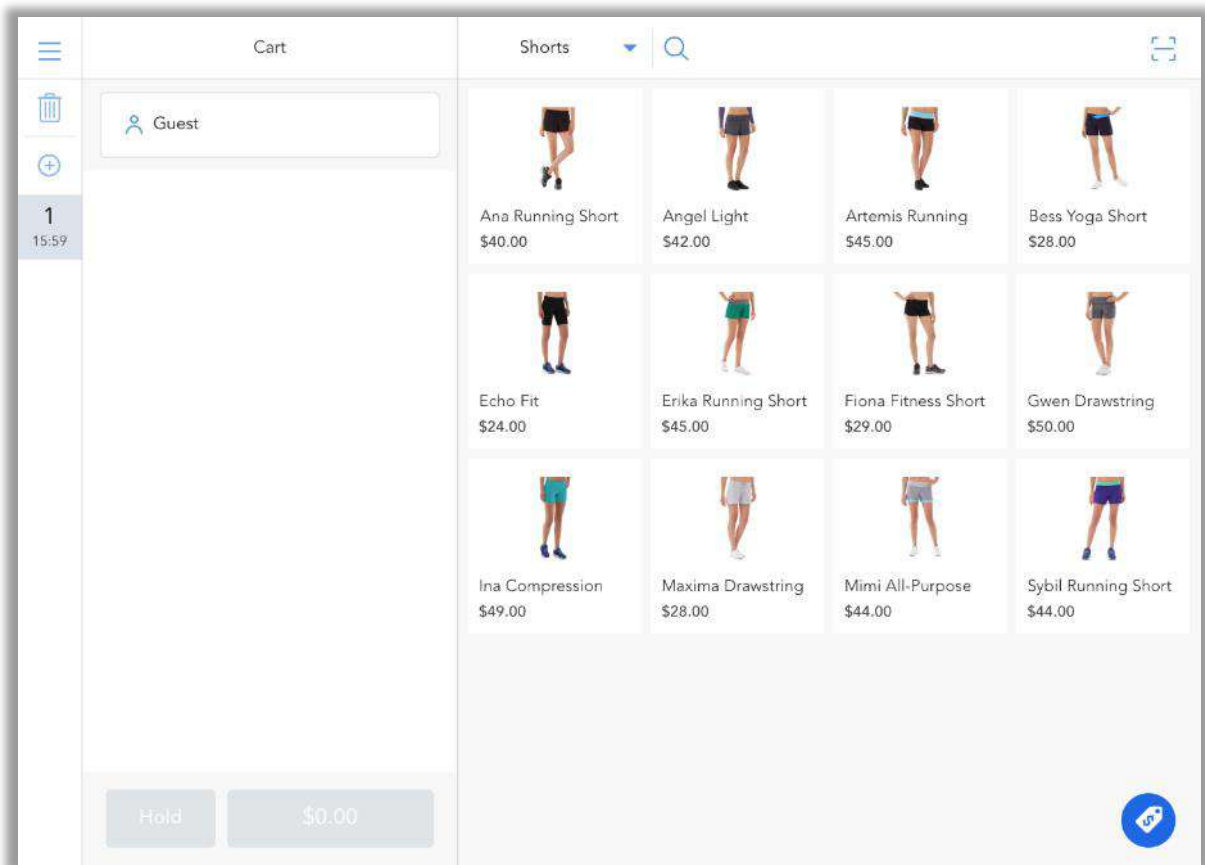
4- Select **All products** to close filter and view all products.
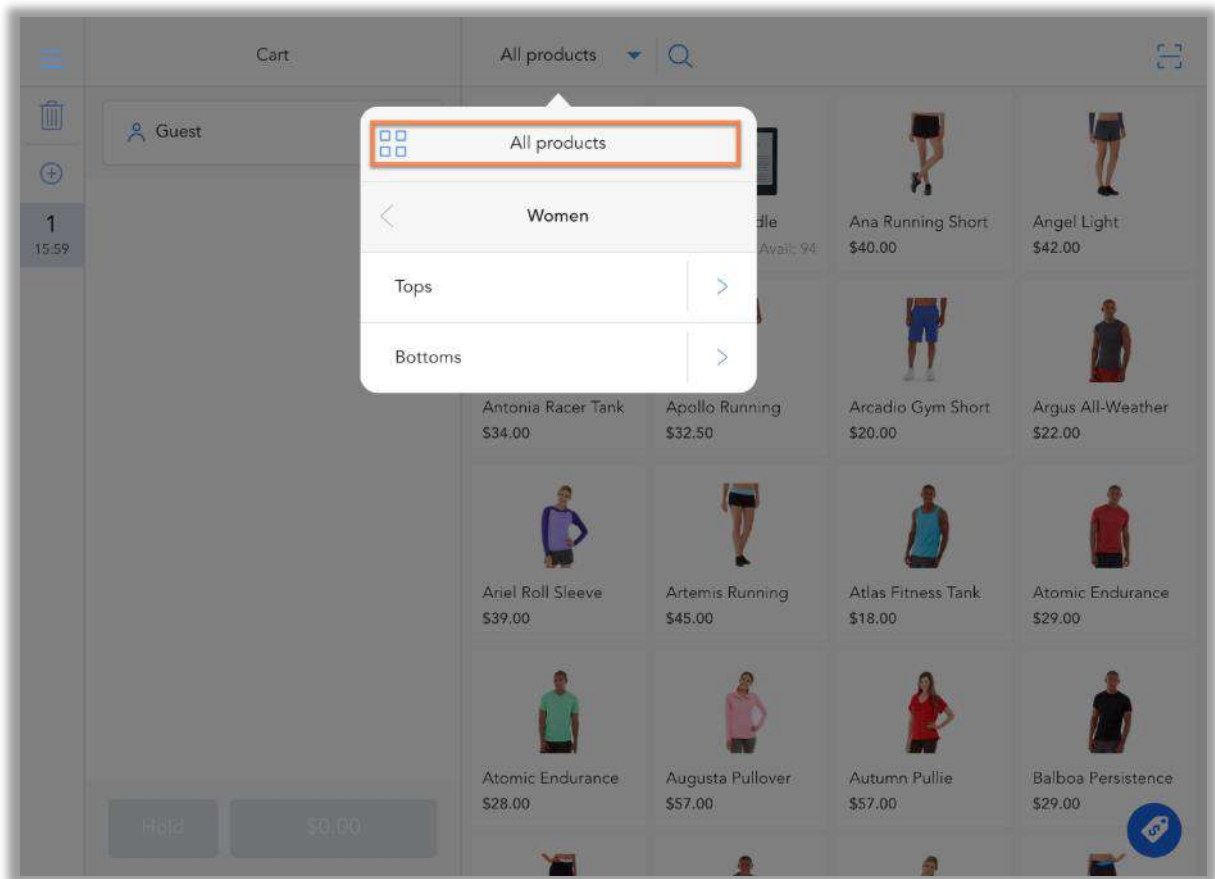
6.5.   How to browse product list

After logging in to POS successfully, users will be redirected to [Checkout] right away and able to view product list on the left screen.
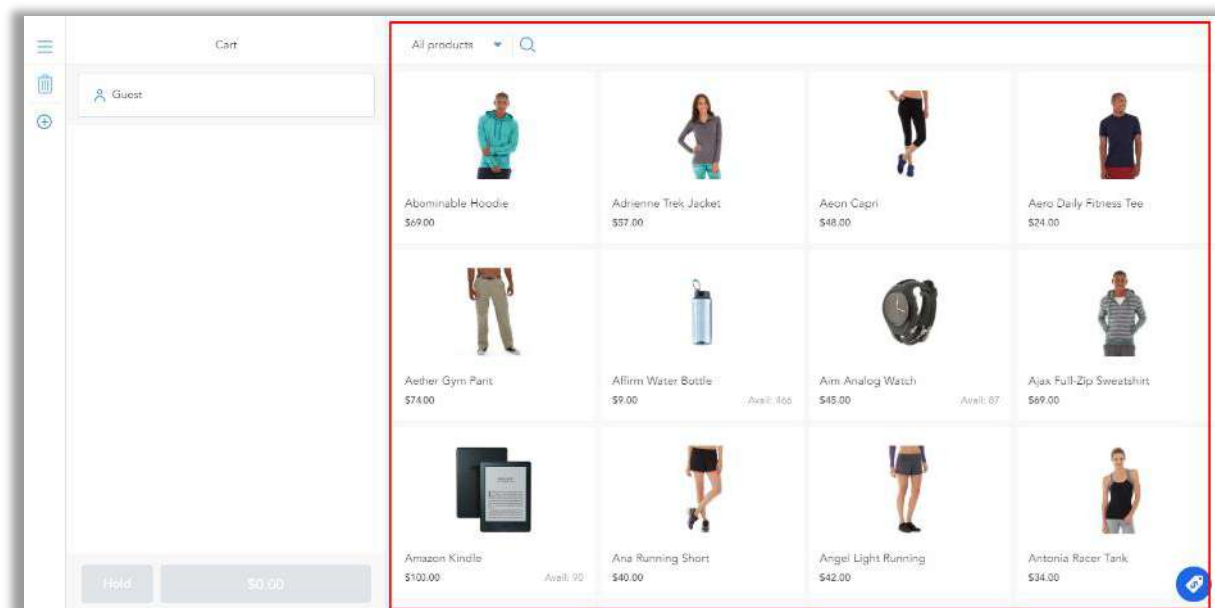
The system displays 4 product boxes in a row, 16 products per page. Each product contains:

- (1) Image:

- Product images listed on category and search results pages on POS is the image of that product which has been configured as small role (Magento image's attribute) in backend.

- If there aren't any images which have been configured as "small role" or Product images haven't been uploaded in backend => POS shows "camera icon" on the position of product image.

- (2) Name of a product
- (3) Price of a product

- Simple product: Value of price would be retrieved from *Catalog > Product > Price* (or *Catalog > Product > Advanced Pricing > Special Price* if special price is set) in Magento backend

- Bundle: Value of price would be retrieved from the starter price of bundle product, displayed as "From xxx"

Sprite Yoga Companion Kit
From: $61.00

- Configure: Value of price would be retrieved from the smallest price of children products

Grayson Crewneck Sweatshirt
$64.00

- Grouped: hide the price

Set of Sprite Yoga Straps

- (4) Available quantity to sell of a product

- Simple product: the value of stock available would be retrieved from ***Inventory Management > Stock Listing > Locations > Location Details (of the linked POS) > Stock On-hand > Available Qty.*** in Magento backend

- Configure/ Bundle/ Grouped product: hide the stock availability field

Products in catalog are sorted alphabetically. User can scroll up and down to view the entire product catalog. The scroll bar is only shown when users swiping through the catalog.

For **out-of-stock products**, the system shows **'out-of-stock'** icon to notify POS users that the products are no longer available to sell. Moreover, the box of this product on catalog page is disabled so that cashiers can't select those out-of-stock products.
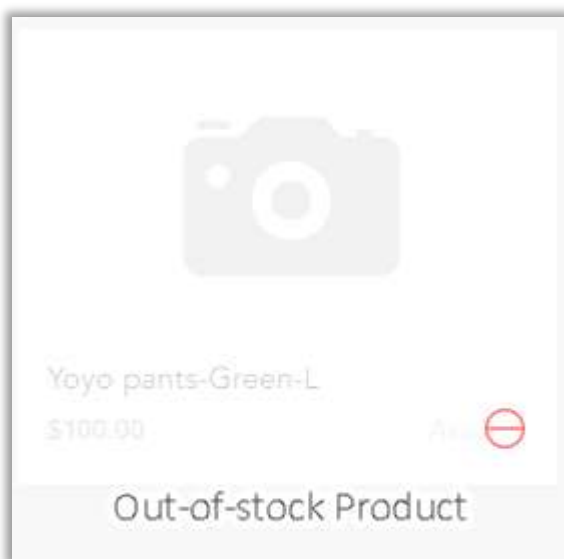
6.6. How to find a product

6.6.1. How to scan product barcode

Attribute used to scan barcode is configured in Magento back-end see how to configure barcode attribute to scan on POS for more details).

Depend on barcode scanner model, you may need to focus on search bar to start scanning barcode. Every time you scan a barcode successfully, this product will be added to cart instantly.

6.6.2. How to search product

Focus on search bar, then type the search string. Search results will be displayed instantly as user typed.
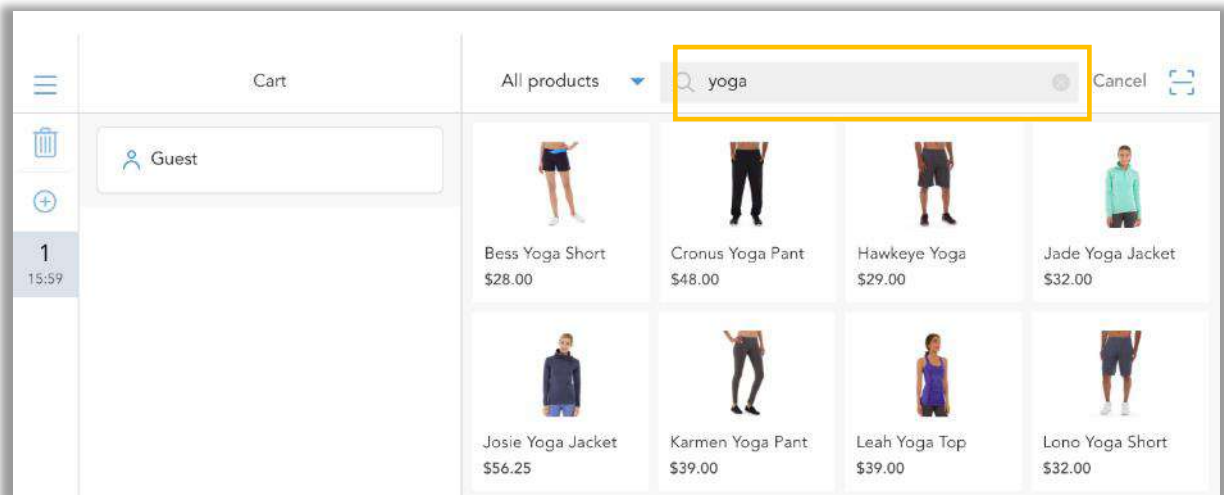
6.7. How to add product to cart

6.7.1. Simple product

In Product Catalogue, Simple Product is displayed with below information: Product name, Product Image, Price, Available Quantity. You need 1 click/click to add them to cart.
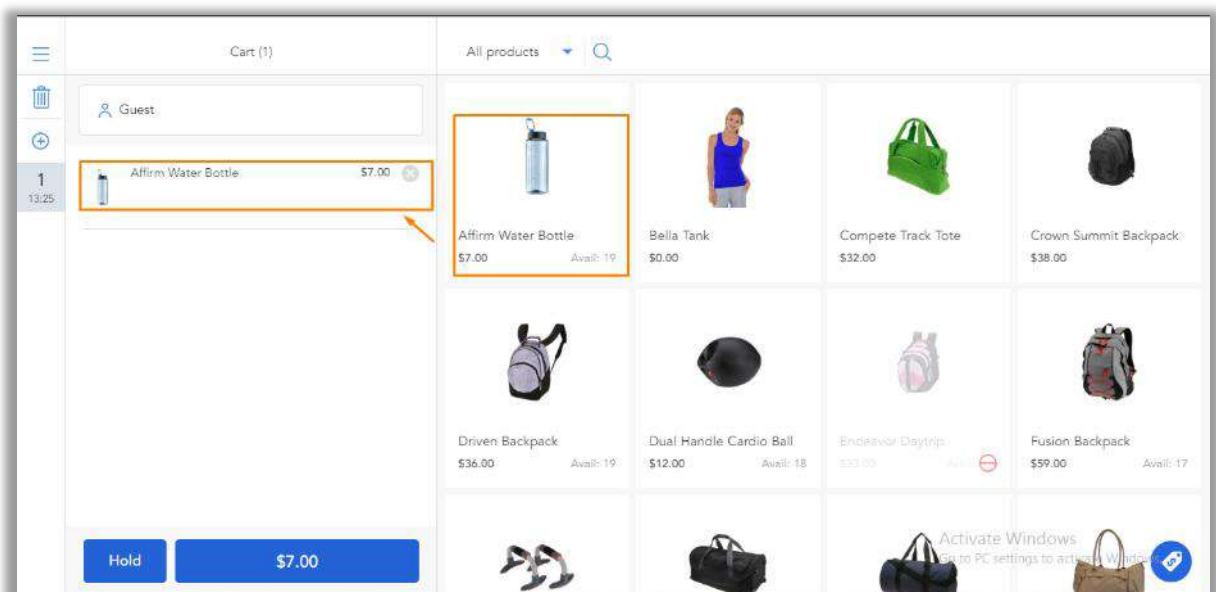
6.7.2. Configurable product

When you click to a configurable product, system will display a pop-up to choose product option. You need to follow these steps below:

1- Choose all options

2- Fill quantity you want to sell

3- Click Add to Cart

If you have not chosen all option(s) yet, quantity box & button **Add to Cart** will be disable.
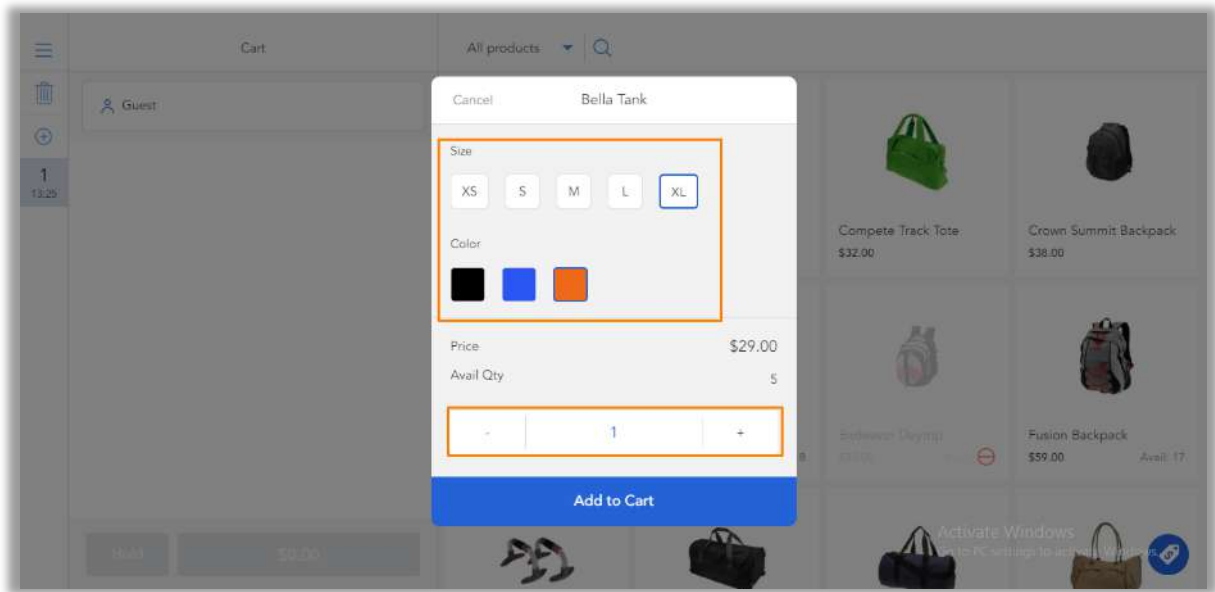
In this pop-up, you can see following information: Product name, Product Option, Price & Avail Qty of each product option. Fill qty by clicking to the qty box or using button (+) to increase qty & button (-) to decrease qty.
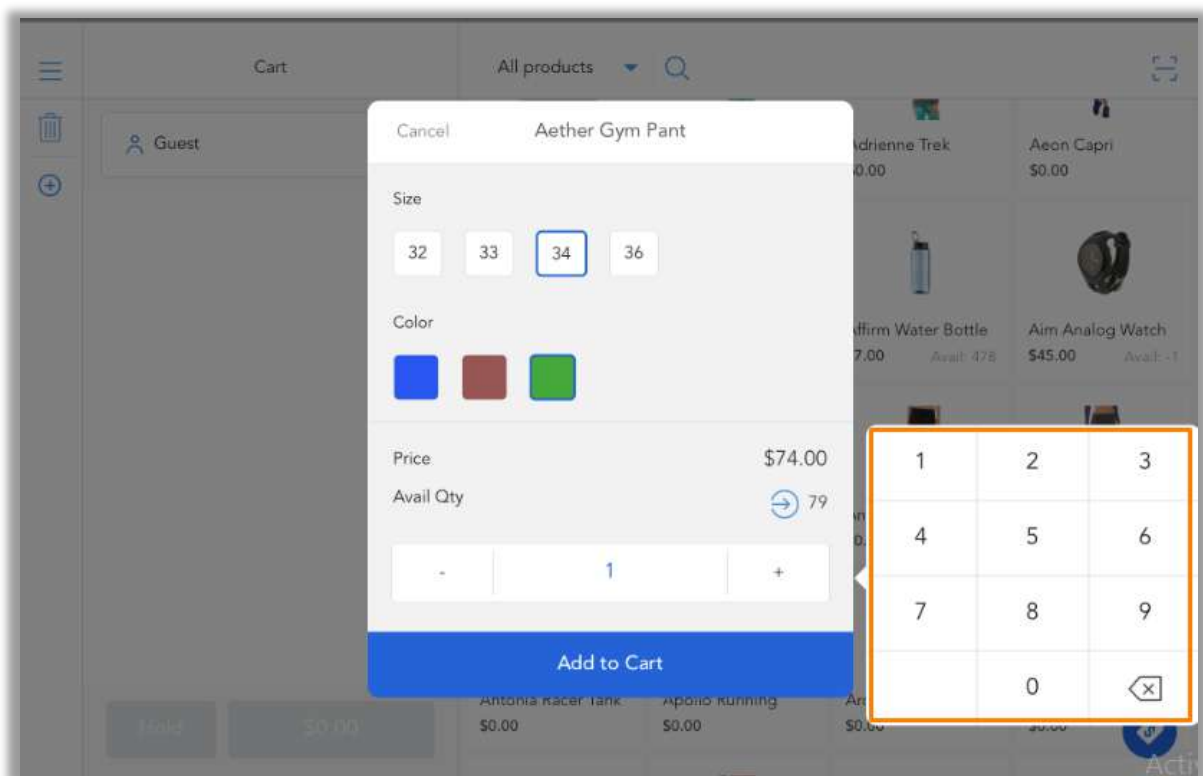
After you add a configurable product to cart, it will be displayed in Cart like that:
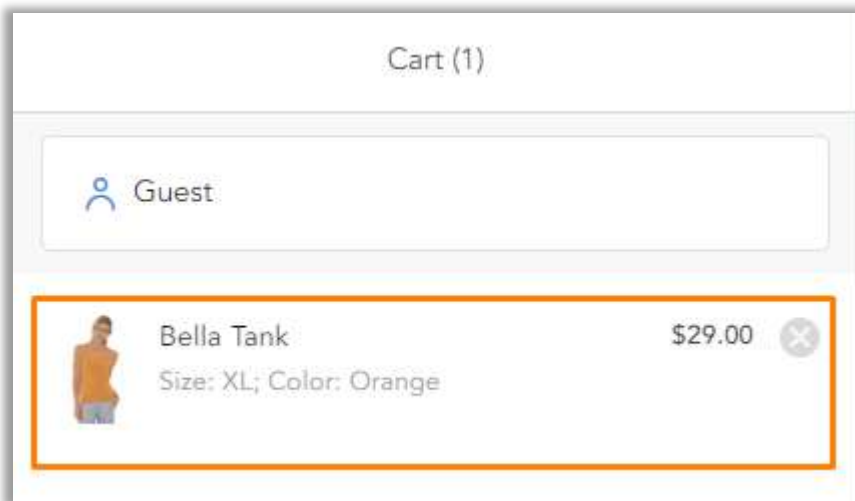
6.7.3. Bundle product

In Product Catalogue, you can view *product image, product name & the starter price of bundle product* (as: From 'ABC')
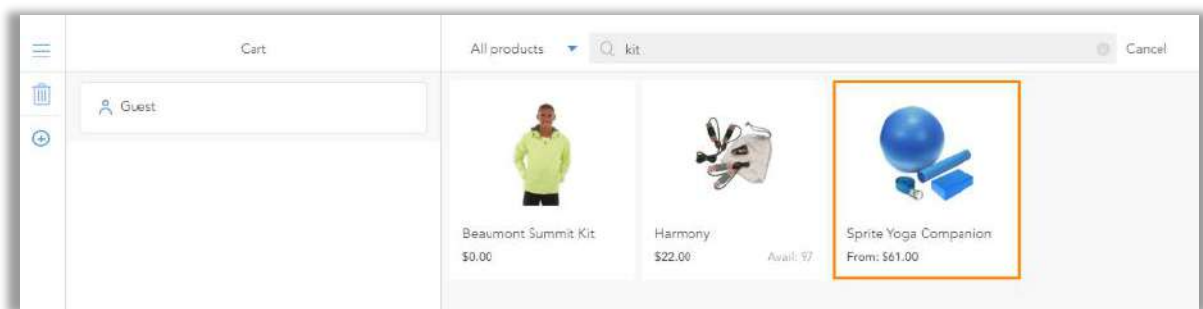
Like configurable product, system will display pop-up to show product option when you click to a bundle product.
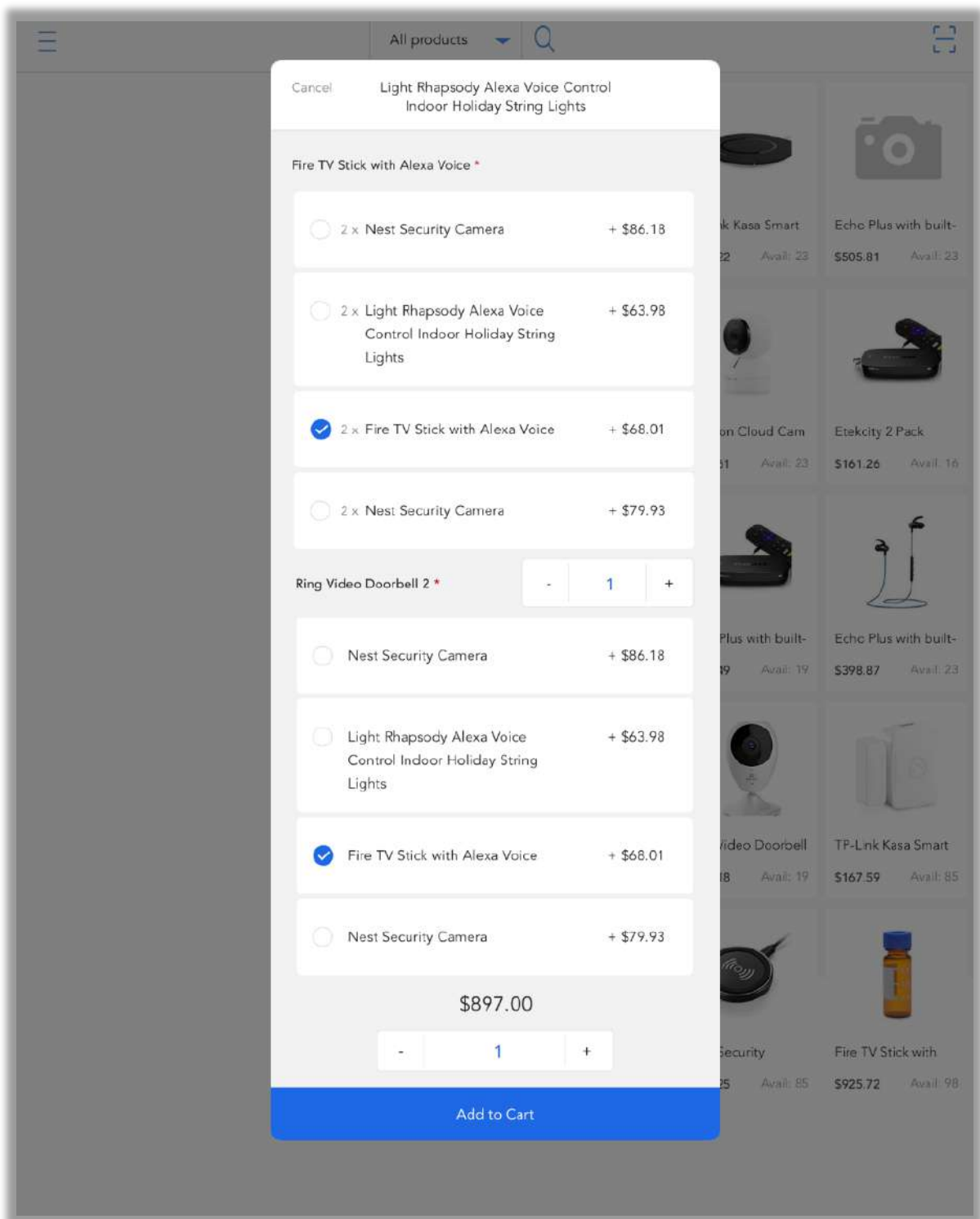
Please note that POS will display icon * for required product option. The quantity can be a preset or user-defined value. So that you can be able to edit the quantity of product options.

In this pop-up, price of product option will be shown & when you choose a product option, price of bundle product will be updated immediately (in case the configuration Dynamic Price = Yes)

Along with quantity of product option, you can choose qty of bundle product (qty of product set)

After all steps above, bundle product will be added to cart:
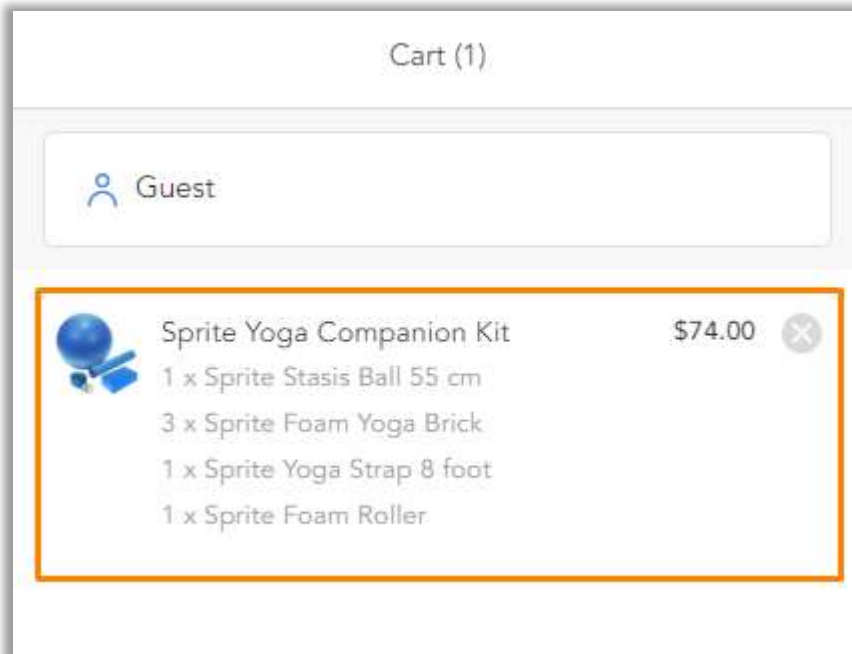
6.7.4. Grouped product

A grouped product presents multiple, standalone products as a group. To add a grouped product to cart, you will go through following steps:

1- Enter qty for each product option
2- Click 'Add to cart'

Each product can be sell separately, or as part of the group. So, for grouped product, system shows only price of product option.

After grouped product are added to cart successfully, they are displayed in cart separately (like simple product)

6.7.5. Virtual product

In Product Catalogue, like Simple Product, Virtual Product is displayed with below information: Product name, Product Image, Price, Available Quantity. You need 1 click/click to add them to cart.

The only difference is that after you have added the Virtual Product to cart, you cannot add shipping method on POS for it. But you can add shipping if the cart also contains other shippable products.
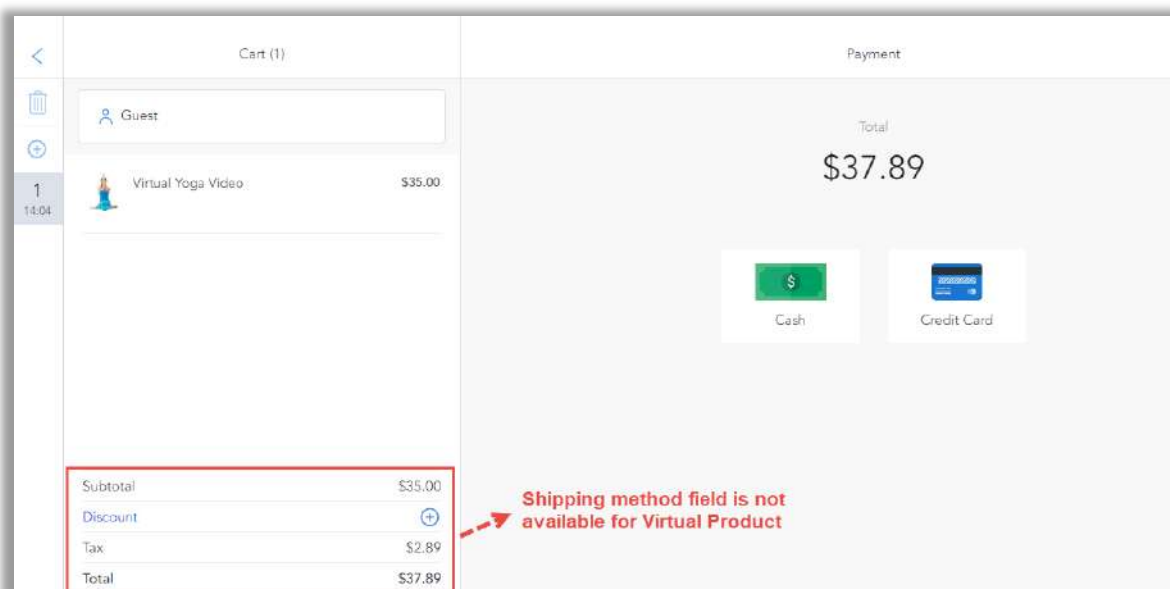
6.7.6. Customizable option product

Configurable Product   Simple Product

In case a simple product has customizable option, when you click to add item to cart, system will display pop-up to choose option for item. Depend on option type, you need to do these different steps to add them to Cart.

- For Option Type is Text (Text Field or Text Area)

In text box, you cannot input more than max characters (that is configured in backend). Then, option's price will be added to product price.

- For Option Type is Select (Dropdown, Radio Buttons, Checkbox, Multiple Select)

You only need to click to selection box to choose option that customer want to buy. Then, option's price will be added to product price.

- For Option Type is Date (Date, Time, Date & Time)

Here you can take the following actions:

- Check the tick box to choose the date & time option

- Press Choose Date to select date.
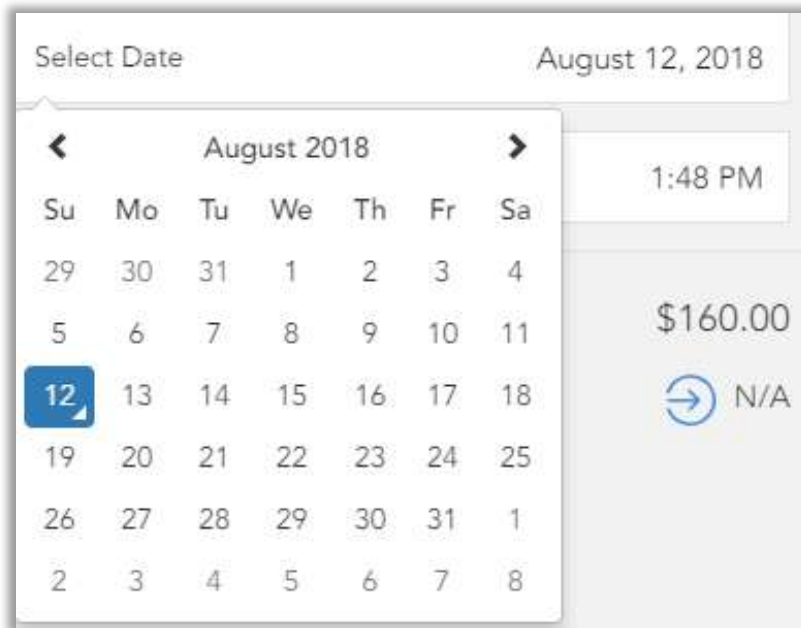
- Press Select Time to select time
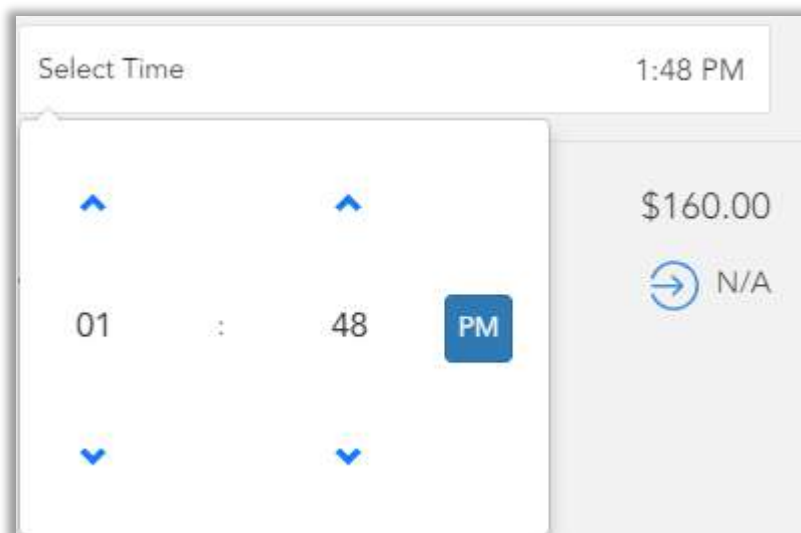
Please note that with product has customizable option type = File, PwA POS had not supported yet.

6.7.7. Custom sale

Custom sale item will be used when the product hasn't been added to the POS system or POS user can't find it in product catalogue (because of any unknown reason).

In POS Checkout, you can easily find Custom sale button in the right corner & bottom of the screen. This button is fixed when scrolling. Click **Custom sale** button (icon tag) to open custom sale form.
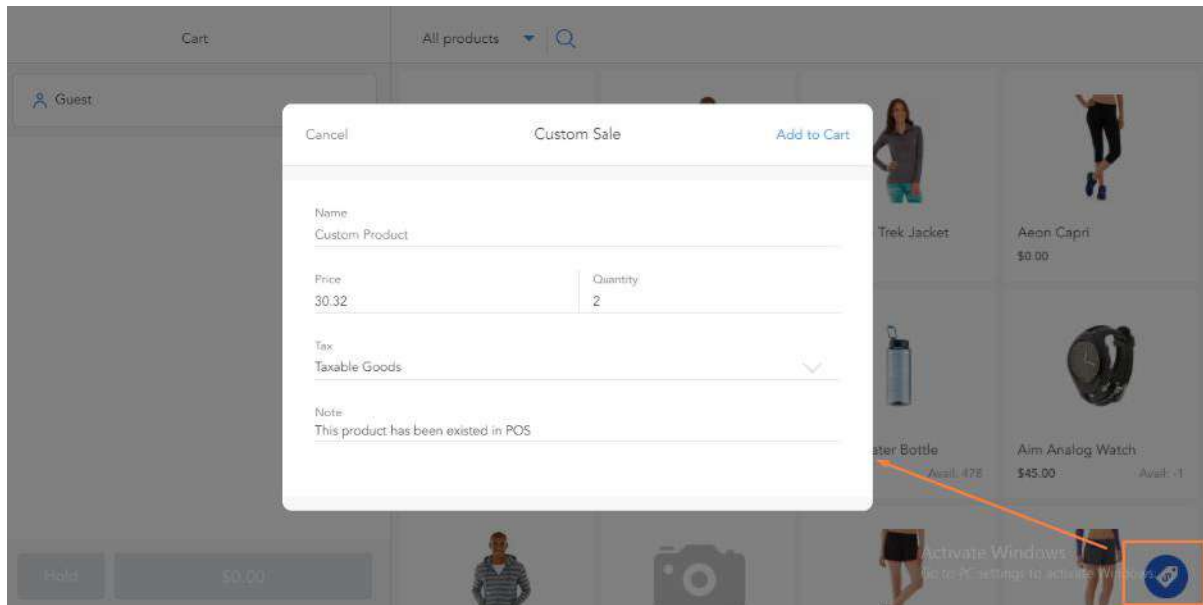
A pop-up will be shown for you to configure this custom product:

- **Name**: to enter custom product's name. If you left this field blank, the product will be displayed 'Custom Product' as name.
- **Price:** to enter custom product's price
- **Quantity**: to enter quantity of custom product
- **Tax:** select tax classes for custom product. Default tax class for custom sale is configured in backend (Path: **Magento > POS > Configuration > Tax Configuration > Tax Class for Custom sale**)
- **Note:** to input note for adding custom product to cart (example : the reason)

After finishing the information, click Add to cart & check out as normally. Note of custom product will be displayed under Product name.
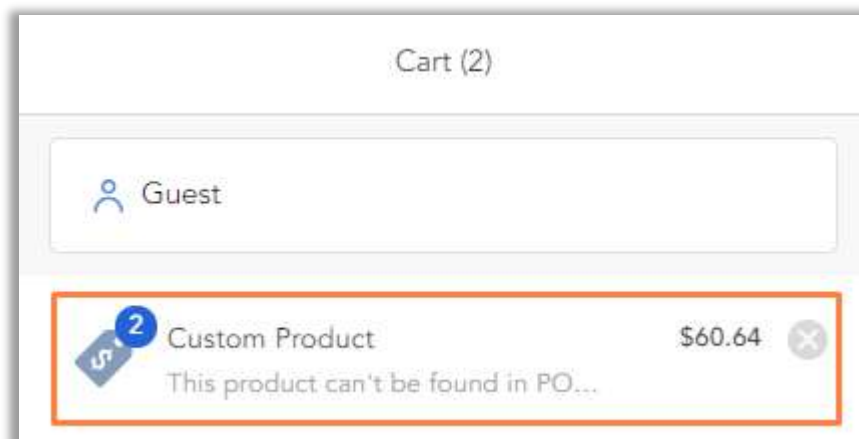
Please note that this custom sale product will not be saved for the next checkout.

6.7.8. Back-ordered item

Allowing to Backorder means giving your customers an option to buy your products even when you don't have enough in stock.

Before you can add a backordered item to cart on POS, you need to activate the backorder feature. There are 2 ways to do it: using default Magento configuration or with Magespacex's POS configuration.

Note: if you enable backorder setting in Magento default, you will allow backorder on both website and POS; enabling backorder setting in Magespacex's POS configuration only allows backorder on POS. Magespacex's setting has higher priority.

a. Enable Backorder feature

- **Enable backorder feature using Magespacex's POS configuration:**

Follow path: **Magento backend > POS > Settings**

Then in Checkout section on the right of the page, select **Yes** for **Add out-of-stock product to cart** setting and click the button **Save Config** at the top right.

Once you've enabled this setting, you can checkout all products on POS even when they are out of stock. The Qty of the product on POS will look like the screenshot below:
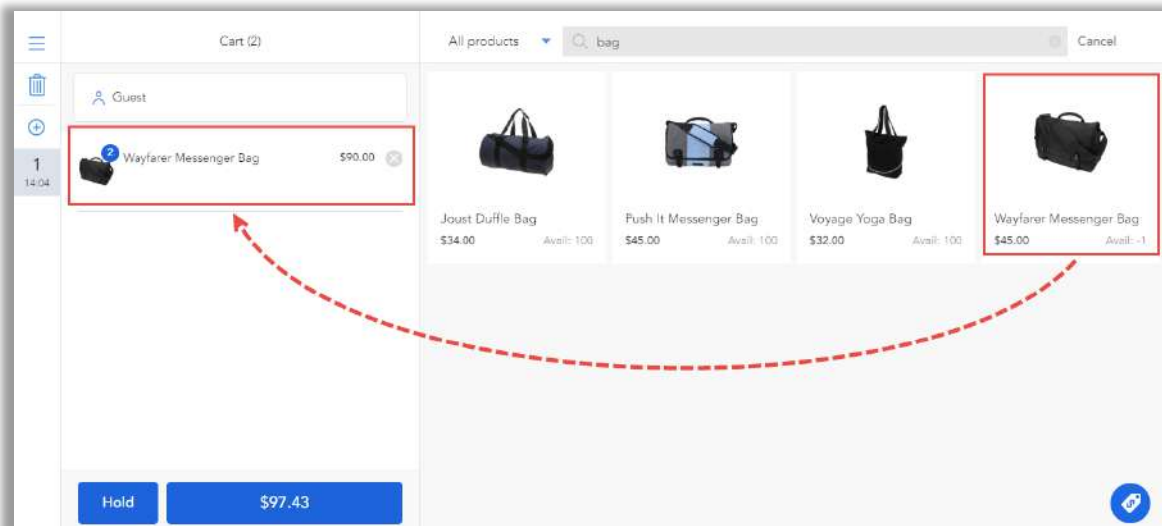
You can disable backorder on POS for specific products by going to **Magento backend >
Catalog** & select the product. Click on **Advanced Inventory** under the Quantity field
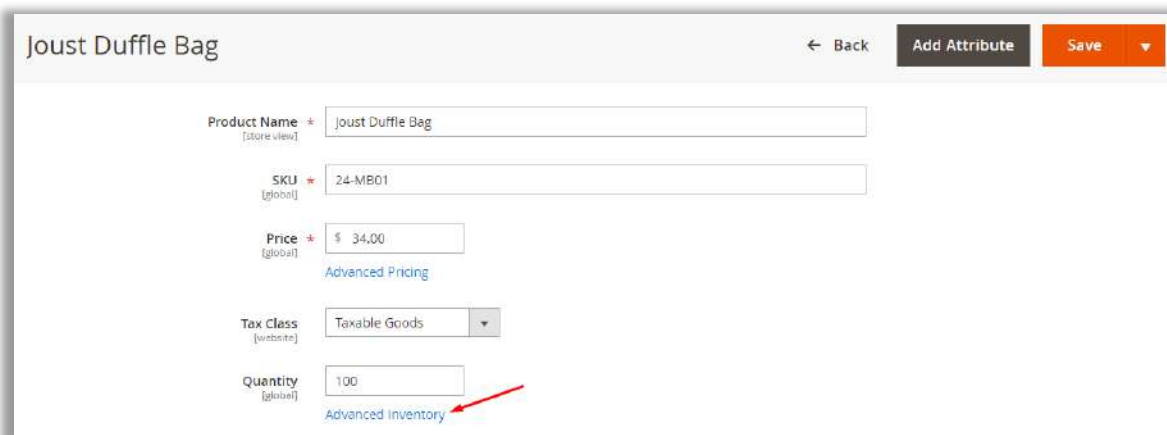
In the popup window, find the **Backorders** field, uncheck the **Use Config** settings and select
No Backorders, then click on **Done** button at the top right.
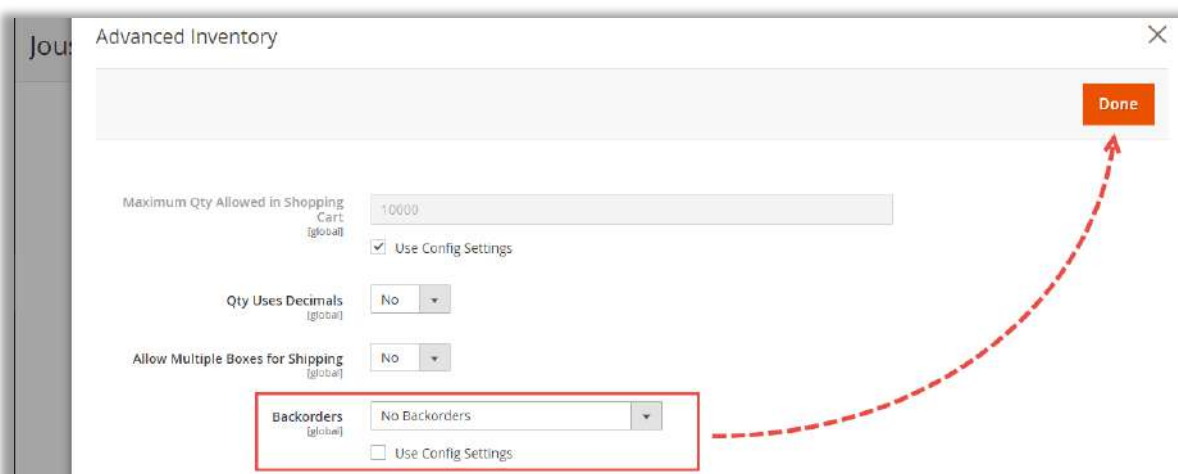
After saving the setting for the product, this product will no longer be available for backorder on POS.

- **Enable backorder feature using default Magento configuration:**
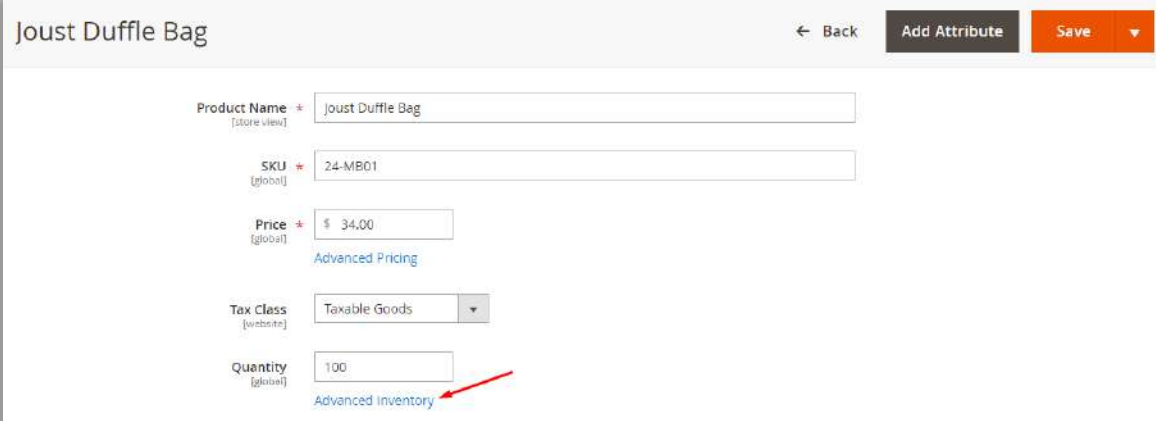
This is another way to activate backorder feature <u>for all products</u>, follow path: **Magento backend > Stores > Settings : Configuration**
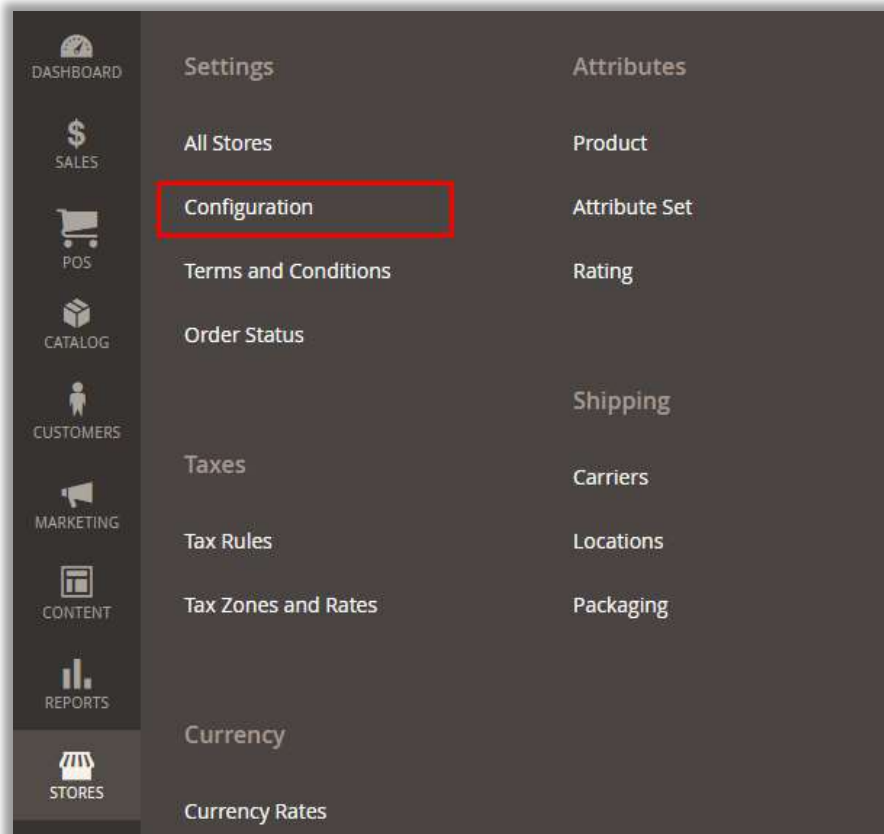
Go to **Catalog > Inventory**, in the **Product Stock Options** section on the right of the page, find the **Backorders** setting, uncheck the **Use system value** box if needed and select **Allow Qty Below 0** and click the button **Save Config** at the top right.
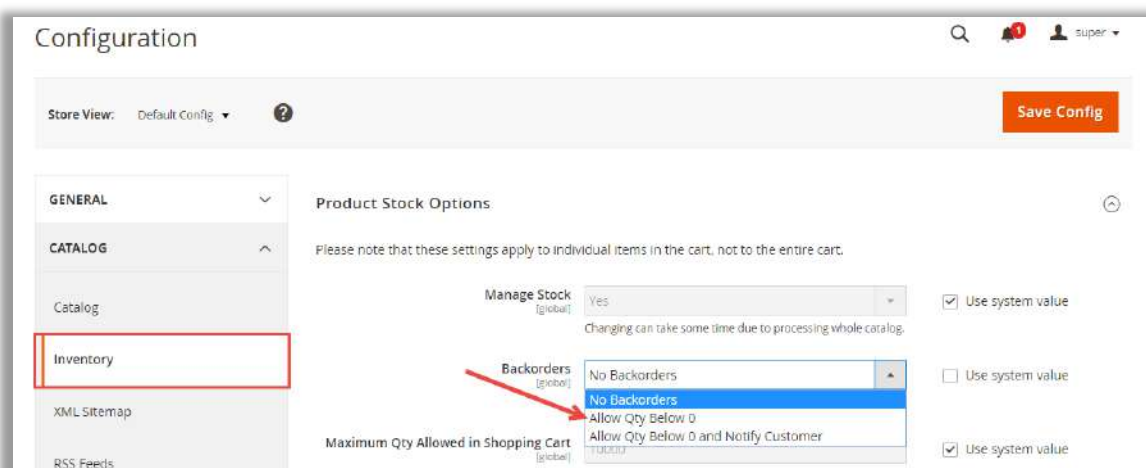
Enabling this setting will enable backorder for all products on both website and POS, unless you use a different **Advanced Inventory** setting for any product.
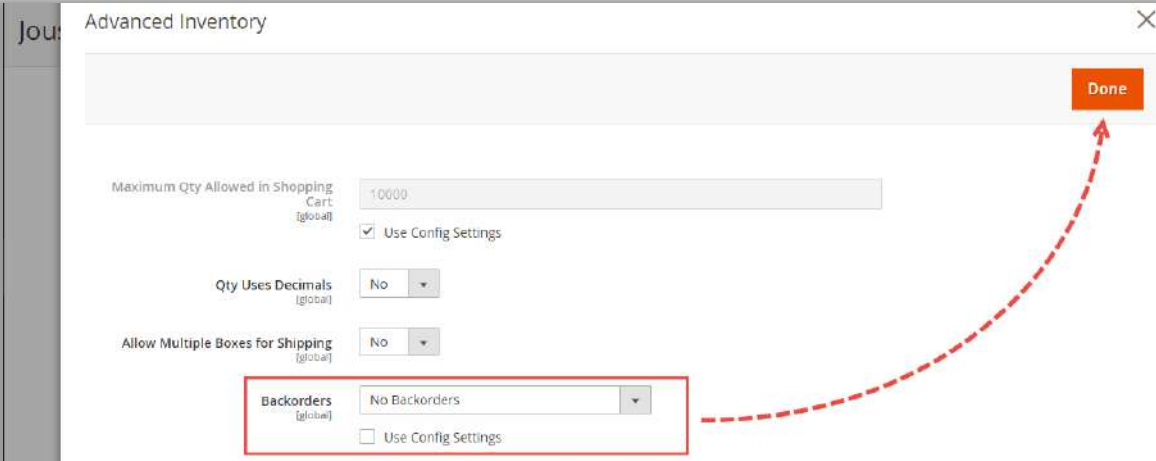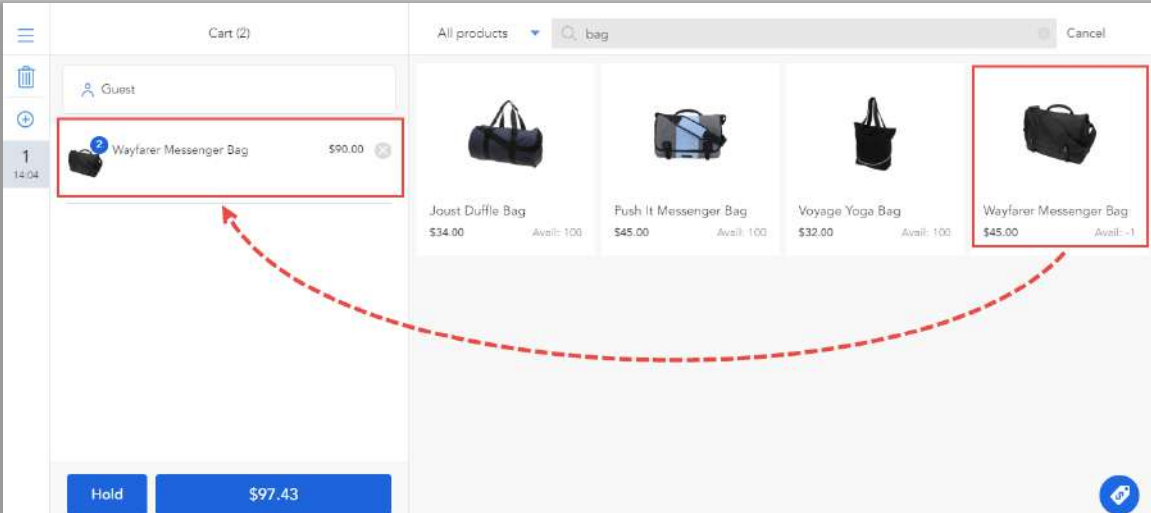
b. Add Backordered items to cart

After enabling backorder feature, you can add the products to cart as normal. If a product has back orders, its Qty will be a negative number.

6.8. How to edit product quantity in Cart

6.8.1. Update quantity

After adding product to cart, you can edit product quantity. By clicking on each product name area, a pop-up will be opened horizontal with product that you want to edit. You can click to quantity box to fill qty you want or using button (+) to increase & button (-) to decrease.
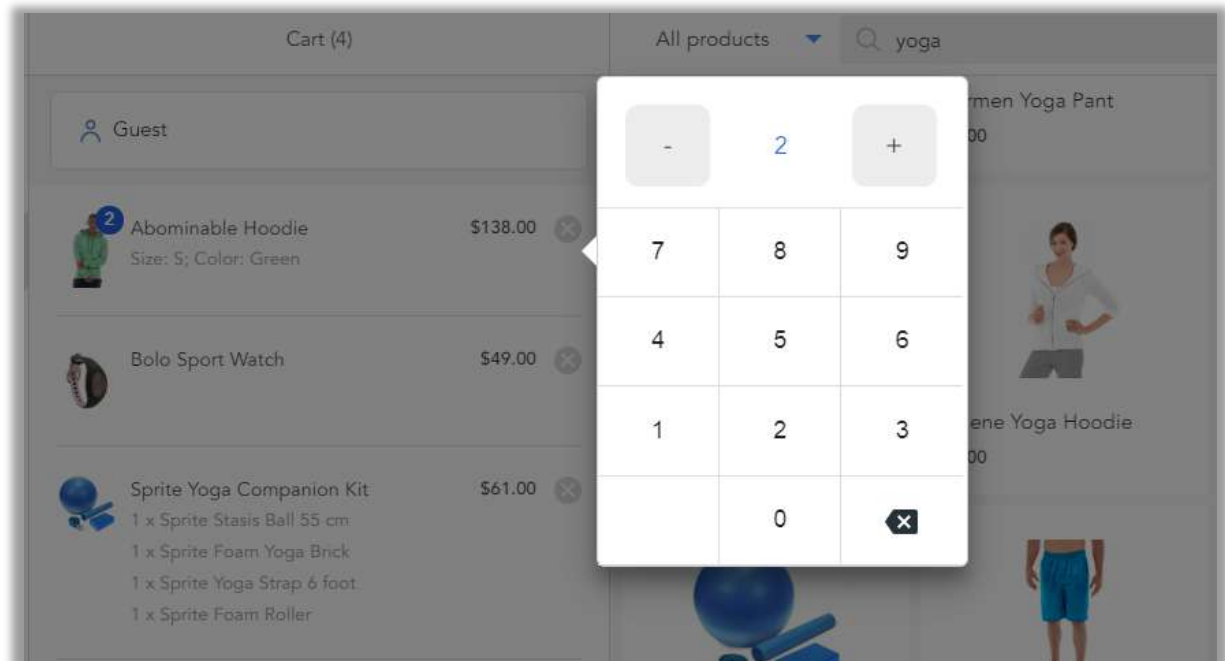
For simple product, configurable product, grouped product; after you edit qty, qty of product option will be updated. Especially for bundle product, quantity of the whole set will be updated instead of product option.
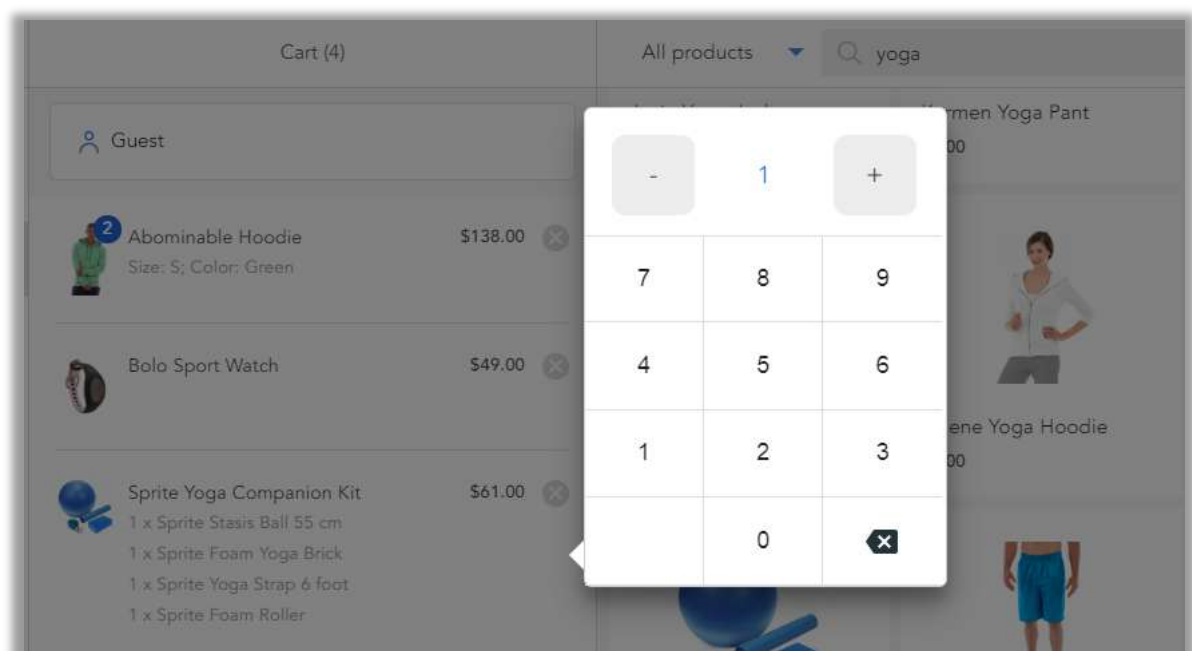
Please note that with product that uses qty decimal, numpad will show decimal separator instead of blank box.

6.8.2. Remove product

In PC, click button X near Product price
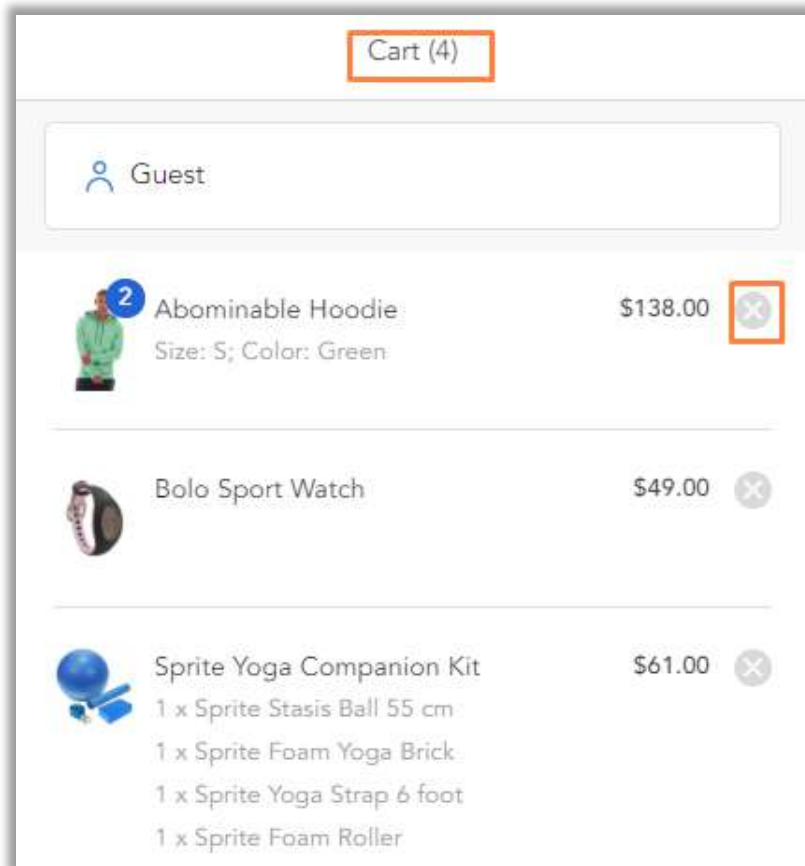
After item is removed successfully, number in cart will be updated immediately.

6.9. How to apply custom price

1- Click on product price to open pop-up Custom Price
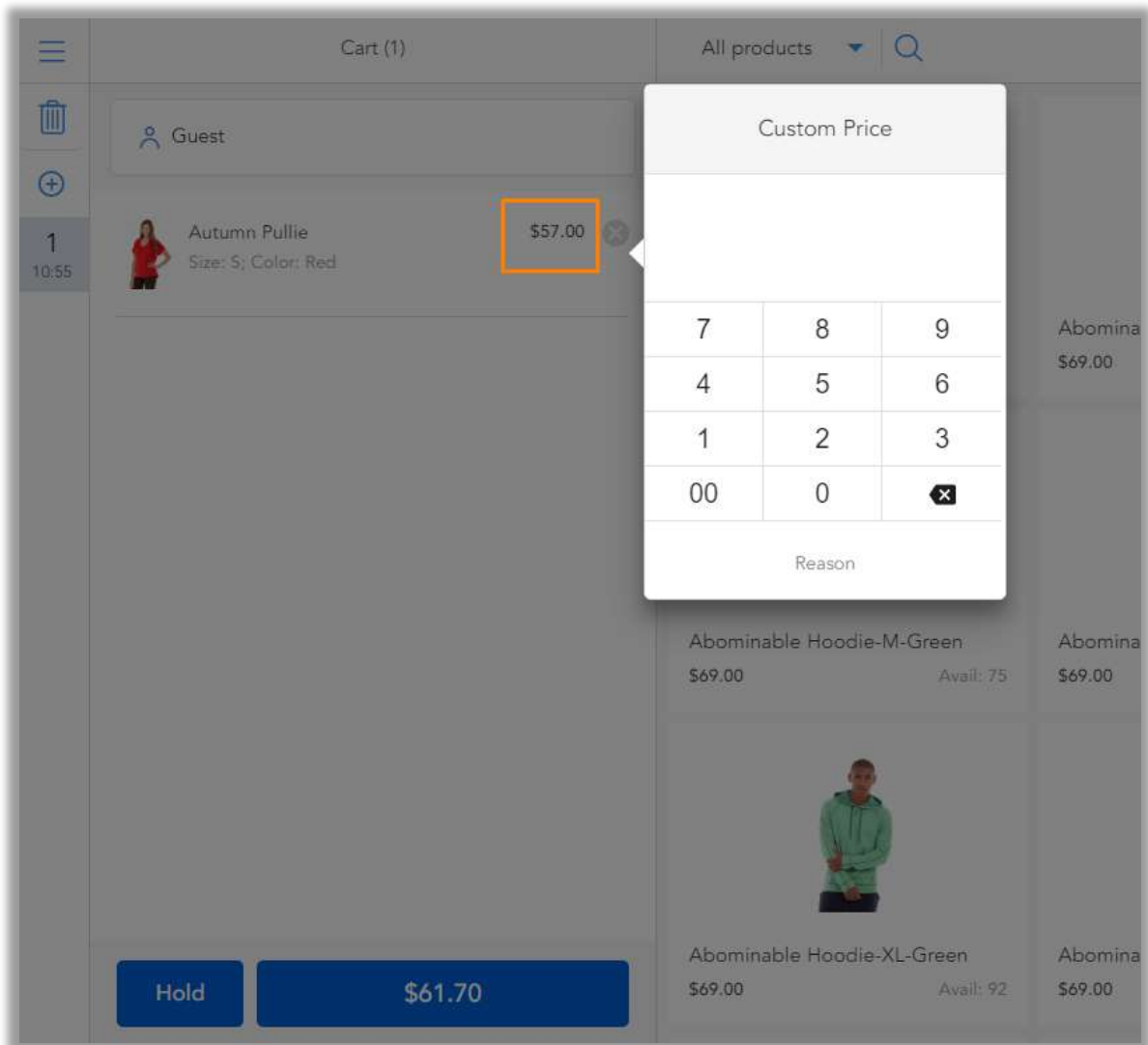
2- Enter custom price and reason (if necessary)
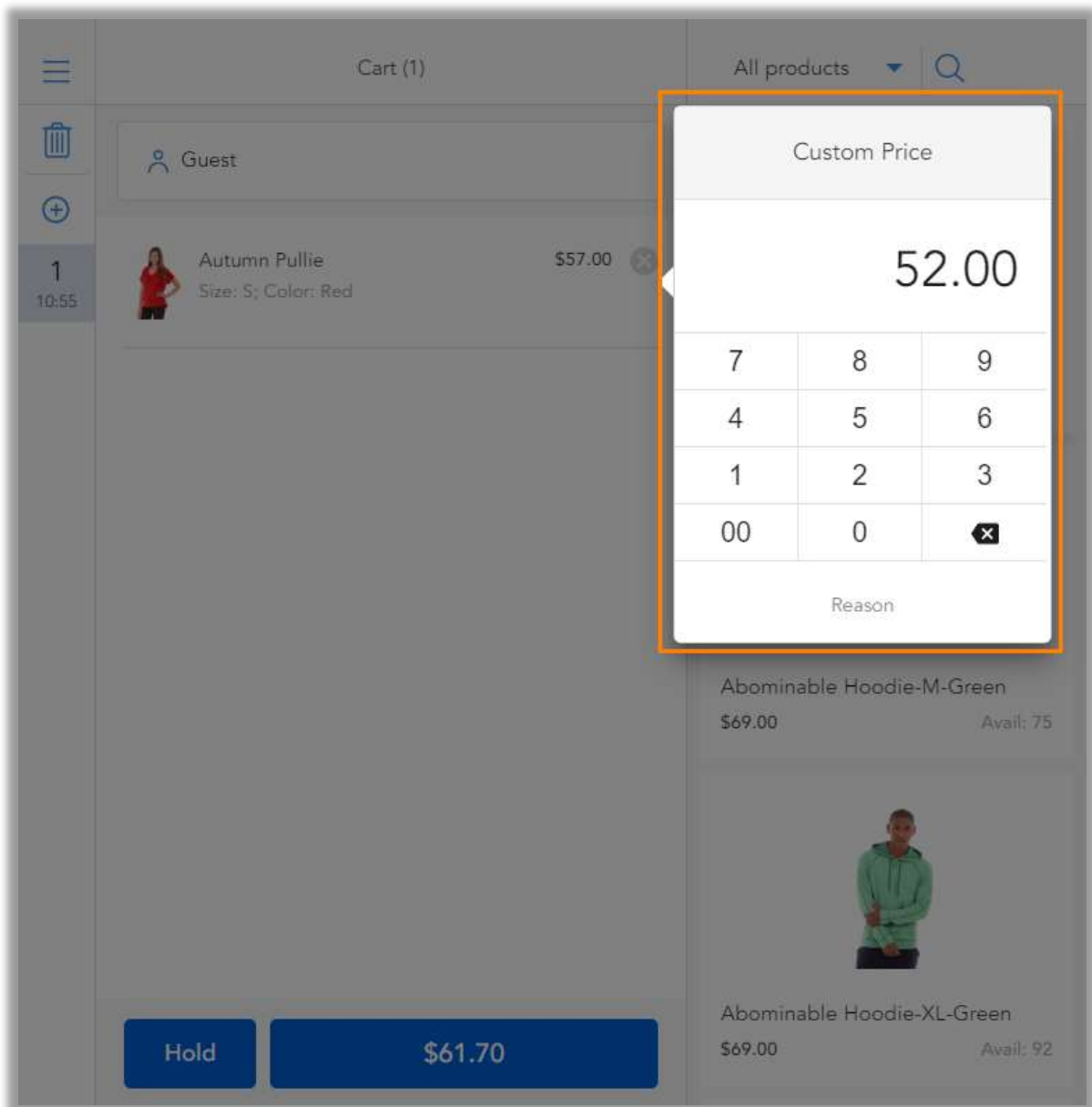
3- Click outside to set custom price for that item

You will see custom price just set and original price below. Promotion, tax, shipping fee… will be calculated based on custom price.
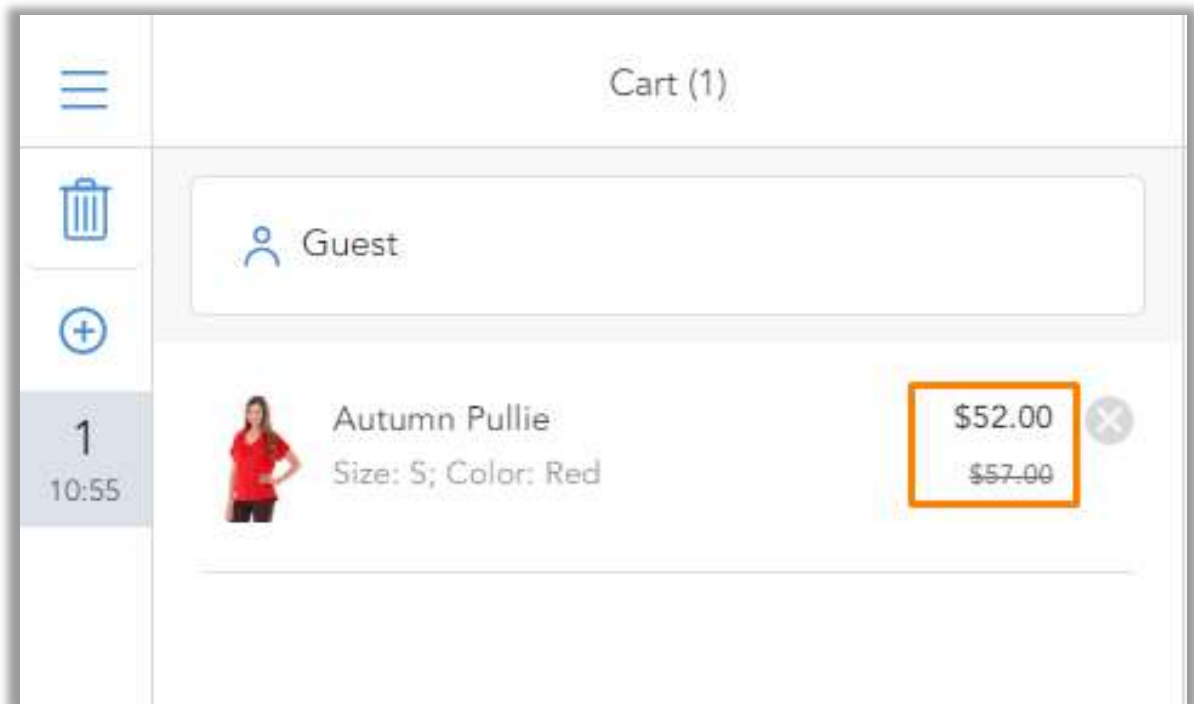
4- To remove custom price, simply open pop-up again and enter 0.

6.10. How to view tax details
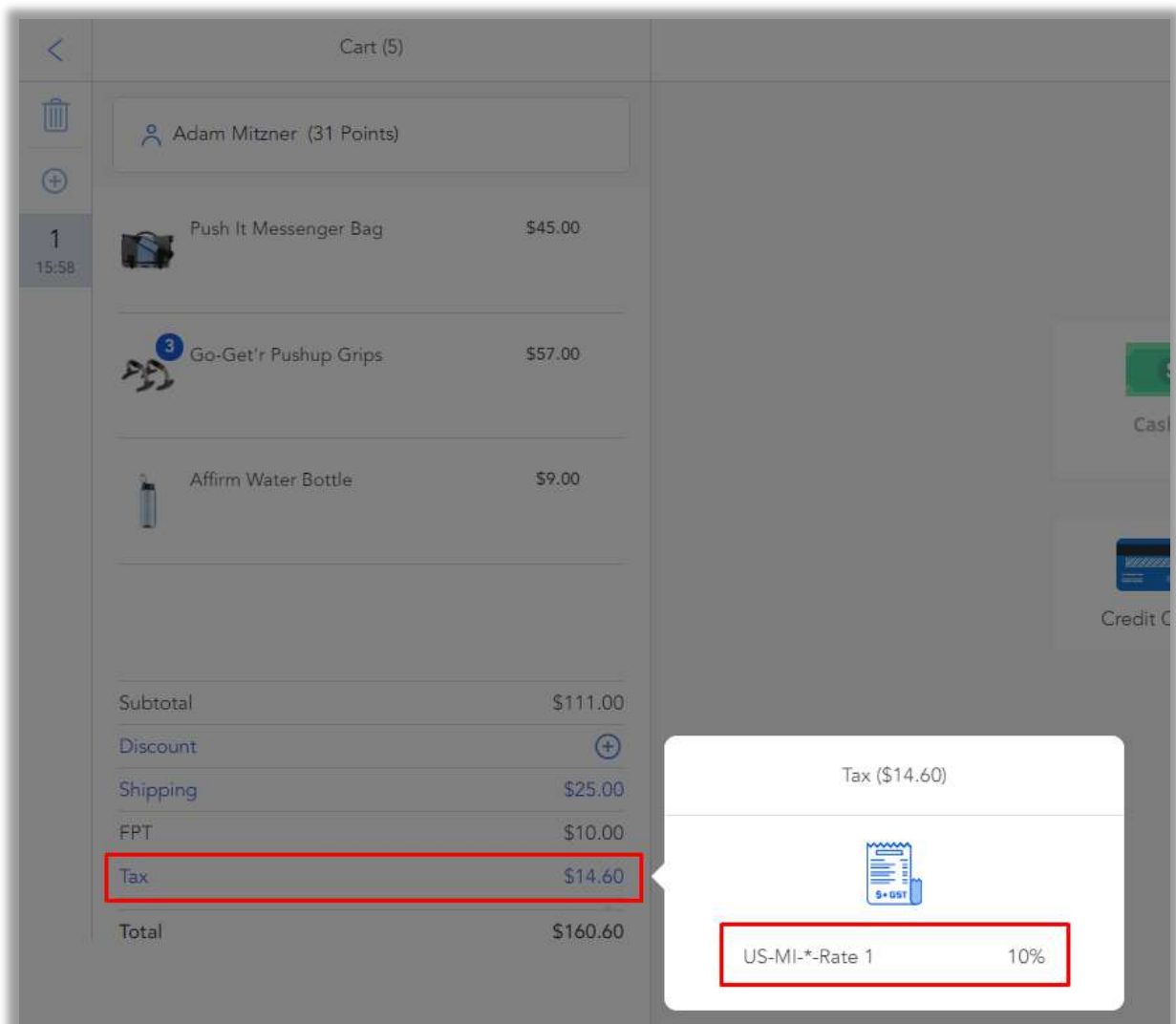
6.11. How to apply coupon code

1- When user is in payment screen, click button on line **Discount**
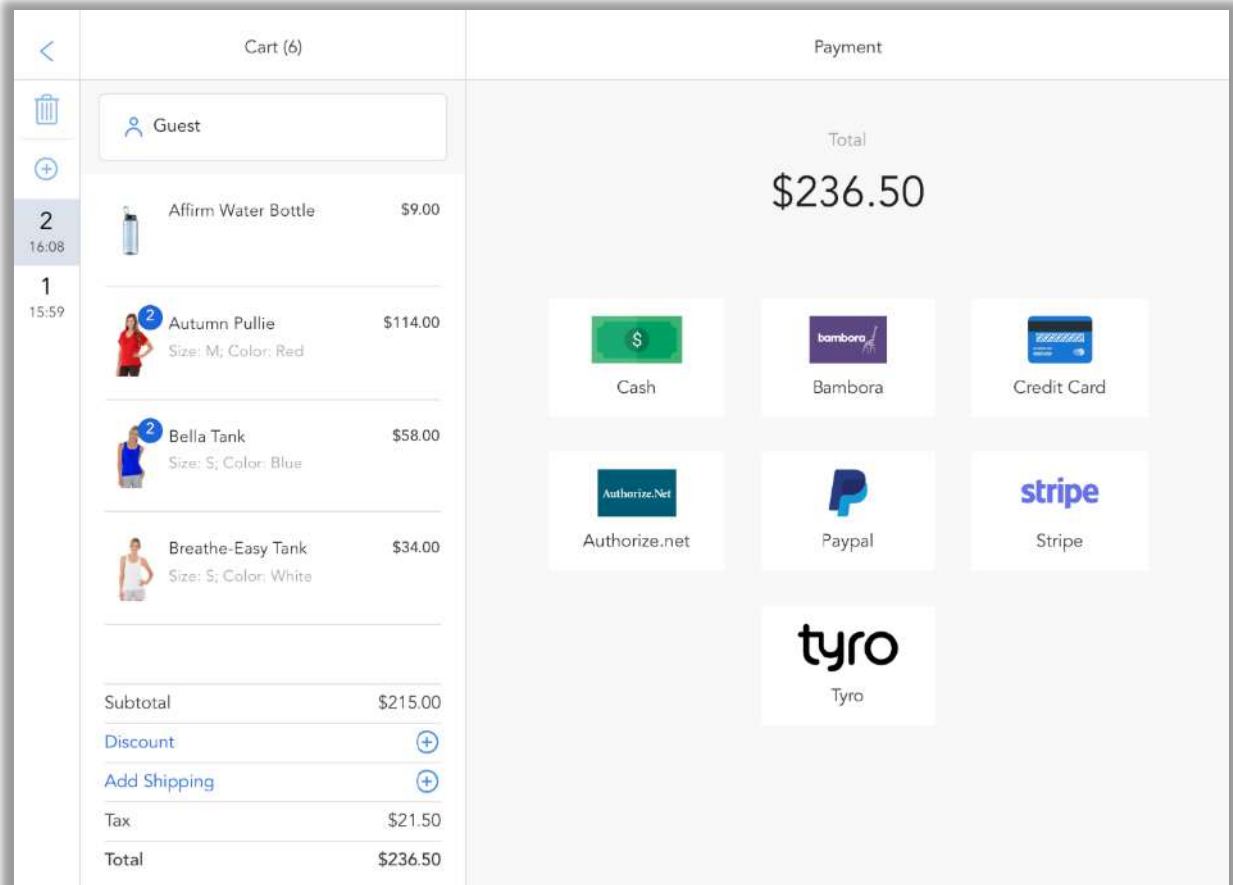
2- Enter coupon code
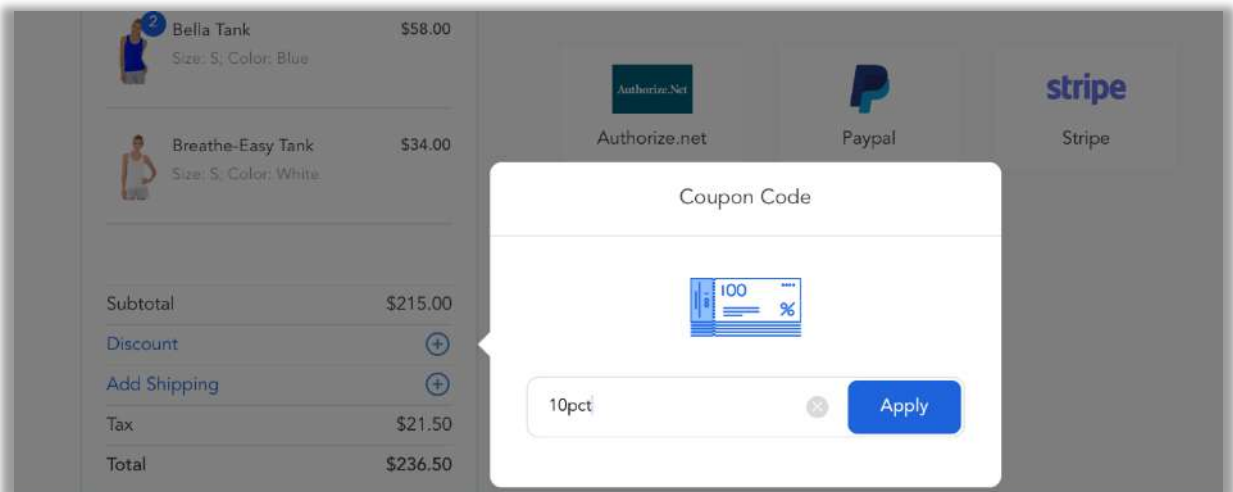
3- Click **Apply** to apply a coupon code. Coupon code applied successfully as well as discount amount will be display in line Discount.
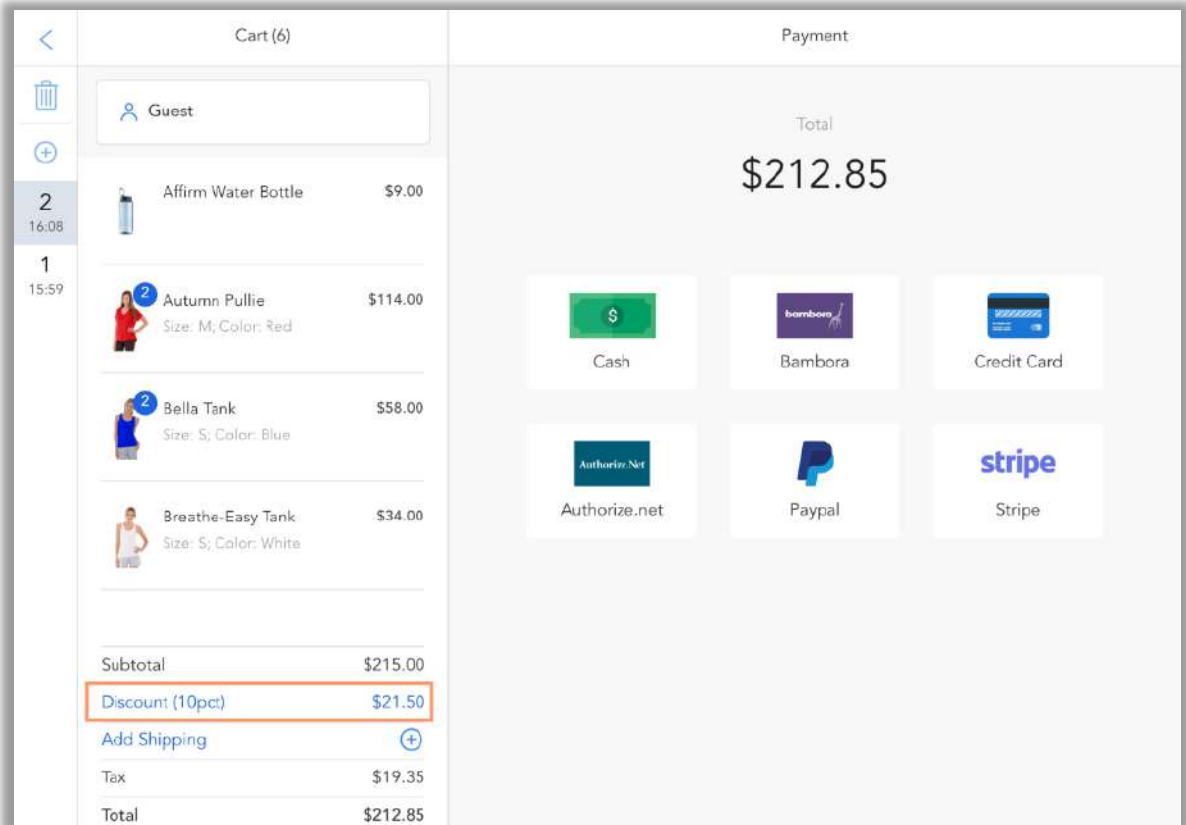
4- If coupon code does not exist or can't be applied for this order, message "Invalid coupon code" will be shown.
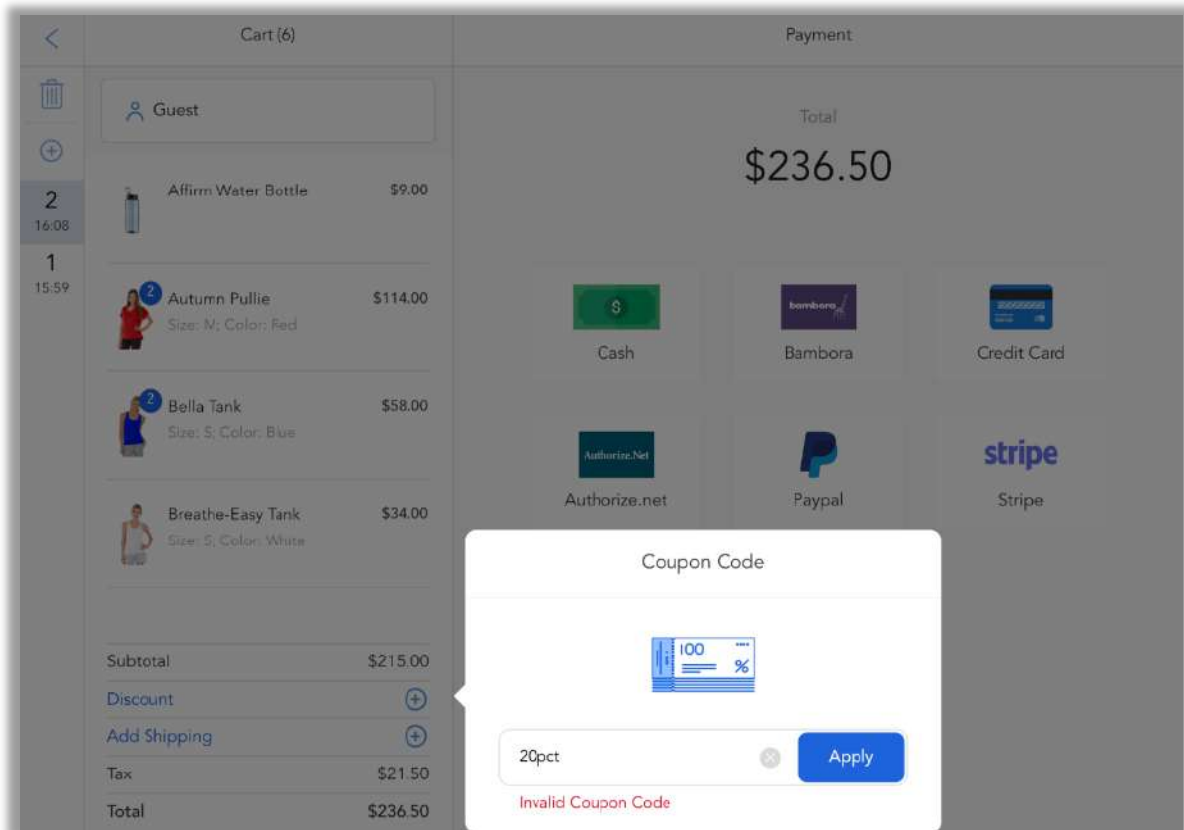
5- Click this line again & click **Remove** to remove applied coupon code
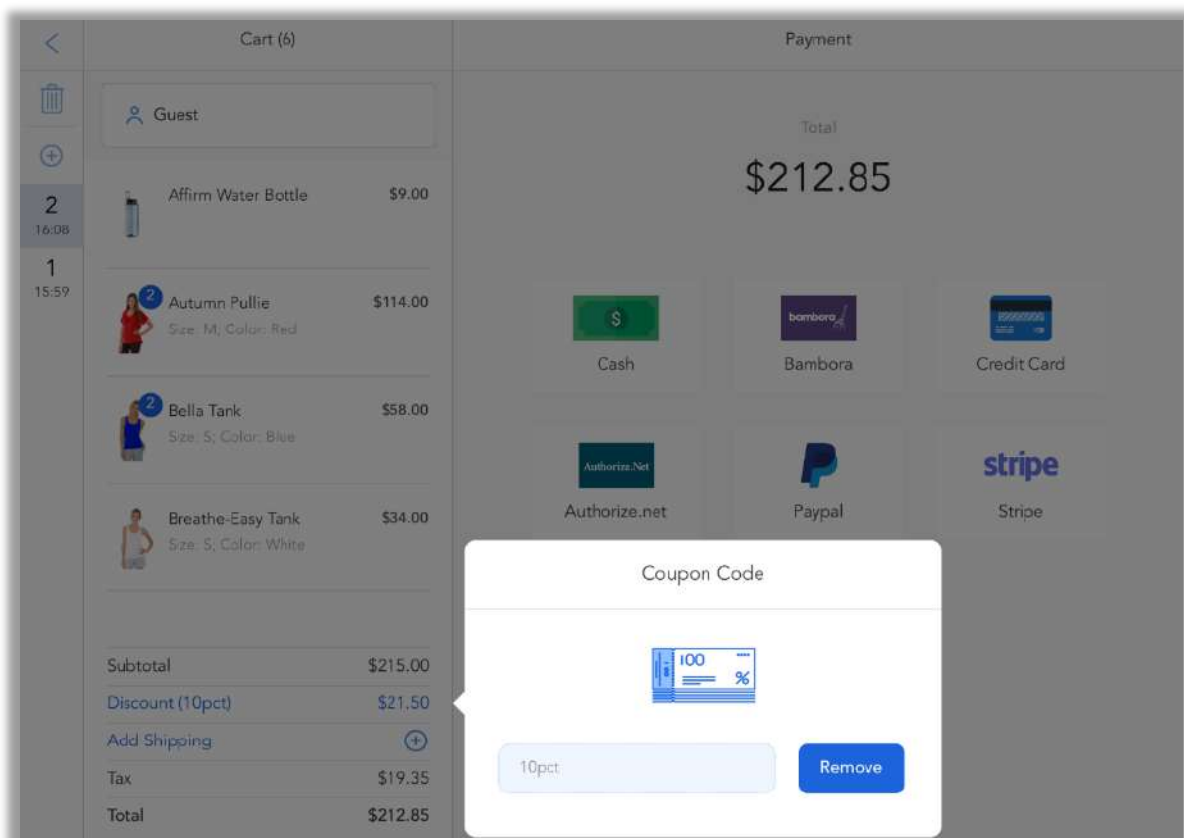
Please note that promotion program that is not assigned a coupon code will be applied automatically when you process to payment screen if order meets program's conditions.

6.12. How to apply custom discount

You can perform this action only if you are assigned permission to set custom discount for order. See **Error! Reference source not found.**How to create a new POS role for more d etails.

1- In payment screen, click button ⊕ on line Discount
2- Swich to second tab to set discount by percentage on the subtotal or to third tab to set discount by fixed amount
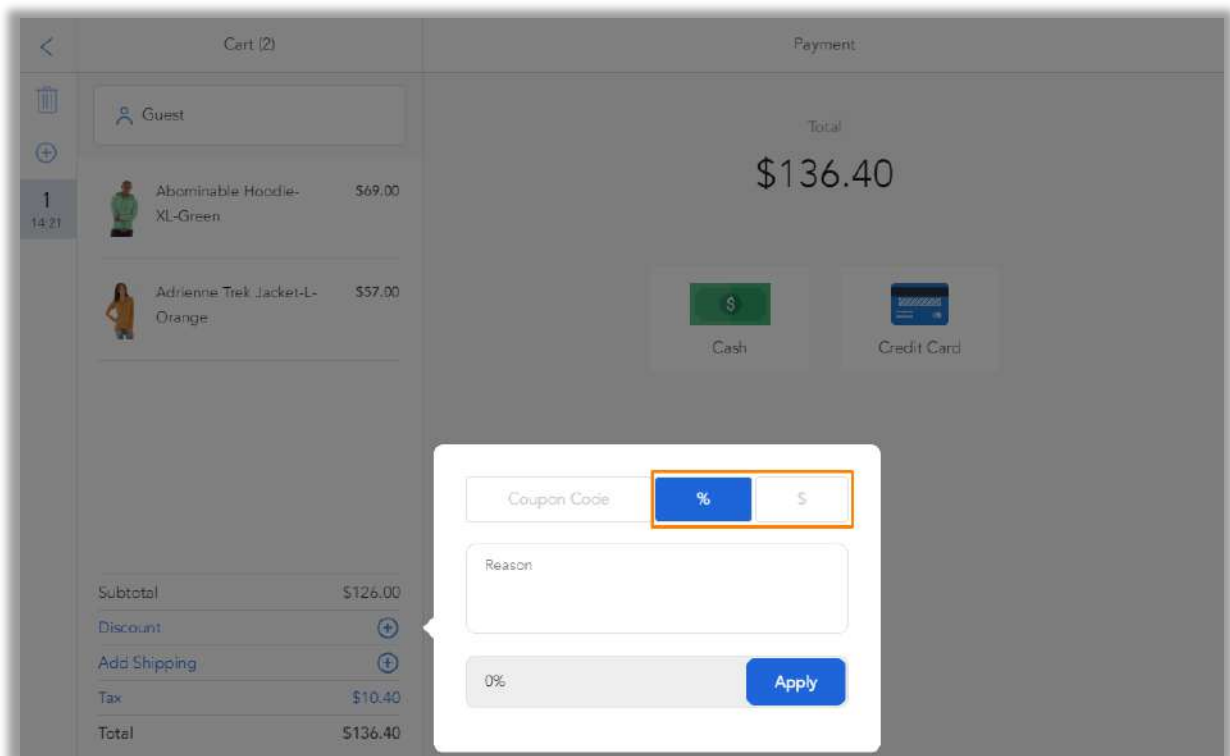
3- Enter discount rate or fixed amount
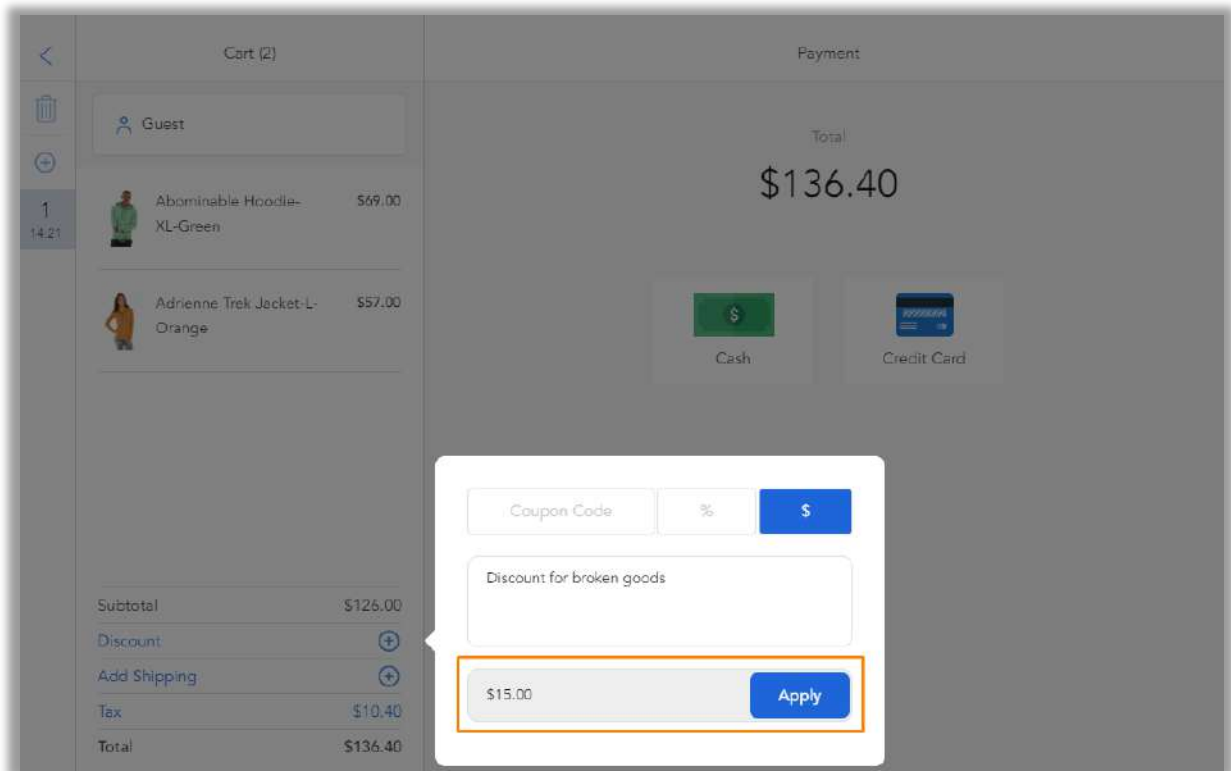
4- Enter reason if necessary

5- Click **Apply**

Please note that custom discount will override all promotions from Magento's cart price rules.

6.13. How to check stock availability on POS

All locations on POS share the same stocks (default Magento available quantity of each product). User can see available quantity of each simple product at the bottom-right corner of

each product. Simple products that are out of stock will be blurred and have icon ⊖ .
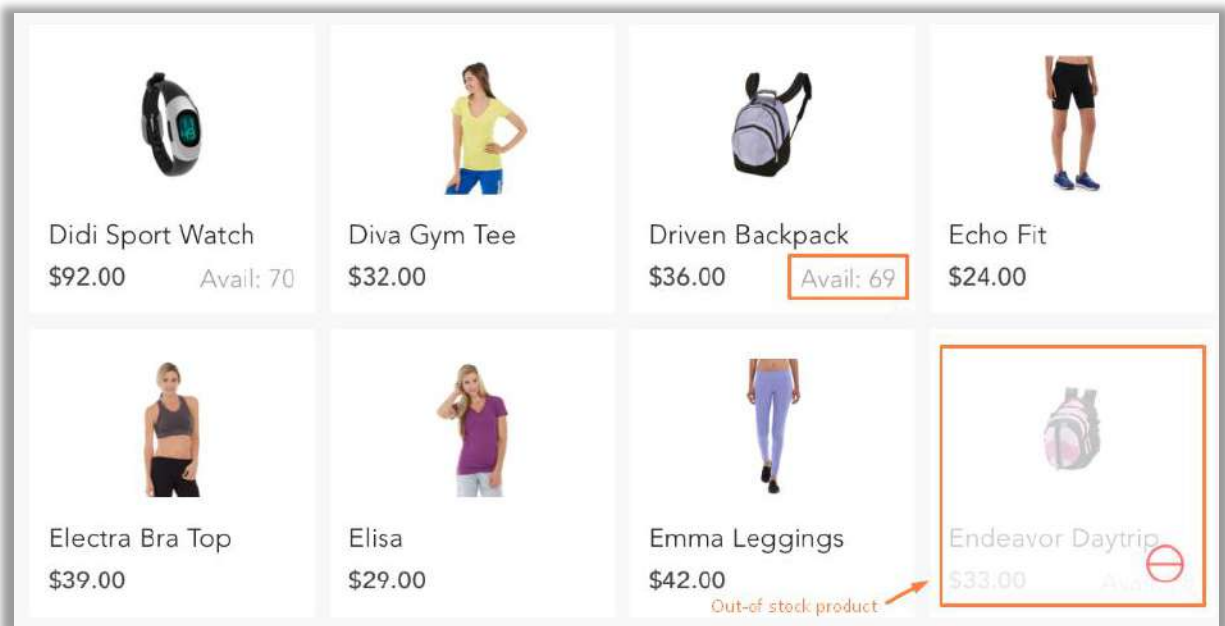
For configured product, user can see available quantity after choosing all attributes of product.
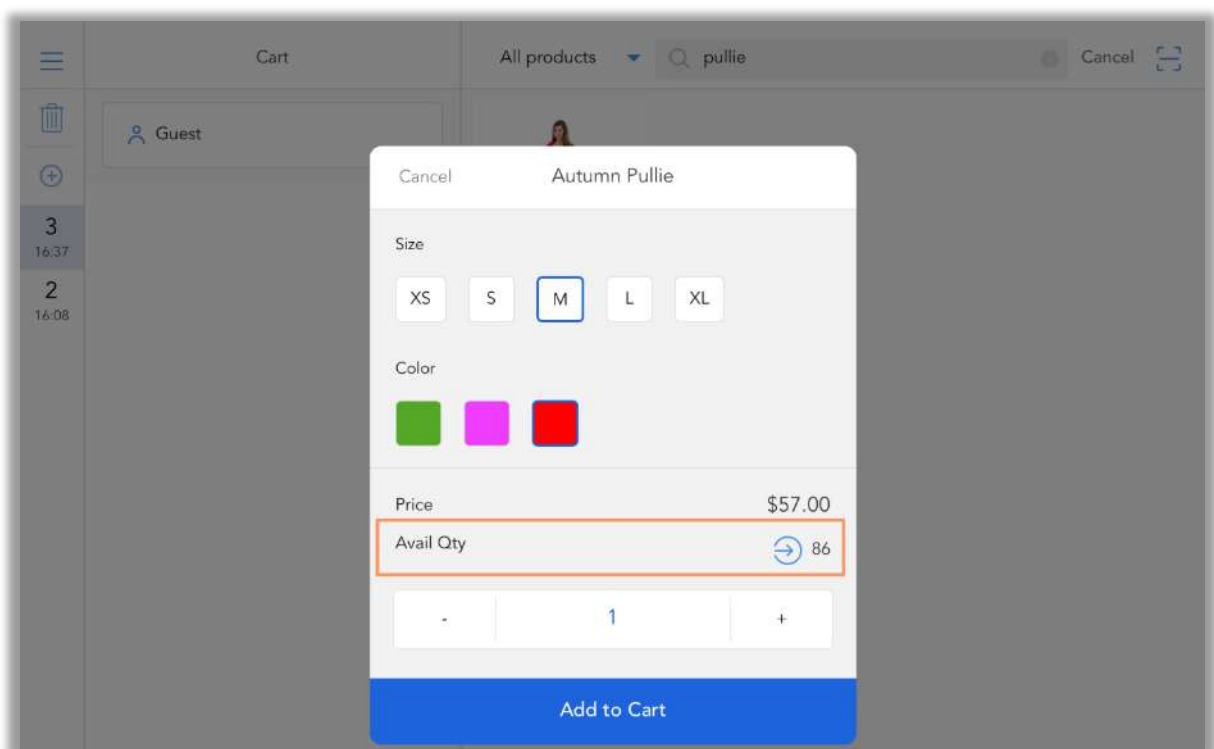
Products that are set do not Manage Stock will not show quantity on POS.

For configurable product, child products that are out of stock will not show available quantity.

Whether you can add out-of-stock items to cart depends on configuration in back-end (see How to configure POS checkout options for more details).

6.14. How to assign order to a customer

6.14.1. Guest checkout

By default, Guest checkout mode will be used for order. Guest checkout is used when customers have not provided their own information.

When you use this mode, the default customer that are configured in backend will be used (Path: **Magento Admin > POS > Configuration > Default Guest checkout**)

There are 2 ways to use Guest checkout:

1- By default, when you create new order
2- When you selected an existing customer, then deselect him for order

6.14.2. Select existing customer

With existing customer in system, you can search or scroll customer list to choose customer.

1- Customer list

The customer list is sorted alphabetically. Moreover, in this listing, you can view the information: **customer name, customer's phone.** By scrolling up & down, you can find you customer that is created in system.

2- Search customer

With a large number of customers in system, you are not able to find them manually. POS system provide search tool to find customer easier. In the search box, you can enter keyword as: customer name, email, phone number. Then, choose customer from suggested results in dropdown list.

Please note that you are able to find customer accounts who are created from another stores, from Magento admin or customer who register in Website.

6.14.3. Edit existing customer

After you chosen a customer to checkout, Guest will be replaced by Customer name. You can click/click to edit. In the pop-up, just edit the pieces of information you want to change. Then, click **Save** to change information & click **Cancel** to discard change.

Note: if you want more or less customer attributes, please configure the attributes in Magento backend. Our POS supports all customer attributes that Magento core provided.

6.14.4. Create new customer

Overview, creating new customer includes 2 steps. You need to go through all steps to create full customer's information. There are:

1- Create General Information
2- Create Customer's Address

Create General Information

If customer hasn't been added in your system yet, instead of searching, click on Create Customer button.

A pop-up is opened with below fields:

- **First name:** enter first name of customer
- **Last name:** enter last name of customer
- **Email**: enter an email address. Email must be unique & valid (as format: abc@xyz.mn)
- **Phone:** enter customer's phone number.
- **Customer Group**: to determine which discounts are available, and the tax class that is associated with the group. Recommend use group General or Retailer for customer who bought in store.
- **Subscribe Newsletter:** this toggle allows you to turn on/turn off. If turn on, customer
- **Address:** click button (+) to add new address. View below for more details.

If the information you inputted is missed or invalid, system will display error icon & message in this field that you need to fix. You will see message as below:

To view error message:

  - In PC: hover to error icon. Message will be hidden when you focus to another area.

Create Customer's Address

After you clicked button (+) Address, system will display a pop-up to create an address. You need to go through all steps below (except for optional field) to add new address successfully.

In this pop-up, click **Save** to save address. Click **Cancel** to discard change & POS will go back to previous step (General Information) & keep inputted information.

- **First name:** enter first name of people in address. Default value is first name of customer that you inputted in General Information step.
- **Last name:** enter last name of people in address. Default value is last name of customer that you inputted in General Information step.
- **Company** – optional field: enter company name (if needed)
- **Phone**: enter the customer's phone number that is associated with address. Default value is phone of customer that you inputted in General Information step.
- **Street**: enter the street address of customer

- **Street 2** – optional field: enter second line of the street address (if needed)
- **City**: enter the city where the customer address is located
- **Zip Code**: The state or province where the customer address is located.
- **Country:** The country where the customer address is located. Default value is country of location which store is located
- **State or Province**: This is required field for some countries that have state or province (example United State)
- **VAT Number**: If applicable, the value added tax number that applies to the customer at this address.
- **Use as default Shipping Address**: this toggle allows you to turn on/turn off. For the first time creating address for customer, this toggle always = ON & you can't turn off this button.
- **Use as default Billing Address:** this toggle allows you to turn on/turn off. For the first time creating address for customer, this toggle always = ON & you can't turn off this button.

Please note that max characters of all fields in this form = 255. You can't input more than 255 symbols.

Furthermore, POS provides Google Suggestion function to help you enter address faster. Pre-condition is that POS is working in online mode. Click **Yes** (when the browser requests to access your location) to suggest more exact.

After you choose an address from Google suggestion list, 4 information below will be filled automatically:

- City

- Zip Code

- Country

- State or Province

After all above steps, remember to click on **Save** button to save the customer information for the next checkout.

6.15.   How to hold an order

Your customers can't make up their minds yet, or are unable to make a payment meanwhile? The features can put these orders on hold - no limit in time - until they are ready to continue processing.

6.15.1. How to hold an order

Once you added at least 1 product to Cart, button Hold will be lighten up & you can click on.
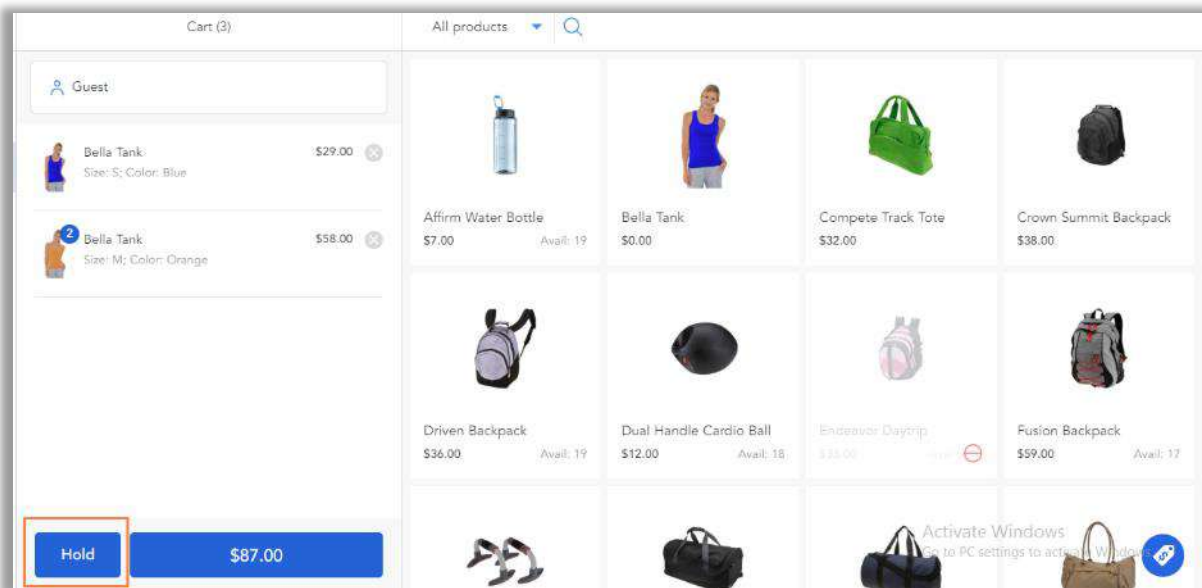
6.15.2. How to check an on-hold order's information

To check order information, you need to access left menu, then click button [image] to go to On-hold Orders page.

On-hold order details will saved information about:

- Item ordered, Qty ordered
- Customer information
- Billing Address, Shipping address: are default addresses of a customer.

6.15.3. How to checkout an on-hold order

If customer comes to your store again to take final action for his on-hold order, you can continue processing for order. Click on Checkout to process checkout. After you click Checkout in on-hold order, this order will be deleted from order list.

In case when a customer goes back, his on-hold order that is created before has at least 1 item is out-of-stock or disable. There are 2 scenarios depend on the configuration about add product to cart (Path: Backend > POS > Configuration > Checkout > Add out-of-stock product to Cart):

- If the configuration: **Add out-of-stock to Cart = YES**, item that is out-of-stock will be added to Cart as usual
- If the configuration: **Add out-of-stock to Cart = NO**, item that is out-of-stock will not be added to Cart & system will display confirmation message.
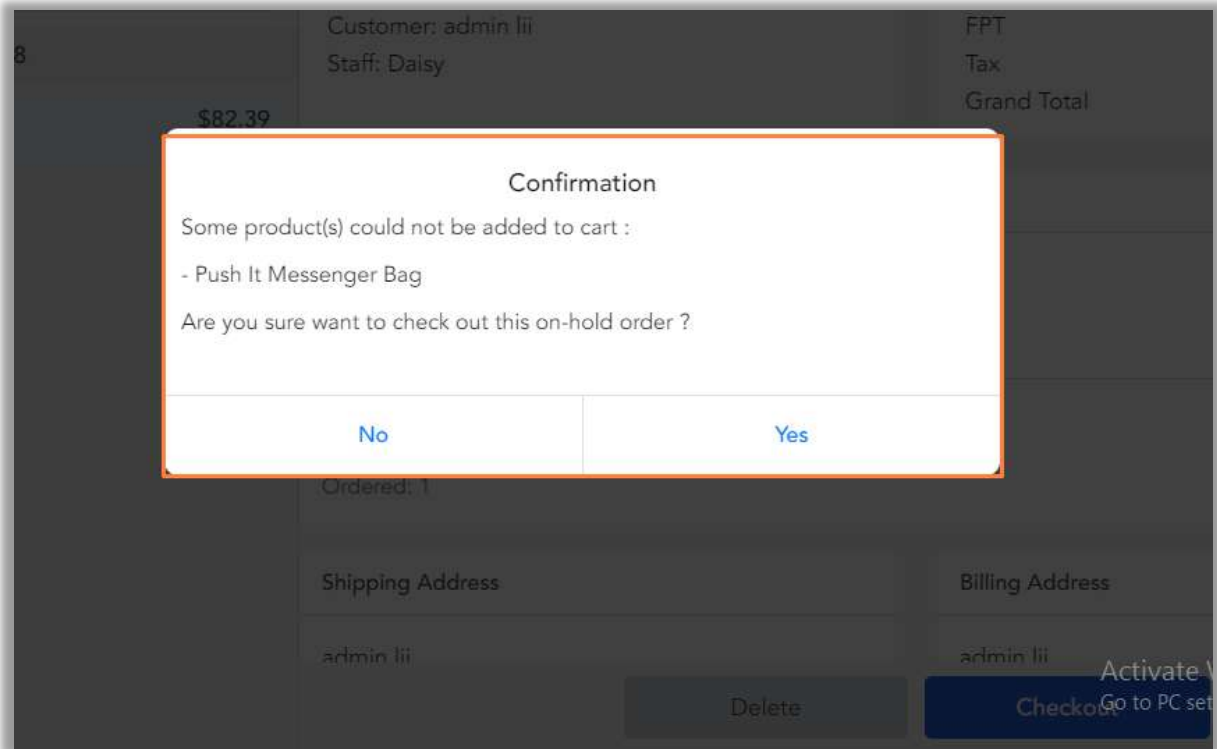
If you still want to check-out this on-hold order, system will remove out-of-stock item(s) & disable item(s) & add the rest item(s) to Cart normally, with updating price from Catalogue Price.

6.15.4. How to delete an on-hold order

You are able to delete an on-hold order if it is not effective anymore.
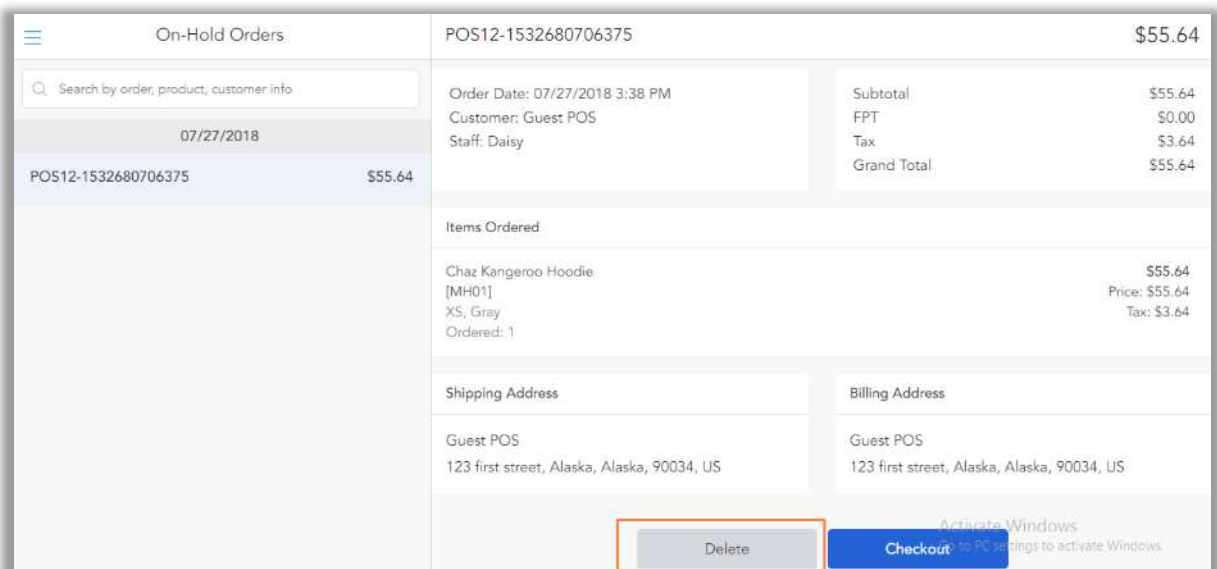
6.16. How to use multi-cart checkout

6.16.1. How to add new cart

You can create multiple carts to serve multiple customers at the same time. You can create a new cart if current cart is not empty. Click button ⊕ to add new cart.
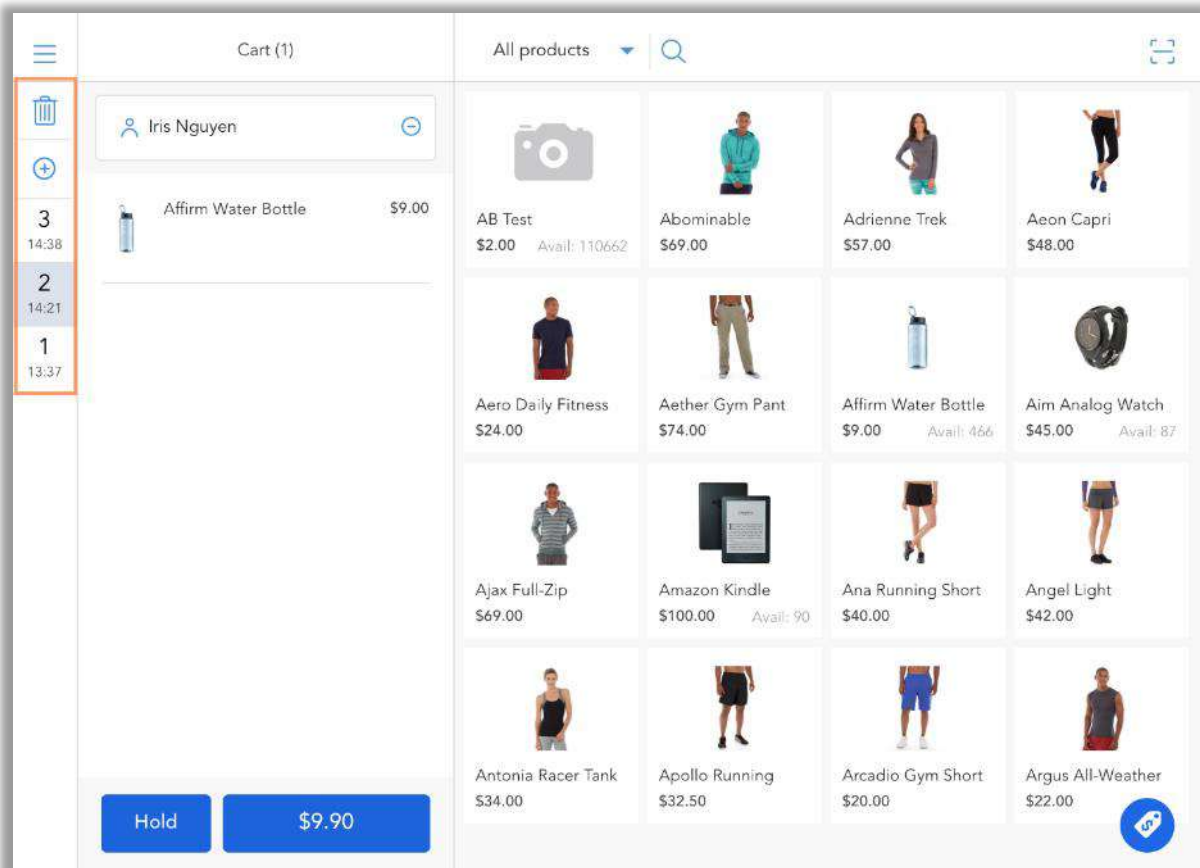
This will create a new cart with no product or customer. Carts are numbered according to time created. You can click to switch between carts.

6.16.2. How to delete cart

Click button 🗑 to delete a cart. If configure Need to confirm before deleting cart = Yes, cashier will need to confirm the deletion.
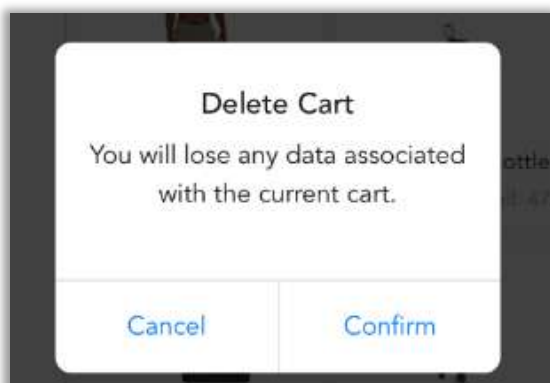
6.17. How to make payment at checkout

When you have been through steps to add customer & product(s) to Cart, let's move to the Checkout process. Press button {Amount} at the end of the Cart page. This amount is the total amount of order.
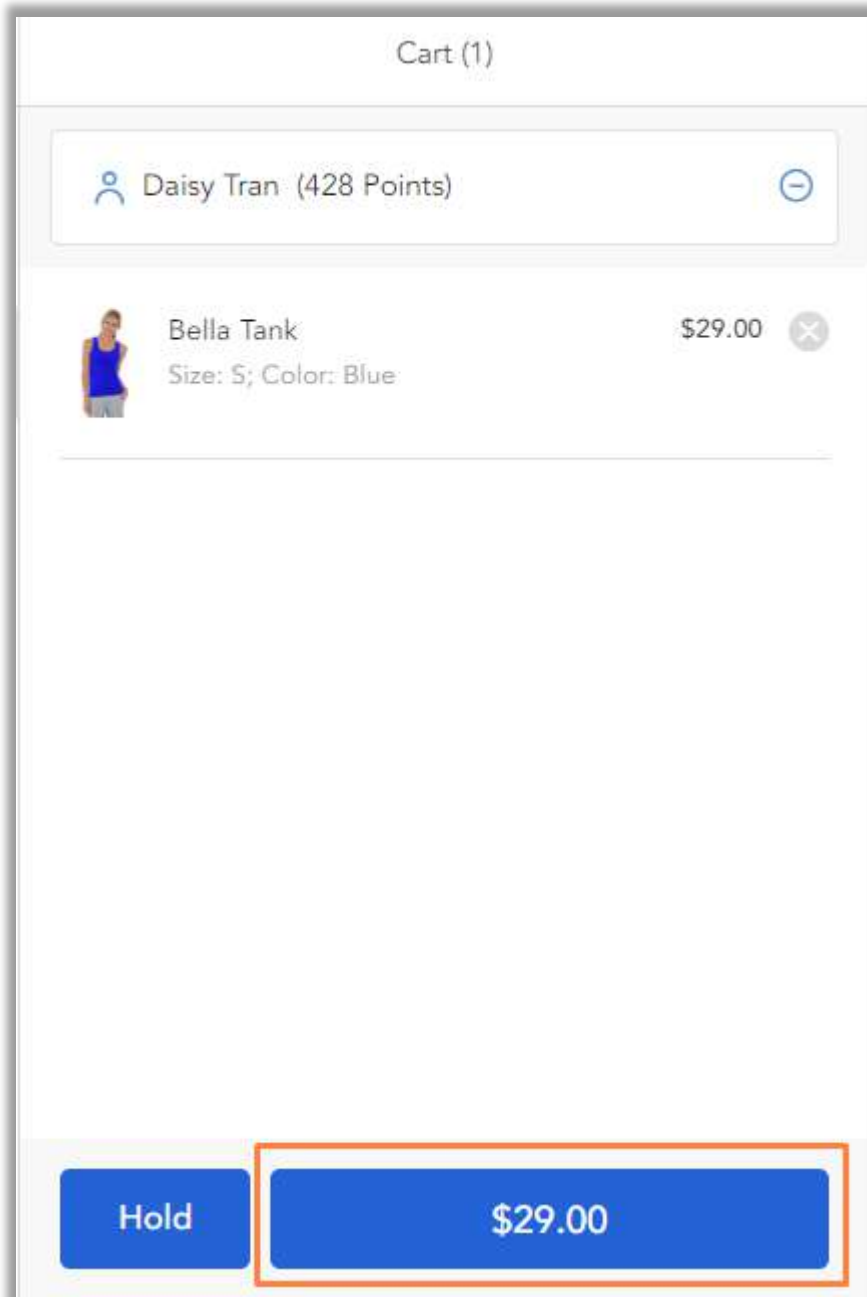
You will be redirected to the next page. In this page, you are not able to edit Cart (change customer, edit product, delete cart).

There are 2 areas in this page. Cart information in the left & Payment method in the right.

To make payment, PWA POS allows you to select simultaneously different payment methods for an order. The information below will provide you for more details of each payment method.

6.17.1. How to pay by Cash

In Payment Method screen, you need to choose Cash.
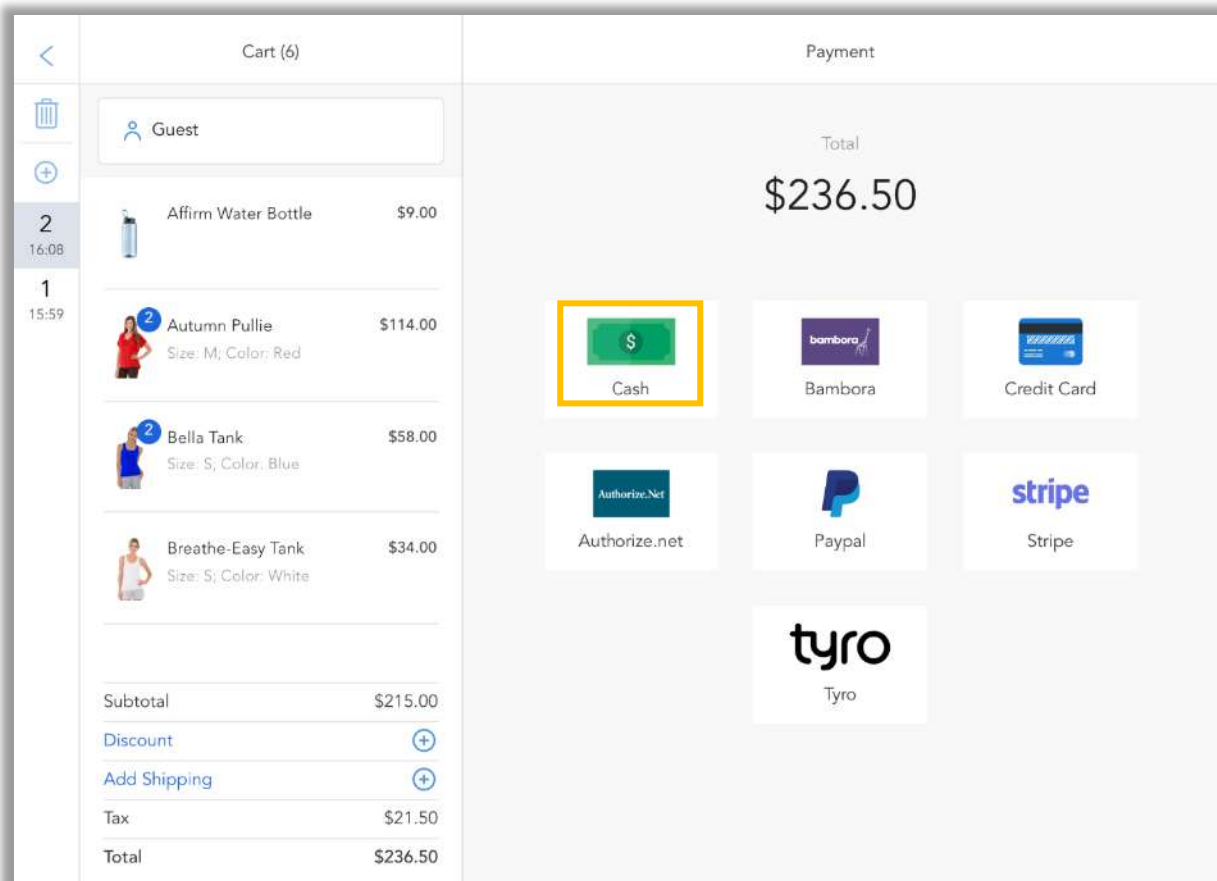
Then, you will be in Cash screen. In this screen, system will show Remaining amount and you need to fill the amount of money that customer pays.
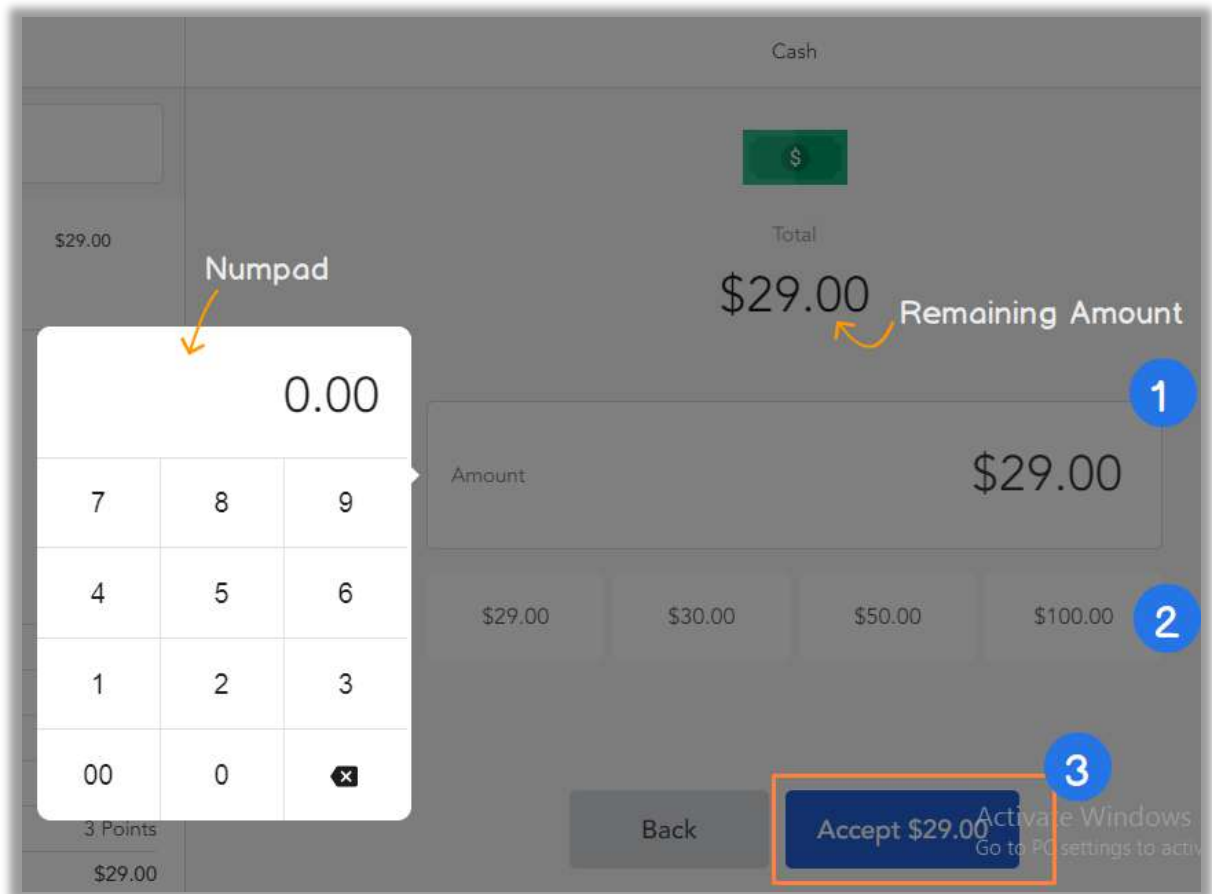
1- Allow you to input money amount. When you click to this field, system will display Numpad to help you input easier. Please note that, For amount, you can input more than remaining amount of order

2- This block is suggestion amount. Depend on the currency that you are configured in backend, system will give you some suggestion amount. When customer give you amount that is equal to suggestion amount, you can press to this amount.

3- This block is action. There are 2 actions: Accept or Back. Press Back if you want to change something & not want to use this payment method. Press Accept to accept this amount.

After you press Accept, you will be redirected to Payment Overview Screen.

After you added the amount of Cash, you will be in the above screen. In this screen, you can see Remaining amount if Cash amount < Total order amount; Change (is the amount you need to give customer back) if Cash amount > Total order amount. Moreover, you can:

- Click to Cash method to edit amount.
- Click button (-) to deselect. System will go back to Select Payment method screen
- If order has been paid fully, you can press button Complete order.
- Click Mark as Partial if order has remaining amount. System will display confirmation message that what you sure to complete order or not. Click Cancel to go back to previous screen, or Complete order to place order.
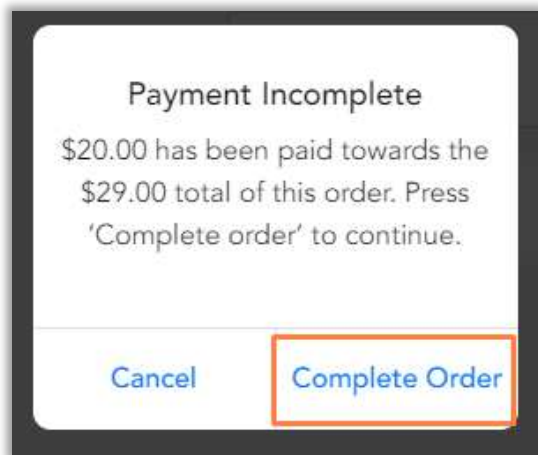
6.17.2. How to pay by Credit Card (offline)
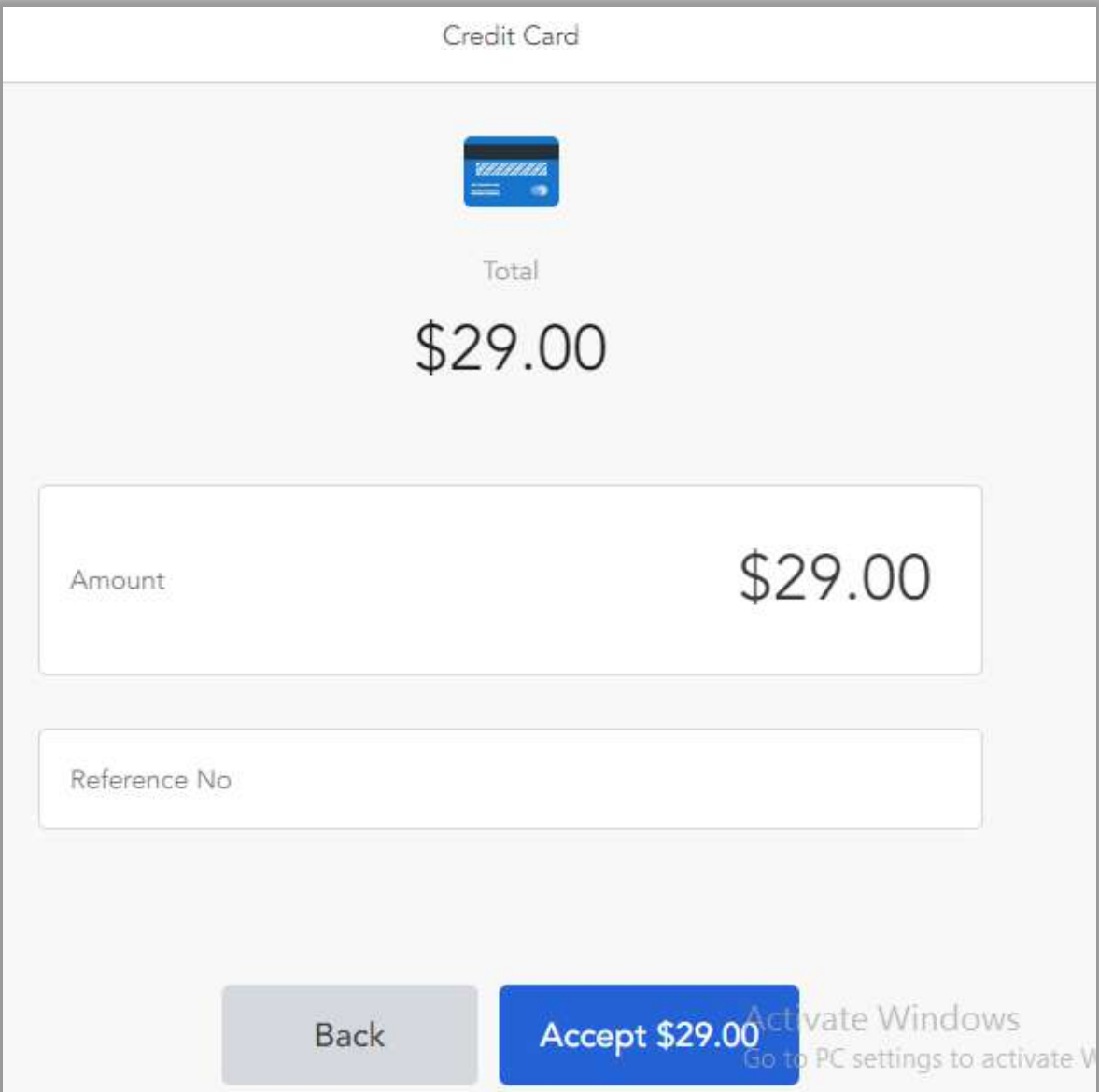
Using Credit Card method is the way to allow business owners like you to accept credit card transactions even though your credit card terminal has temporarily lost its internet connection.

Similarly to Cash, if Credit Card is configured Enabled in backend, you can choose this method in Checkout Screen.
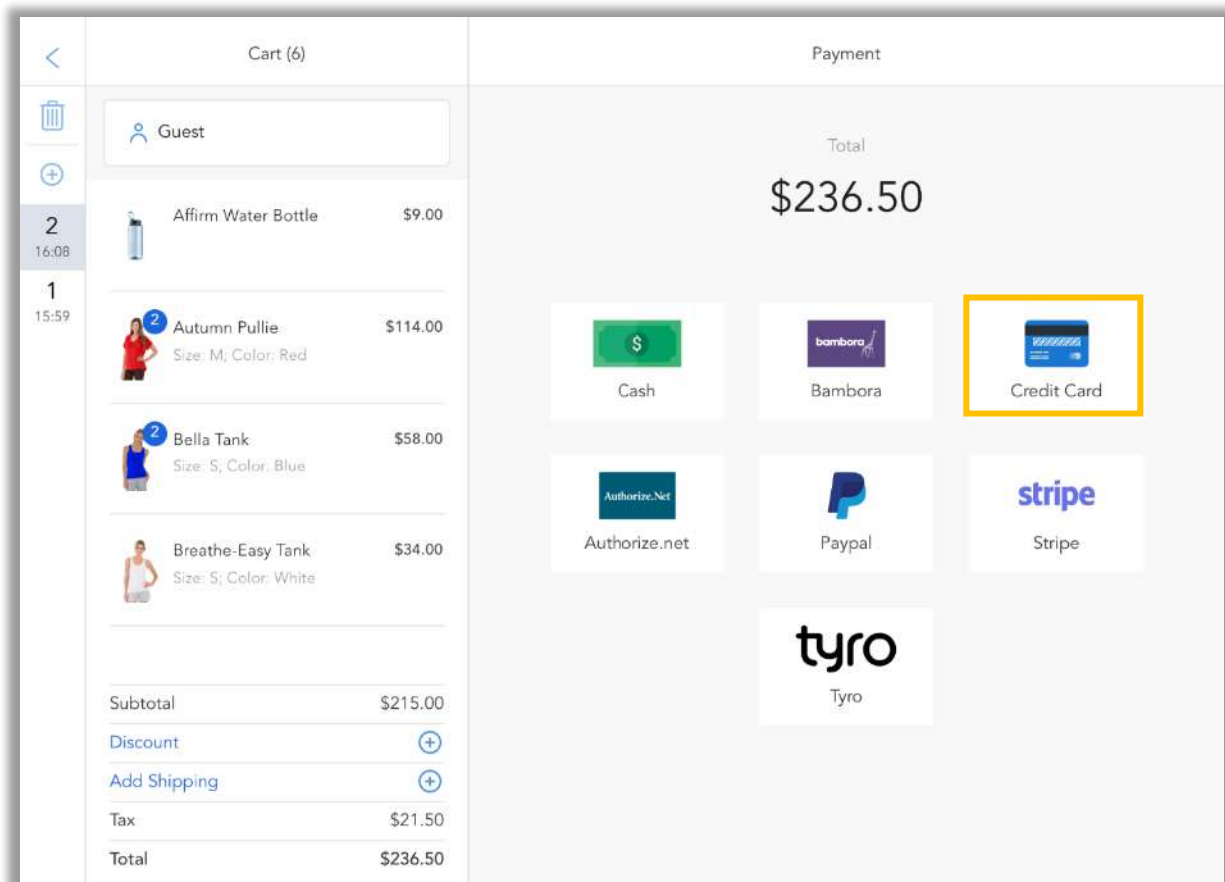
There are 3 different things between Cash & Credit Card screen:

- The amount to input in Credit Card screen must be less than total order amount.
- Credit Card screen includes Reference number field. You can input Reference number of payment transaction to check later.
- Credit Card screen has no suggestion amount.

Like Cash method, after you accepted the Credit Card amount, you will be redirected to next page. You can edit, deselect chosen payment method. After that, order will be completed.

6.17.3. How to pay by PayPal

6.17.3.1.   How to make payment with Card information

Select PayPal in Payment method screen. Please ensure that you has configured PayPal integration successfully in backend. This payment method is working only in online situation, so you need to connect to Internet if POS is working in offline mode before.
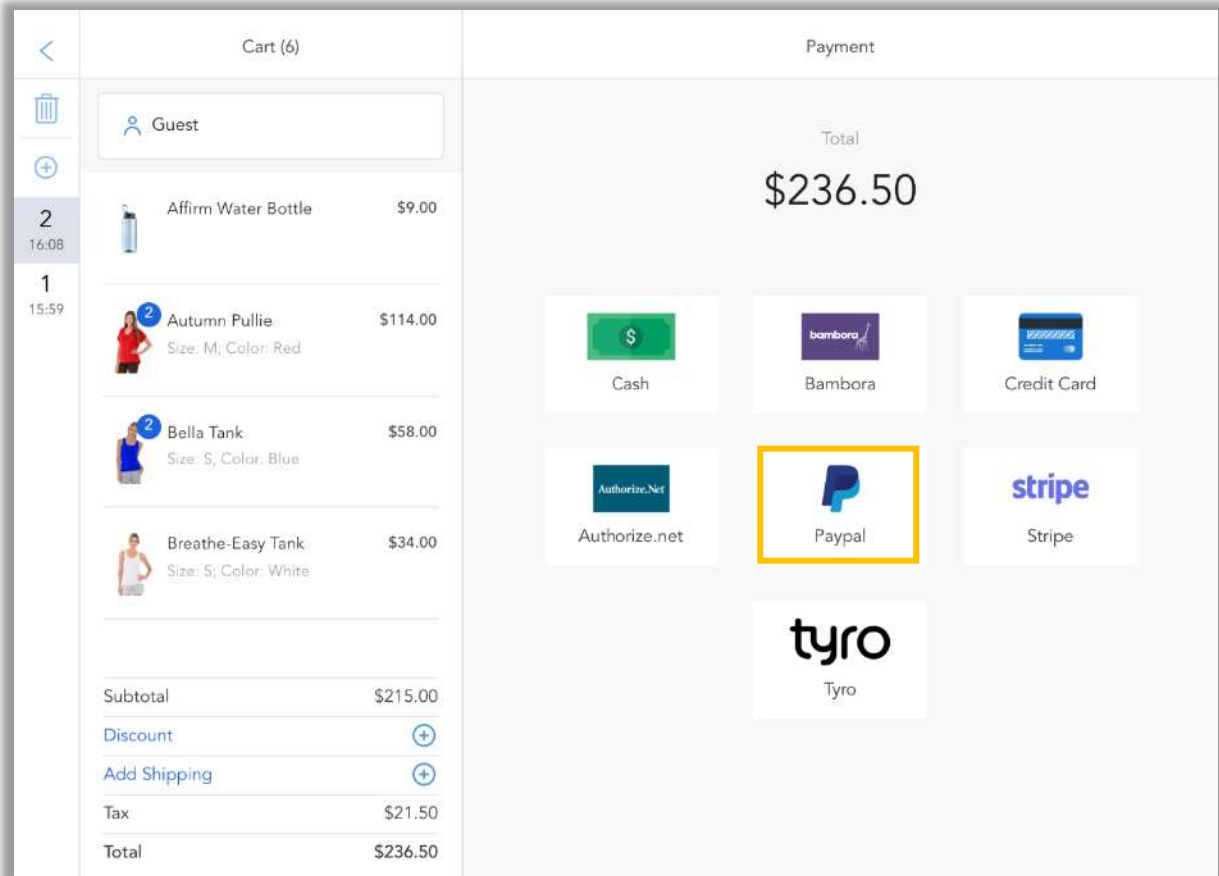
If you input card information manually, please follow these steps:

1- Edit the amount of money that will be paid via PayPal gateway. Please note that you cannot input amount more than Remaining amount.

2- Input Name on Card: input cardholder's name in the front of card

3- Input Card Number: input card number in the front of card. Because of security reason, characters will be encoded as * instantly, except for 4 ending characters.

4- Input Expiration Date: input the expiration Date in the front of card. You can only type 4 digits & system will format it as MM/YY.

5- Input CSC: input card security code. With Visa, MasterCard & JCB, this number is in the back of card – is 3 ending numbers.
   With American Express, CSC is 4-digits in the front of card.

6- Click Accept to accept this payment method.

Another way to fill this form is using credit card reader. The method allows you input information easier.

1- Edit the amount of money that will be paid via PayPal gateway. Please note that you can't input amount more than remaining amount.
2- Click on 'Click to swipe card' to activate card reader device. Make sure that credit card reader is connected to POS before.
Until this status is changed to 'Ready to swipe', you need to swipe card through the device to get card's information.

Immediately, POS will automate filling out 3 information: Name on Card, Card Number, Expiration Date.

3- Enter CSC manually to complete this form
4- Click Accept to accept this payment method.

After all above steps, you will be go to Payment Overview screen with information of chosen payment method.

After you click on Complete Order, system will display loading icon when authorizing payment. POS system will received transaction status from PayPal. If transaction failed because of many reason such as: Internet connection lost, Invalid Account number…; POS will display message to notify you.

Order will be completed when transaction processed successfully.

6.17.3.2.   How to make payment with PayPal Email

1- Switch the toggle to **Pay by Email** option
2- Enter email address of customer
3- Click on Accept

After order is completed, the customer's email address will be received an email from merchant's email address. Customer will be received an invoice & he has duty to pay for merchant. After customer has paid, order will be updated in POS system.

Please note that after you place order successfully & customer has not paid via email yet:

- Total Paid & Total Due haven't been updated yet
- Remaining Amount will be updated

Let me give you an example:

Total Order amount = $200

You accepted Cash = $20 & PayPal Email = $50

So, after you placed order meanwhile customer has not paid via email yet:

- *Total Paid = the amount you really received from customer = $20*
- *Total Due = the amount that you has not received from customer = $200 - $20 = $1800 - $20 = $180*
- *Remaining Amount = the remains amount that customer must pay for merchant for the next time = $200 - $20 - $50 = $130.*

6.17.4. How to pay by Stripe

1 Select **Stripe** in Payment method screen.

Please ensure that you have configured Stripe integration successfully in backend. This payment method only works in online mode, so you need to connect to Internet if POS is working in offline mode.
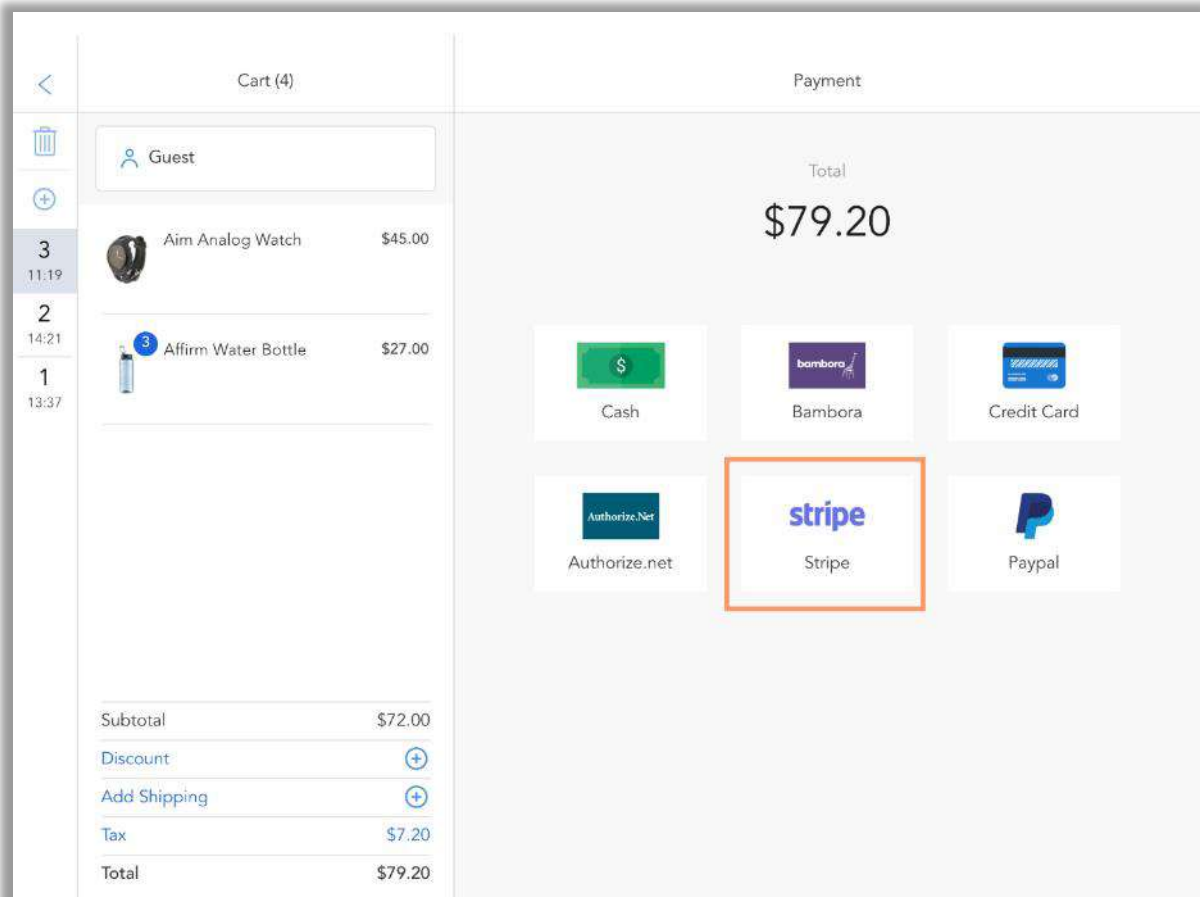
2 Edit the amount of money that will be paid via Stripe. You can't input amount bigger than remaining amount.

3 Click on **Click to swipe card** to activate card reader device. Make sure that credit card reader is connected to POS before.

When status changes to **Ready to swipe**, you need to swipe card through the device to get card's information. Following information will be filled: Name on Card, Card Number, Expiration Date.

If you do not have a card reader, you can input card information manually:

- Input **Name on Card**: input cardholder's name in the front of card (optional)
- Input **Card Number**: input card number in the front of card. Because of security reason, characters will be encoded as * instantly, except for 4 ending characters.
- Input **Expiration Date**: input the expiration Date in the front of card. You can only type 4 digits & system will format it as MM/YY.

1- Enter **CSC** number. Normally, you can find this number in the back of card.

2- Click **Accept** to accept this payment method
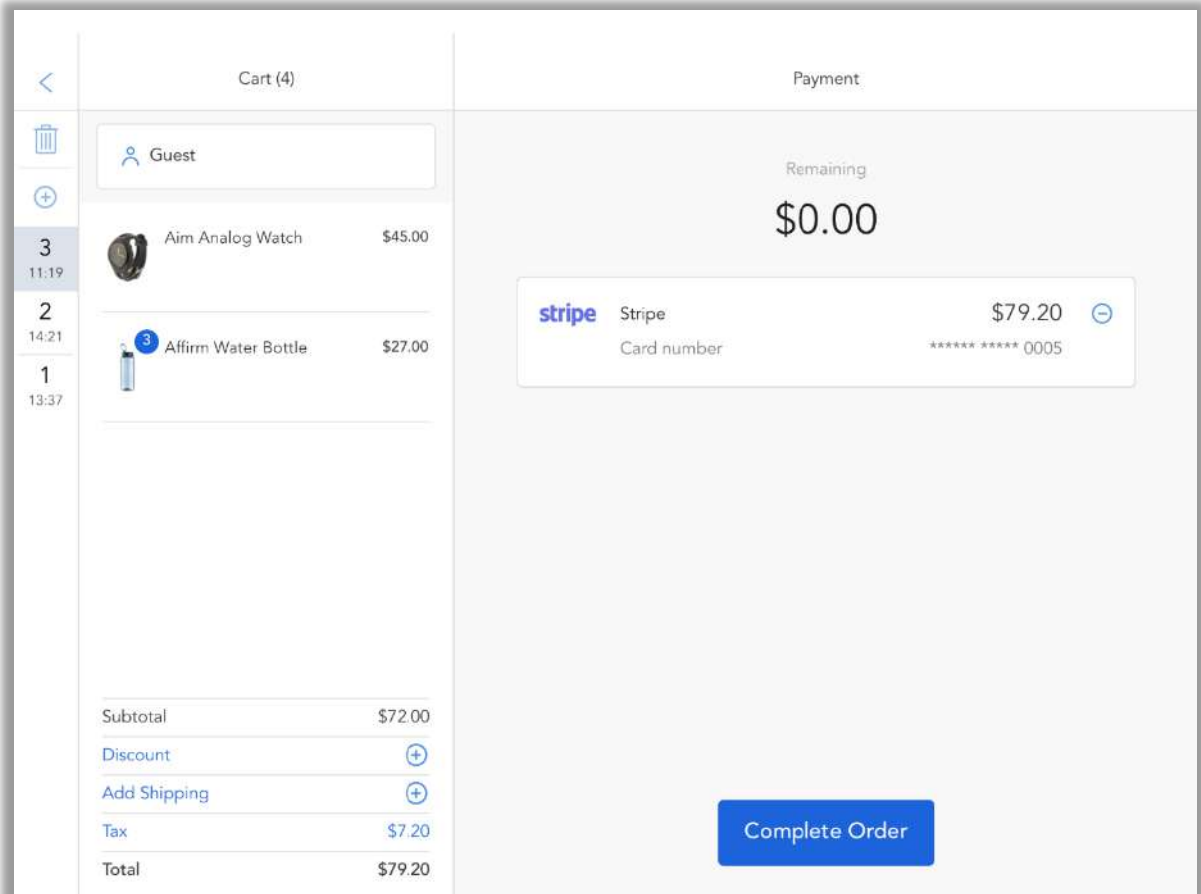
In payment overview screen, you can see card number used for each Stripe payment.

6.17.5. How to pay by Bambora

    1- Select **Bambora** in Payment method screen.

Please ensure that you has enabled Bambora in backend and connect to terminal successfully.
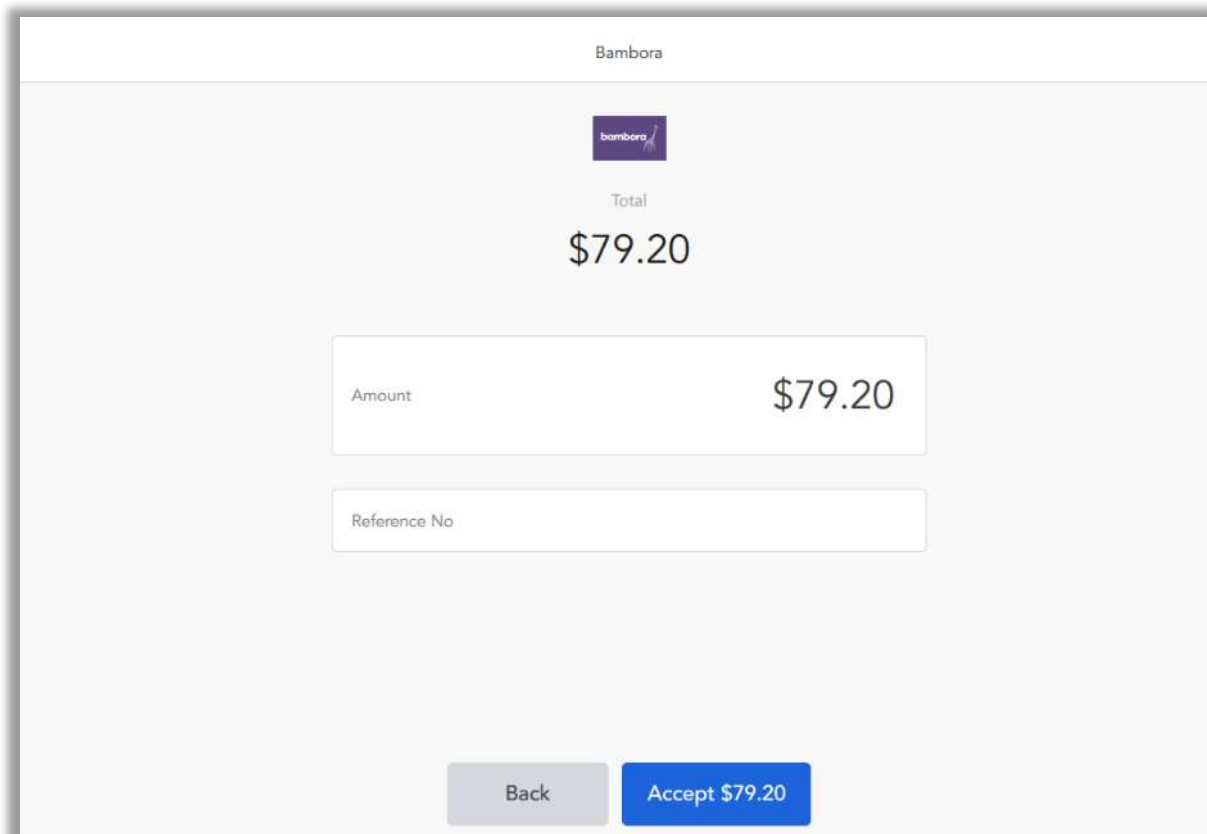
2- Edit the amount of money that will be paid via Bambora terminal. You can't input amount bigger than remaining amount.

3- Click **Accept** to accept this payment method.

4- POS will open a pop-up showing message from Bambora device. You need to follow actions guided in screen to complete transaction.

In online mode:

- Swipe card through Bambora device
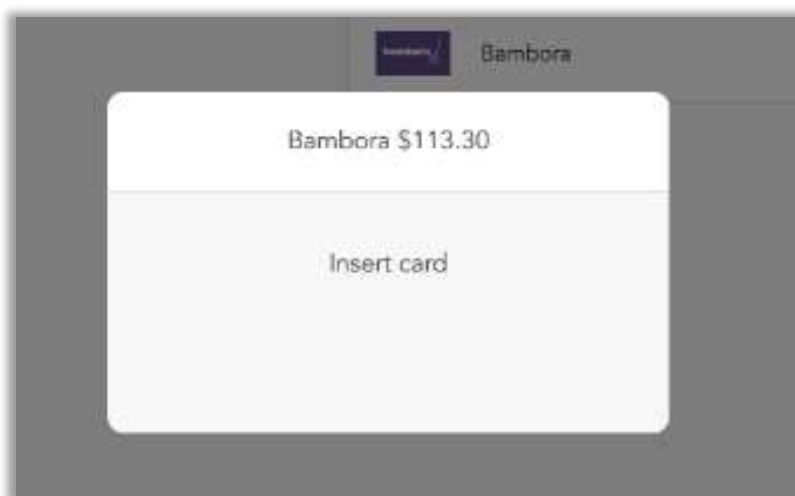
- Enter PIN and confirm (if needed)
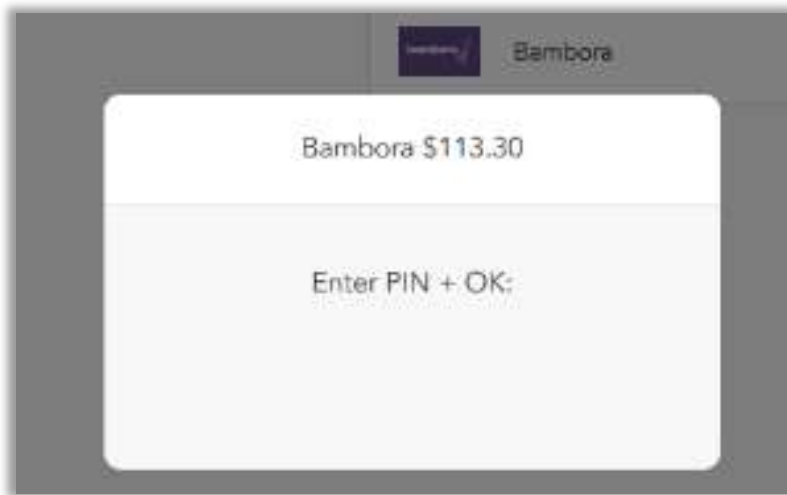
- If signature is required to process transaction, system will print merchant's copy of receipt to record customer's signature

- Confirm signature (if needed)
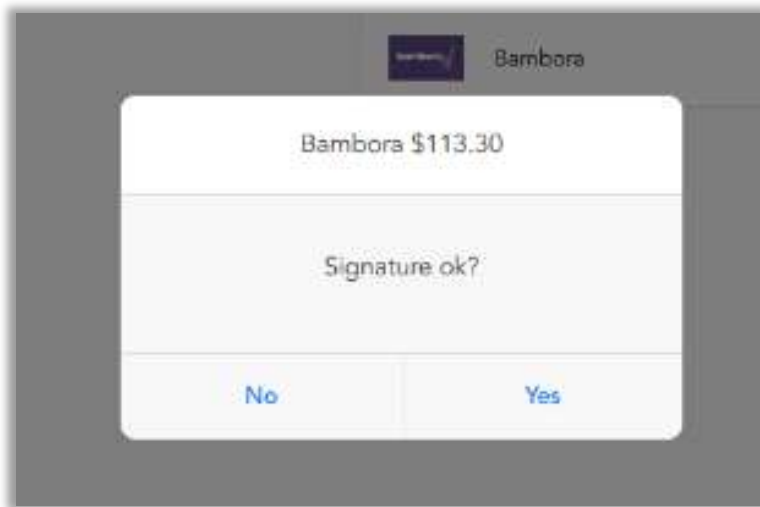
- POS will show status of transaction (approved or declined)
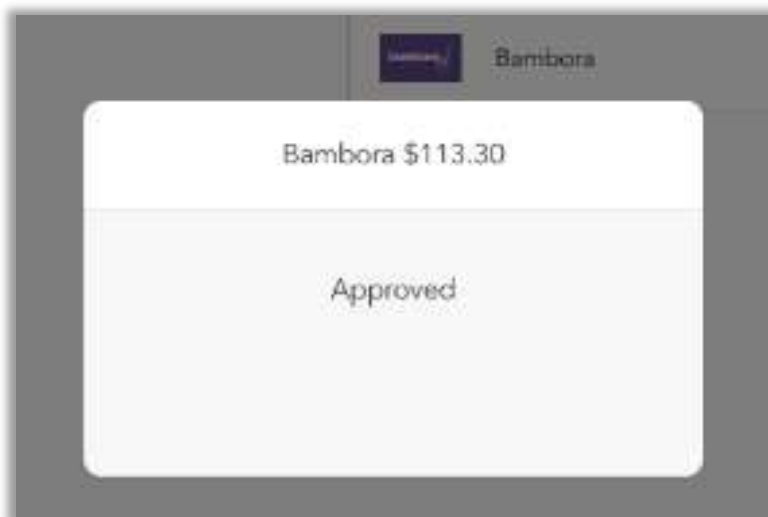
In offline mode:

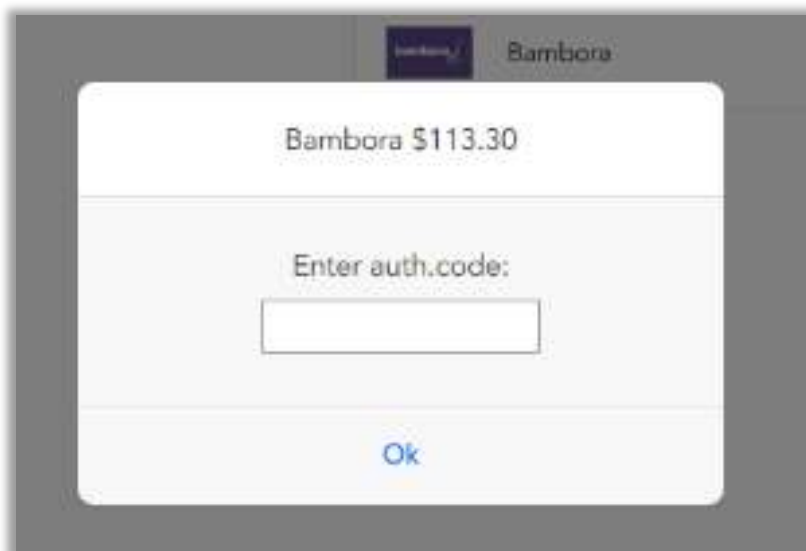- Swipe card through Bambora device
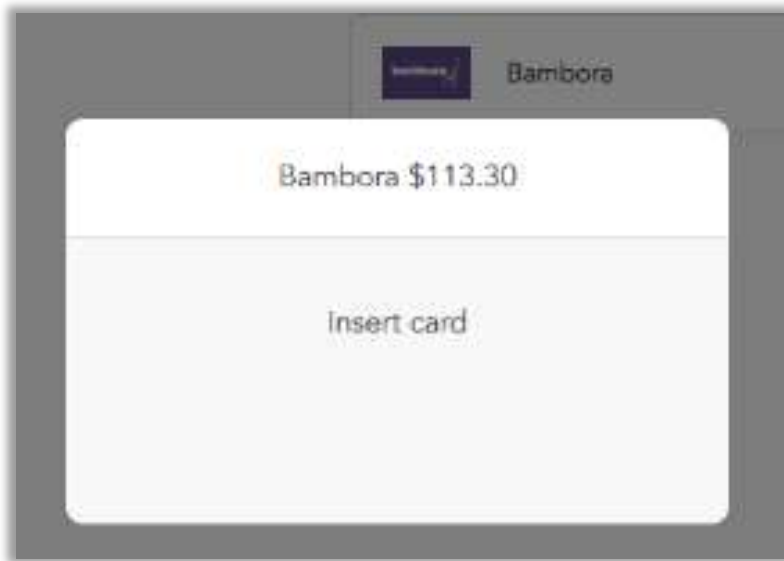
- Confirm using voice authorization
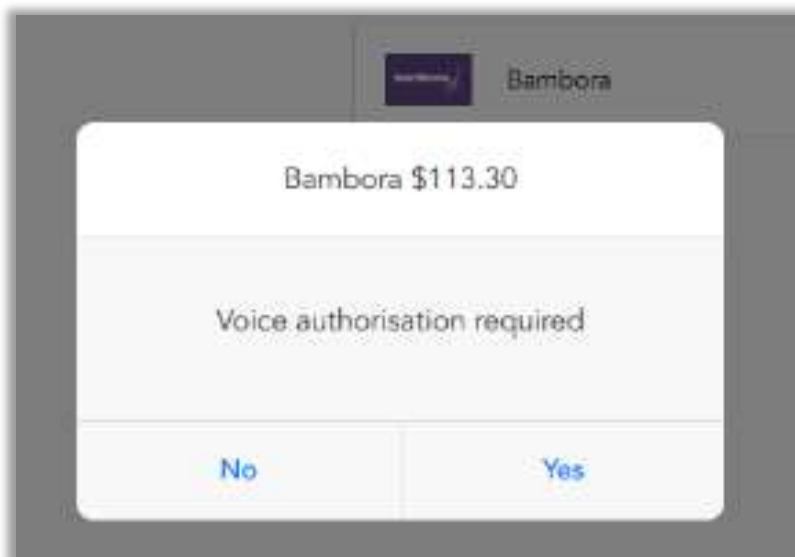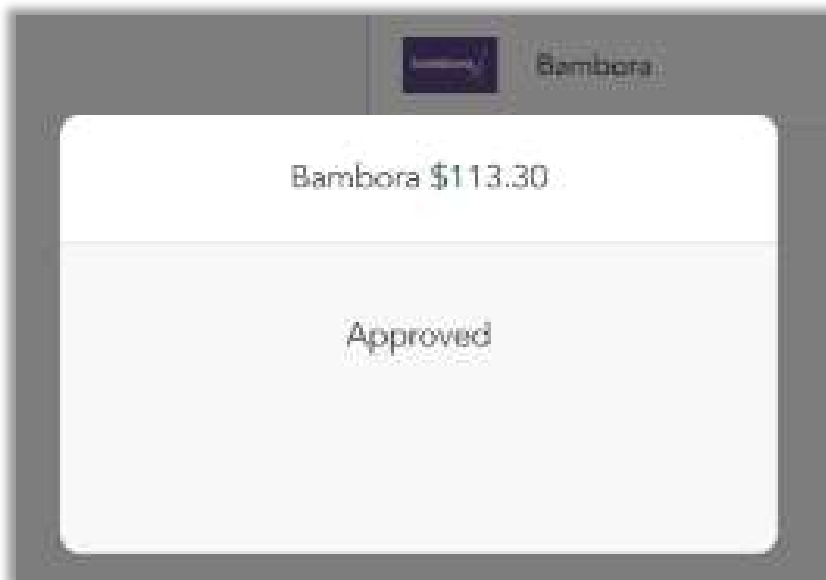

- Call to the number displayed in POS to authorize card
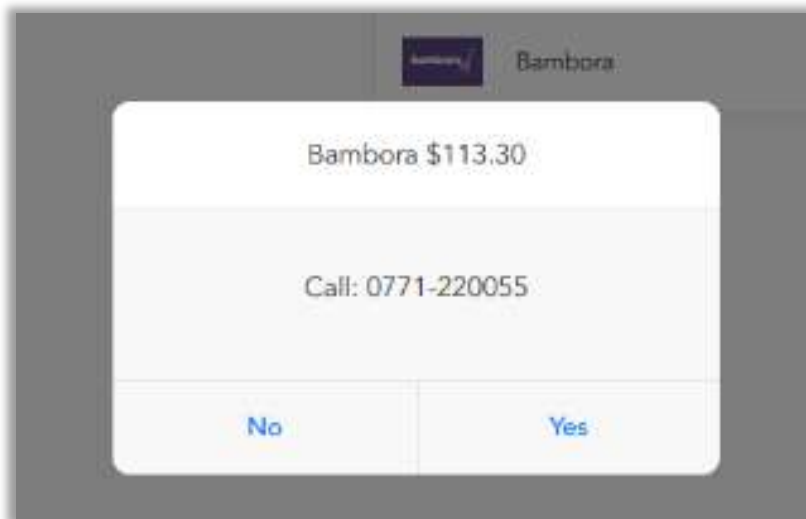
- Enter authorization code

- Confirm signature

- POS will show status of transaction (approved or declined)

System will print transaction receipt from terminal:

If there is any error in the process, transaction will be canceled. You can edit this payment or remove this payment. If transaction is processed successfully and there is no other online payment processing, order will be completed.
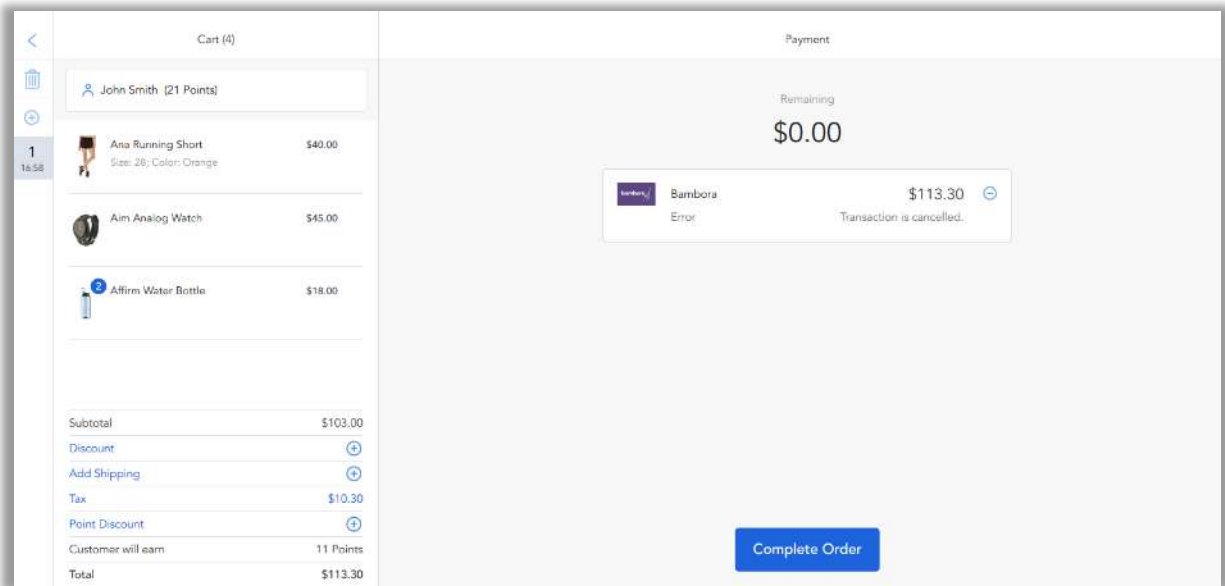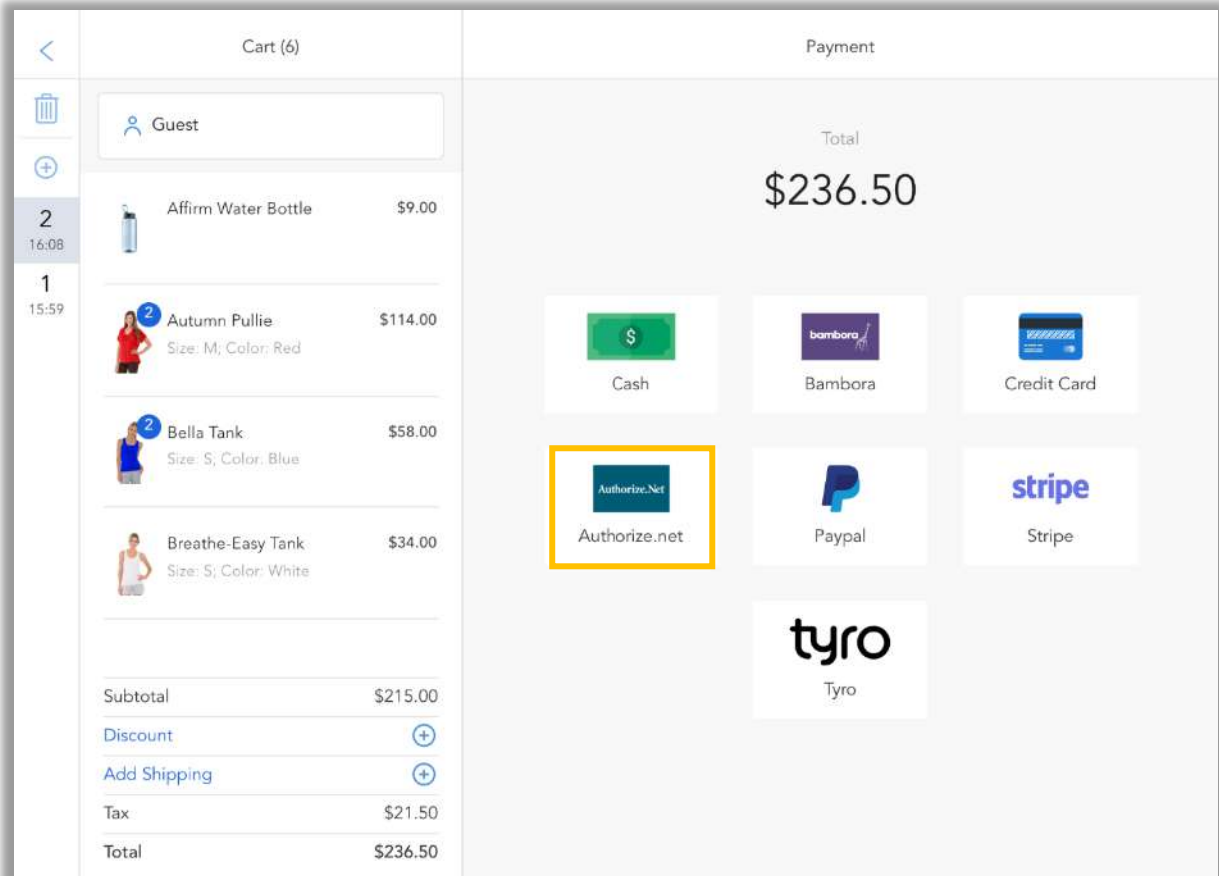
Note:

In Bambora screen, you can enter reference number for transaction manually. If you enter value for this field, POS will understand that you already performed a transaction with Bambora device before, so your transaction will not be send to Bambora device. The reference number you entered will be recorded for checking later.

6.17.6. How to pay by Authorize.net

Here you can take the following actions to make payment by Authorize.net:

1- Select Authorize.net in Payment method screen. Please ensure that you have configured Authorize.net integration successfully in backend. This payment method is working only in online situation, so you need to connect to Internet if POS is working in offline mode before.

2- Edit the amount of money that will be paid via Authorize.net gateway. Please note that you cannot input amount more than Remaining amount.

3- Input Name on Card: input cardholder's name in the front of card

4- Input Card Number: input card number in the front of card. Because of security reason, characters will be encoded as * instantly, except for 4 ending characters.

5- Input Expiration Date: input the expiration Date in the front of card. You can only type 4 digits & system will format it as MM/YY.

6- Input CSC: input card security code. With Visa, MasterCard & JCB, this number is in the back of card – is 3 ending numbers.

7- Press Accept to confirm

6.17.7. How to use multi payment method in order

You can use more than 1 payment method for split payment when checkout on PWA POS.

After you accepted the first payment method which has amount less than total order amount, instead of press Mark as Partial to complete order, you can add payment for order by click button Add payment as below:

After that, system will display Select Payment Method Screen. In this screen, you can choose another payment method or back to previous screen by click **Back** button.
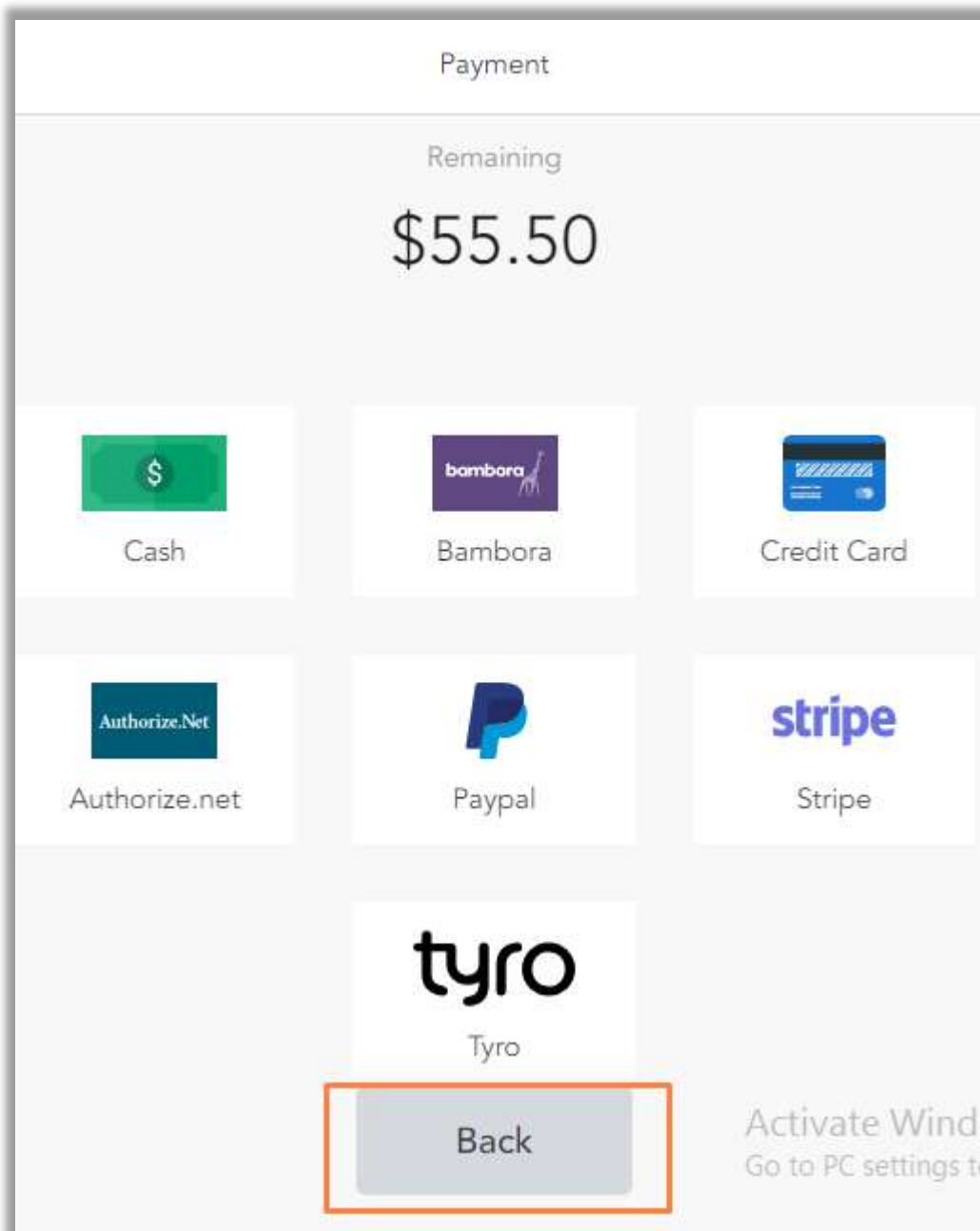
After you chosen a payment method & accepted the amount, you will be in Payment Overview screen as below:

6.19. How to print Order Receipt

After you placed an order successfully, the browser will open pop-up to print order receipt.

In order receipt, you will find all details about order including information about customer, items ordered, payment:

If your browser blocks pop-ups, please allow pop-ups as below:

### 6.20. How to check order History

To quickly find an order to check information, you can search by many criterias:

- By Order ID
- By Customer: name, email, phone
- By Product: name, SKU, barcode

When you input queries into search box, under search box will display 2 radio buttons: Last 7 days (this option is depended on the configuration about time since order history is synced) & All time

- Option **Last 7 days** allows you to search order since 7 days before from now. You can search with this option in both online & offline mode
- Option **All time** allows you to search order all the time, all order in system. This option can be worked in online mode only.

In offline mode, if you choose to search **All time**, instead of showing results, system will display message:
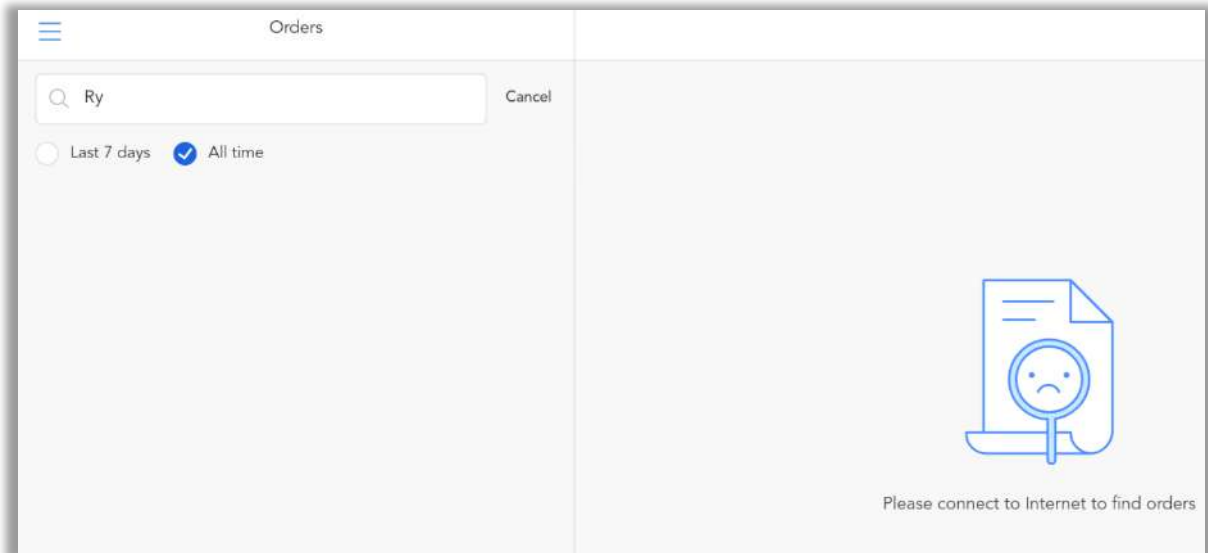
If results are successfully founded then system will show informations of lastest order in order detail

If no order is found, system will display as below:
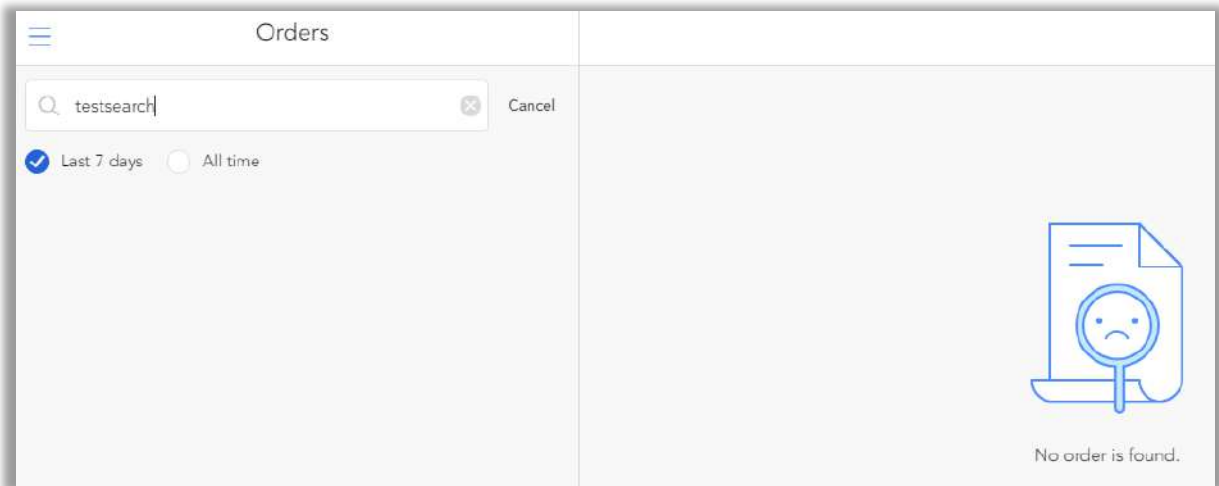
6.20.1. How to find an order by scan barcode tool

Besides searching, POS provides another tool to find order. Once you connected Barcode scanner to PWA POS, you can scan barcode by:

- Order ID
- Product Barcode

Click to search box in the top of Order history page, then you focus to barcode that you want to scan. Barcode scanner will scan & fill out to search box to search order.

6.20.2. How to check order detail

You can review an order after that is placed. PWA POS allows you to check a lot of different information in order detail. See below for more details.

6.20.2.1. How to check Order overview

The Order overview block provides you some information below:

- POS ID: is the number that is generated from system & printed in receipt. It helps you to find an order easier.
- Total Order Amount: is value of order, is the amount that customer has to pay for you.
- Order Date: the date & time that order was placed
- Customer
- Staff: are the people who created this order.
- Order status:
    + Complete: when you shipped order AND created invoice
    + Processing: when you shipped order OR created invoice

+ Pending: When you created order successfully but have not shipped order and created invoice yet

+ Canceled: when you cancelled an order

+ Closed: when order has been refunded.

- Payment Status:

+ Unpaid: when total paid = 0

+ Paid: when total paid = total order amount

+ Partial Paid: when total paid < total order amount

- Subtotal: is the purchase price multiplied by the quantity of all items in an order. The amount is excluding Tax or including Tax is depended on the Tax configuration (Path: **Magento > POS > Setting > Tax Configuration > Orders, Invoices, Credit Memos Display Settings**)

- Discount: is the discount amount of order

- Shipping: is the shipping fee of order if applicable. The amount is excluding Tax or including Tax is depended on the Tax configuration (Path: **Magento > POS > Setting > Tax Configuration > Orders, Invoices, Credit Memos Display Settings**)

- FPT: is FPT tax of order. This amount will be shown only when configure FPT = Yes

- Tax: is the tax amount of order if applicable.

- Grand Total: is the total order amount.

- Total Paid: The total amount paid toward the order, if applicable.

6.20.2.2.   How to check Item Ordered

- Show product information : Product name, SKU

- Show qty information: Qty Ordered, Invoiced, Shipped, Canceled, Refunded

- Show product's price in the right side, including:

+ Row Total

+ Purchase Price (per item)

+ Tax (per line item)

+ Discount (per line item)

6.20.2.3.   How to check Shipping Information

You can check 2 information about Shipping, including: Shipping Method & Shipping Address.

- Shipping Method & Shipping fee
- Delivery Date: is the date that customer want you to deliver order to them
- Shipping Address: is customer's address if you use shipping method. If pick-up-at store, Shipping address will be location's address

6.20.2.4. How to check Payment Information

Similarly to Shipping Information, Payment Information block will be described you some information including:

- Payment Status
- Payment Method & Amount
- Payment Date
- Billing Address: is the customer's address that invoice will be created in.
  If Guest checkout, Billing address is Location Address
  If Customer checkout, Billing address is default billing address of customer.

Moreover, PWA POS brings you another experience:

6.21. How to take payment

With order has remaining amount, customer has duty to pay the rest money for store. In POS, you can follow these steps to record payment amount of customer.

1- From Order Details, click on Take Payment. This button will be disable in case payment status is Paid (when order has no remaining amount) or Void (when order has been canceled)

2- In Select Payment method screen, select payment method that customer using to pay for you. Like checkout flow, you can use multi payment method as well.

3- After accepted all payment method, you need to press Complete Payment.

Order history will be updated if payment has been received. If customer paid the rest amount of order, order will has no remaining amount & system will create invoice for order automatically.

6.22. How to refund

There are 3 steps in Refund progress

1. Select Item(s) to refund

2. Make adjustments

3. Payment

6.22.1. How to select item(s) to refund

From Order Details, press on Refund button when it is enable to click.

You will be redirected to Refund items screen – Step 1 in refund process. To select item(s) refund successfully, you need to follow these steps:

1- **Find item** you want to refund by name or SKU. The listing will show all products in the original order that have been invoiced but not refunded yet (Products that have Qty Invoiced > Qty Refunded)

2- **Enter quantity** of item(s) that customer want to refund. On click, system will display numeric keyboard. You can also use button (+) & (-) to increase/ decrease number in the box.

Another way to fill out qty to refund is using toggle 'Use Max Qty to Refund' in the top. If you turn on this toggle, system will fill out maximize Qty to Refund values of all products.

Moreover, after you chosen quantity to refund, system will calculate & show you price, tax, discount & row total of refunded product.

3- **Return to Stock:** Designate whether to add returned item(s) back to inventory or not. Please note system cannot return non-shipped item(s) to stock. In case all product in Refund Item(s) list are no need to manage stock (the configure: Manage Stock = No), the column Return to Stock will be hidden.

4- Press **Next** to go to next step.

6.22.2. How to make adjustments

In second step, you can adjust some following amount and review the breakdown of refund grand total:

- Refund Shipping fee
- Adjustment Fee
- Adjustment Refund

According to these amount to adjust, there are 2 blocks in this step:

Refund Adjustments - Order #POS42-1539144438024

Refund Adjustments

Refund Shipping ($10.00 Remaining)	10.00 $
Adjustment Refund	0.00 $
Adjustment Fee	0.00 $

Refund Totals

Subtotal	$54.00
Refund Shipping	$10.00
Adjustment Refund	$0.00
Adjustment Fee	$0.00
Tax	$6.40
Grand Total	$70.40

Back   Next

6.22.3. Refund Adjustments

1- **Enter Refund Shipping:** Shipping fee could be re-calculated when refund, if order had shipping fee. System will show you the remaining shipping amount from the original order that is available for refund. It can be equal to the full shipping amount from order, less any shipping amount that has already been refunded.

Please note that Refund Shipping cannot be greater than Remaining amount.

2- **Enter Adjustment Refund:** Adjustment Refund is an additional amount that does not apply to any particular part of the order, such as: items, shipping or tax (Subtotal, Shipping & Tax are not re-calculated after updating Adjustment Refund)

You can fill out adjustment refund by percentage or exact amount. If Adjustment Refund is set to percentage, the value added to refund is calculated by the same Magento rule applied to Credit Memo in backend:

Formula: Adjustment refund value = Grand Total of original order * Adjustment Refund %

3- **Enter Adjustment Fee:** Adjustment fee is subtracted from Refund Grand Total, not from a specific section of the order such as shipping, items, or tax. (Subtotal, shipping & tax are not recalculated after updating Adjustment Fee).

You can enter Adjustment fee by percentage or exact amount. If Adjustment Fee is set to percentage, the value added to refund is calculated by the same Magento rules applied to Credit Memo in backend:

Adjustment Fee value = Grand Total of the original order * Adjustment Fee%

6.22.3.1. Refund Totals

After all above steps to adjust amount, you can view block Refund Totals for more details. The most important data that you want to view is the Grand Total amount – the money you need to give customer back.

Formula is the same Magento rule applied to Credit Memo in backend:

Refund Grand Total = Subtotal + Refund Shipping + Adjustment Refund – Adjustment Fee – Discount + Tax
(all data are excluding tax)

Refund Totals	
Subtotal	$54.00
Refund Shipping	$10.00
Adjustment Refund	$0.00
Adjustment Fee	-$1.00
Tax	$6.40
Grand Total	$69.40

Back   Next

Press **Next** to continue Refund progress, or **Back** to return to previous step.

6.22.4. How to select refund payment methods

Refund Payment Method - Order #POS42-1539144438024

Order Payment Method	∨

Payment Status	Paid
Cash (10/10/2018)	$70.40

Remaining	$1.40
$ Cash	$18.00 ⊖
Credit Card	$50.00 ⊖
	Reference No
Add Payment	⊕

Back   Refund $69.40

In step 3, you can view original order's payment method & select suitable payment method for Refund. The payment flow will be the same to checkout or take payment flow.

1- **Select payment method**. System will show all payment methods that are used in original order. If you use another method for Refund, you can deselect & add other payment method.

2- **Enter amount** of each chosen payment method.

3- **Add payment method if needed.**

4- **Press Refund** to confirm to refund this order.
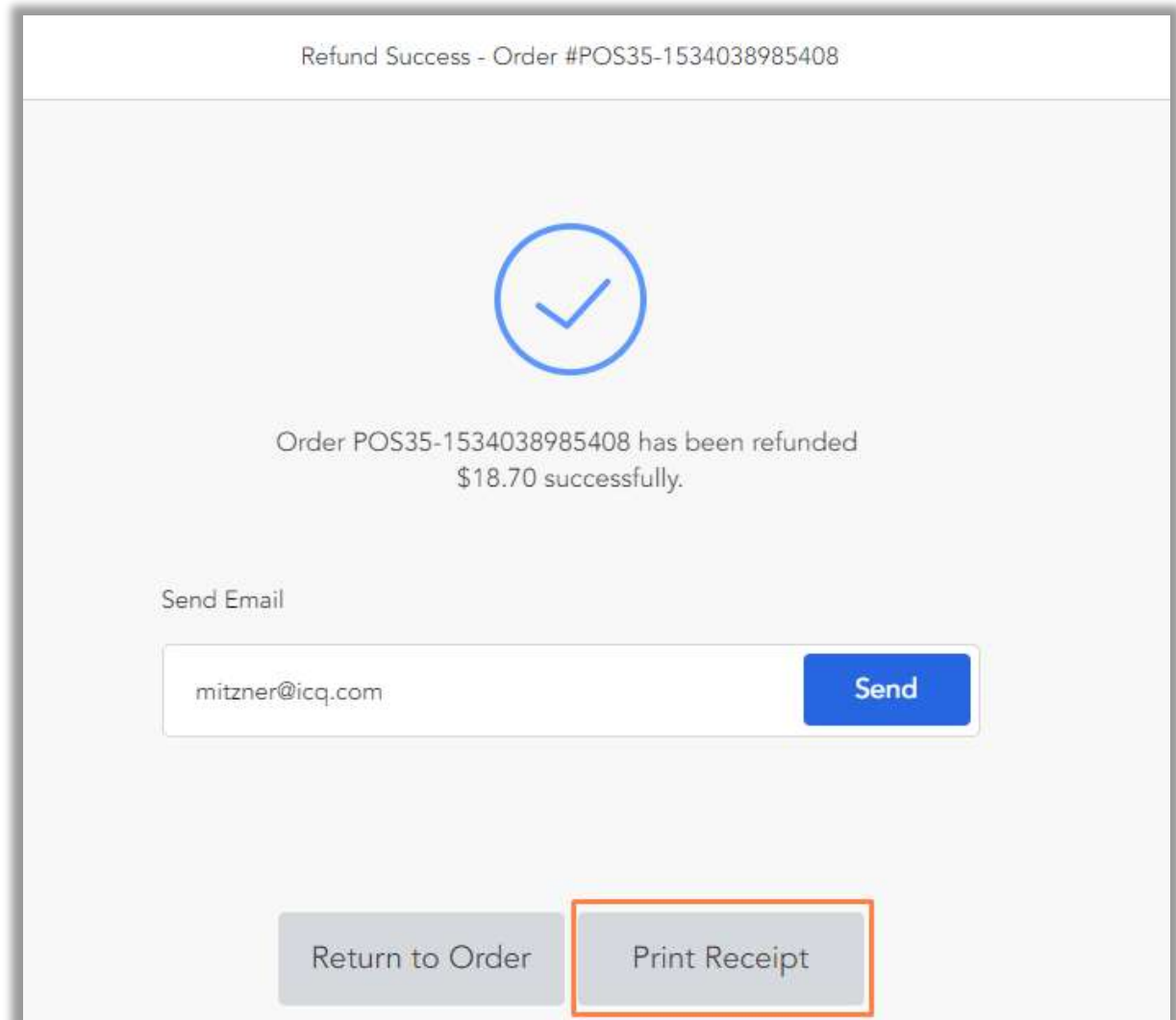
If you haven't allocated amount to any refund payment yet, system will display message to notify you. Click **Yes** if you really want to continue.
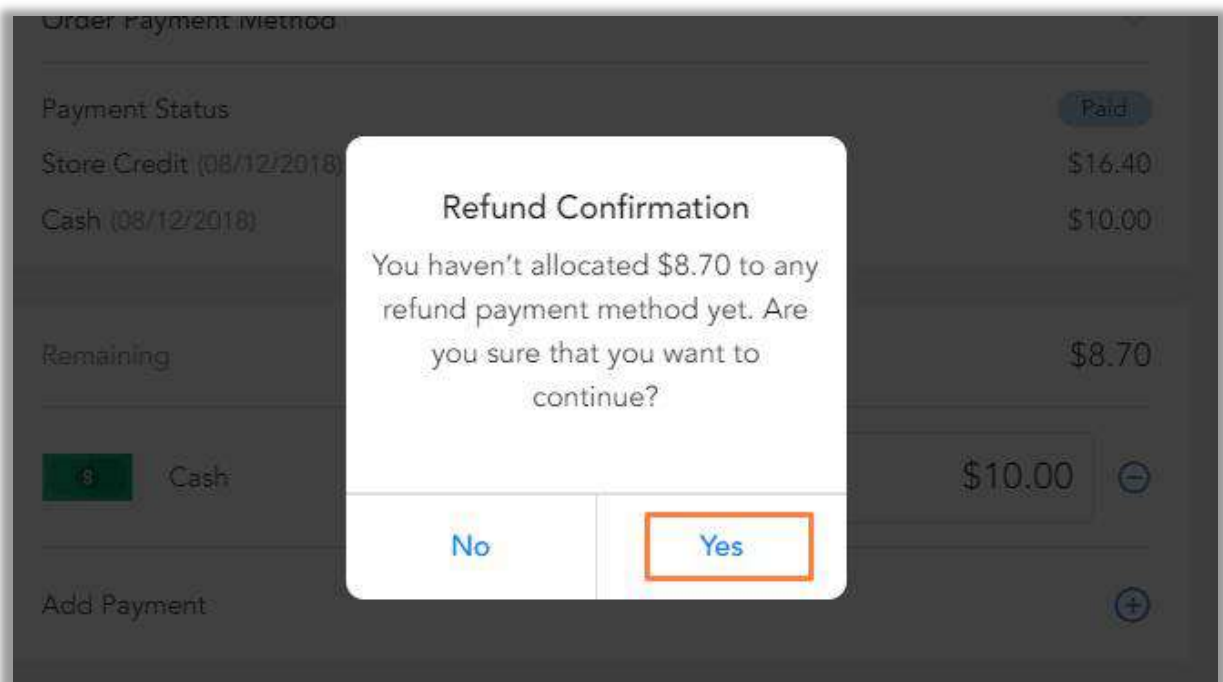
After click **Yes**, you need to confirm in next pop-up. In this pop-up, you can input reason to refund to check later. Then, press **Yes** to confirm.
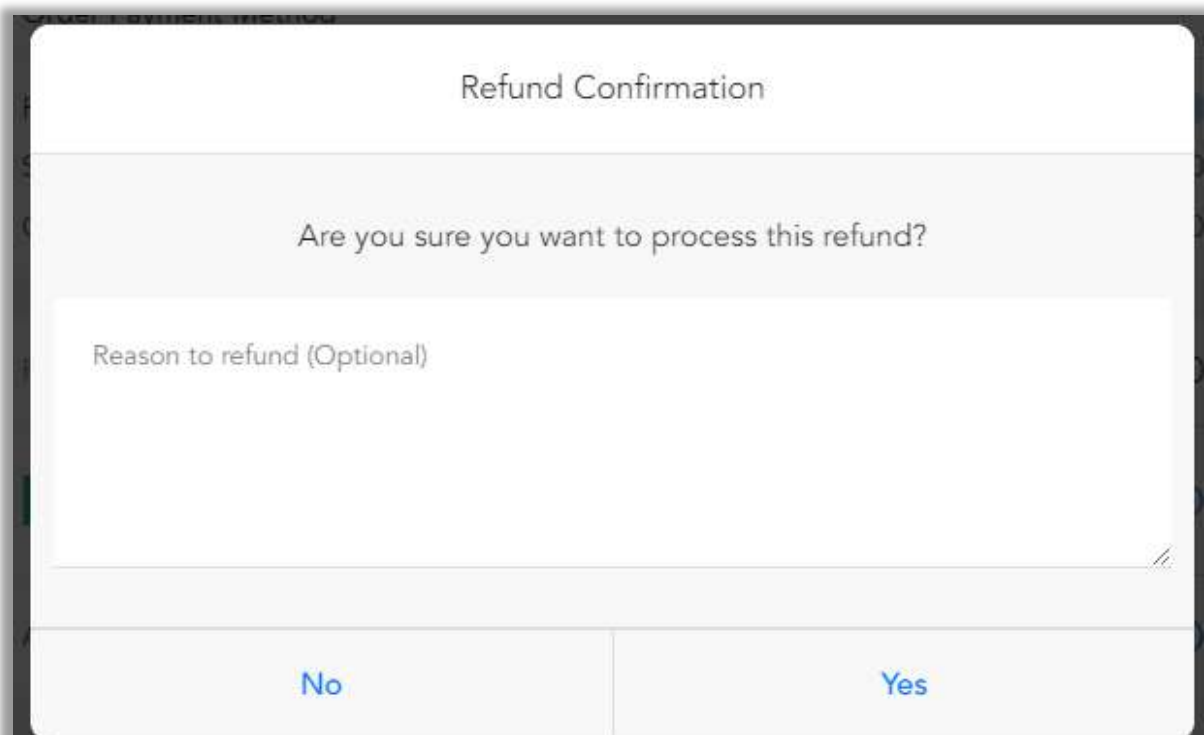
6.22.5. How to email customer after refund

You will go through the last screen. After a credit memo has been created successfully, you have option to send email for customer or not. If you want to send credit memo for your customer:

1- Input customer's email address.
2- Click on Send button. You can send multi times with more than 1 email.

Besides, you can also create customer account if order used Guest check out mode. Order & credit memo will be added to this account after being created.

Here are the actions you can take in:

- **Enter customer's email address**. If you enter an existing email address, order & credit memo will be merged to customer's account instantly. In case you enter a new email address, system will create a customer account with information: name & email address, then it will add original order & credit memo to new customer's account.

- Click **Create** for new email address & **Merge** if email is existed to complete.

After all above steps, you have 2 options: Back to Order history or Print Refund Receipt.

You will be redirected to Order History if you choose **Back.**

If you **Print receipt** (available function in PC), you will receive a receipt as below:

Please note that in progress of refund, you can cancel to refund anytime by click to Cancel button in the top of the left.
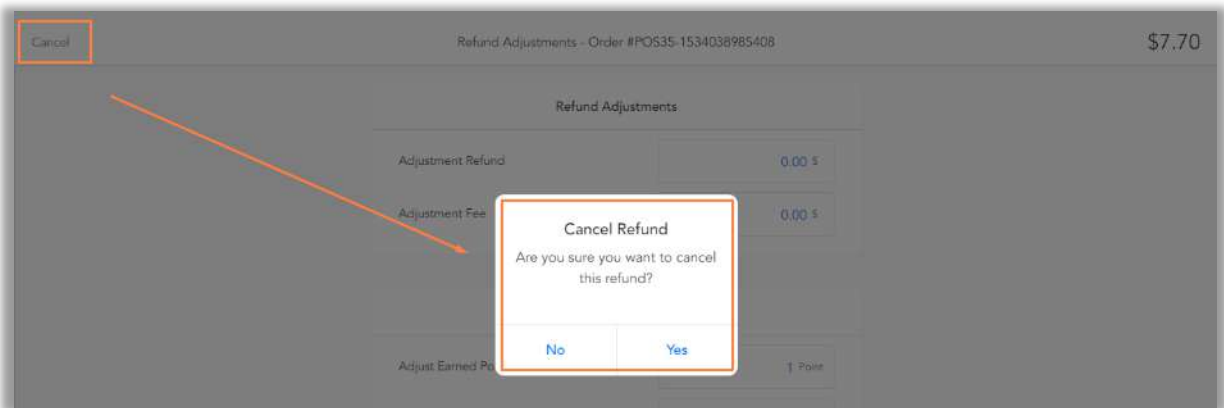
6.23. How to reprint order

1- Click on the left menu icon. Click on the **Order History** tab listed in the menu bar.

2- Select an order.

3- In order details, click button **Print**. A copy of order receipt will be printed.

6.24. How to email order

When you want to send confirmation email for customer about order that is created, you can use Send email function in PWA POS. Click on button **Email** in Order Detail & input customer's email address.

Button Send will be disable until you input email address. After that, the email sending request has been saved in queue and will be sent when ready.

And here is email of order confirmation:

6.25.   How to add order comment

1- Click on the left menu icon. Click on the **Order History** tab listed in the menu bar.

2- Select an order. In **Order Details**, click button **Add Note.**

3- Type comment and click **Save**

4- Comment will be saved in **Comment History** section in Order Details.

6.26. How to re-order

In case a customer who orders some products that are similar to your previous order here. No need to look further as last time you did it, the only thing you care is reordering those products as quickly as possible with some changes in quantities and attributes.

Firstly, find an order to reorder. Then, select the corresponding order & click on Reorder to reorder the same cart for customer.

In case, you reorder but at least 1 item is out of stock or disable, there are 2 cases depend on the configuration (Path: **Magento > POS > Setting > Checkout**)

- If the configuration: **Add out of stock to Cart = YES** => item that is out of stock will be added to Cart as usual
- If the configuration: **Add out of stock to Cart = NO** => item that is out of stock will not be added to Cart & system will display message to confirm. If you choose YES in this message, all items will added to Cart except for out of stock product & disable product.

After you re-order an order, price of product will be updated according to Catalogue price.

6.27. How to cancel an order

1- Click on the left menu icon. Click on the Order History tab listed in the menu bar.

2- Select an order. In Order Details, click button **Cancel**.


3- Type reason (optional) and confirm the cancellation.
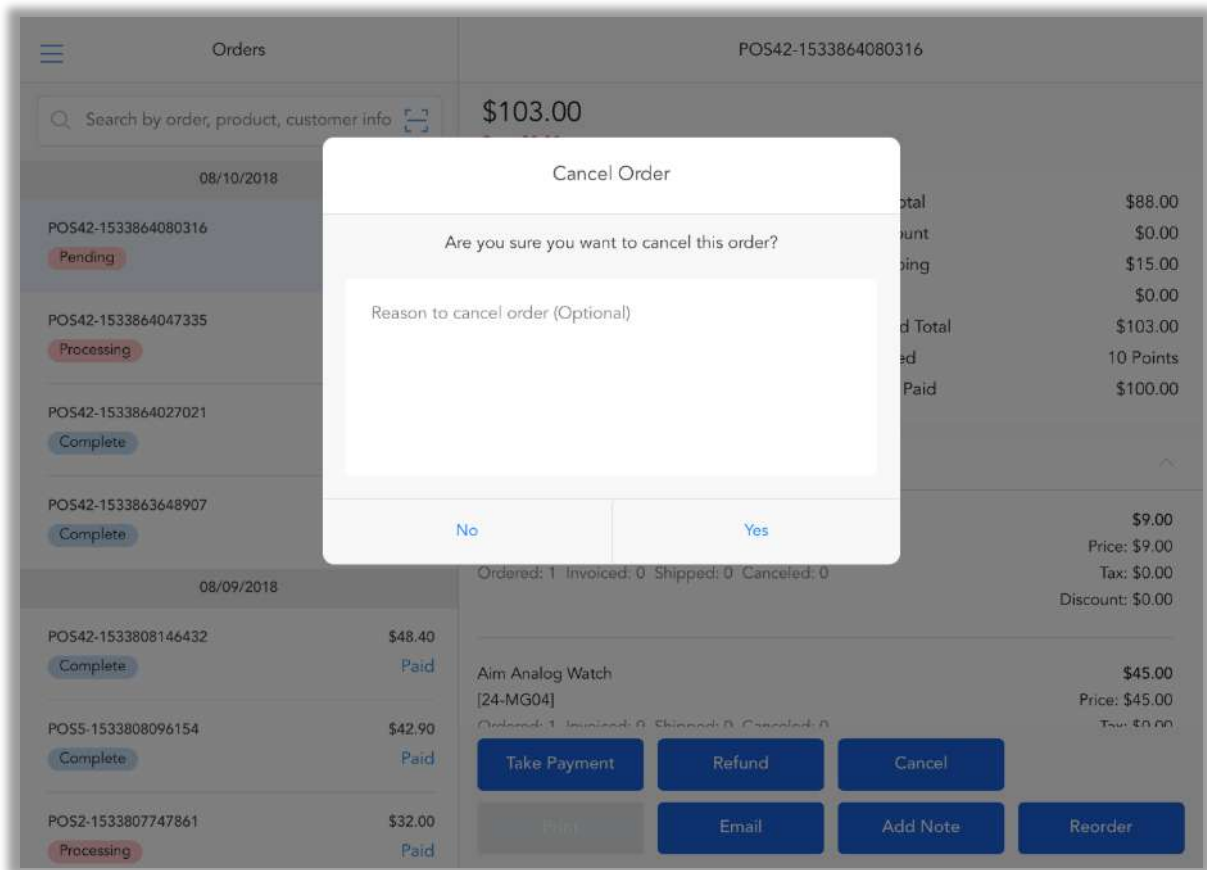
4- After you canceled order, items in order will be canceled partially/fully depending on number of invoiced/shipped items.

Order that hasn't been invoiced yet will be canceled the whole order. Order status becomes **Canceled** and payment status becomes **Void**.

6.28. How to export unsynced order

Once PWA POS is working in online mode, data will be automatically & smoothly synced between POS & server. But in the case data of POS haven't been synced to server yet due to a network interruption, you can export those unsynced data.

1- From left menu, click to Export Unsynced Orders

2- Click on Yes to confirm export

3- After users click YES, the next file export process would be defined and depend on the current devices. Next, browsers would ask users to save the PDF files to Google drive, Dropbox or any other applications that available to support saving files on devices.

In PC, downloaded file will be saved to which disk on your device.
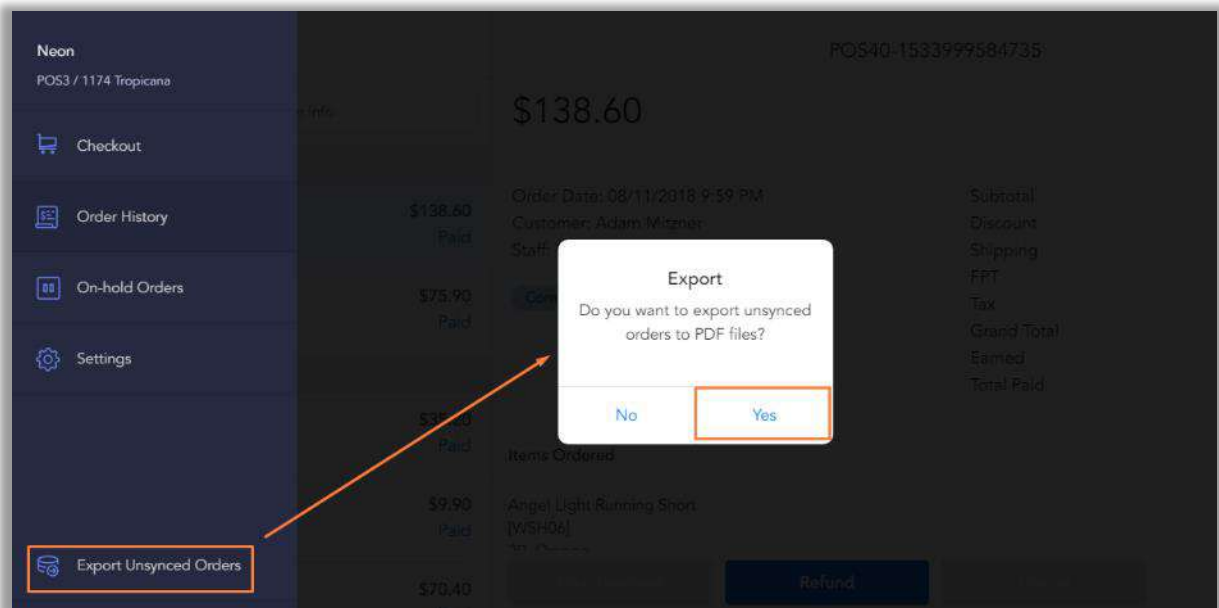
When you click on Export Unsynced order meanwhile POS has no unsynced order, system will display message:
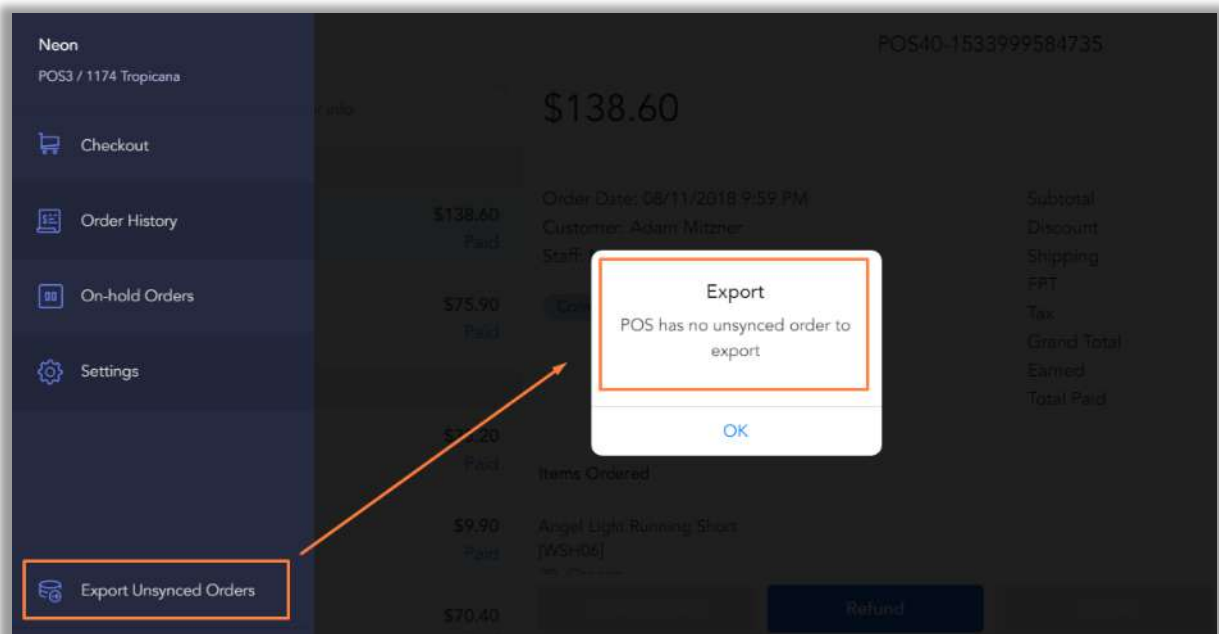
The unsynced order will be downloaded as PDF file. It will include many orders if needed, break page for new order.

If POS has at least one unsynced order, system will notify you when you want to log out. Click **Yes** in the confirmation pop-up if you really want to log out.

7. HOW TO USE IN BACK-END

7.1. How to find POS orders by ID prefix

1- On the Admin sidebar, select **Sales**, then navigate to **Orders.**
2- Click **Filter**, then enter ID prefix in field **ID**

3- Click **Apply Filters**

System will show all orders that have ID matching the text you entered. By this way, you can easily filter all orders created on POS.

7.2. How to check POS order's information

1- In the order list, click each order to view order details

2- For orders created on POS, you will see the name of POS on which order is created.

- System will automatically create an invoice for order that is fully paid.

- If cashier do not select any shipping method for order on POS, which means order uses shipping method Pick-up at store, system will automatically be created a shipment for all items in this order.

7.3. How to manage POS session

You can access path: POS > Manage POS, then press on any POS that you want to check session. Then, you can view closed session of POS.

To see more details about checking order's information including payment, shipment, credit memo, invoice,

This is the end of our User guide for Magespacex's PWA POS. We hope it is helpful. If you have any questions, please feel free to reach us with the information as below.

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