MAGENTO 2

STARTER PACKAGE
User guide

Updated October 2017

magestore
Best Retail Solution for Magento ®

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1. INTRODUCTION

Having a combined **POS** and **In-stock Management** solution is a must-have for retail businesses that want to be more efficient and keep accurate data. Web POS, a web based Point of Sale for Magento, is specially designed to integrate with this Instock Management module. Carrying out checkout procedure for customers has never been easier. Web POS helps your sales staff quickly create orders and apply promotion, conveniently collect in-store cash and credit sales transactions in a flash. And all steps are on just one single page! So, wouldn't it be great if this process could be hastened, saving time for more profitable actions!

Moreover, if your inventory is not enough to supply, you may lose customers. But if the inventory you keep is more than needed, it will cost you lots of money to manage. Thus, it is vital to equip your business with an effective inventory system to always keep your warehouses at an ideal stock level. Magestore team has been working hard to offer you a friendly & affordable stock management solution for Magento 2 with smart design, clean and simple workflow to handle every activity about stock management, stock taking and low stock notification... in your warehouses in the most efficient way.

With the latest upgraded version and its convenience and the amount of time saved, we hope that you would enjoy and feel exhilarated when experiencing our solution.

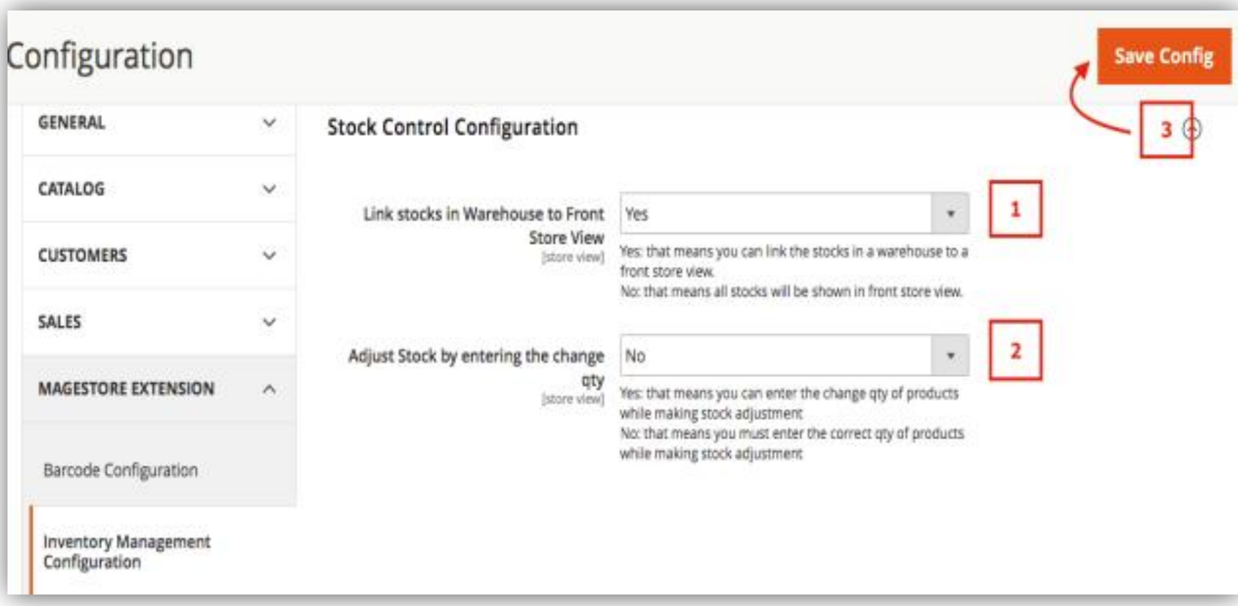
Thanks and Best regards,
Magestore Team

2. HOW TO CONFIGURE

2.1. Inventory

2.1.1. Stock Control Configuration

Path: **Stock Management > Settings** section **> Configuration**



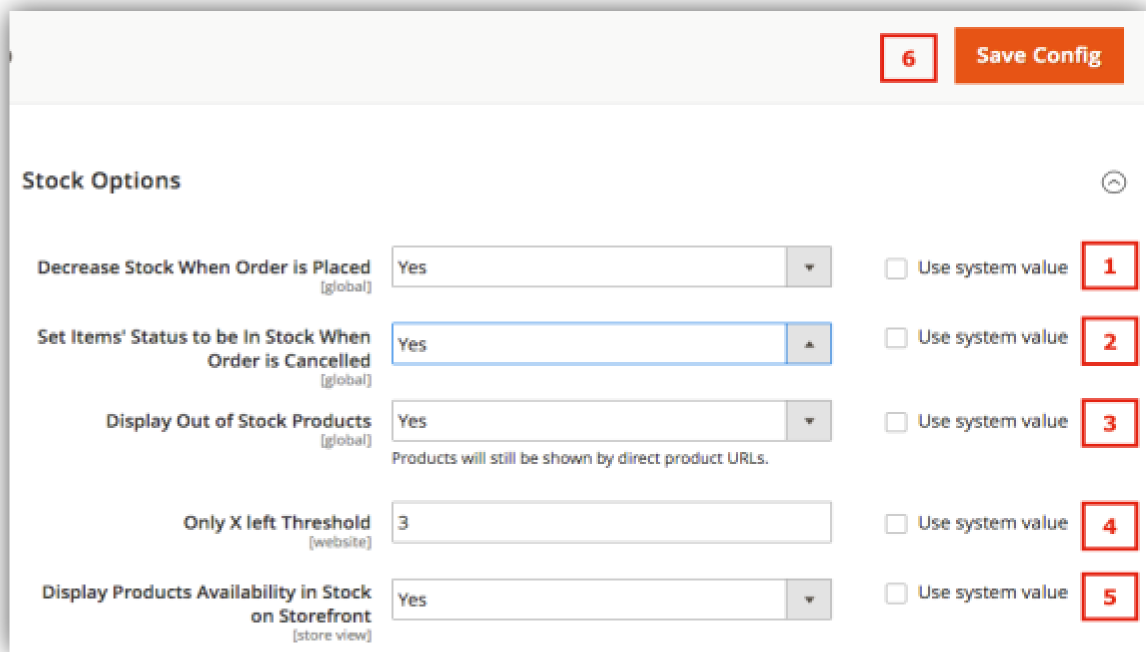
1) **Link stocks in Warehouse to Front Store View:** choose **Yes** to activate the visibility of Stocks in Warehouse on the Front Store View
2) **Adjust Stock by entering the change Qty:**
   - if you choose **Yes**, when you enter the difference quantity (either a positive or negative figure), the system will calculate the final balance in warehouse by adding/ subtracting the entered value.
   - If you choose **No**, you need to enter the exact quantity of stock in warehouse and the system will recognize this figure as the latest available quantity of product.
3) Click **Save Config** to finish

2.1.2. Inventory option

Path: **Stock Management > Settings** section **> Configuration > Catalog > Inventory**

Note: *If you want to configure based on your own features, then unmark box* ***Use System value****.*

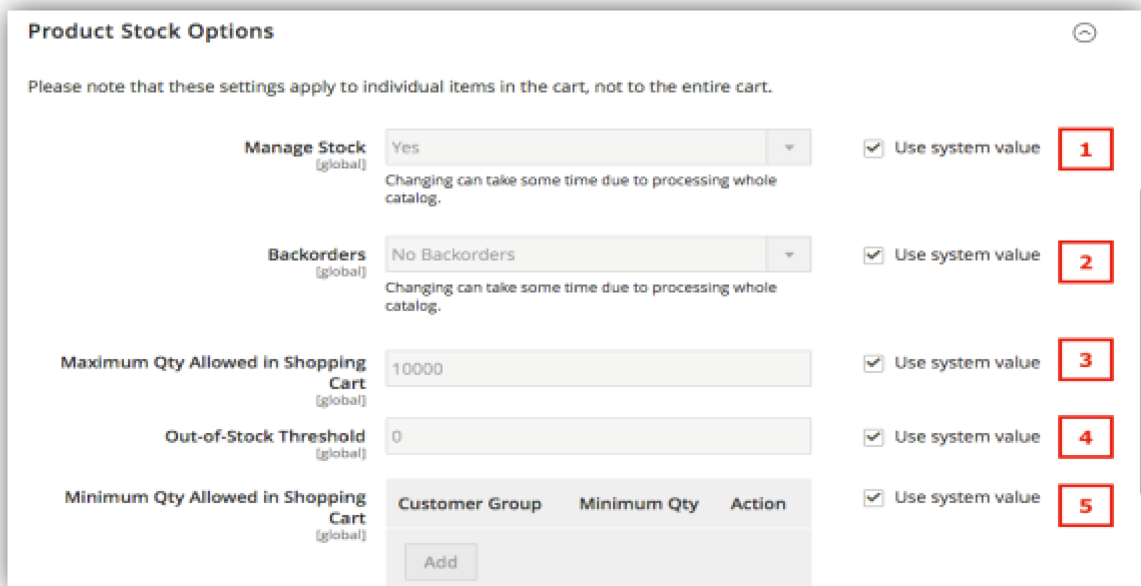
2.1.3.1 Stock Option



1) Select **Yes** in the dropdown list to adjust the quantity on hand when an order is placed.
2) Select **Yes** in the dropdown list to return items to stock if an order is cancelled.
3) Select **Yes** in the dropdown list to continue to display products in the catalogue that are no longer in stock.
4) Enter the number in the blank to display the message: **Only x left** on website when the quantity in stock reaches the threshold.
5) Select **Yes** in dropdown list to display an **In Stock** or **Out of Stock** message on the product page.
6) Tap **Save** to finish.

2.1.3.2. Product Stock Options

Path: **Stock Management > Settings** section **> Configuration > Catalog > Inventory**



(1) Select **Yes** to activate inventory control for your catalog.

(2) Set Backorders to one of the following status:

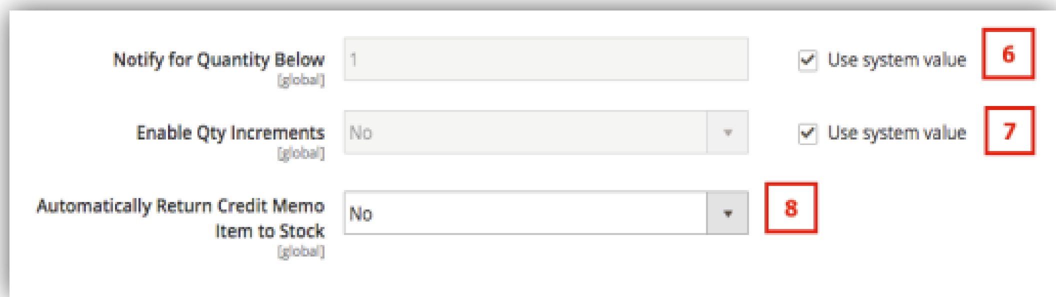
- **No Backorders Allow Qty. Below 0**: To reject backorders when product is out of stock.
- **Allow Qty. Below 0**: To accept backorders when the quantity falls below zero.
- **Notify Customer**: To accept backorders when the quantity falls below zero, and notify the customer that the order can still be placed.

(3) Enter the **Maximum Qty.** allowed in Shopping Cart.

(4) Enter the quantity for Item's Status to become out of stock.

(5) Enter the **Minimum** quantity allowed in Shopping Cart.

Next,



(6) Enter the stock level that generates notification showing the item is out of stock.

(7) Select **Yes** to activate quantity increments for the product. Then in the **Qty. Increments** field, enter the number of the items that must be purchased to meet the requirement mentioned above.

(8) Select **Yes** to return the item to inventory by default when a credit memo is issued for the item.

Finally, click on **Save Config** to save changes.

2.1.3. Low Stock Notification Rules

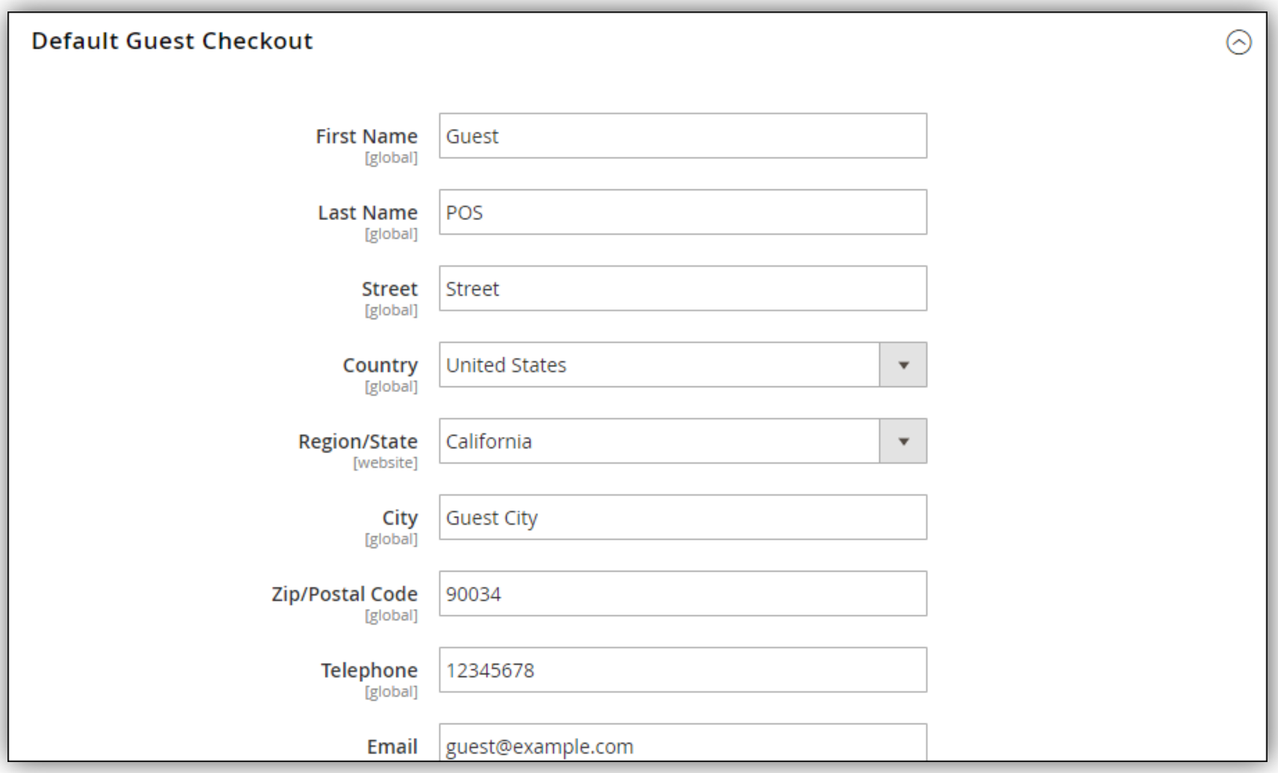
Please refer to section [4.1.3.3. Low Stock Rules]

2.2. Web POS

2.2.1. Default Guest Checkout

Path: **Sales > Web POS** section **> Settings > Default Guest Checkout**

Default customer is the customer whose information will be used for Guest Checkout or when customer information is not enough, default value will be filled automatically.



Fill in all information as you want to use as default, including **First Name**, **Last Name**, **Street**, **Country**, **State/Province**, **City**, **Zip/Postal Code**, **Telephone** and **Email**. After finishing, click on **Save Config** button to save your work.

2.2.2. How Web POS works with peripheral devices

MageStore Web POS module can connect with **Barcode readers, Card swiper & Receipt printers**.

- **Barcode readers**: are any devices that can connect with iPad/Laptop/PC (including USB Port, Wifi or Bluetooth). The scanner can read barcodes & fill encoded information into Web POS search box.
- **Card swiper**: only devices connected through USB port (supports Authorize.Net & Stripe).
- **Receipt printers**: any devices that connect with iPad/laptop/PC

3. HOW TO MANAGE USER PERMISSION

Note: Only admin accessing Web POS can set up Staff permission

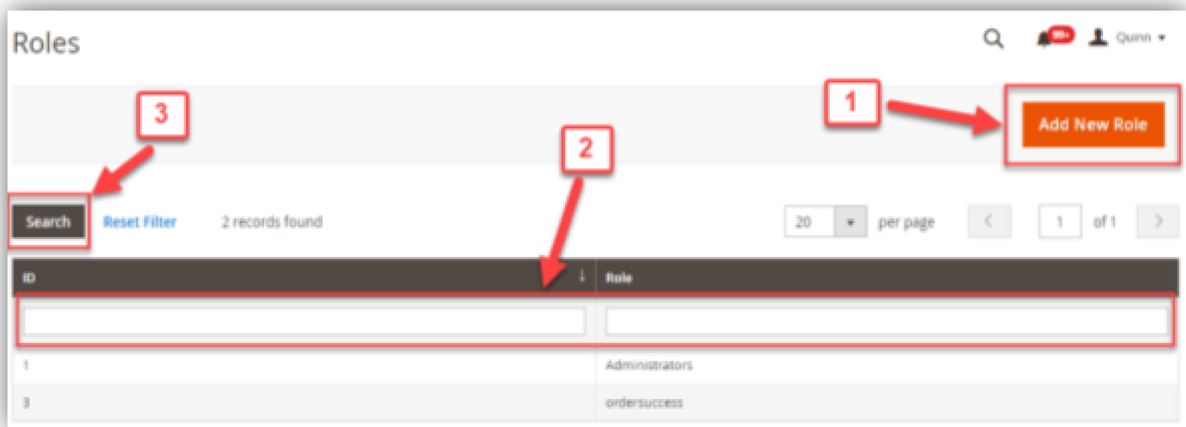
3.1. How to manage User Roles and Users

Note: *Users are the one who get permission to access in the Backend*

3.1.1. Decentralize User Roles

Path: **System > Permission** section > **User Roles**

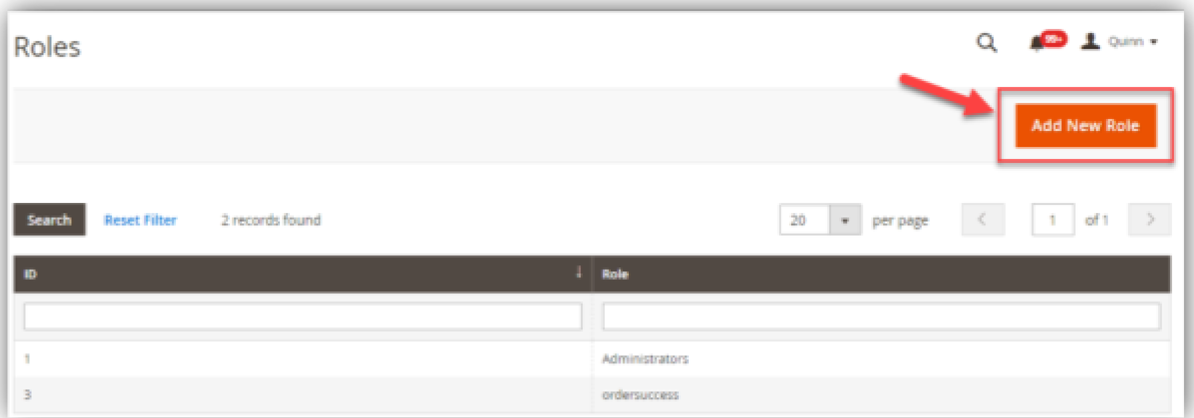
3.1.1.1. Manage user role



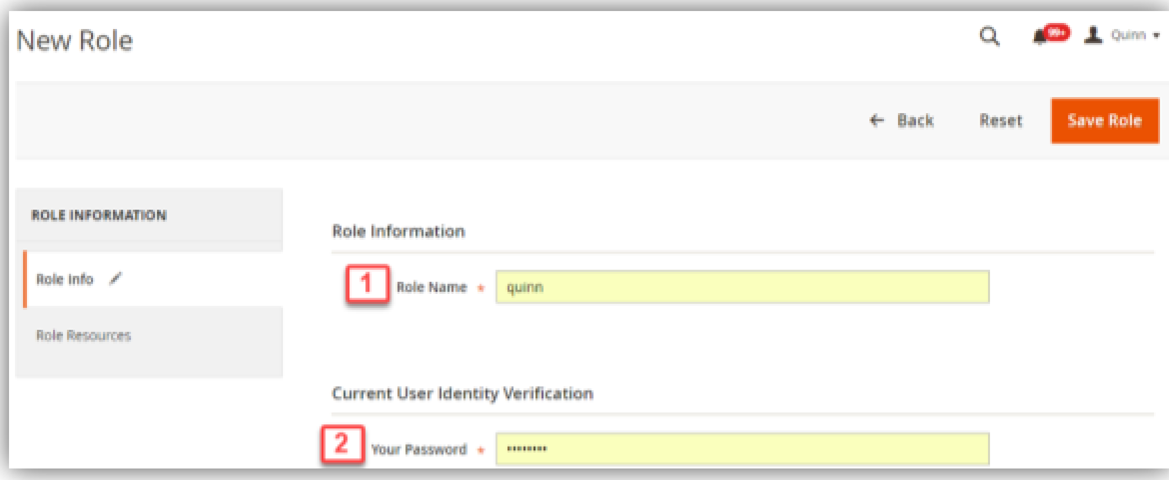
(1) Click **Add New Role** to create new user role.
(2) Fill out the blank with a value to search, after click **Search.**
(3) Search user role information with keyword.

View or edit a role's detail by clicking on each line.

3.1.1.2. Create a new user role

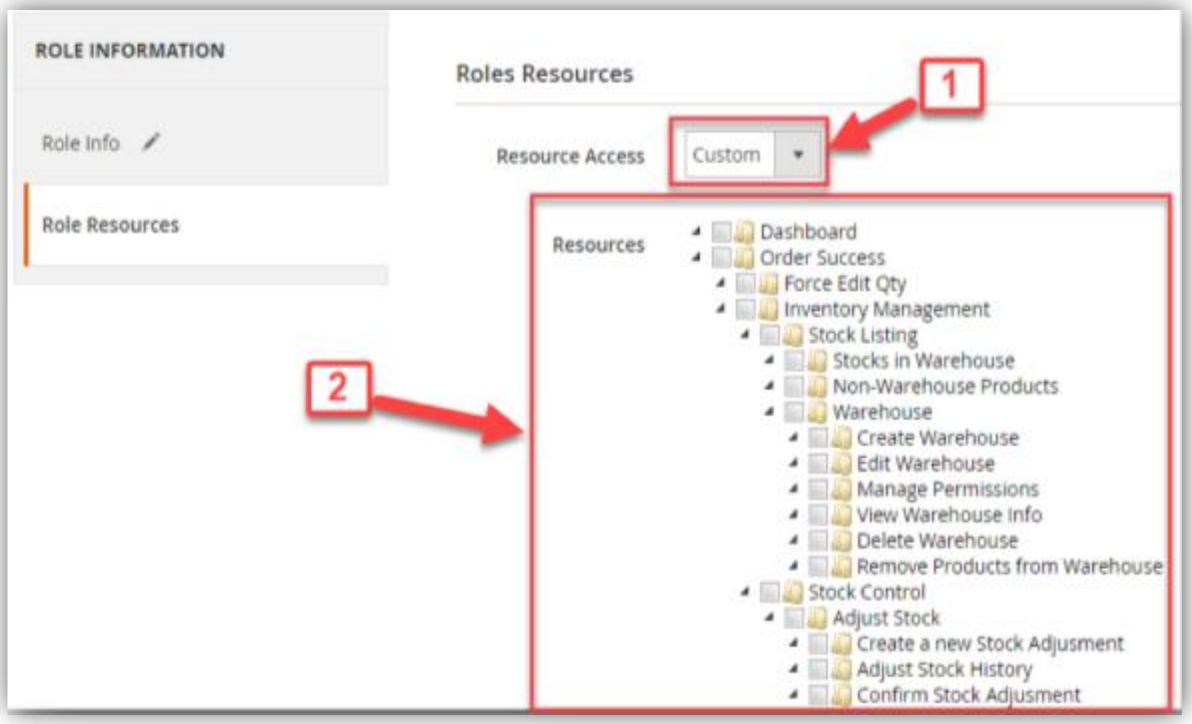


Click **Add New Role**



In tab **Role Info**

Fill in all required fields



In tab **Role Resources:**

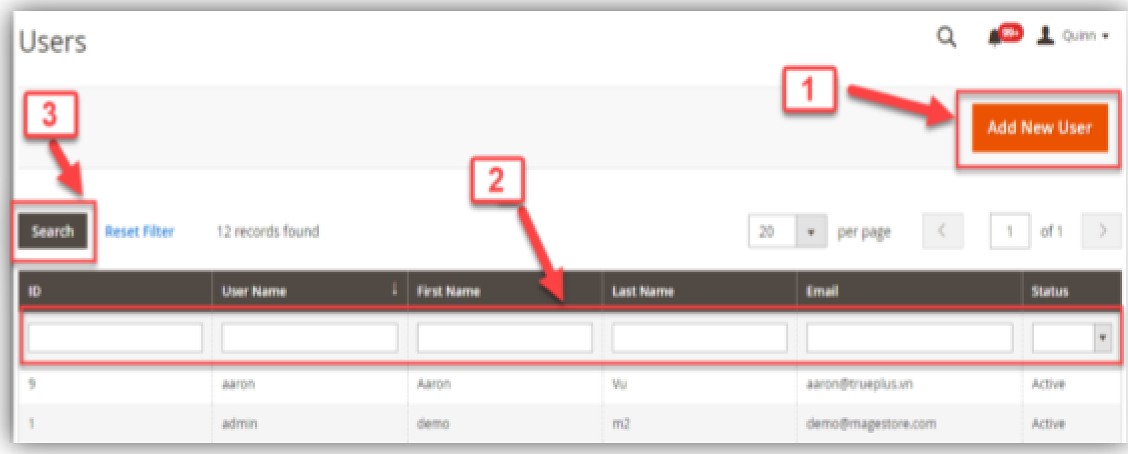
(1) **Resource Access**: You can choose **Custom** or **All**. Choose **All** if you want users having this role will have access to all resources, click on **Save** or **Save And Continue Edit** button to save your work.

(2) If you choose **Custom**, you can tick to assign specific permissions for that role.

Click **Save** to complete the process.

3.1.2. Decentralize Users

3.1.2.1. Manage user



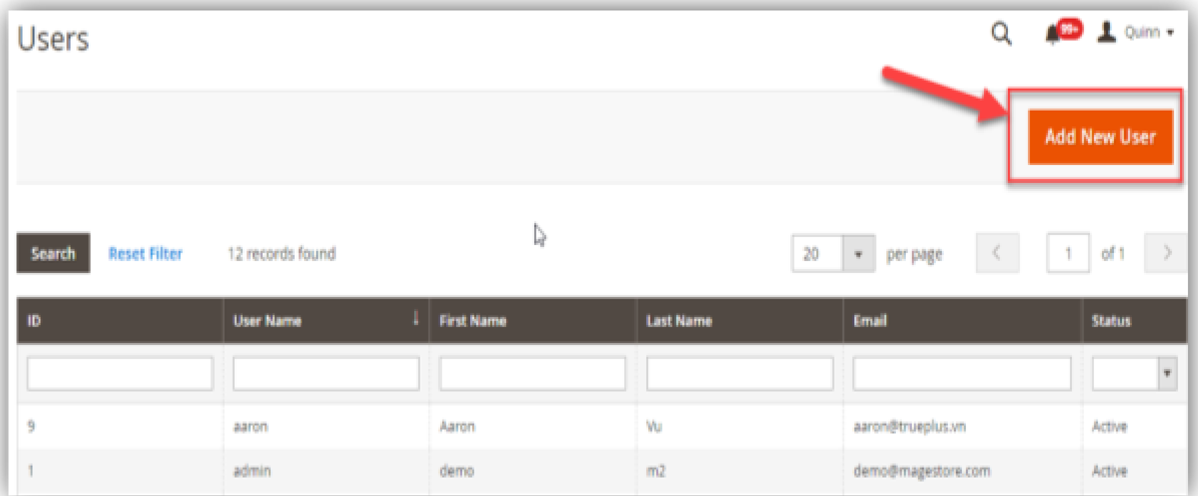
(1) Click **Add New User** to create new user.

(2) Fill out the blank with a value to search, after click **Search**.

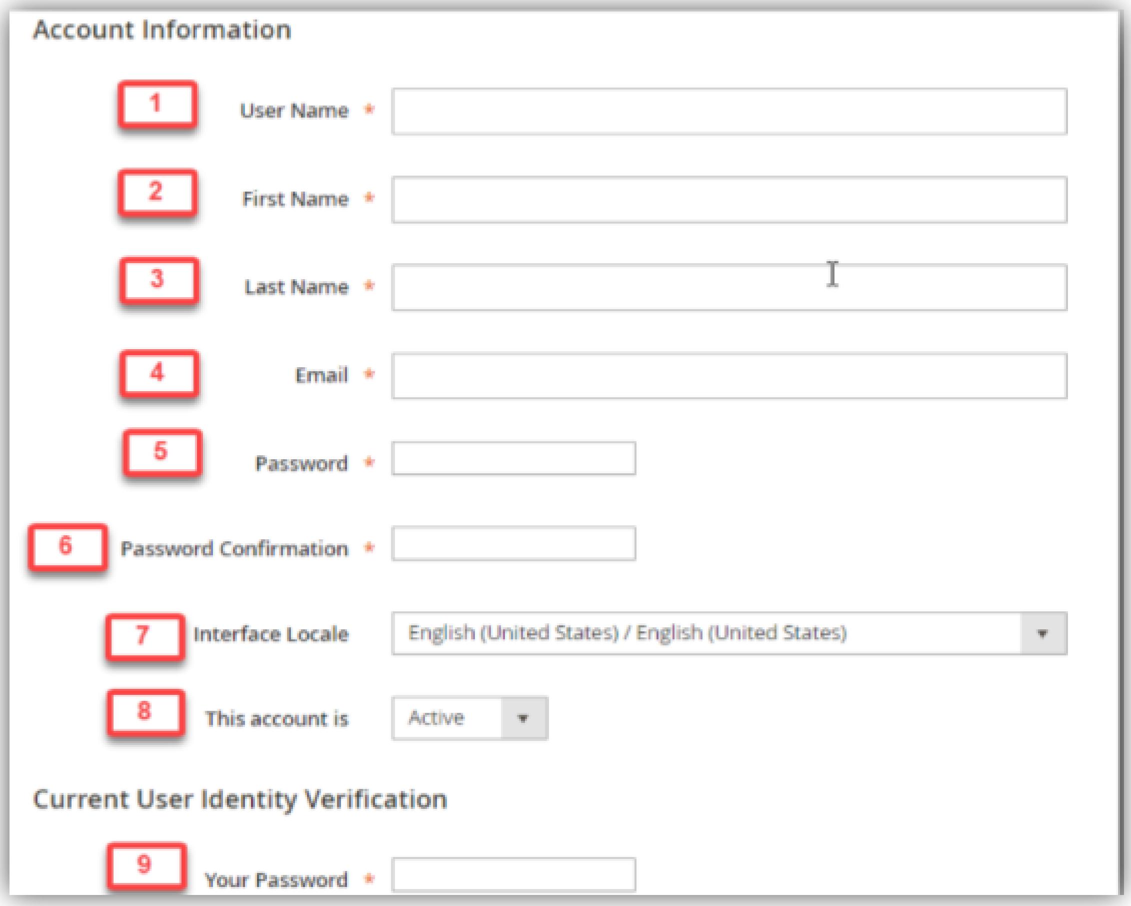
(3) Search user information with keyword.

View or edit a user's detail by clicking on each line.

3.1.2.2. Create a new user

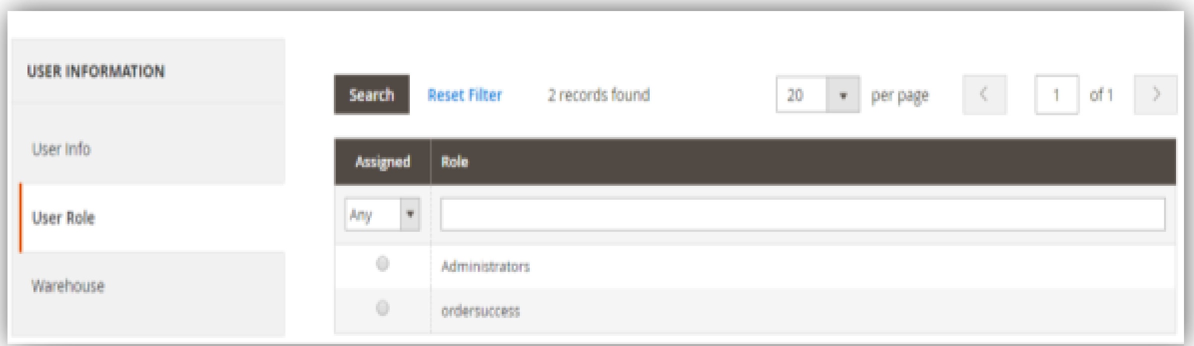


To create new user, click **Add New User**



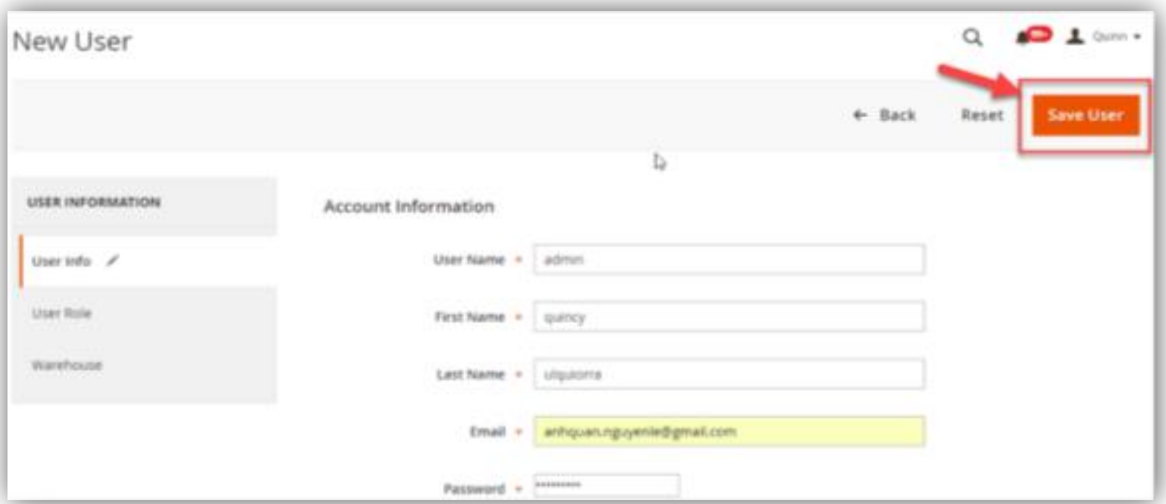
In tab **User Info**, fill in the blank:

(1) **User Name** (required)
(2) **First Name** (required)
(3) **Last Name** (required)
(4) **Email** (required)
(5) **Password** (required)
(6) **Password Confirmation** (required)
(7) **Interface Locale**: you can select different location.
(8) **This account is**: Active or Inactive.
(9) **Your Password**: fill out your password. (required).



In tab **User Role**, select a role for user.

In tab Warehouse, click **Assign Warehouses** to assign warehouses to this user.



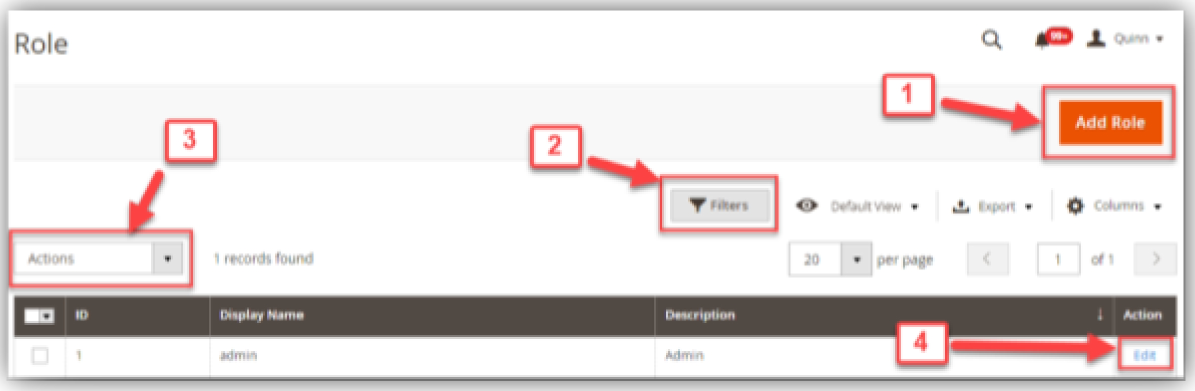
Click **Save User** to complete the process.

3.2. How to manage staff

3.2.1. Decentralize access permission of Web POS users

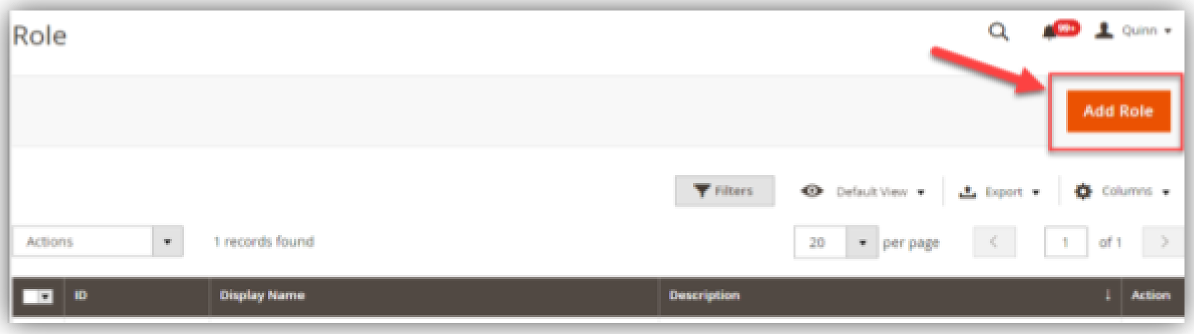
Path: **Sales > Web POS** section **> Manage Roles**

3.2.1.1. Manage role

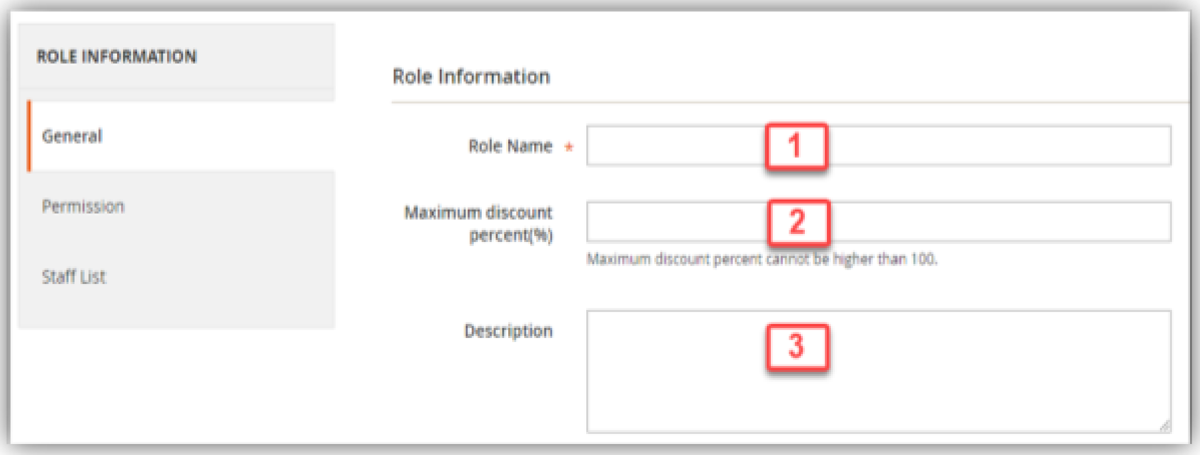


(1) **Add Role**: Click to add a new role.
(2) **Filters**: You can find role information by click it and fill out values.
(3) **Action**: If you want to delete a role record, you need choose a role, then click Action and select Delete.
(4) **Edit**: You can view role's details (edit) by click Edit or click each line.

3.2.1.2. Add a new role

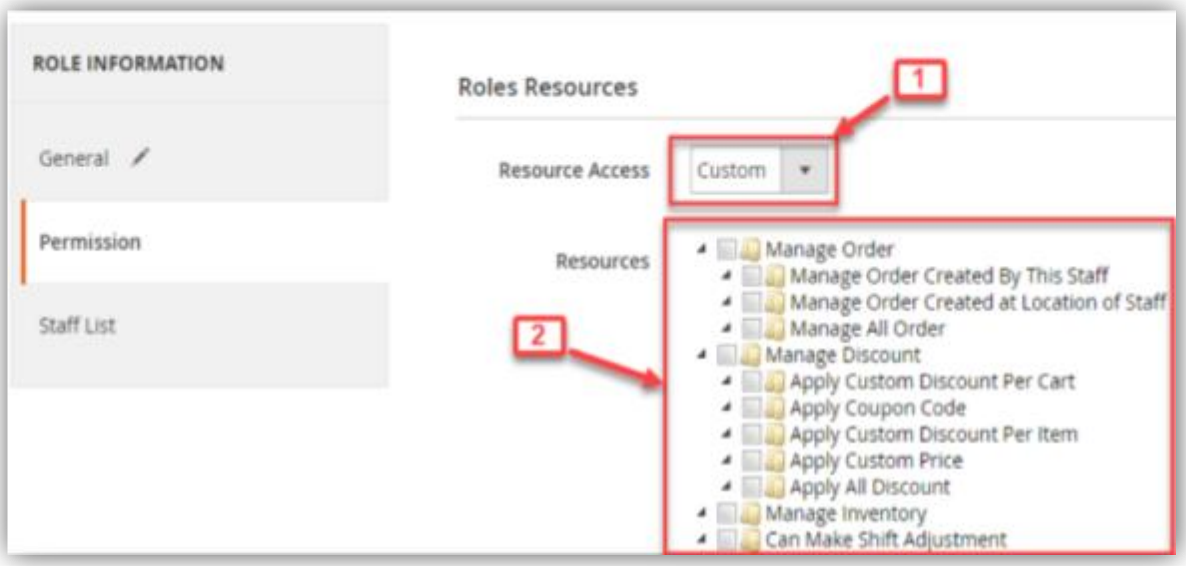


Click **Add Role** to add a new role.



In **General** tab, fill out the blank.

(1) **Role Name**: Enter a name for the role. (required)
(2) **Maximum discount percent (%)**: Limit the highest discount percent that each user role can offer customers.
(3) **Description**: Enter text that describes the role.



In **Permission** tab:

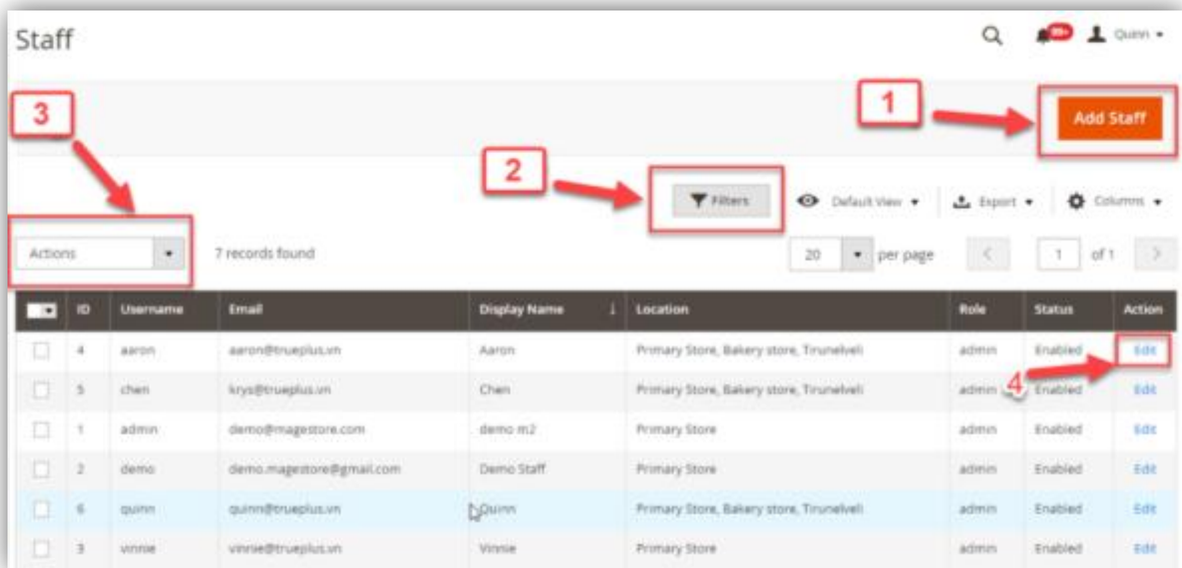
(1) **Resource Access**: You can choose **Custom** or **All**. Choose **All** if you want users having this role will have access to all resources, click on **Save** or **Save And Continue Edit** button to save your work.

(2) If you choose **Custom**, you can tick to assign specific permissions for that role.

3.2.2. Decentralize staff

3.2.2.1. Manage Staff

Path: **Sales > Web POS** section **> Manage Staff**



(1) Click **Add Staff** to create a new staff.

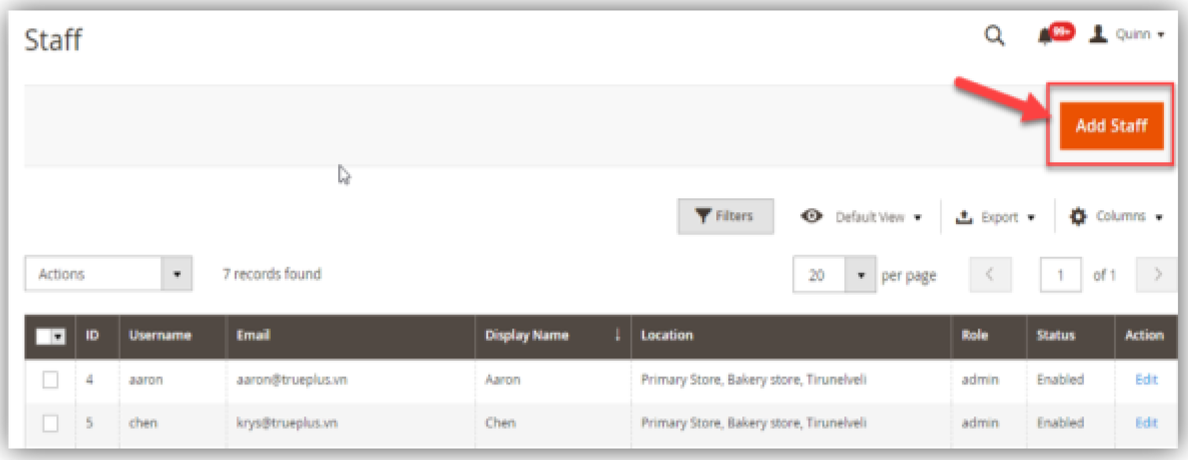
(2) Click **Filters** to search staff information.

(3) If you want to **Delete** or **Change status** a staff, first select a staff, then click **Actions**: choose **Delete** or **Change status**.

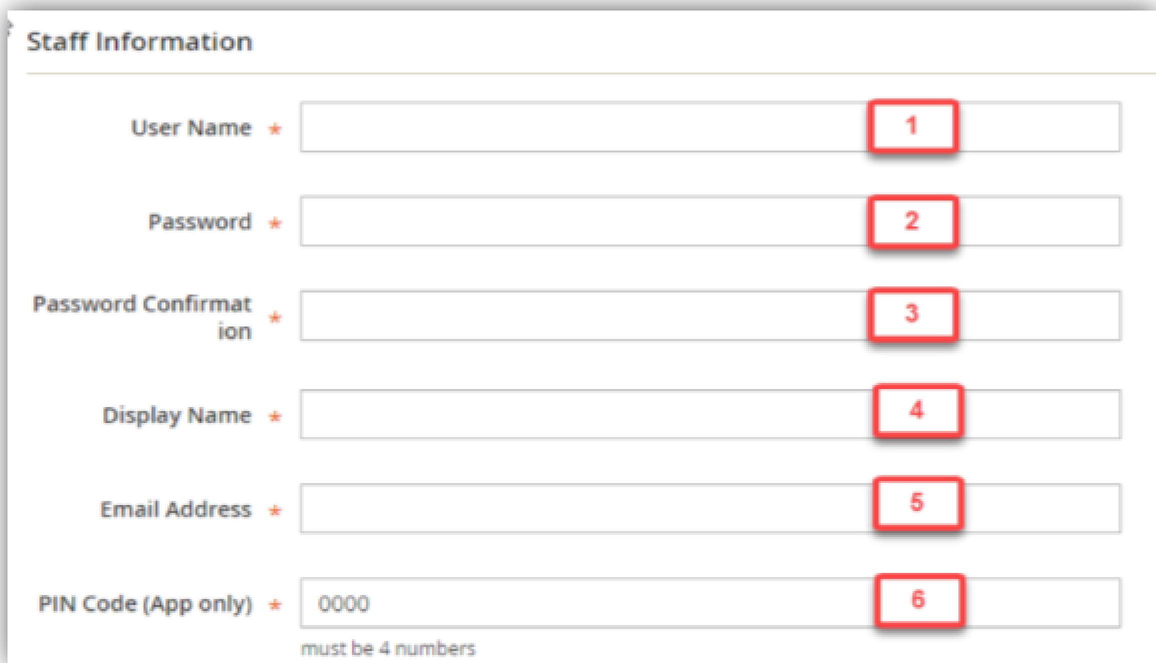
Click **Detail** to view a staff's details or edit.

3.2.2.2. Create a new staff

Path: **Sales > Web POS** section **> Manage Staff**



Click **Add Staff**.



Fill out all the required fields or select:

(1) **User Name**.

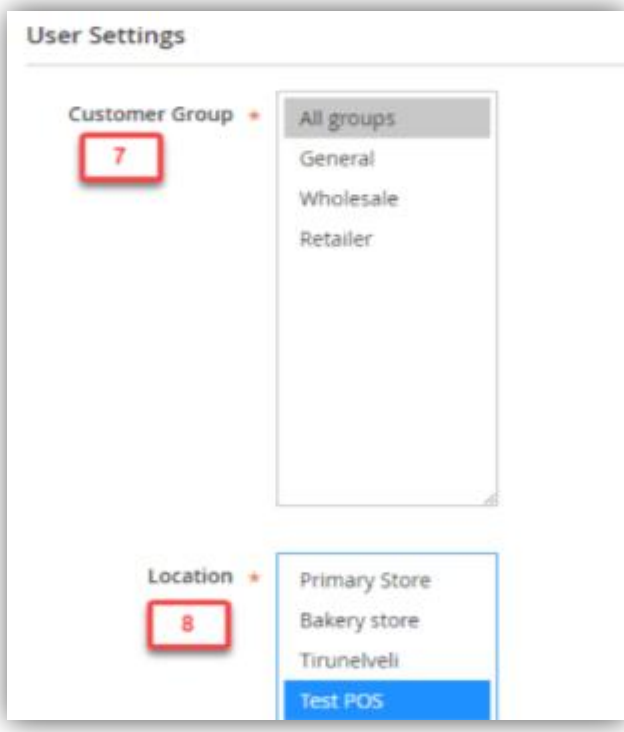
(2) **Password.**

(3) **Password Confirmation**.

(4) **Display Name**.

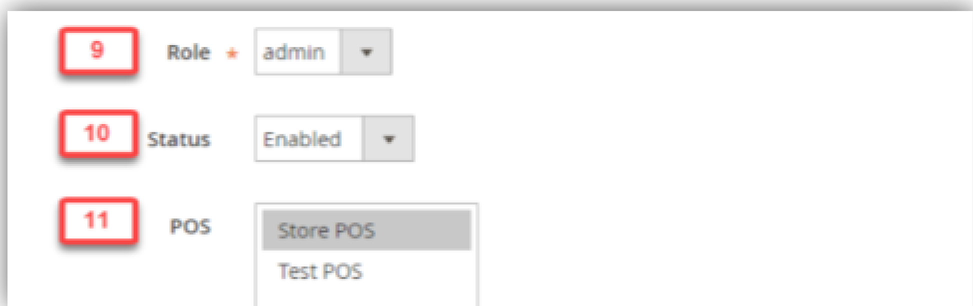
(5) **Email Address.**

(6) **PIN Code (App only)**.



(7) **Customer Group**.

(8) **Location**: Hold **Ctrl + Click** to choose more than one



(9) **Role**.

(10) **Status**: You can **Enabled** or **Disabled** this staff.

(11) **POS**: Assign POS for user. To choose more than one, hold **Ctrl + Click.**

Finally, click **Save** to complete the process.

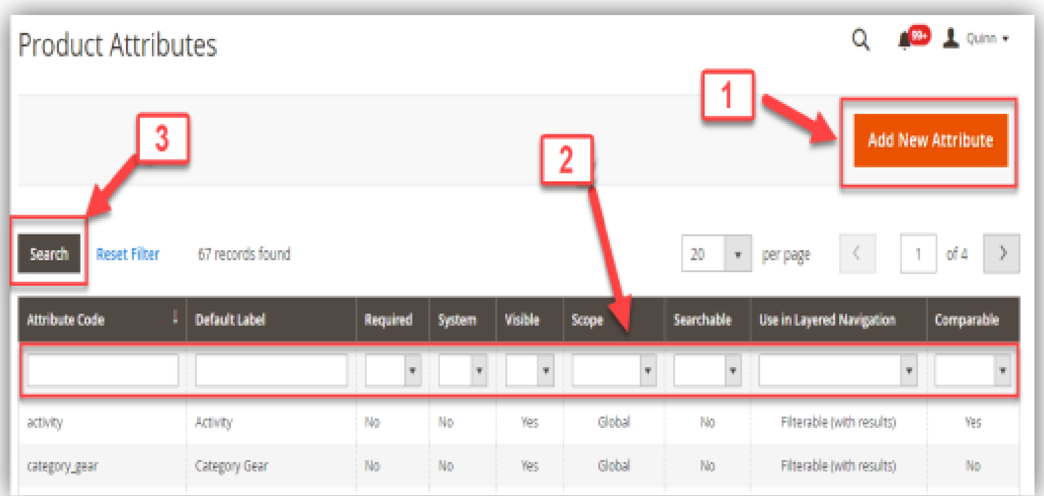
4. HOW TO MANAGE MASTER DATA

4.1. Product

4.1.1. Attribute

Path: **Stores > Attributes** section**> Product**

4.1.1.1. Manage Attribute



(1) Click **Add New Attribute** to create new user.

(2) Fill out the blank with a value to search, after click **Search**.

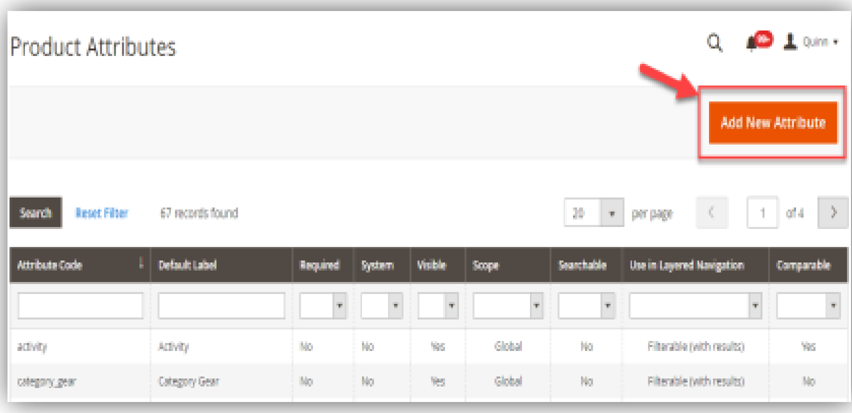
(3) Search attribute information with keyword.

You can view or edit attribute's details by clicking on each line

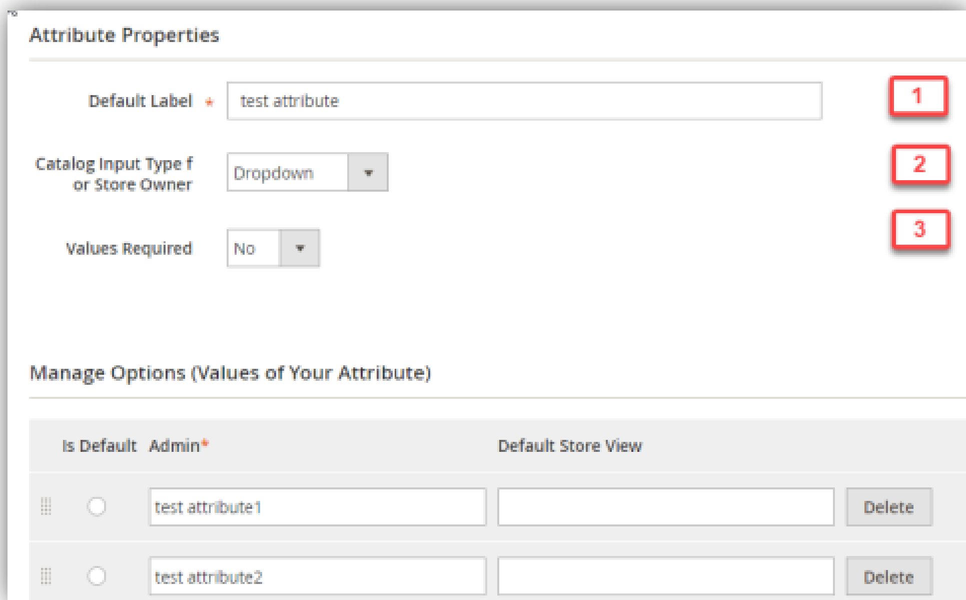
4.1.1.2. Create A New Attribute

Attributes can be created while working on a product, or from the Product **Attributes** pages. The following example show how to create attributes from the Stores menu. Any attribute that is used as a drop-down list of values for a configurable product must have the following properties:

Property	Value
Catalog Input Type for Store Owner	Dropdown
Scope	Global



Click **Add New Attribute**



Basic Properties

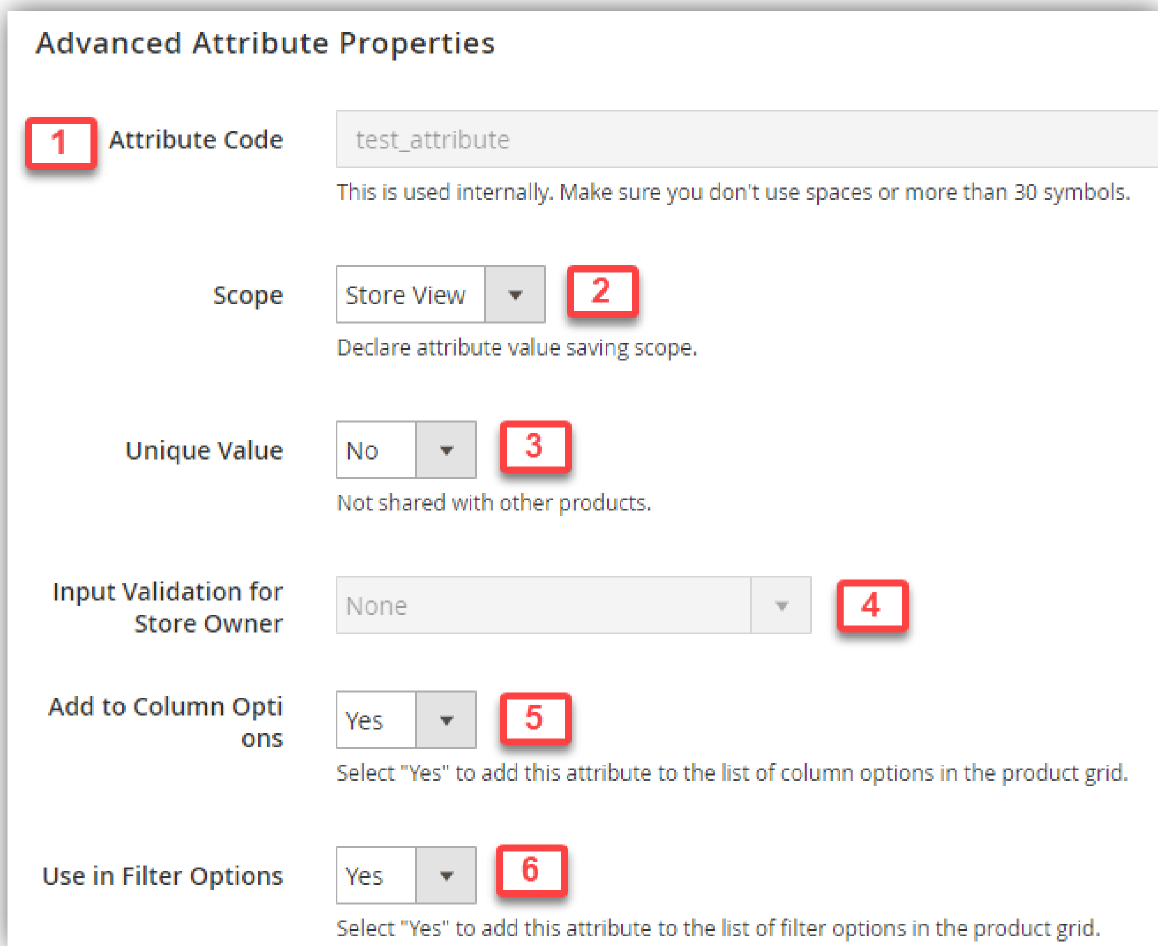
(1) Enter a **Default Label** to identify the attribute

(2) Set **Catalog Input Type** for Store Owner to the type in input control to be used for data entry

(3) Select **Yes** to require the customer choose an attribute value option

For Dropdown and Multiple Select input types, do the following:

- Under Manage Options, click **Add Option**.
- Enter the first value that you want to appear in the list.
  - Enter one value for the **Admin**, and a translation of the value for each store view.
  - Enter only the Admin value, if you have only one store view, you can enter only the Admin value.
- Click **Add Option** and repeat the previous step for each option that you want to include in the list.
- Select **Is Default** to use the option as the default value.



Advanced Properties (if needed).

(1) Enter a unique **Attribute Code** in lowercase characters, and without space.

(2) Set **Scope** to indicate where in your store system the attribute can be used.

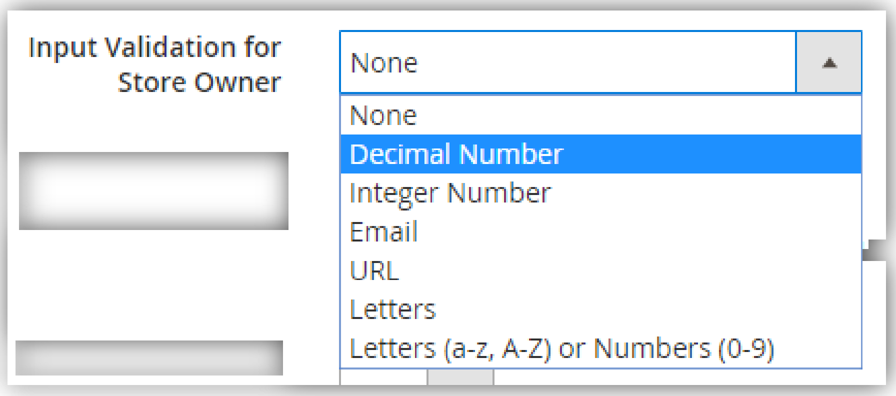
(3) If you want to prevent duplicate values from being entered, set **Unique Value** to **Yes**

(4) To run a validity test of any data entered in the text field, set **Input Validation for Store Owner** to the type of data that the field should contain. This field is not available for input types with values that are selected. The test can validate any of the following:

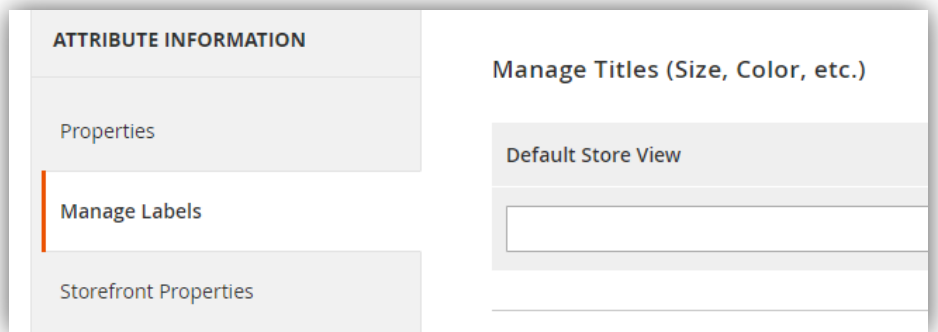
- Decimal Number.
- Integer Number.
- Email.
- URL.
- Letters.
- Letters (a-z, A-Z) or Numbers (0-9).

(5) **Add to Column Options**: Include the attribute as a column in the Products grid.

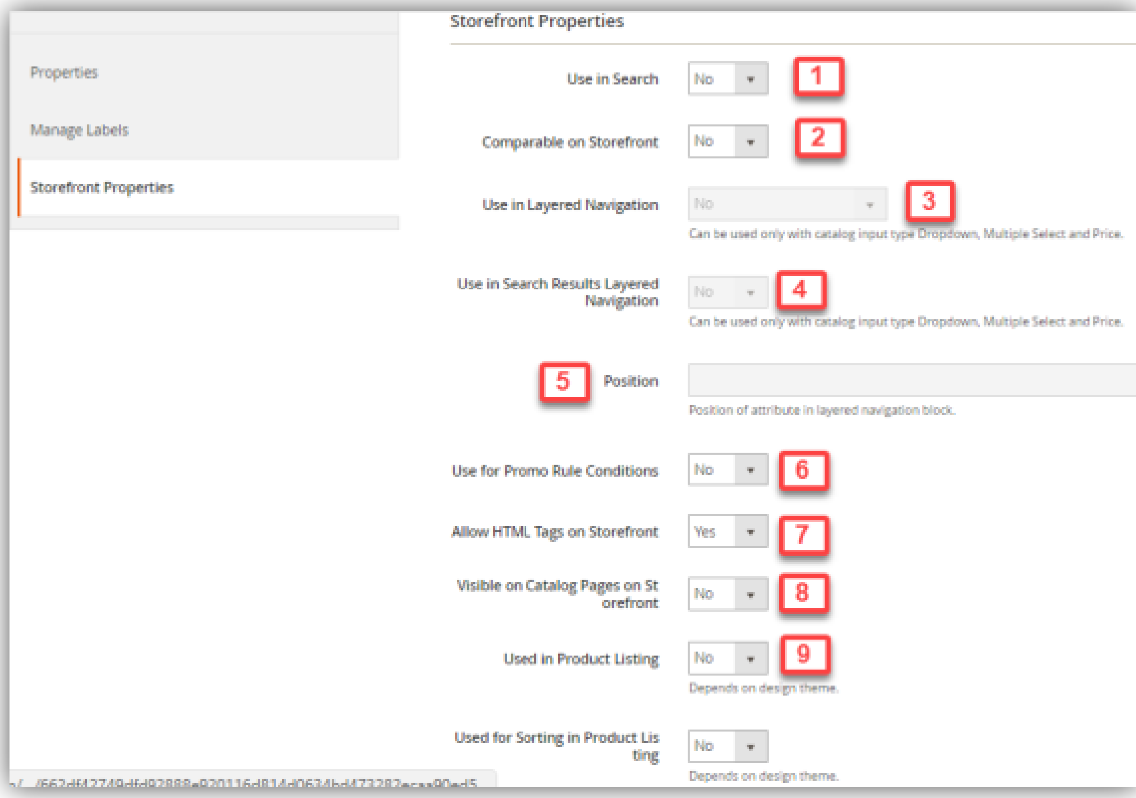
(6) **Use in Filter Option**: Adds a filter a control to the column header in the Products grid.



Input Validation.



In tab **Manage Labels**: Enter a **Title** to be used as a label for the field. If your store is available in different languages, you can enter a translated title for each view.



In tab **Storefront Properties**

(1) If the attribute is to be available for search, set Use in Search to **Yes**

(2) To include the attribute in Product Compare, set Comparable on Storefront to **Yes**

For dropdown, multiple select and price fields, do the following:

(3) To use the attribute as a filter in layered navigation, set **Use in Layered Navigation** to **Yes**

(4) To use the attribute in layered navigation on search results pages, set **Use in Search Results Layered Navigation** to **Yes**

(5) In the **Position** field, enter a number to indicate the relative position of the attribute in the layered navigation block.

(6) Set **Use for Promo Rule Conditions** to **Yes** to use the attribute in price rule.

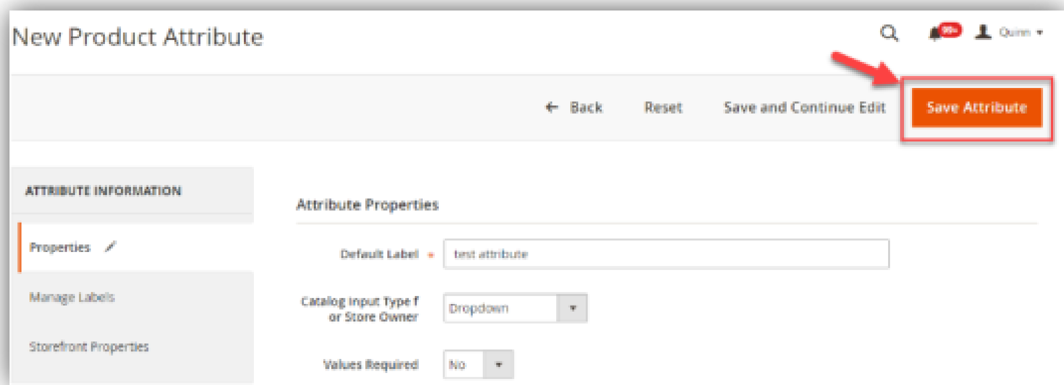
(7) To allow the text to be formatted with HTML, set **Allow HTML Tags on Frontend** to **Yes.** This setting makes the WYSIWYG editor available for the field.

(8) To include the attribute in catalog page listings, set **Visible on Catalog Pages on Storefront** to **Yes**

(9) Complete the following settings if supported by your theme:

- To include the attribute on the product detail page, set Visible on Catalog Pages on Storefront to **Yes**
- To include the attribute in product listings, set Used in Product Listing to **Yes**

To use attribute as a sort parameter for product listings, set Used for Sorting in Product Listing to **Yes**

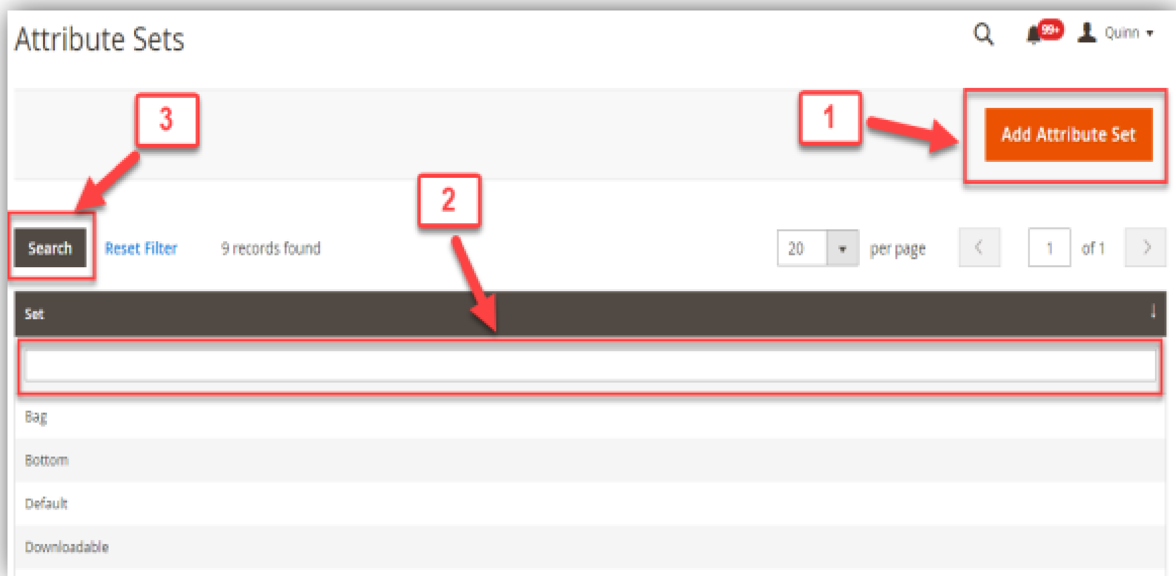


When complete, click **Save Attribute.**

4.1.2. Attribute Set

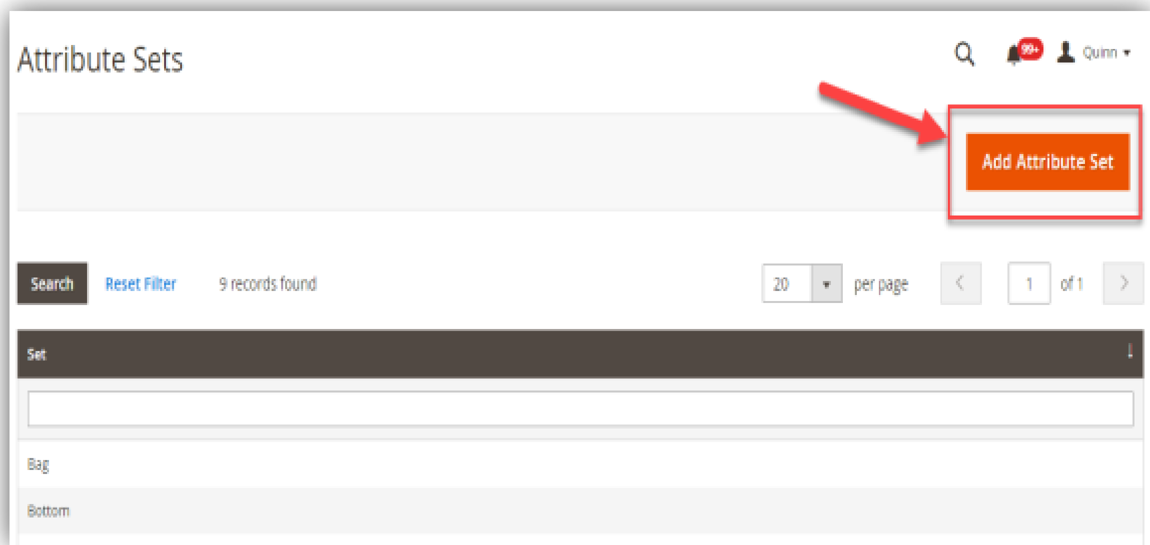
Path: **Stores > Attributes** section **> Attribute set**

4.1.1.1. Manage Attribute Set

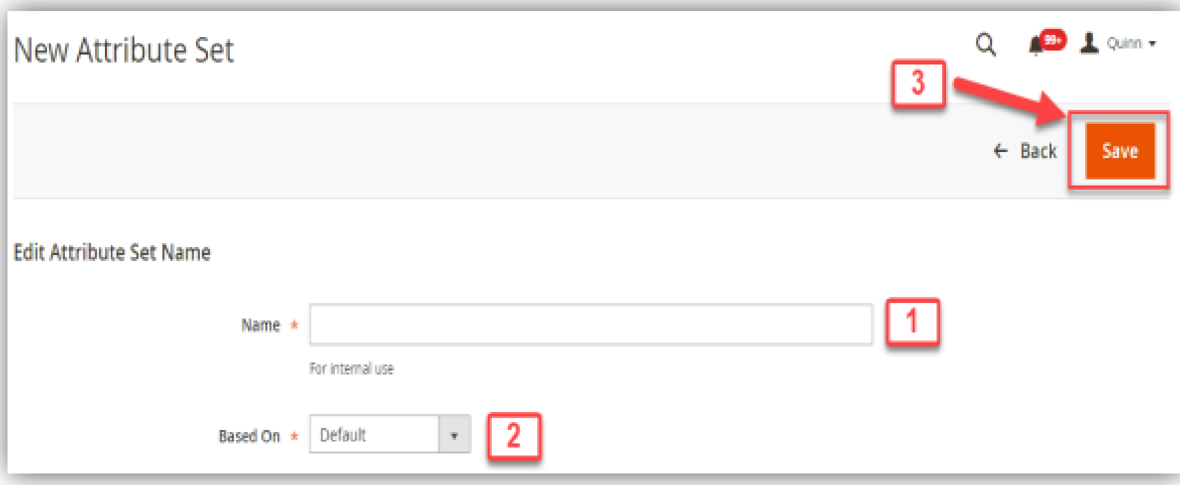


(1) Click **Add Attribute Set** to create new attribute set.
(2) Fill out the blank with a value to search, after click **Search**.
(3) Search attribute set information with keyword.
You can view or edit details of attribute set by clicking on each line.

4.1.1.2. Create A New Attribute Set



Click **Add Attribute Set** to create new attribute set.

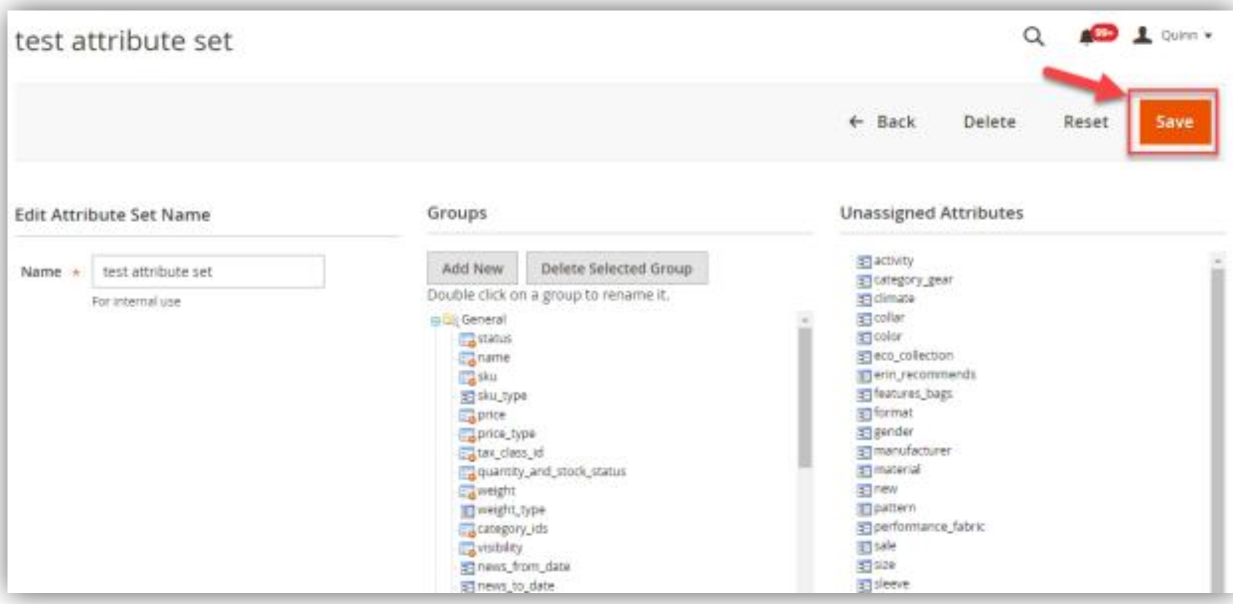


(1) In the **Name** field, enter a name for the attribute set (required)

(2) In the **Based On** field, select an existing attribute set to be used as a template:

- Bag
- Bottom
- Default
- Downloadable
- Gear
- Sprite Static Ball
- Sprite Yoga Strap
- Top

(3) Click **Save** button and continue



To add a new attribute to the set, drag the attribute from the Unassigned Attribute list to the appropriate folder in the General group.

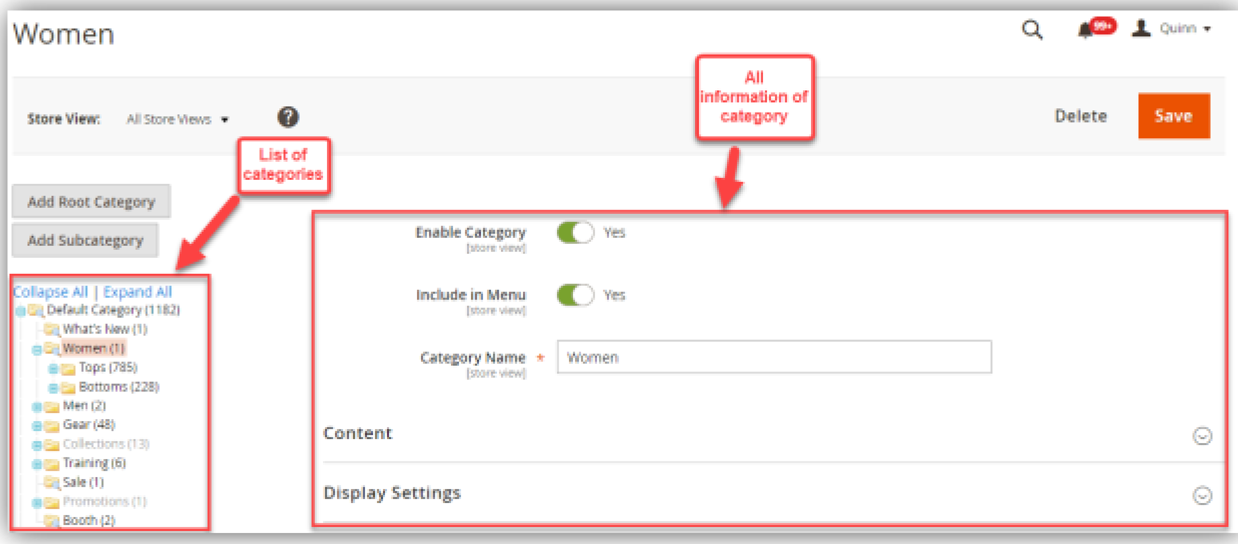
Click **Save** to complete the process.

4.1.3. Categories

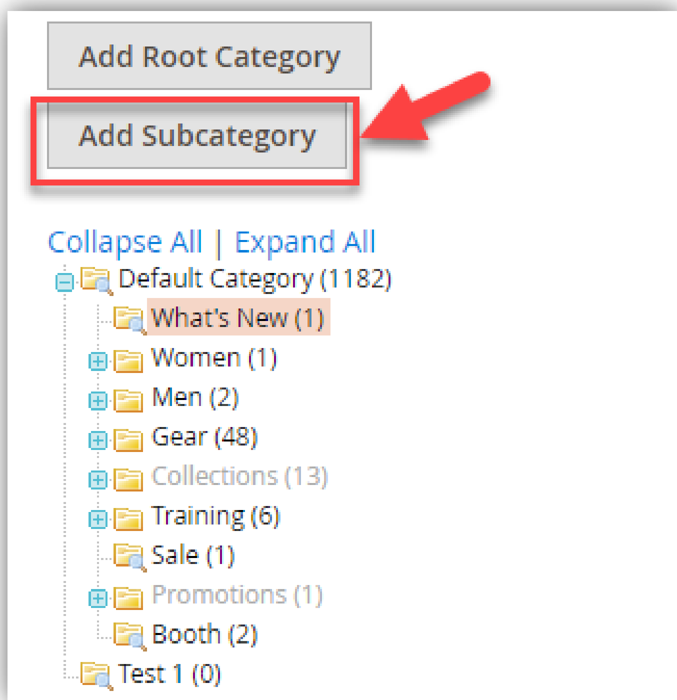
Path: **Products > Inventory** section **> Categories**

4.1.1.1. Manage Categories

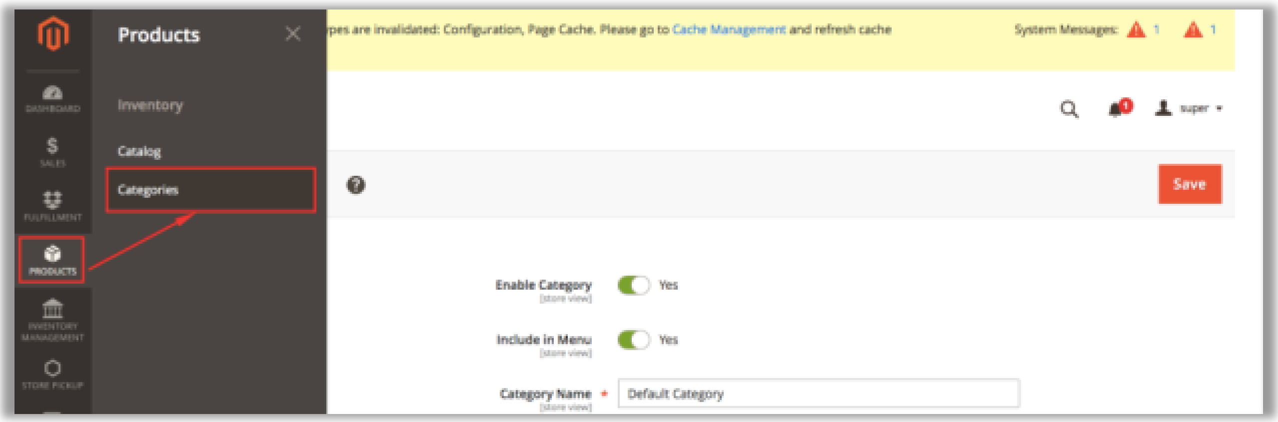
When selecting a category on the left, all the information will be displayed on the left.



4.1.1.2. Create A New Category



Create a Category



Path: **Products > Inventory** section **> Categories**

Set Store View to determine where the new category is to be available. In the category tree, tap the parent category of the new category. The parent is one level above the new category.

If you're starting from the beginning without any data, there might be only two categories in the list: **Default Category**, which is the root, and an **Example Category**.

Click **Add Sub-category** to add a new category.

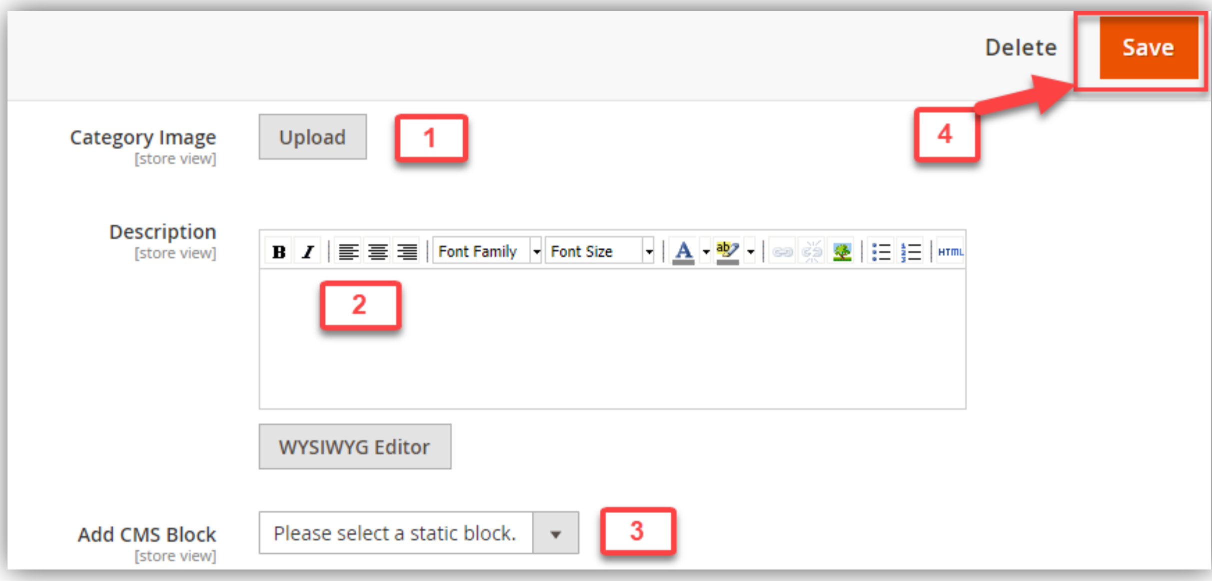
Complete the Basic information

(1) If you want the category to be immediately available in the store, set **Enable Category** to the **Yes** position.

(2) To include the category in the top navigation, set Include in Menu to the **Yes** position.

(3) Enter the **Category Name**.

(4) Click **Save.**



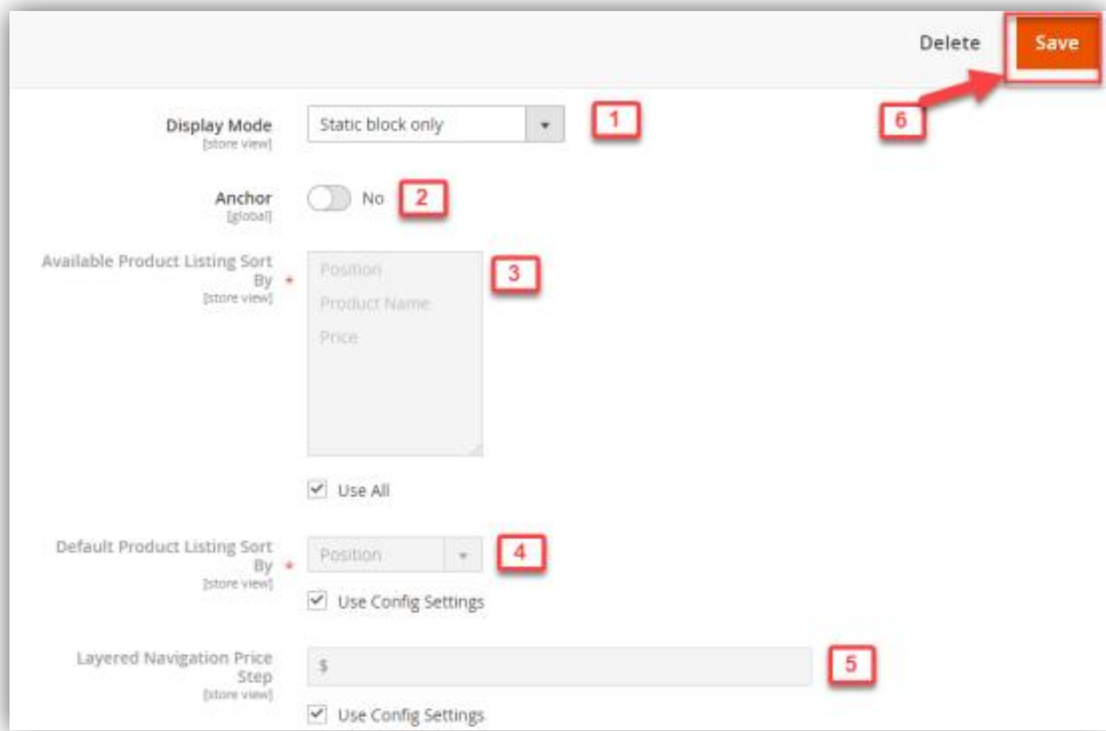
Complete the Category Content

(1) To display a Category Image at the top of the page, tap **Upload**. Then, choose the image that you want to represent the category.

(2) In the **Description** box, enter the text that you want to appear on the category landing page. Then, format the text as needed.

(3) To include a content block on the category landing page, choose the CMS Block that you want to appear.

(4) Click **Save**.



Complete the **Display Settings**

Expand the **Display Settings** section.

(1) Set Display Mode to one of the following:

- Products Only.
- Static Block Only.
- Static Block and Products.

(2) If you want the category page to include the **Filter by Attribute** section of layered navigation, set Anchor to the **Yes** position.

(3) To change the Available Product Listing Sort By options, do the following:

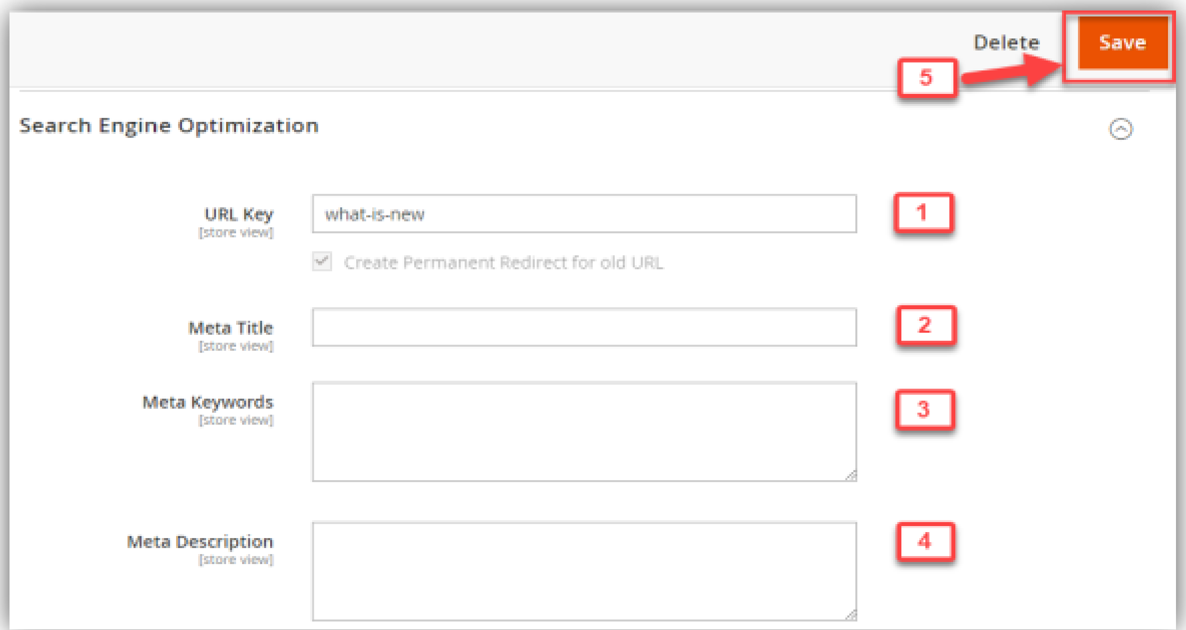
- Clear the **Use All checkbox**.
- Select one or more of the available values to be available for customers to sort the list. By default, all available values are included. For example, the values might include:
  - Position.
  - Product Name.
  - Price 5.

(4) To set the default sort order for the category, choose the **Default Product Listing Sort By value**.

(5) To change the default layered navigation price step setting, do the following:

- Clear the **Use Config Settings** checkbox.
- Enter the value to be used as an incremental price step for layered navigation.

(6) Click **Save**.



Complete the **Search Engine Optimization Settings**

Expand the Search Engine Optimization Settings section

(1) Enter a URL Key for the category, or let the system automatically create one that is based on the category name.

Complete the following meta data for the category:

(2) Meta Title.

(3) Meta Keywords.

(4) Meta Description.

(5) Click **Save.**

Choose the **Products** in **Category**

Expand the Products in Category section. Then, use one of the following methods to add products to the category.

To find the products:

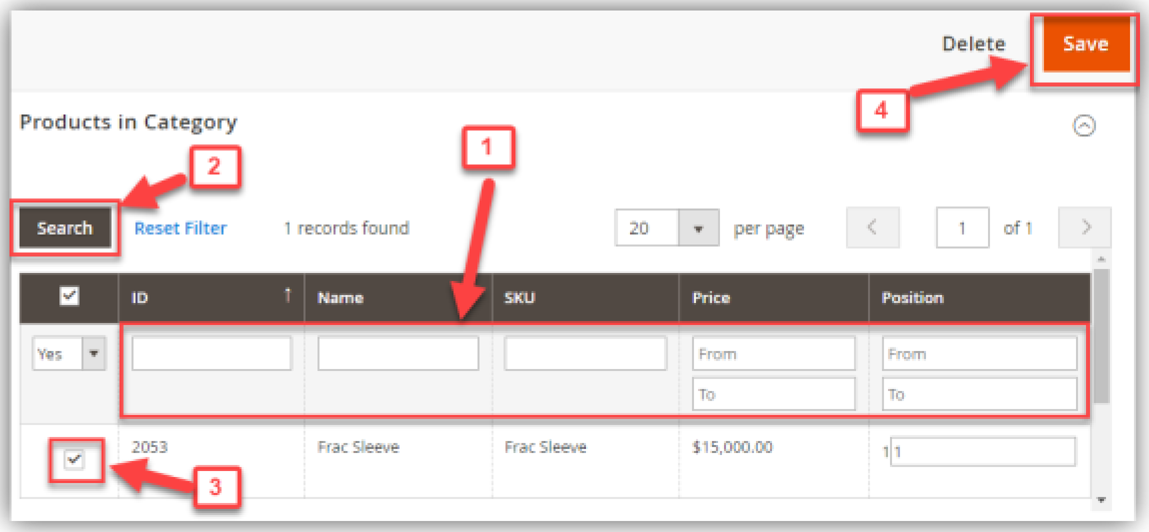
(1) Fill out the blank with a value.

(2) Click Search to find the products.

To include a product in the category.

(3) Mark the checkbox of each product, in the first column.

(4) Click **Save**.



Choose the **Products** in **Category**

Expand the Products in Category section. Then, use one of the following methods to add products to the category.

To find the products:

(1) Fill out the blank with a value.

(2) Click Search to find the products.

To include a product in the category.

(3) Mark the checkbox of each product, in the first column.

(4) Click **Save**.

4.1.4. Product Types

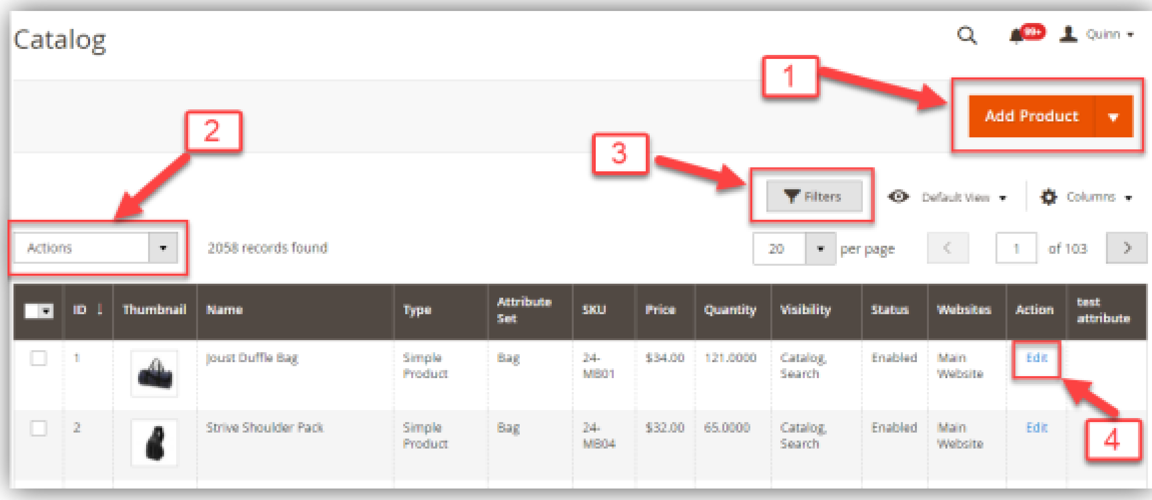
Path: **Products > Inventory** section **> Catalog**

4.1.4.1. Product Types

Product Types	Description
Simple Product	A simple product is a physical item with a single SKU. Simple products have a variety of pricing and of input controls which makes it possible to sell variations of the product. Simple products can be used in association with grouped, bundle, and configurable products.
Configurable Product	A configurable product appears to be a single product with lists of options for each variation. However, each option represents a separate, simple product with a distinct SKU, which makes it possible to track inventory for each variation.
Grouped Product	A grouped product presents multiple, standalone products as a group. You can offer variations of a single product, or group them for a promotion. The products can be purchased separately, or as a group.
Virtual Product	Virtual products are not tangible products, and are typically used for products such as services, memberships, warranties, and subscriptions. Virtual products can be used in association with grouped and bundle products.
Bundle Product	A bundle product let customers “build their own” from an as sort of options. The bundle could be a gift basket, computer, or any things else that can be customized. Each item in the bundle is a separate, standalone product.
Downloadable Product	A digitally downloadable product that consists of one or more files that are downloaded. The files can reside on your server or be provided as URLs to any other server.

4.1.4.2. Manage Product

Path: **Products > Inventory** section **> Catalog**

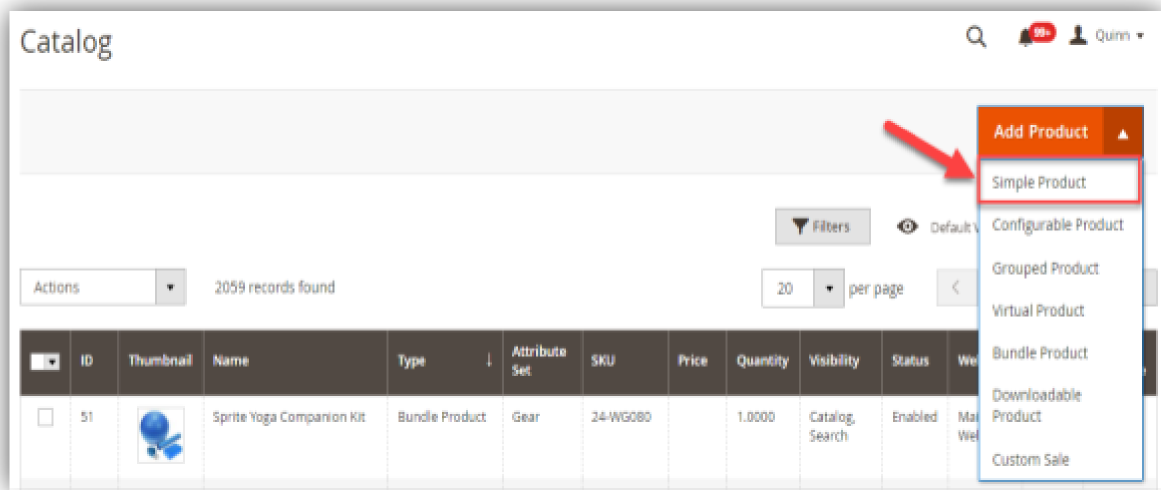


Workspace Controls

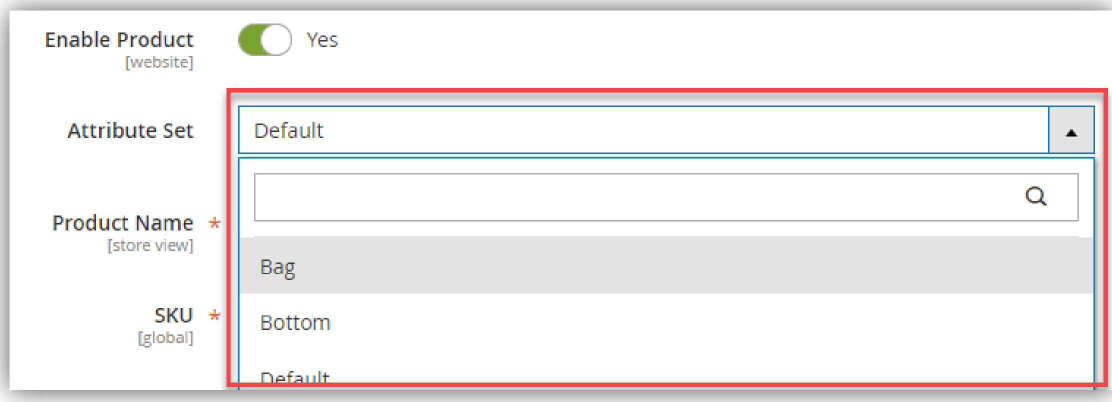
Control	Description
- Add Product	Initiates the process to create a new simple product. To choose a specific product type, click the down arrow. Options: • Simple Product. • Configurable Product. 1. Grouped Product. 2. Virtual Product. 3. Bundle Product. 4. Downloadable Product.
- Action	Lists all actions that can be applied to selected products in the list. To apply an action to a product or group of products, mark the check box in the first column of each product. Options: 5. Delete. 6. Change Status. 7. Update Attributes.
- Filters	Initiates a catalog search based on the current filters.
- Edit	Opens the product in edit mode or view product's detail. You can accomplish the same thing by clicking any where on the row.

4.1.4.3. Create A New Product

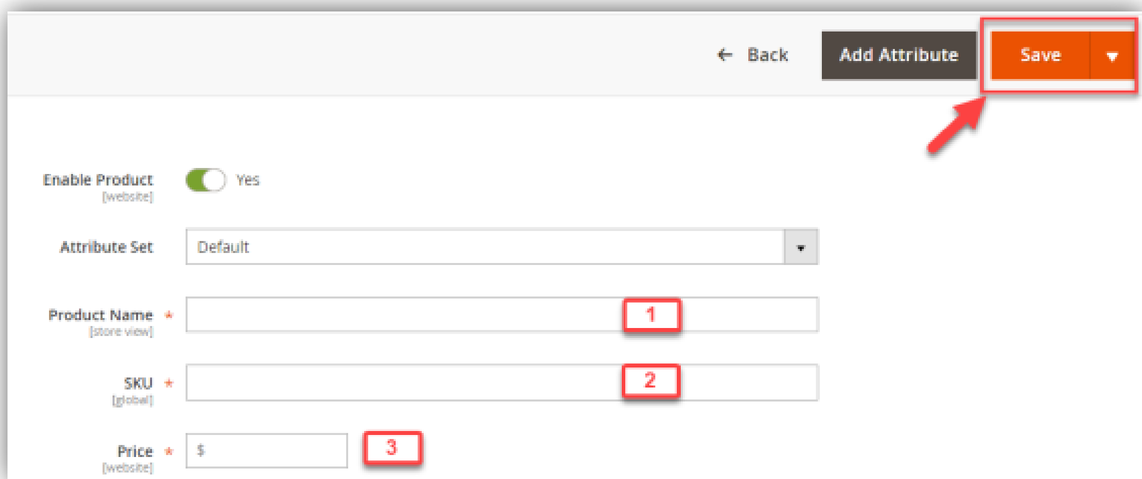
Simple product



In the upper-right corner on the Add Product menu, choose Simple Product.



Choose the attribute set that is used as a template for the product.



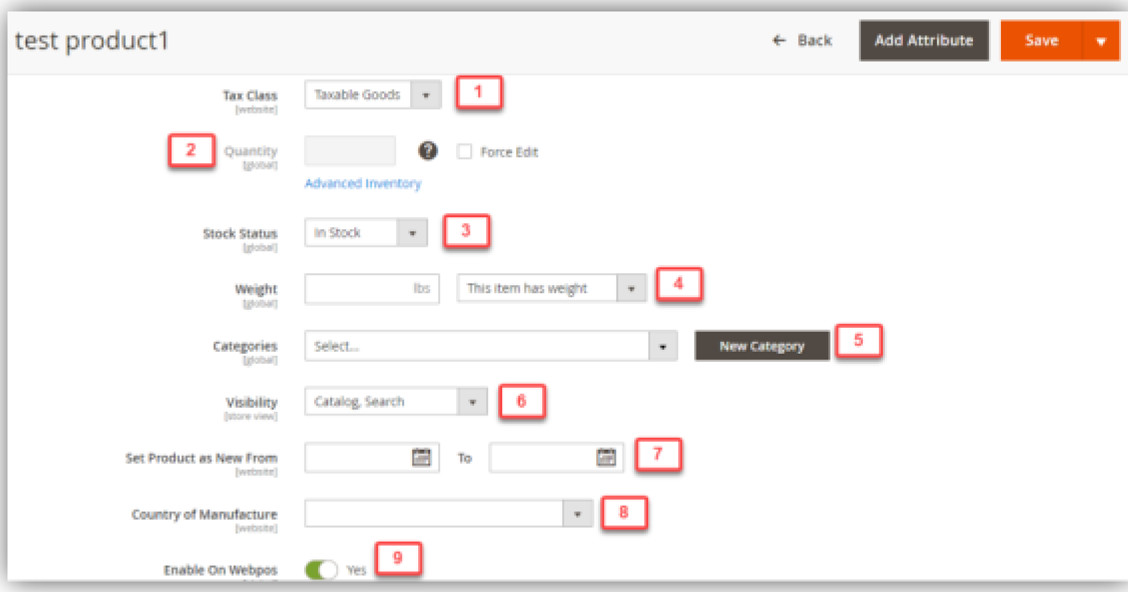
Complete the required setting.

(1) Enter **Product Name**. *(required)*

(2) The default SKU that is based on the product name, or enter another.

(3) **Price**: enter the product price.

Then, Click **Save** to continue.



Complete the basic settings

Set Tax Class to one of the following:

(1) Taxable Goods/None

(2) Enter the Quantity of the product that is currently in stock.

(3) By default, Stock Status is set to **In Stock**

(4) Enter the Weight of the product.

(5) Assign Categories to the product. Tap the **Selec**t to select available category or you can create new category by click New Category

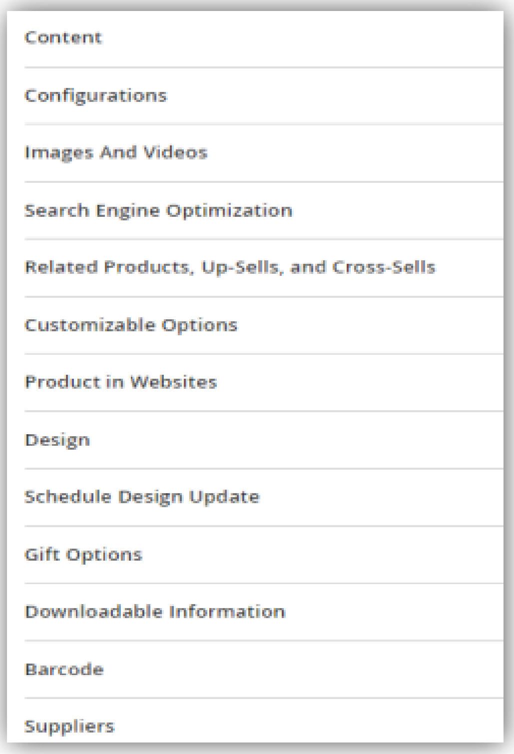
(6) Accept the default Visibility setting, **Catalog, Search**.

(7) Mark the Set Product as New checkbox to add the product in the list of new products.

(8) Choose the Country of Manufacture.

(9) Enable **On Web POS**

Then, click **Save** to continue



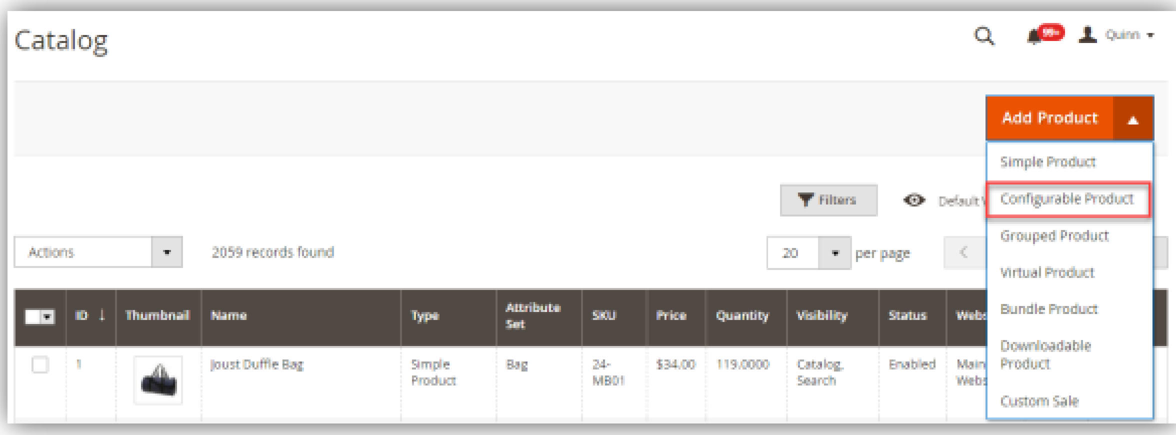
Complete the product information

Scroll down and complete the information in the following sections as needed:

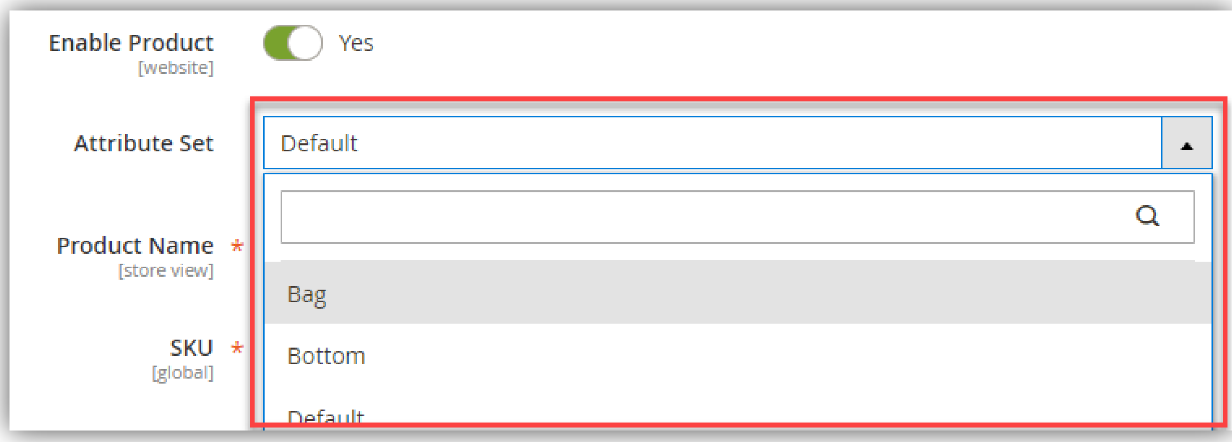
- Content
- Configurations
- Images and Videos
- Search Engine Optimization
- Related Products, Up-Sells, and Cross-Sells
- Customizable Options
- Products in Websites
- Design
- Schedule Design Update
- Gift Options
- Downloadable Information
- Barcode
- Suppliers

Configurable product

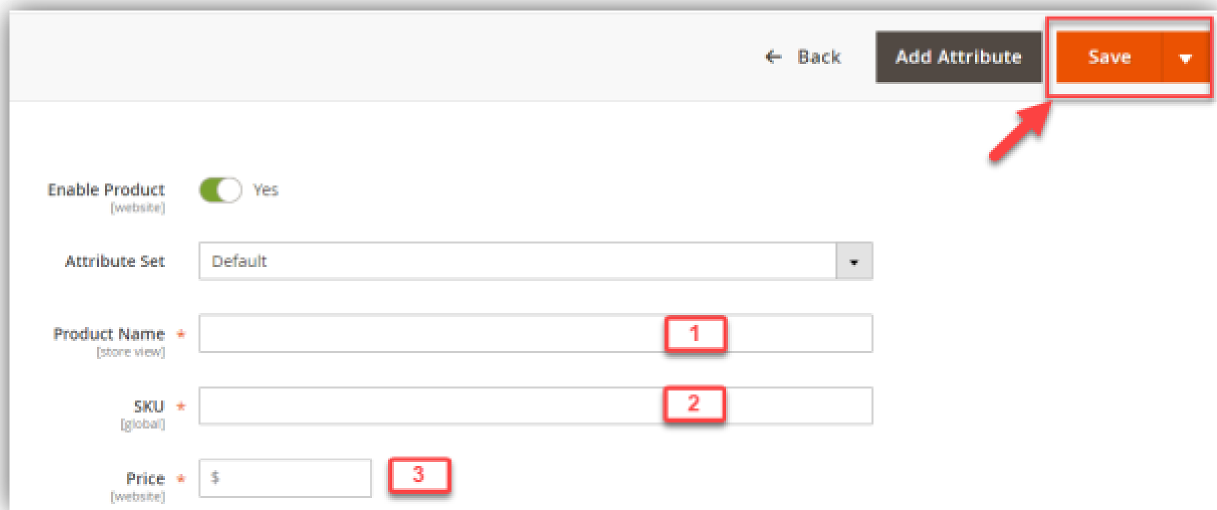
Create a new configurable product



In the upper-right corner on the **Add Product** menu, choose **Configurable Product**.



Choose the attribute set that is used as a template for the product.



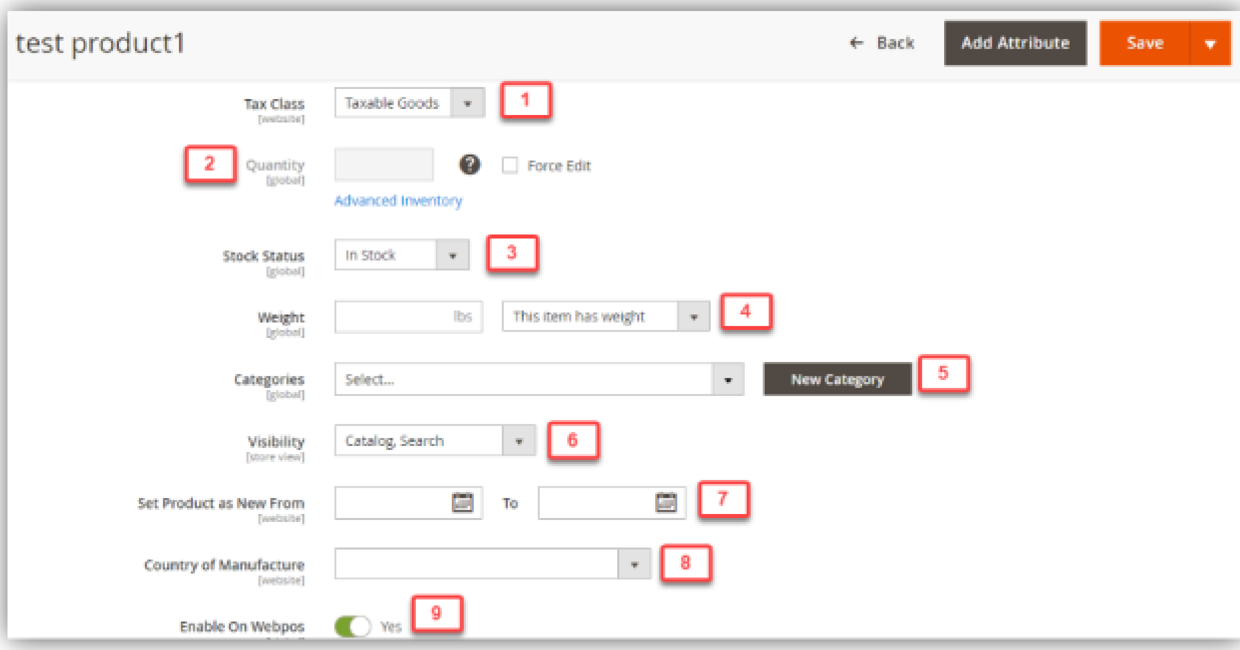
Complete the required setting

(1) Enter **Product Name**. (required)

(2) The default SKU that is based on the product name, or enter another.

(3) Enter the product Price.

Then, Click **Save** to continue.



Complete the basic settings

(1) Set Tax Class to one of the following:
- None.
- Taxable Goods.

(2) Enter the Quantity of the product that is currently in stock.

(3) By default, Stock Status is set to **In Stock**.

(4) Enter the Weight of the product.

(5) Assign Categories to the product. Tap the **Select** to select available category or you can create new category by click New Category

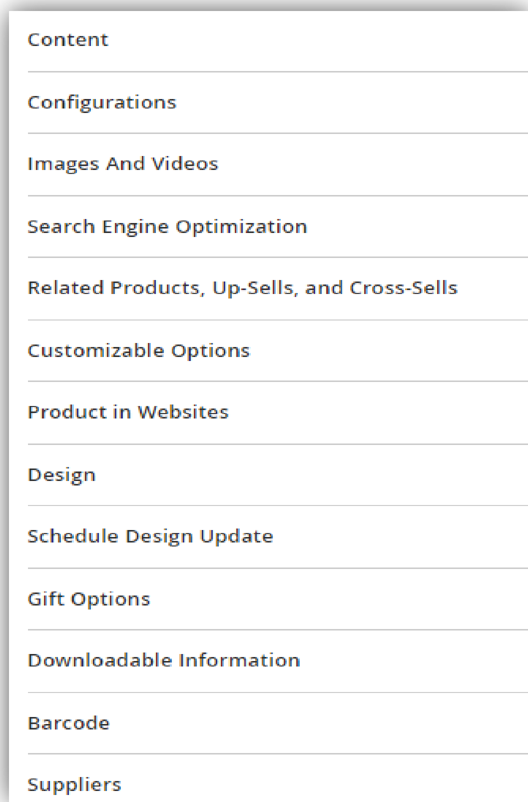
(6) Accept the default Visibility setting, **Catalog, Search**.

(7) To feature Mark the Set Product as New checkbox to add the product in the list of new products.

(8) Choose the Country of Manufacture.

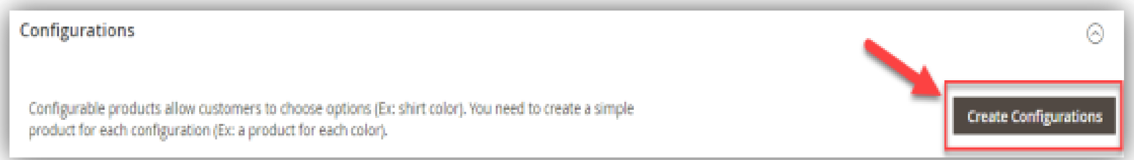
(9) Enable on Web POS

Then, click **Save to continue.**

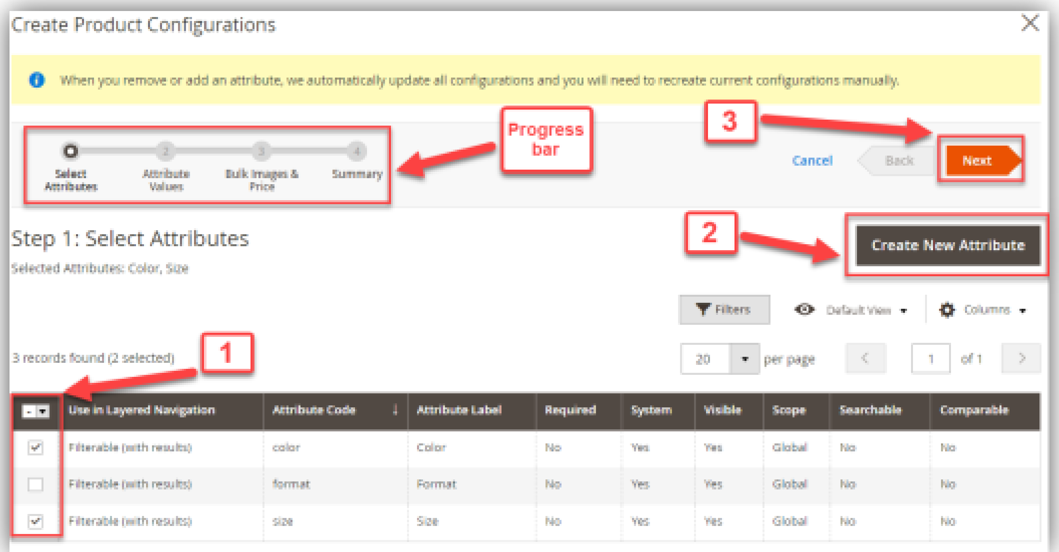


Complete the product information.

Adding configurations



After creating a product, scroll down the **Configuration** section **>** Click **Create Configurations**.

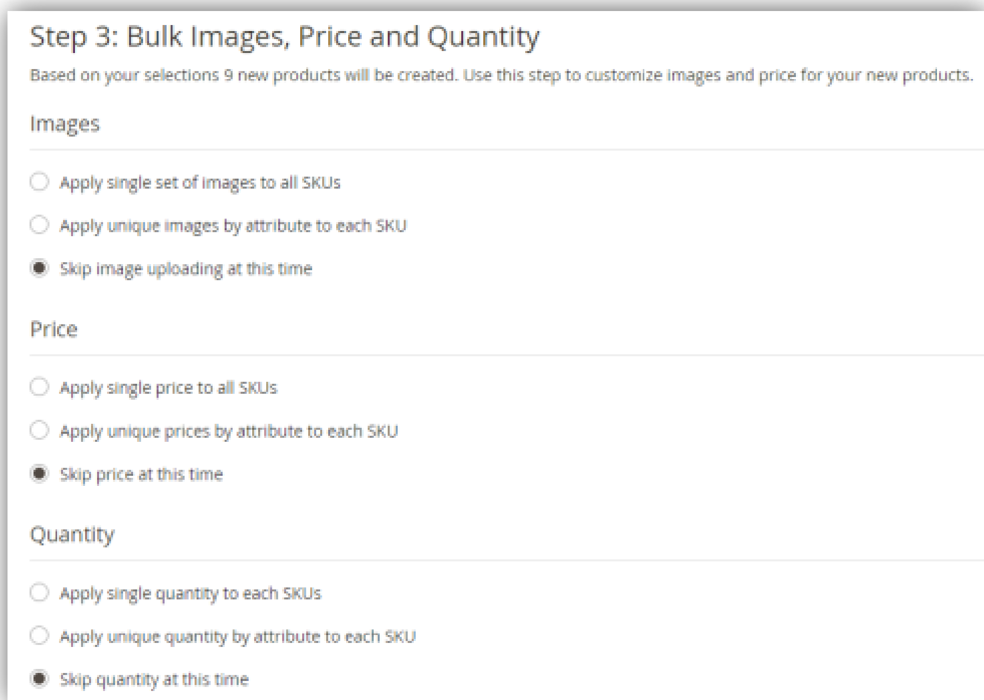


Choose the attributes

(1) Mark the checkbox of each attribute that you want to include as a configuration.
(2) Add a new attribute.
(3) Click to continue.

For each attribute, mark the checkbox of the values that apply to the product.

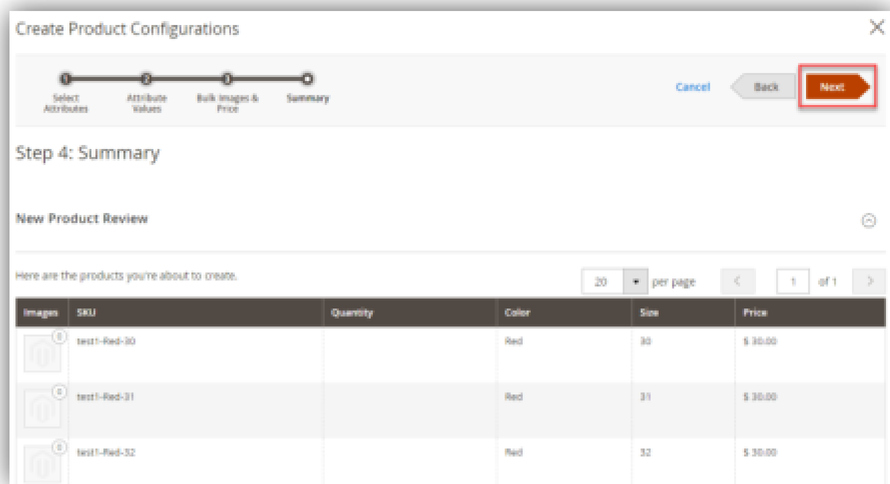
Click **Next to continue**



Configure the Images, Price, and Quantity.

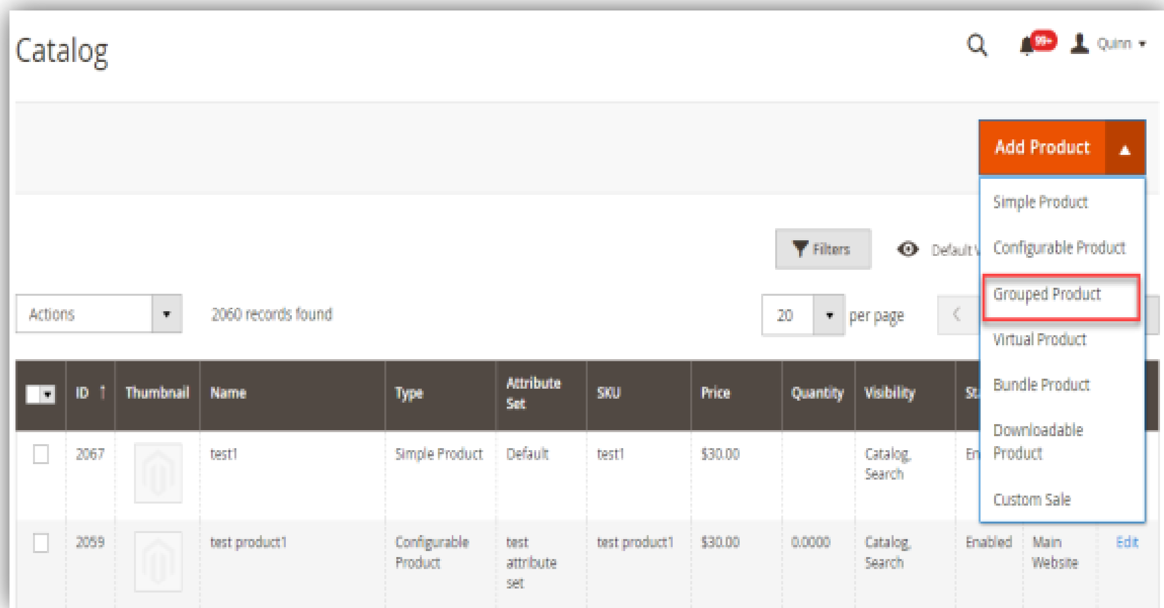
Click **Next** to continue.

You will see list product.

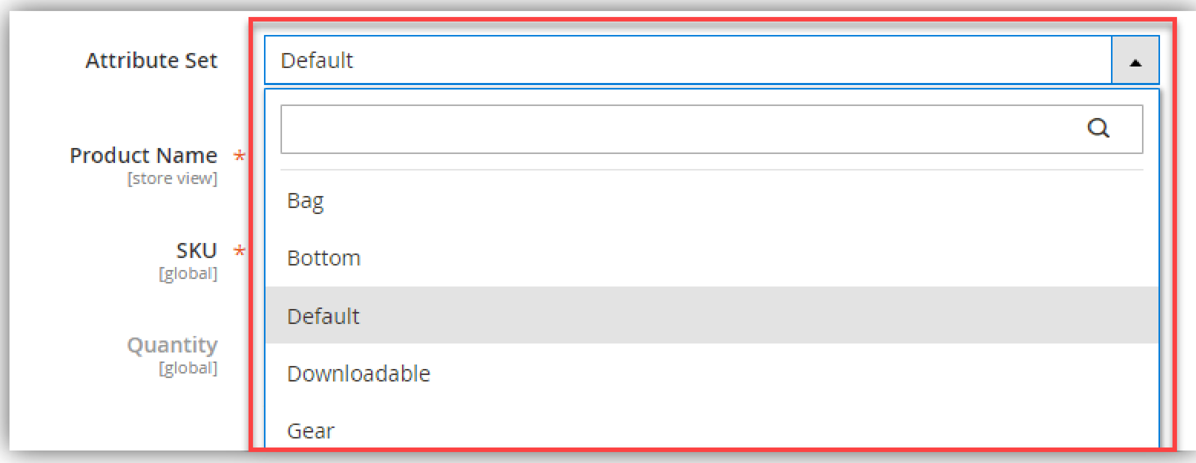


Click **Next** to finish the process.

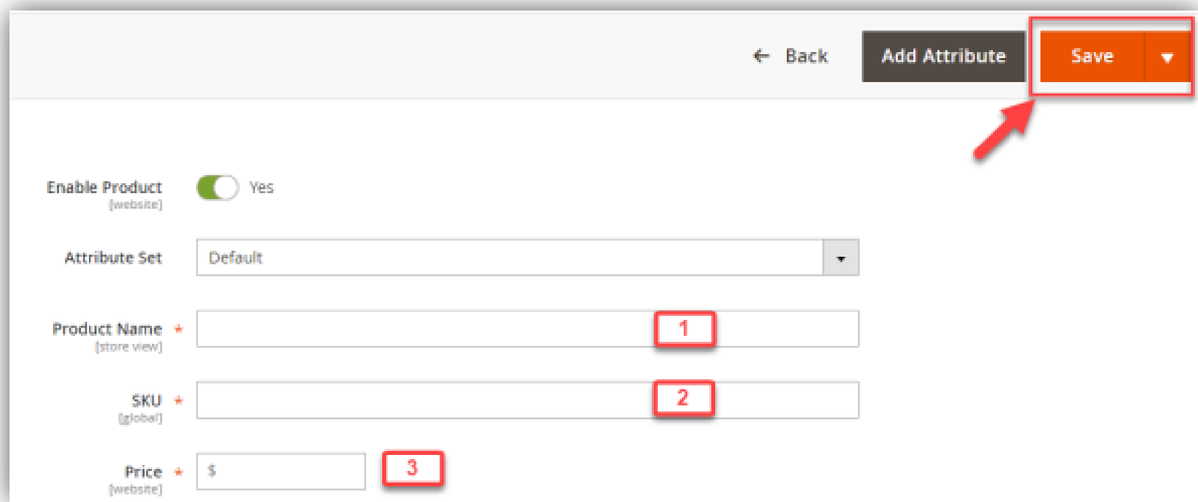
Grouped product



In the upper-right corner on the **Add Product** menu, choose **Grouped Product**.



Choose the attribute set that is used as a template for the product.



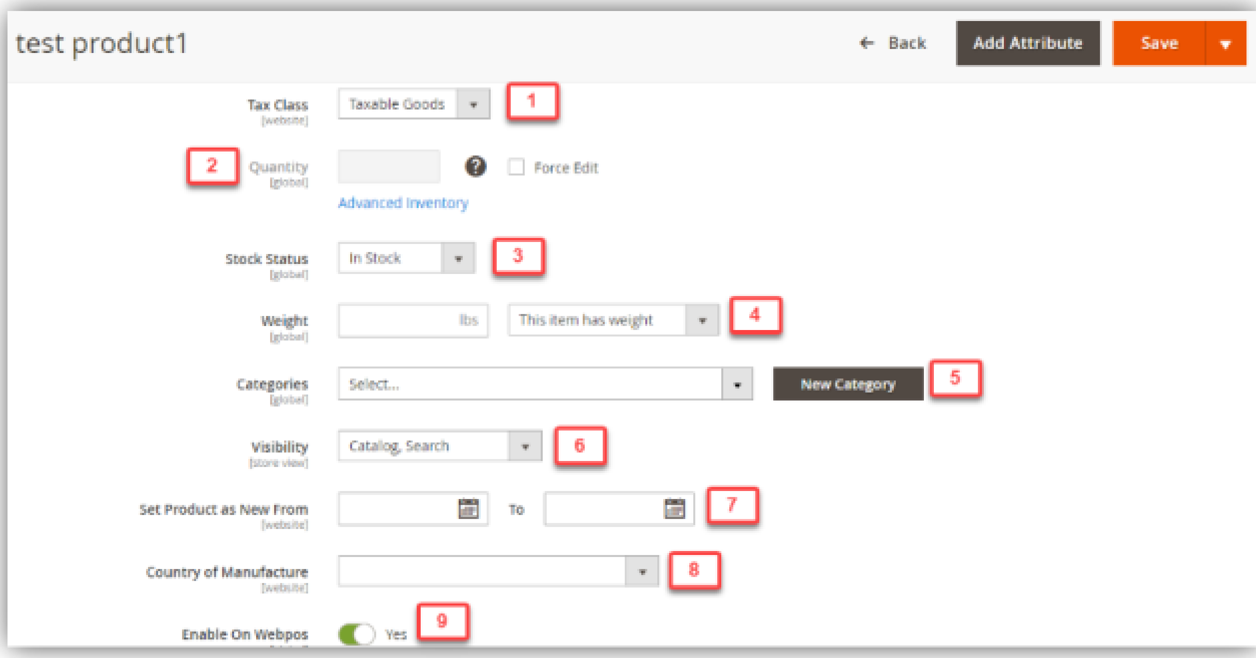
Complete the required setting

(1) Enter **Product Name**. (required)

(2) The default SKU that is based on the product name, or enter another.

(3) Enter the product Price.

Then, Click **Save to continue**.



Complete the basic settings

(1) Set Tax Class to one of the following:
  - None.
  - Taxable Goods.

(2) Enter the Quantity of the product that is currently in stock.

(3) By default, Stock Status is set to **In Stock**

(4) Enter the Weight of the product.

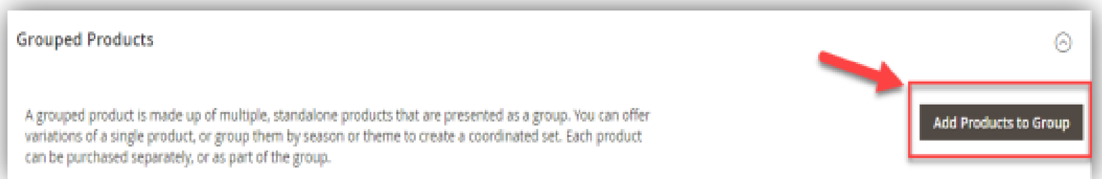
(5) Assign Categories to the product. Tap the **Select** to select available category or you can create new category by click New Category

(6) Accept the default Visibility setting, **Catalog, Search**.

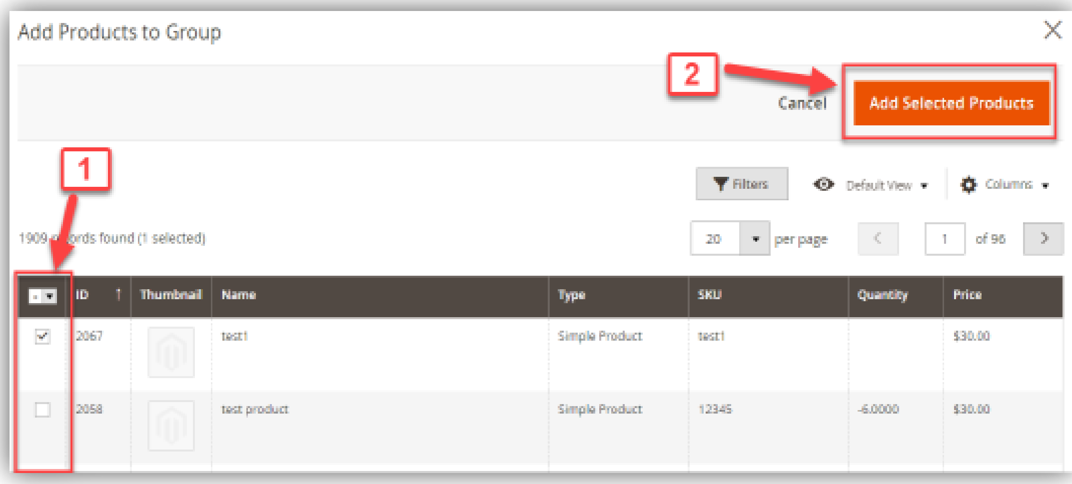
(7) To feature Mark the Set Product as New checkbox to add the product in the list of new products.

(8) Choose the Country of Manufacture.

Then, click **Save to continue**.

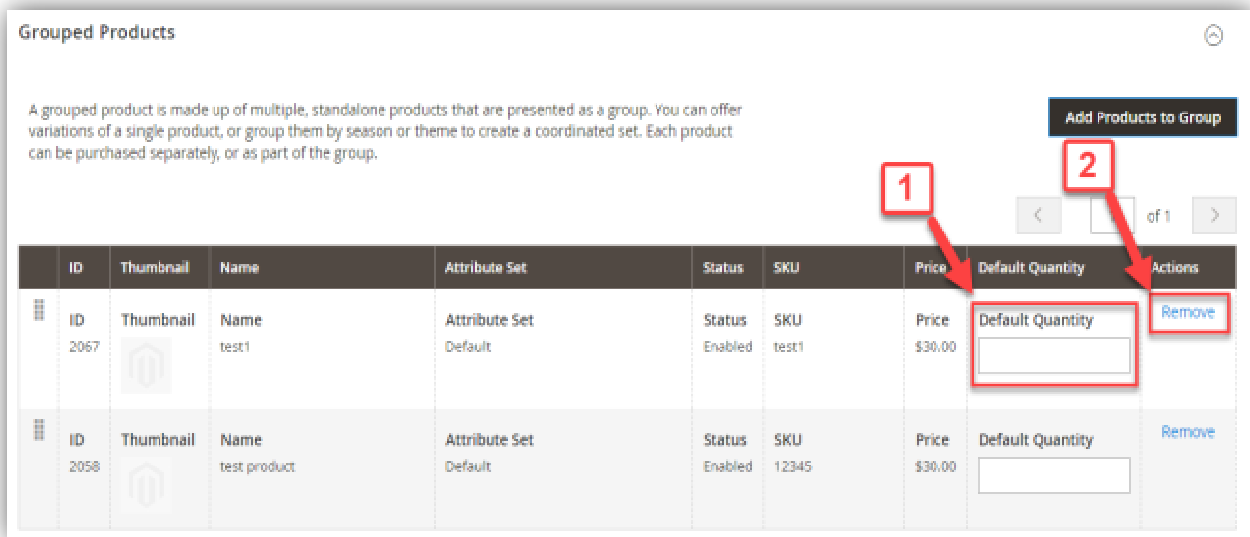


Add products to Group



(1) Select product that you want to include in the group.

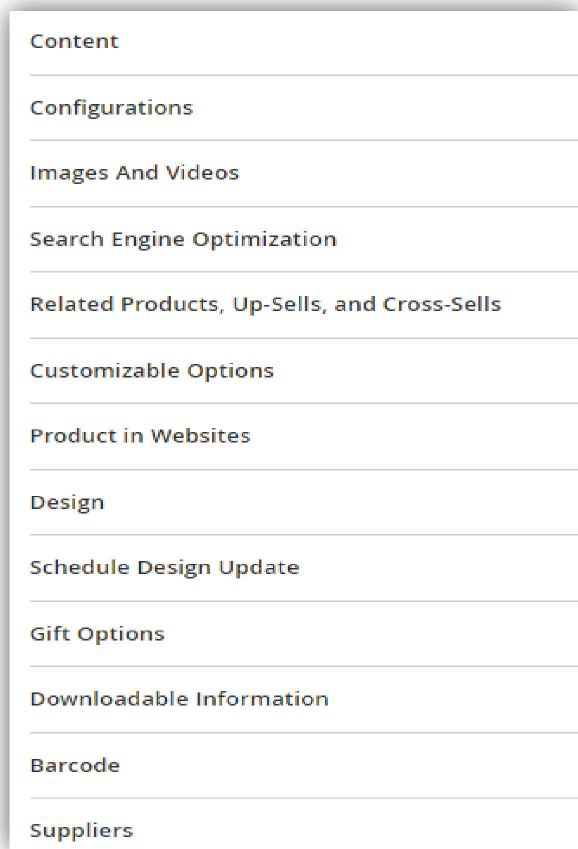
(2) Click to add them to group.



(1) Enter a quantity.

(2) Remove a product from group.

Click **Save** to finish the process.

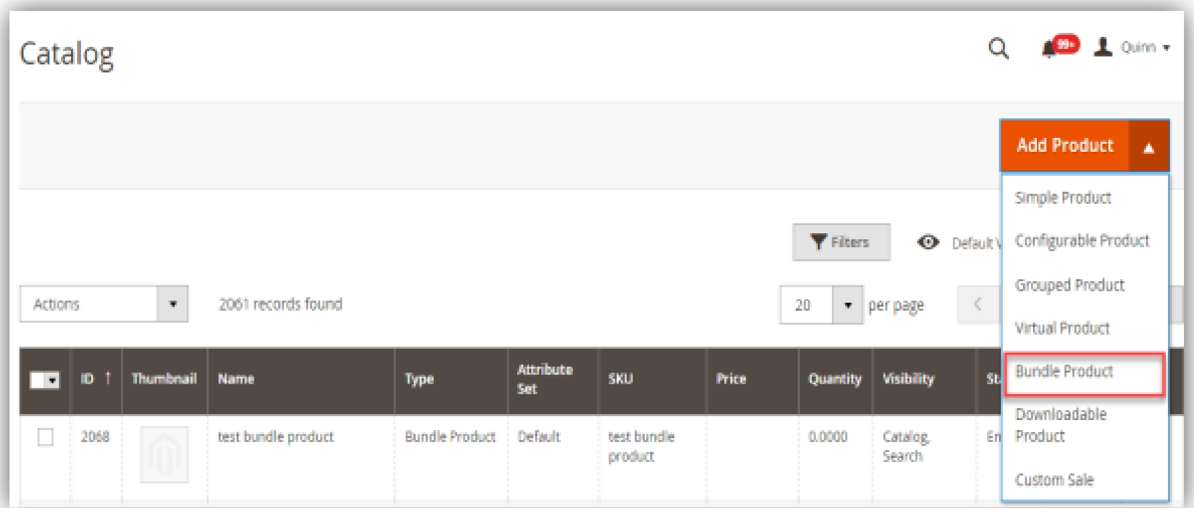


Complete the product information

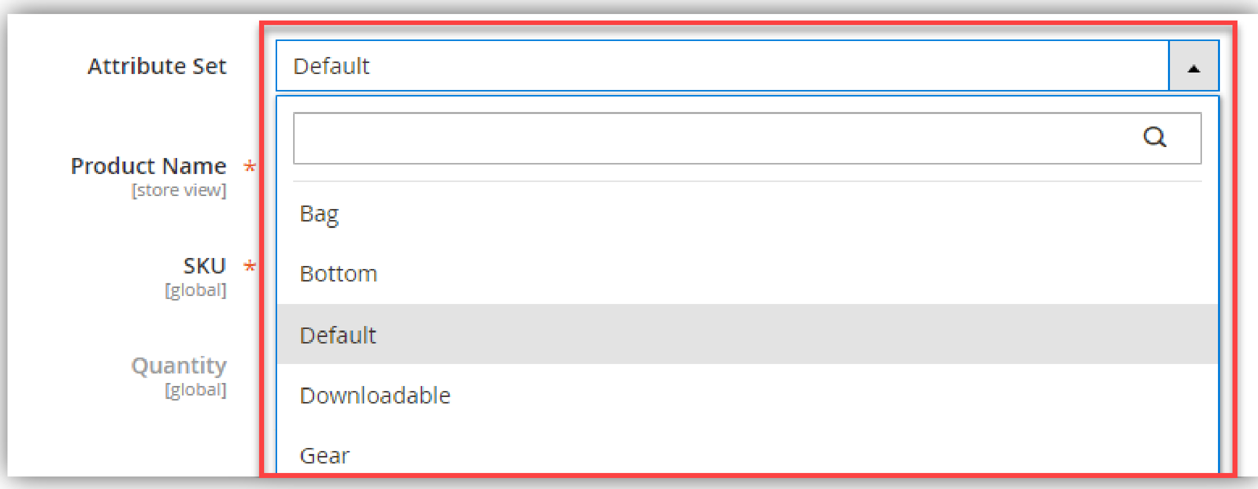
Virtual product

Aside from the absence of the Weight field, the process of creating a virtual product and a simple product is the same.

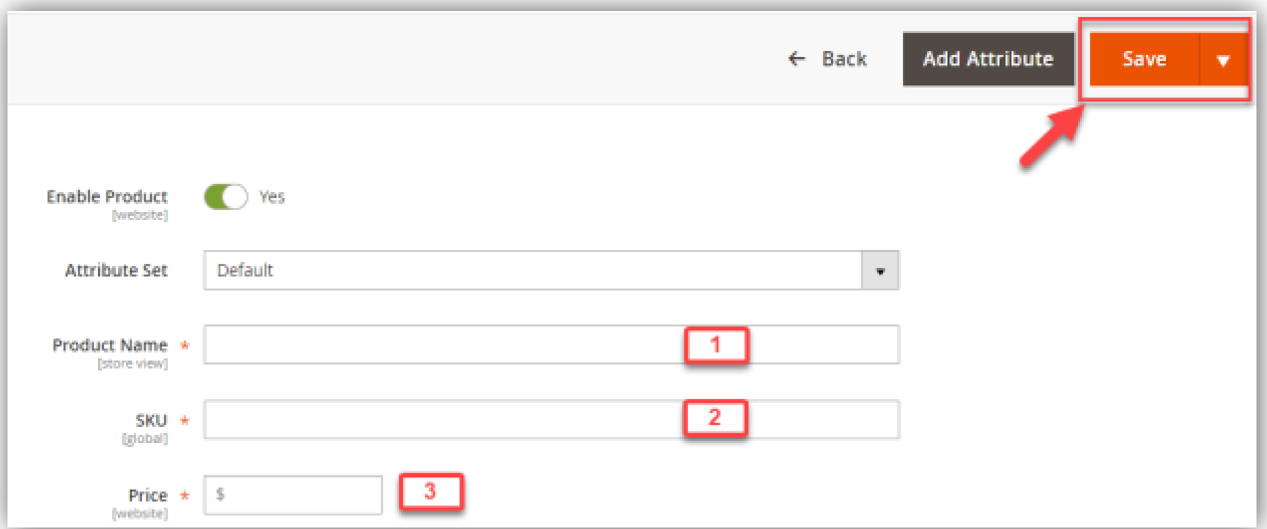
Bundle product



In the upper-right corner on the Add Product menu, choose Grouped Product.



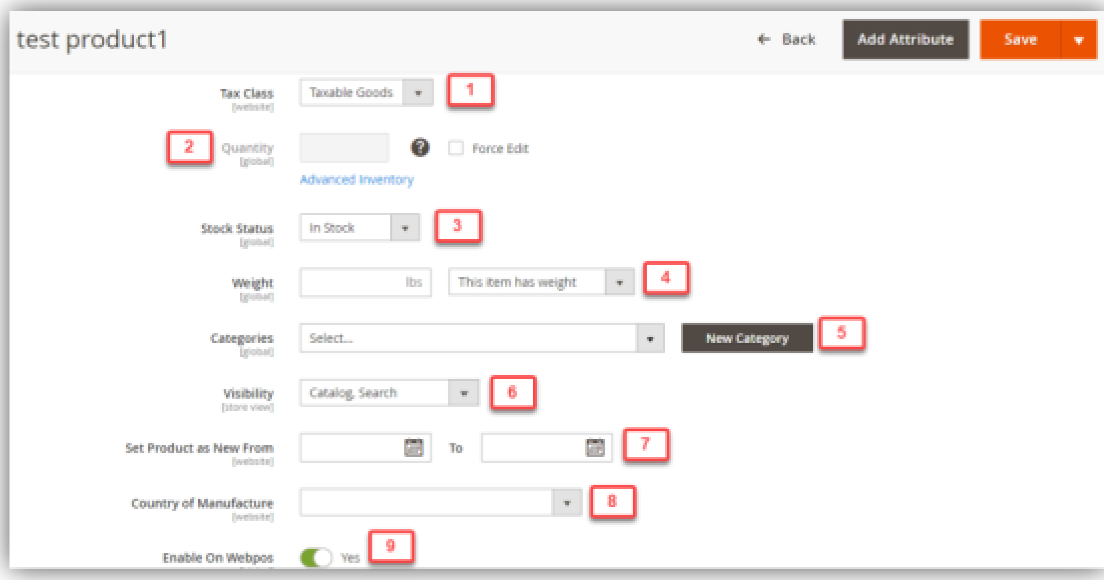
Choose the attribute set that is used as a template for the product



Complete the required setting

(1) Enter Product Name. (required)
(2) The default SKU that is based on the product name, or enter another.
(3) Enter the product Price.

Then, Click **Save to continue**.



Complete the basic settings

(1) Set Tax Class to one of the following:

- None
- Taxable Goods.

(2) Enter the Quantity of the product that is currently in stock.

(3) By default, Stock Status is set to **In Stock**

(4) Enter the **Weight** of product.

(5) Assign **Categories** to the product. Tap the **Select** to select available category or you can create new category by clicking on New Category

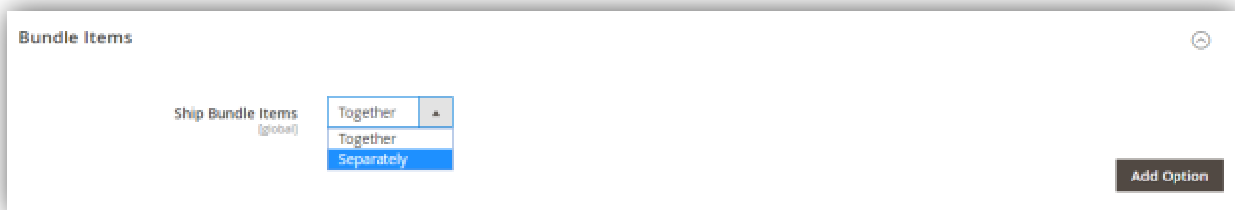
(6) Accept the default **Visibility** setting, **Catalog, Search**

(7) To feature Mark the **Set Product as New** checkbox to add the product in the list of new products.

(8) Choose the **Country of Manufacture**.

(9) Enable **on Web POS**

Finally, click **Save** to continue.

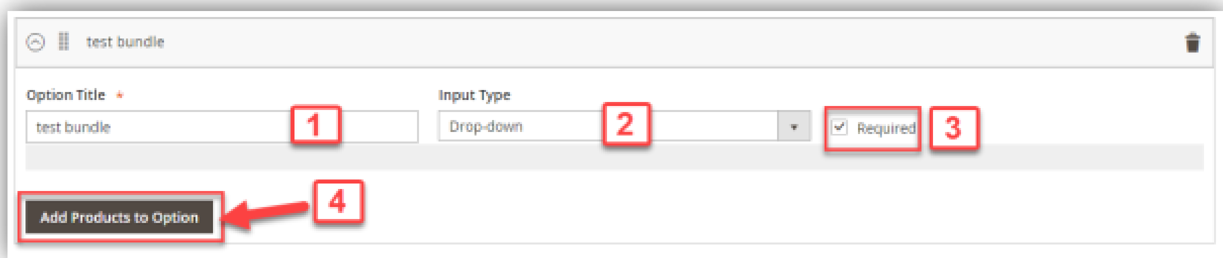


Add **Bundle items**

Scroll down to the **Bundle Items** section. Then, set **Ship Bundle Items** one of the following:

1. Separately
2. Together

Click **Add Option**



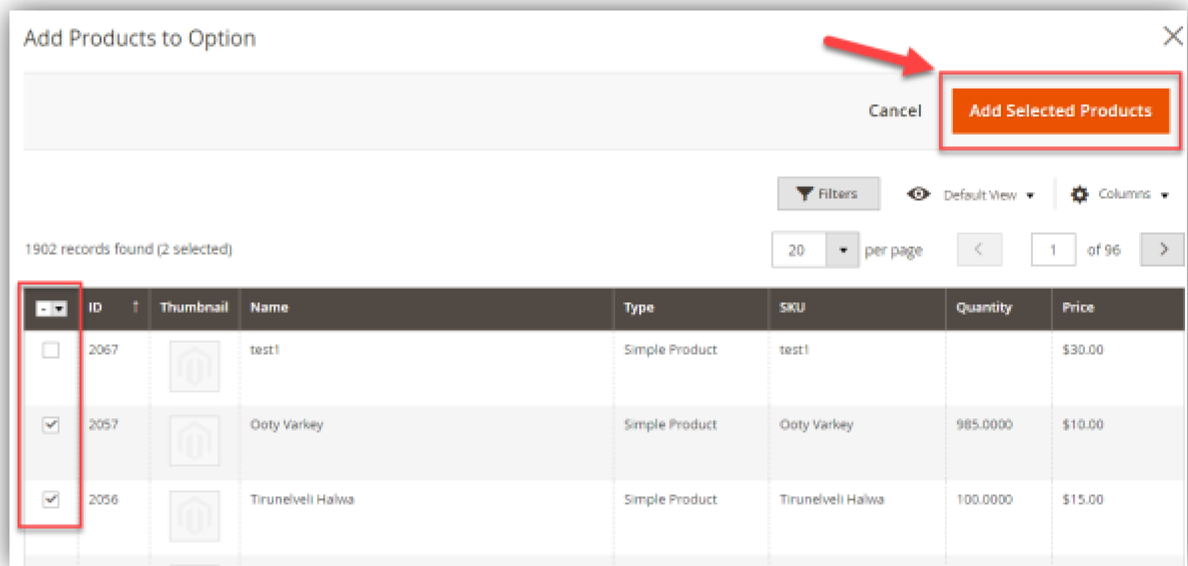
(1) **Option Title** to be used field label.

(2) Set **Input Type** to one of the following:

- Drop-down.
- Radio buttons.
- Checkbox.
- Multiple Select.

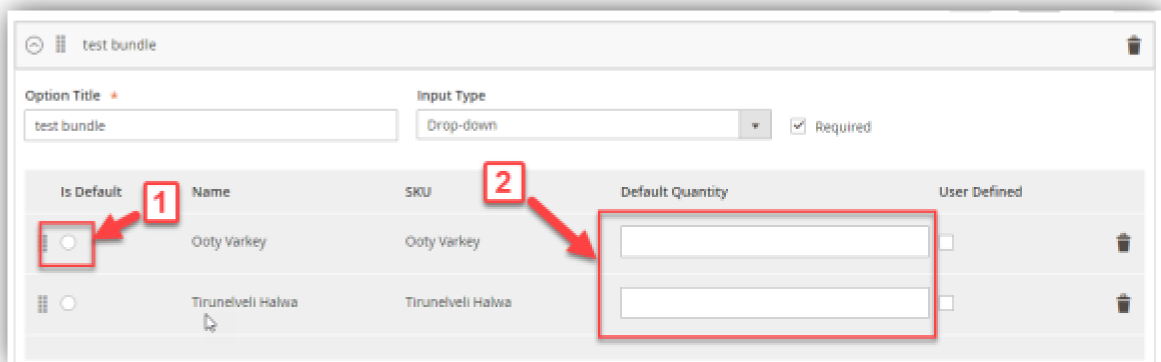
(3) Mark to make the field a **required** entry.

(4) Tap **Add Products to Option,** then mark the checkbox of each product that you want to include in this option.



Mark the checkbox of each product.

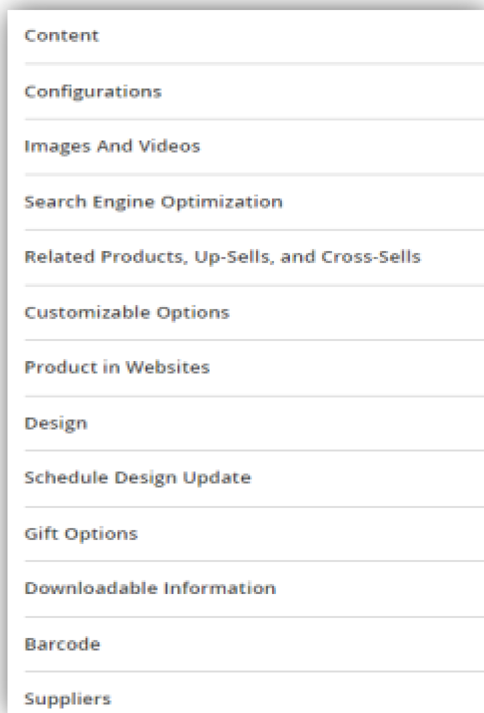
Click **Add Selected Products,** you will see.



(1) Mark the checkbox of a product that you want it is default.

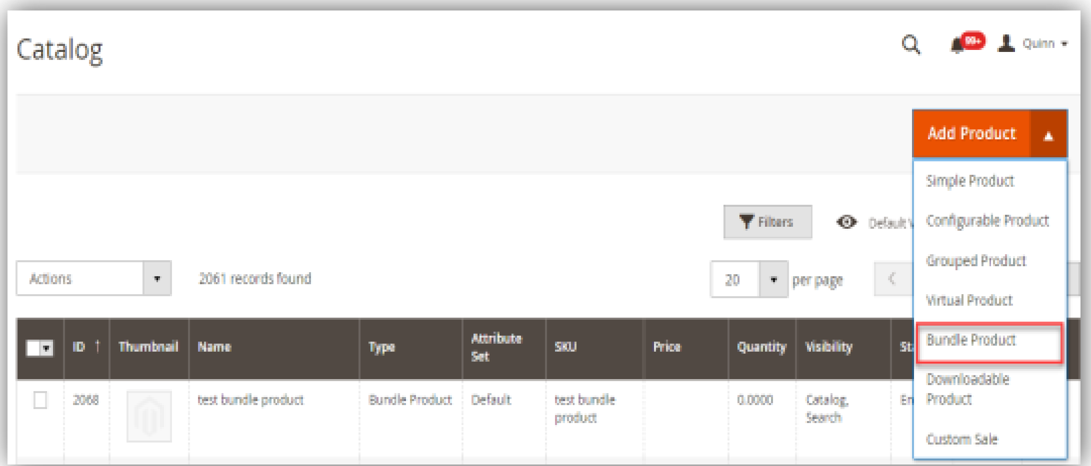
(2) Enter **Default Quantity**.

Finally, click **Save**.

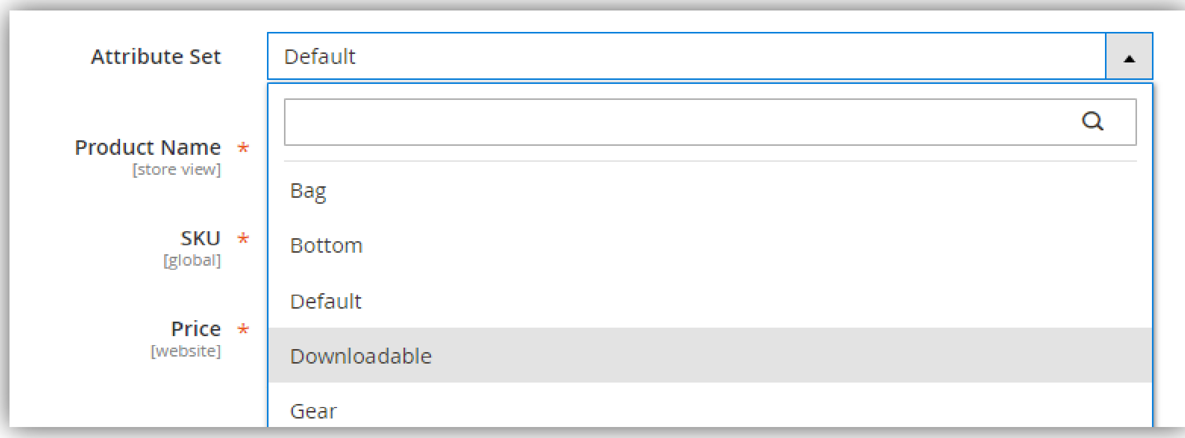


Complete products information

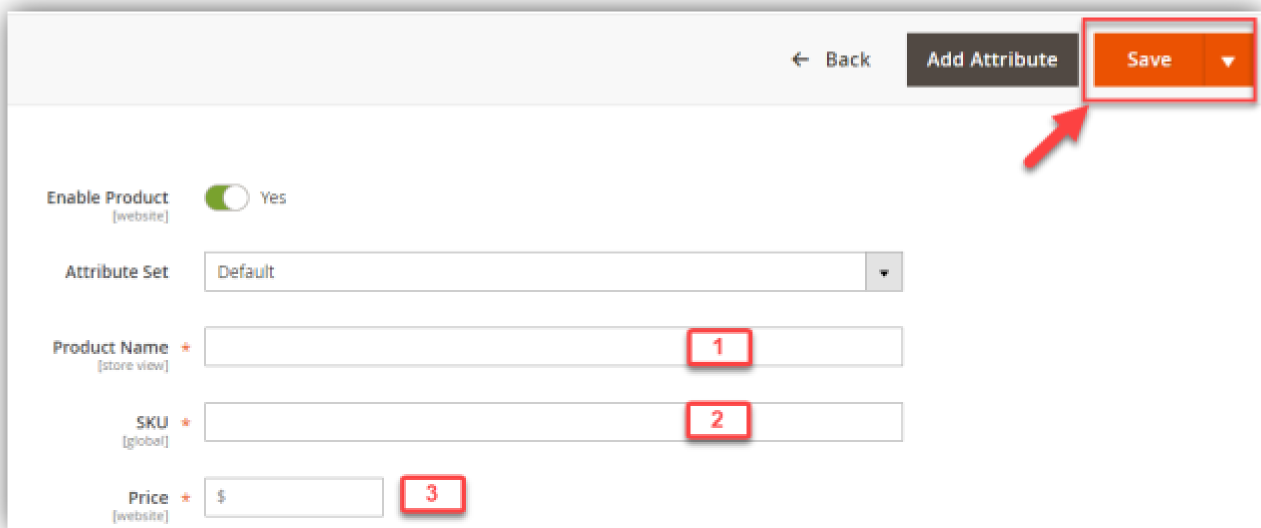
Downloadable product



In the upper-right corner on the Add Product  menu, choose Grouped Product.



Choose **Downloadable** as the **attribute set**



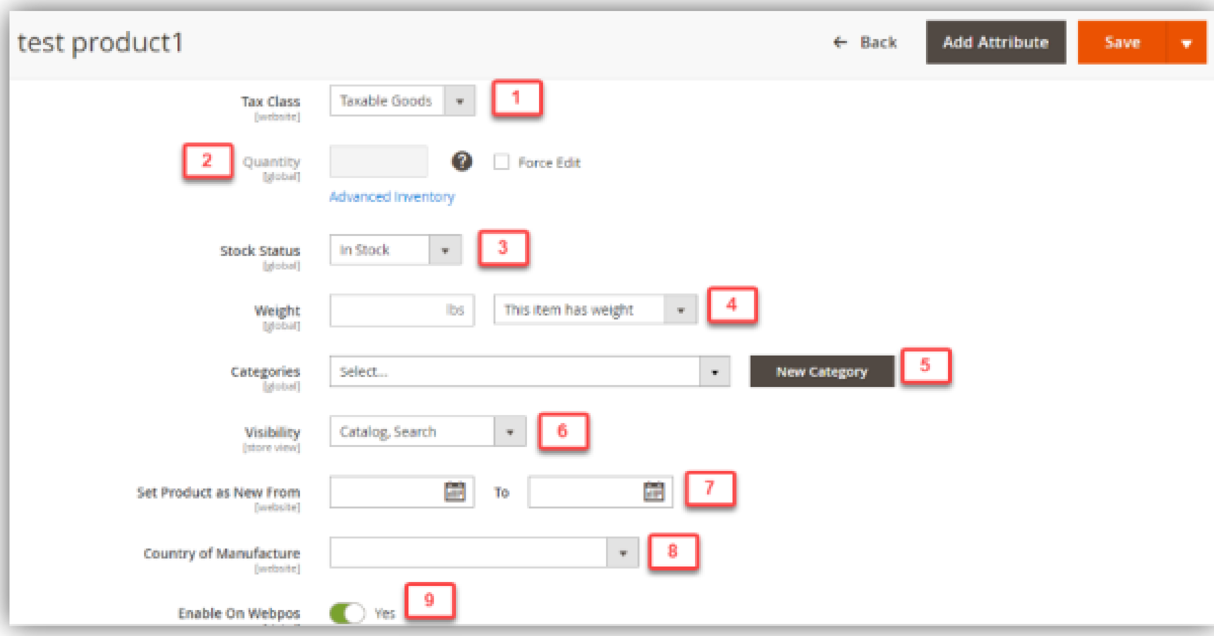
Complete the required setting

(1) Enter **Product Name**. (required)

(2) The default **SKU** that is based on the product name, or enter another

(3) Enter the product **Price**

Then, Click **Save** to continue.



Complete the basic settings

(1) Set **Tax Class** to one of the following:

- None.
- Taxable Goods

(2) Enter the Quantity of the product that is currently in stock.

(3) By default, Stock Status is set to Out of Stock.

(4) The Weight is not used, because downloadable products are not shipped.

(5) Assign Categories to the product. Tap the Select to select available category or you can create new category by clicking on New Category

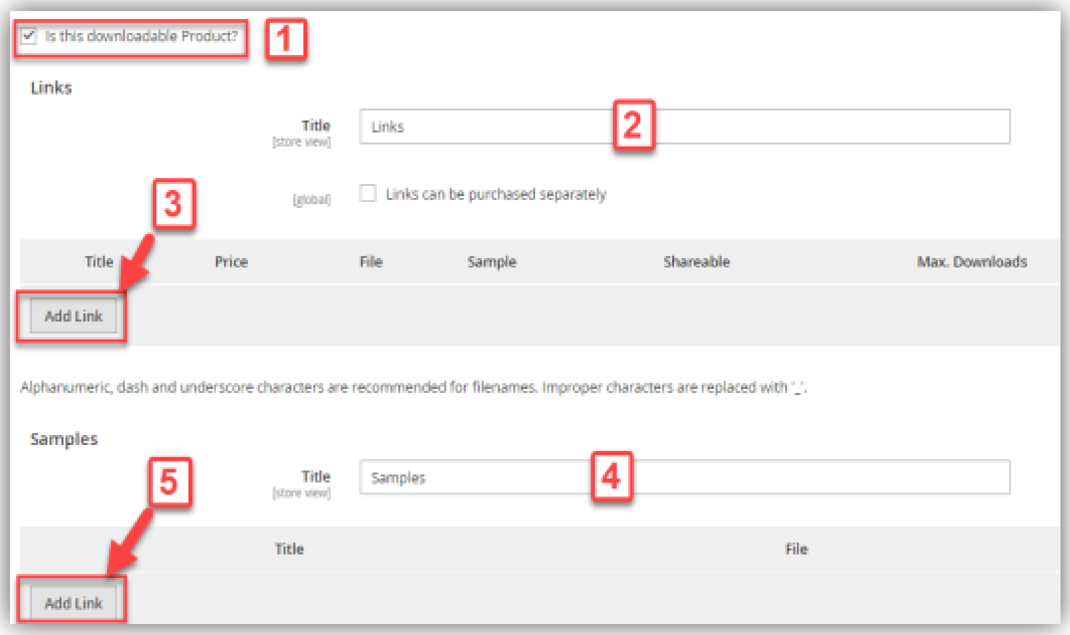
(6) Accept the default Visibility setting, Catalog, Search.

(7) To feature Mark the Set Product as New checkbox to add the product in the list of new products.

(8) Choose the Country of Manufacture.

(9) Enable on Web POS

Then, click **Save** to continue.

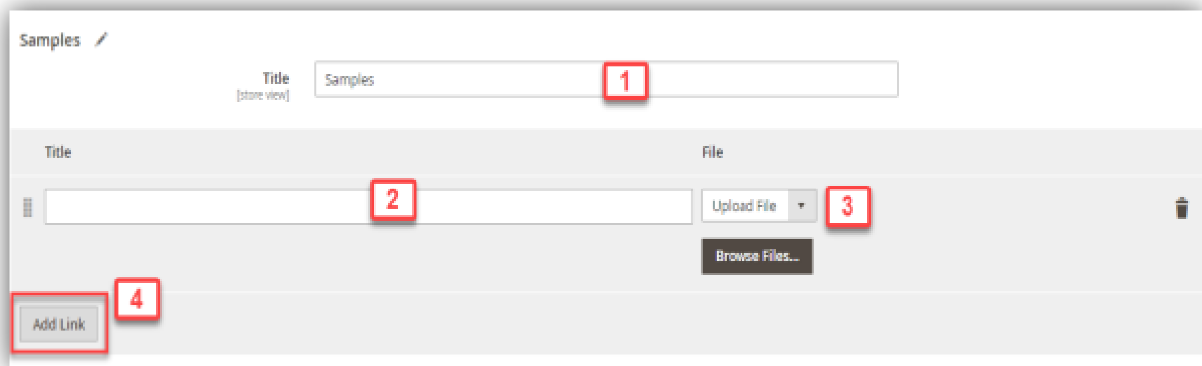


Complete **downloadable product.**

1. Mark the checkbox "**Is this downloadable product"**
2. Enter the **Title** - to use as a heading for the download links.
3. Click **Add Link**, then:

   Enter **Title** and **Price**. For both File and Sample files, choose:

   - **Upload File:** To upload the the distribution file to the server. Browse to the file, and select it for upload.
   - **URL:** To access the distribution file from a URL. Enter the full URL to the download file.



Complete the **Sample**.

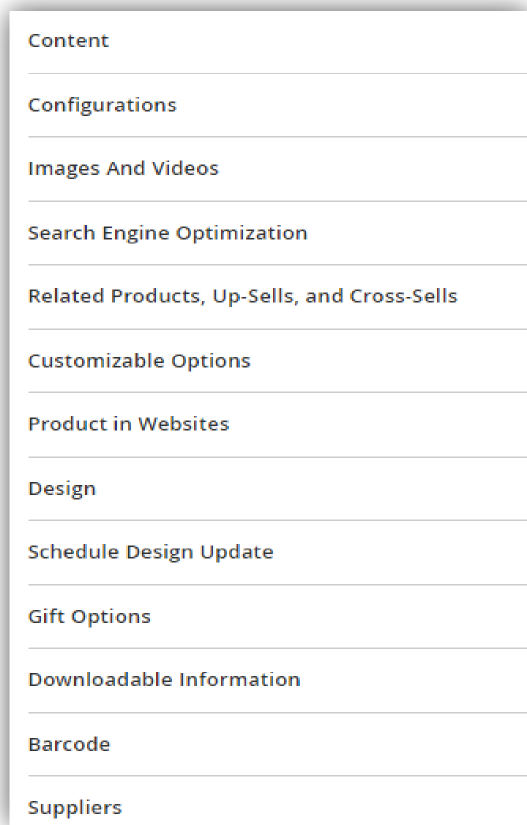
(1) Enter the **Title** - to use as a heading for the samples.

(2) Enter the **Title** of the individual sample.

(3) Choose distribution methods.

(4) Click to add another sample.

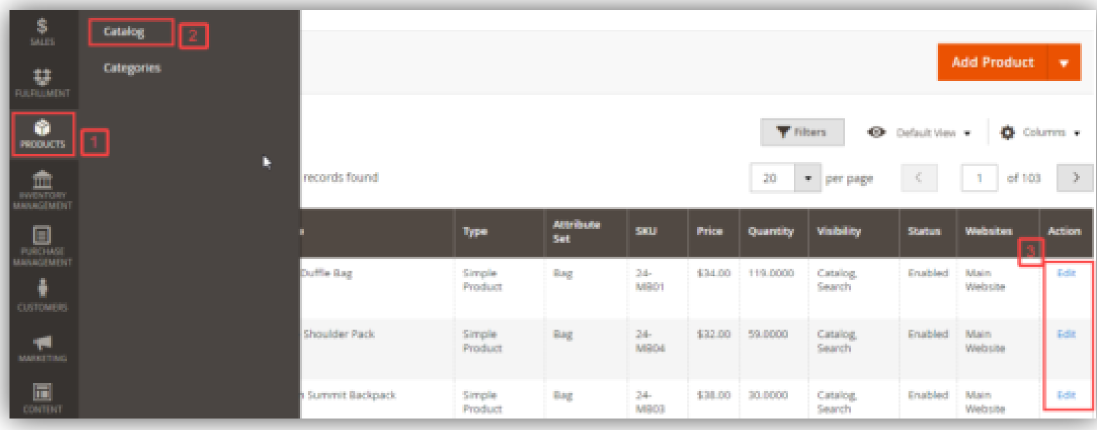
When complete, click **Save**.



Complete the product information

4.1.4.4. Product Setting

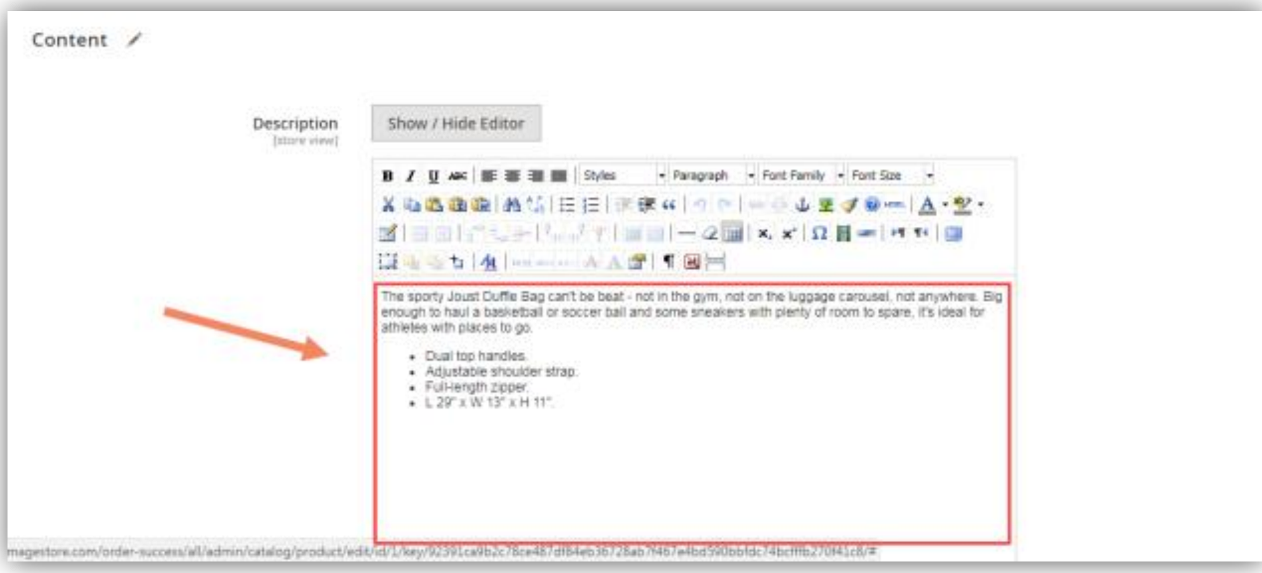
a. Content



(1) Click on **Products**

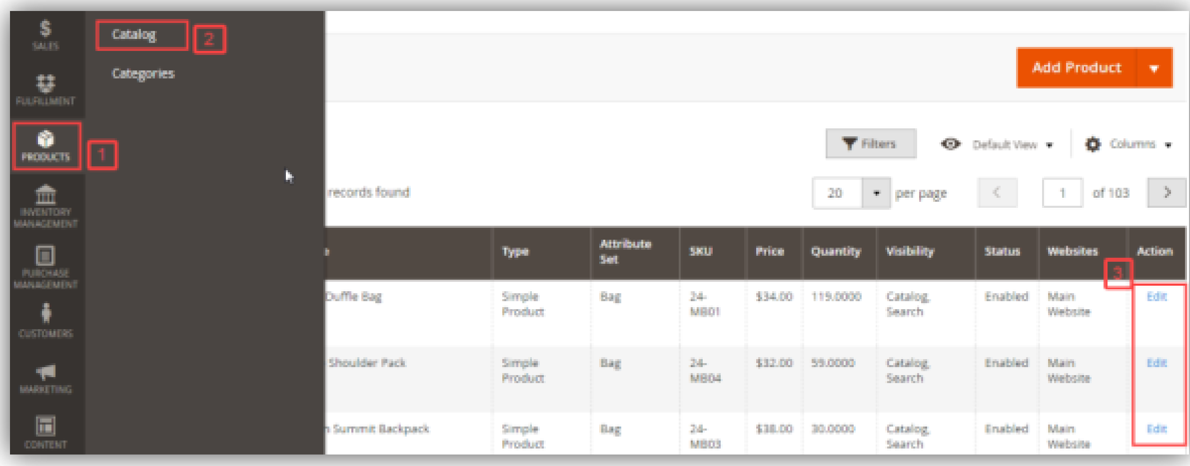
(2) Click on **Catalog**

(3) Click on **Edit**



Scroll down to **Content**, and click on ☺, then write the description for the product, and the click **Save** on top right of the screen

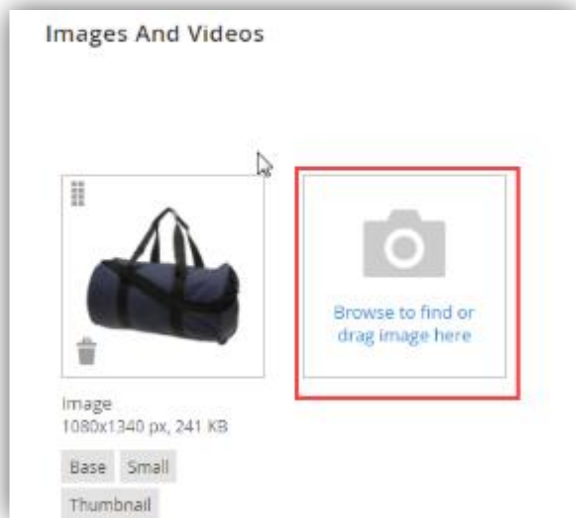
b. Images and Videos



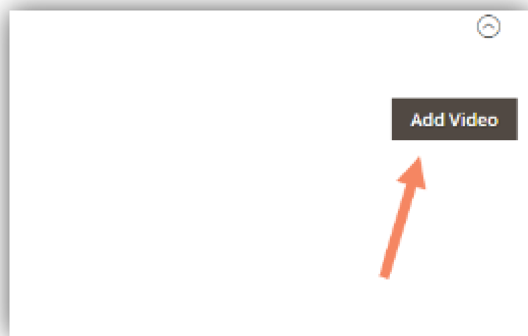
(1) Click on **products**

(2) Click on **catalog**

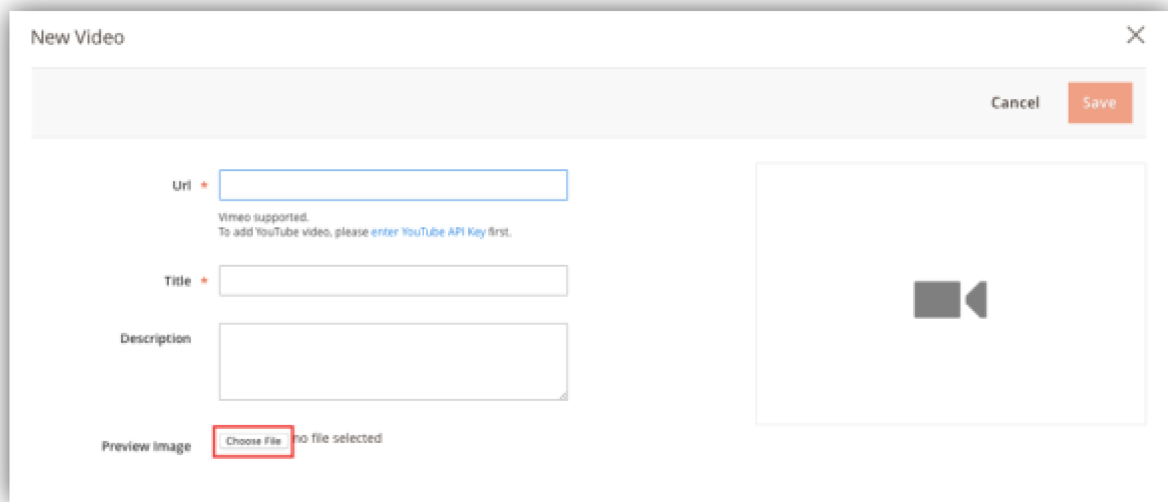
(3) Click on **edit** of product



Scroll down to **Images And Videos**, and click on , then click on **Browse to find or drag image here to upload new image**

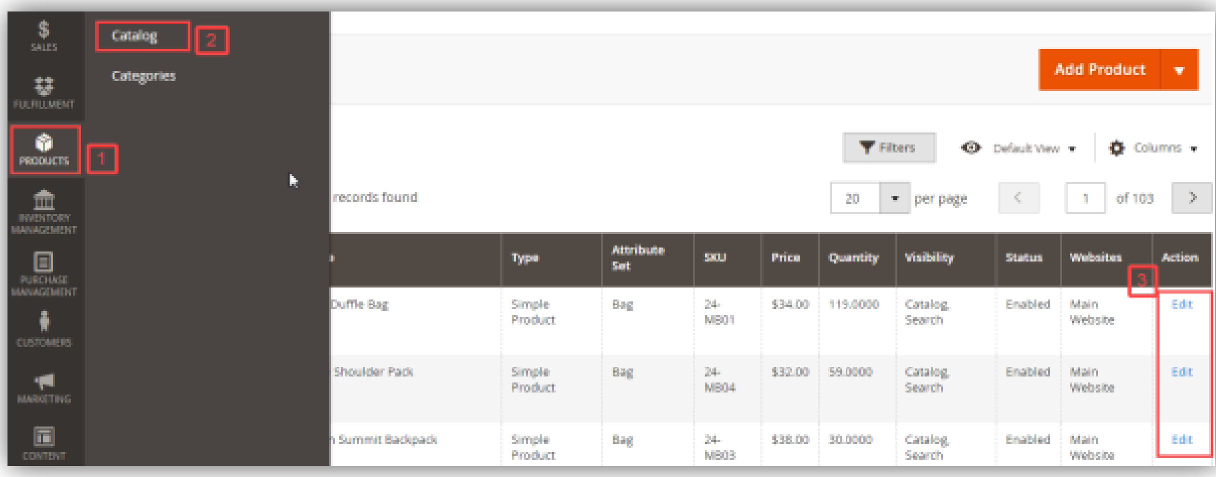


Click on **Add Video** to add new video



Fill in the box and the click on **Choose File** to upload new video

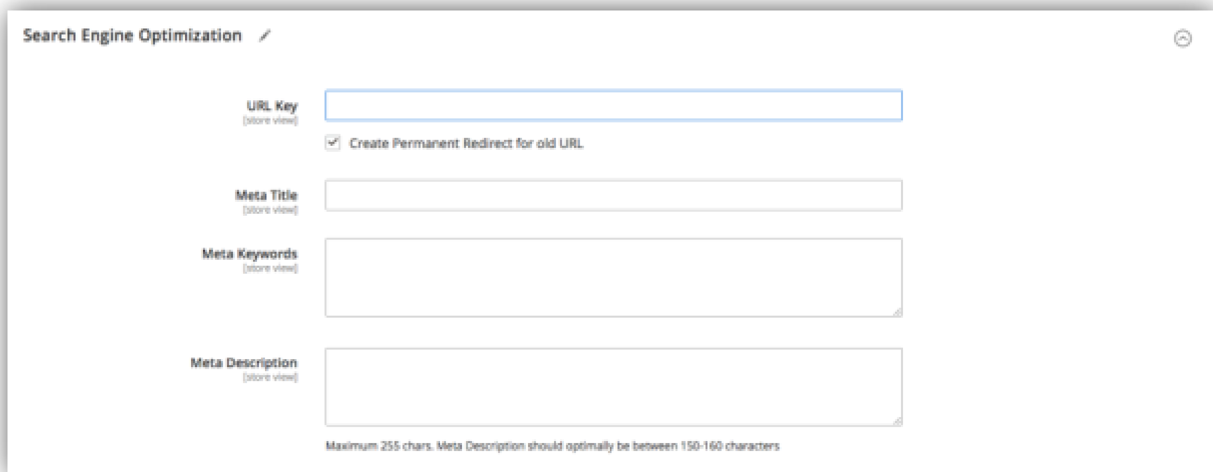
c. Search Engine Optimization



(1) Click on **Products**

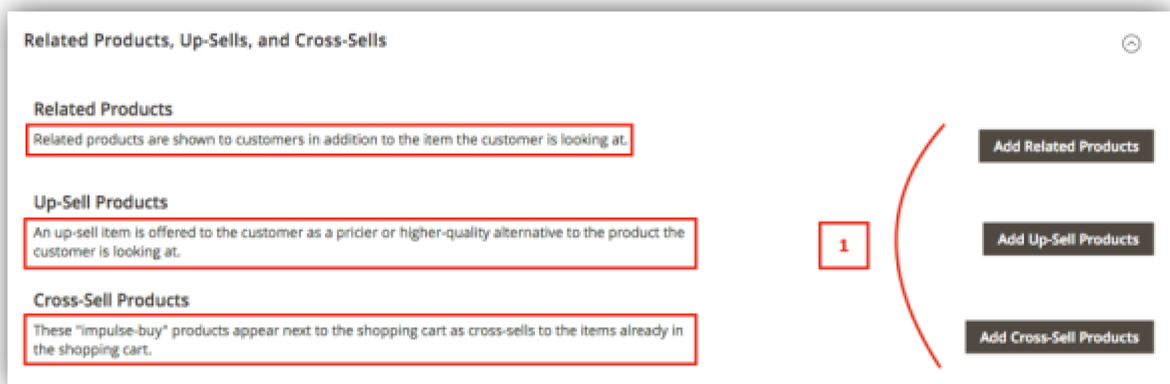
(2) Click on **Catalog**

(3) Click on **Edit** of product



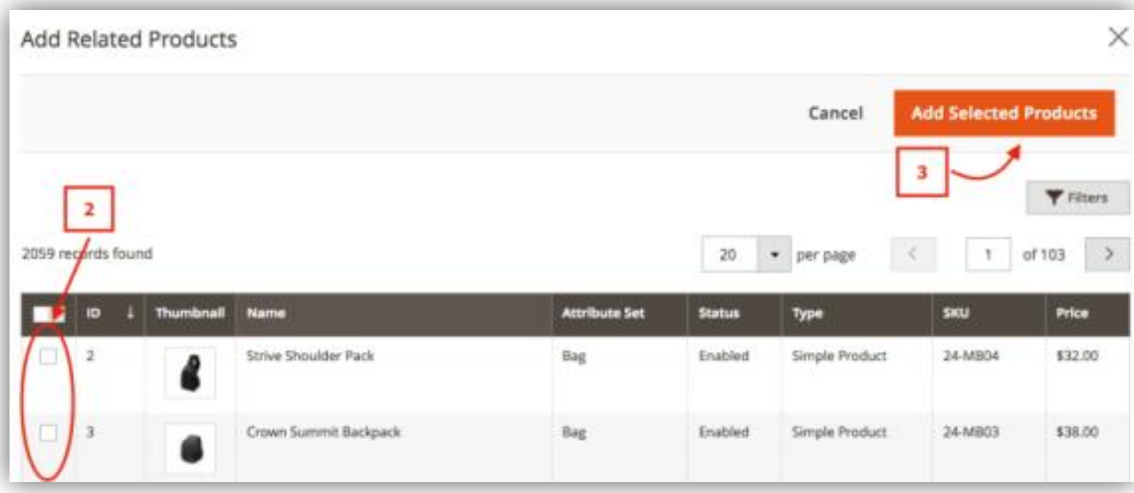
Scroll down to search **Engine Optimization**, and click on , then fill in the box

d. Related Products, Up-sells and Cross-sells



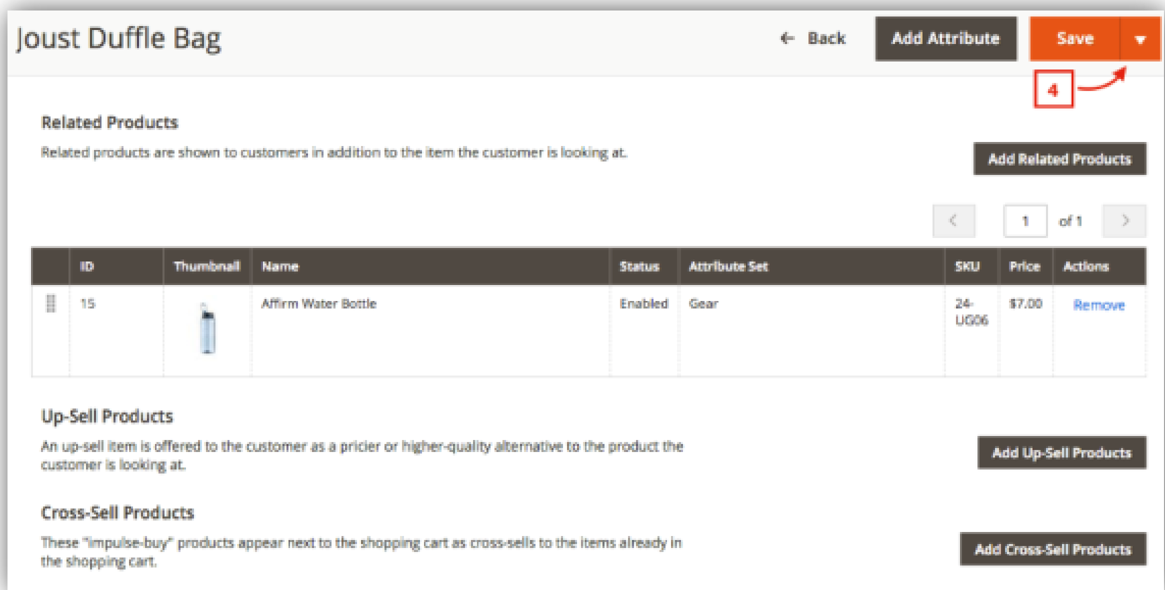
Click on respectively

1) **Add Related Products**
2) **Add Up-sell Products**
3) **Add Cross-sell Products**



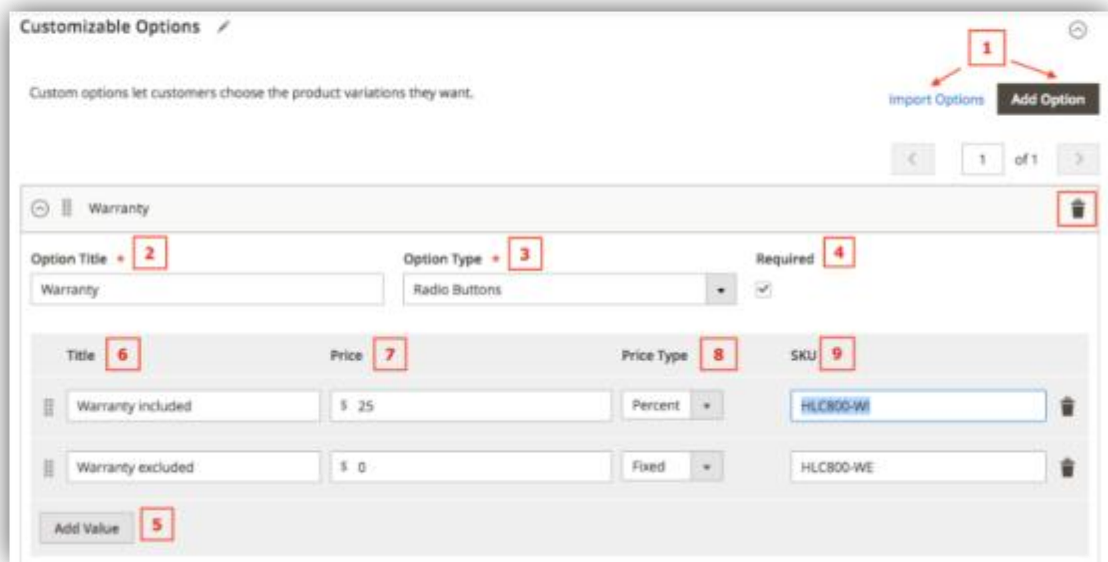
(2) Mark the checkbox to select products

(3) Click on Add Selected Product



(4) Click on **Save** to finish

f. Customizable Options



This function allows users to set and manage extra price for each product's variant separately.

Users can simply set the extra price to be applied on a product's variant, regardless of its attribute and attribute value.

(1) Click on **Add Option**

(2) Enter the **option tittle**

(3) Select an **option type**

(4) Mark the checkbox to require

(5) Click on **Add Value**

(6) Enter a **title** for the value

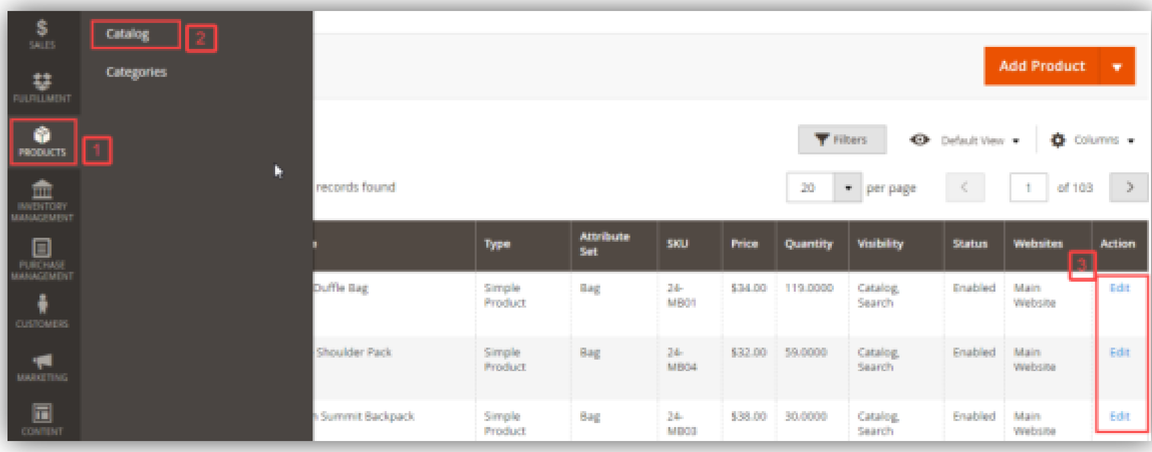
(7) Enter an **extra price**

(8) Select a **price type**

(9) Enter an **SKU** for each product’s variant

To remove a value, click 🗑 on the right hand-side of the column

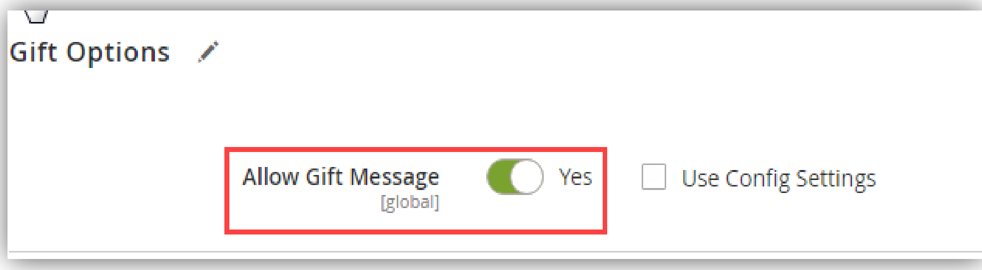
g. Gift Option



(1) Click on **Products**

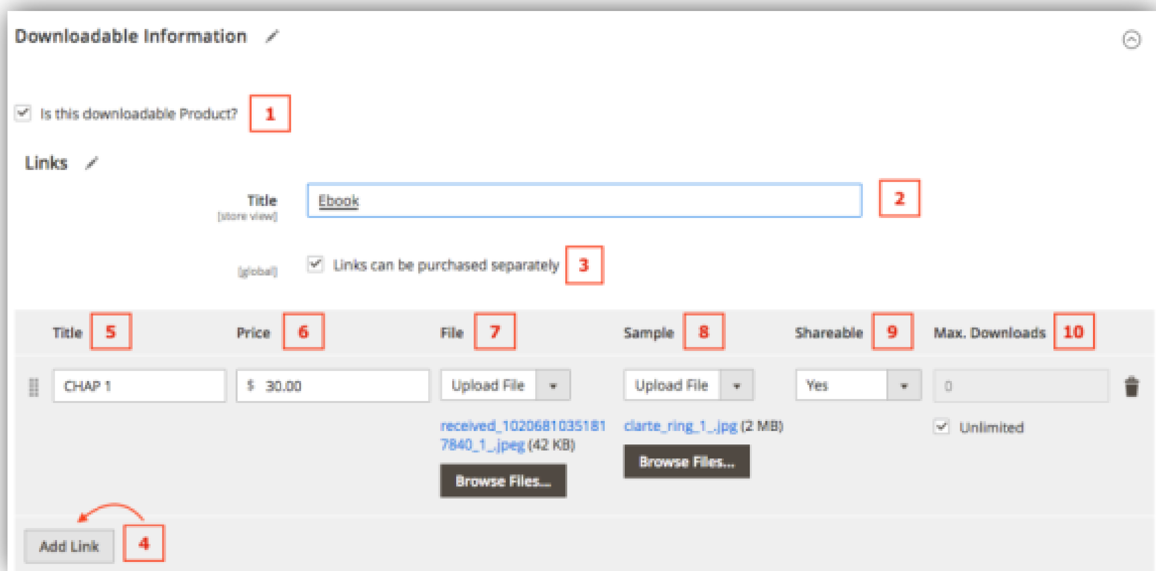
(2) Click on **Catalog**

(3) Click on **Edit of a product**



Scroll down to **Gift Option**, and click on , then set the allow gift massage to **Yes**

h. Downloadable Information



(1) Mark the checkbox

(2) Enter a title for the download link

(3) Mark the checkbox (if applicable)

(4) Click "**Add Link**", then do the following:

(5) Enter a title for the download

(6) Enter a number as a price for the download

(7) Select an upload method for a file **(Upload File/ Use URL)**

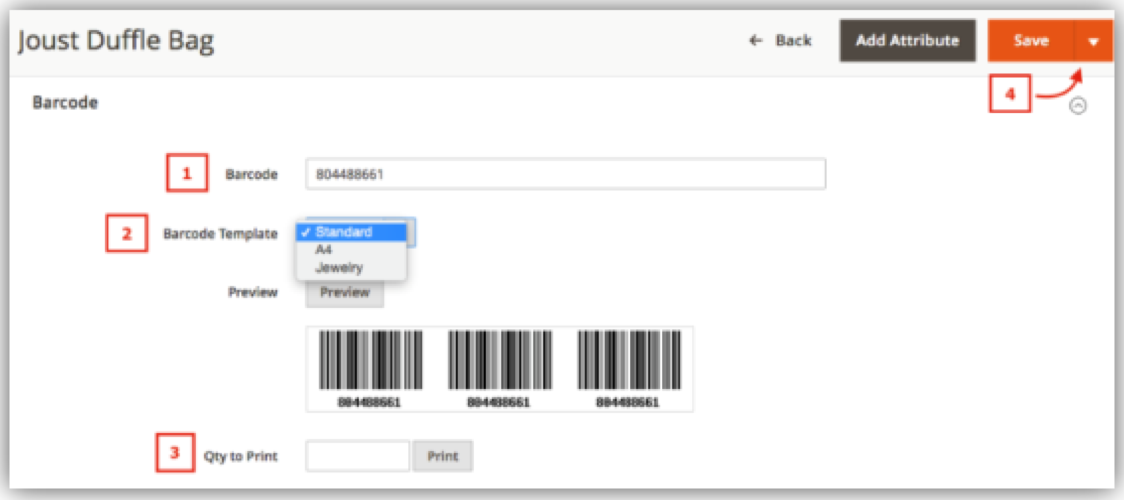
(8) Select an upload method for a file **(Upload File/ Use URL)**

(9) Select a label in the dropdown list:

- **No:** to requires customers to log in to their accounts to access the download link.
- **Yes:** Sends the link by email, which customers can share with others.
- **Uses Config**: Uses the method that is specified in the Dowloadable Product Options configuration.

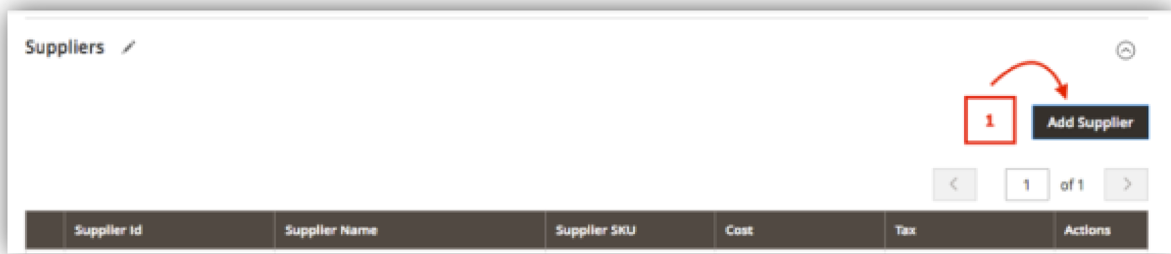
(10) Enter the number of "**Max. downloads"** to limit downloads per customer. Otherwise, to allow unlimited downloads, mark the "**Unlimited" checkbox**

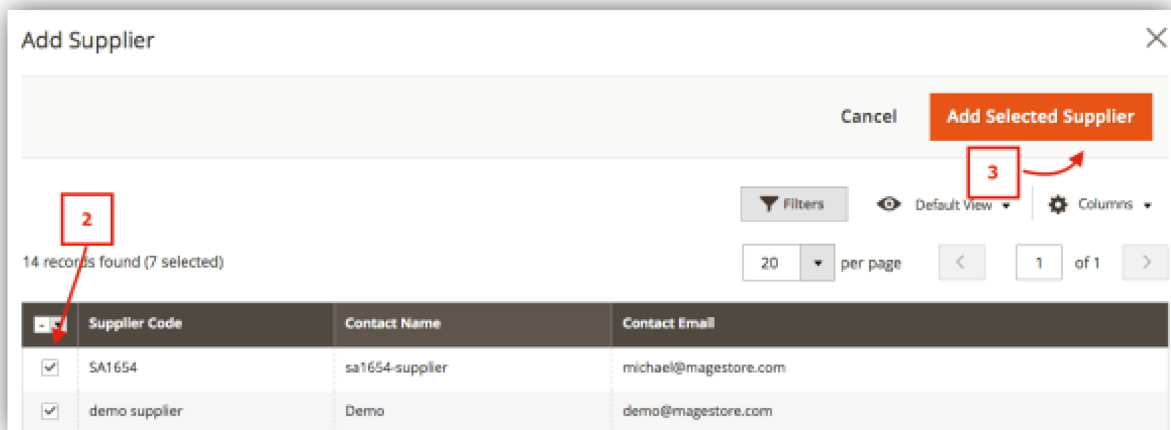
i. Barcode



(1) Enter barcode
(2) Select a barcode template and see the preview as below
(3) Enter the quantity to print out
(4) Click on **Save** to finish

j. Suppliers

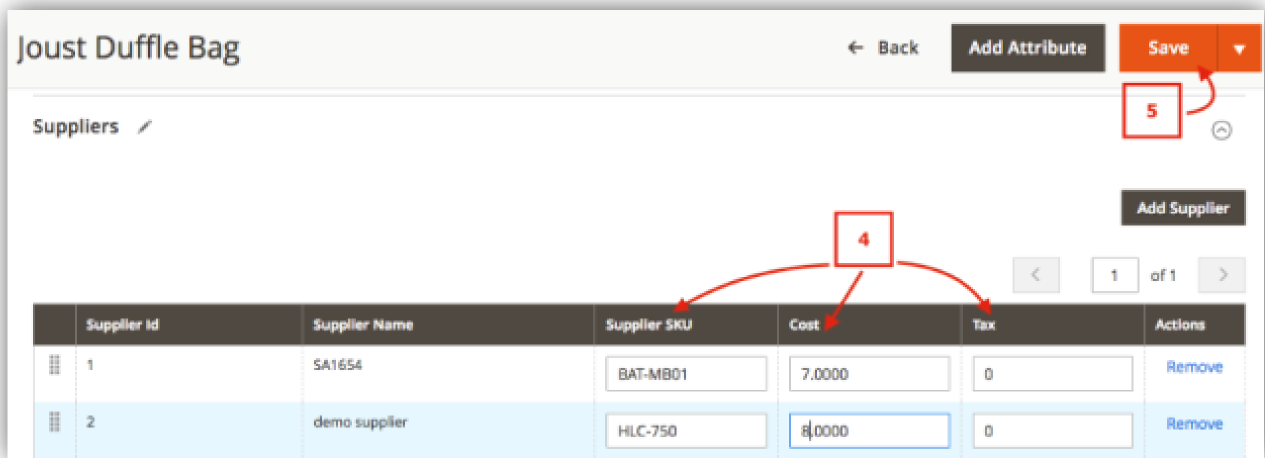




(1) Click on **Add Supplier**

(2) Mark the checkbox to select suppliers

(3) Click on **Add Selected Supplier**



(4) Enter the **Supplier SKU, Cost, Tax**

(5) Click **Save** to finish

4.2. Customer

Path: **Customers > All customers**

4.2.1. Manage Customer

(1) Click **Add New Customer** to create new customer.

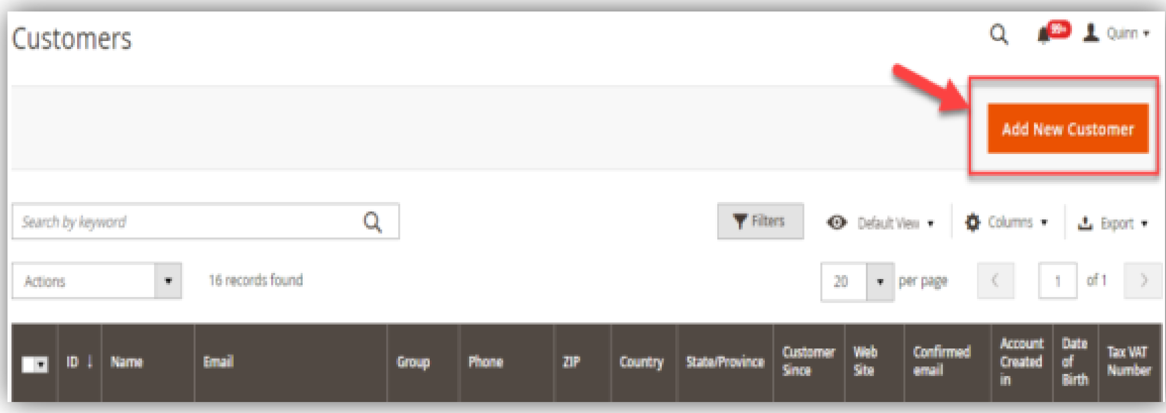
(2) Click **Filters** or fill out key word to search customer information.

(3) **Action**: First, select a customer, then you can:

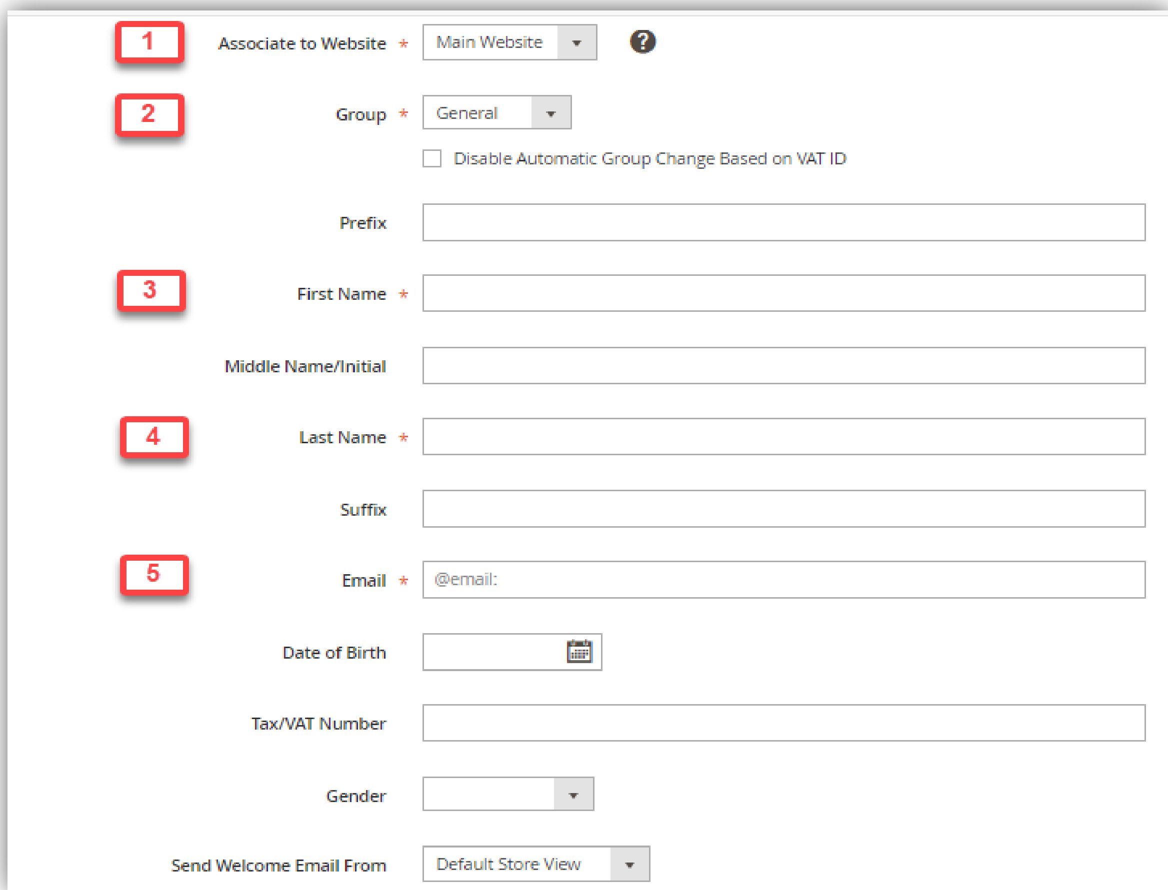
- Delete
- Subscribe to Newsletter.
- Unsubscribe from Newsletter.
- Assign a Customer Group.
- Edit

(4) Click **Edit** to view customer's details and edit.

4.2.2. Create New Customer

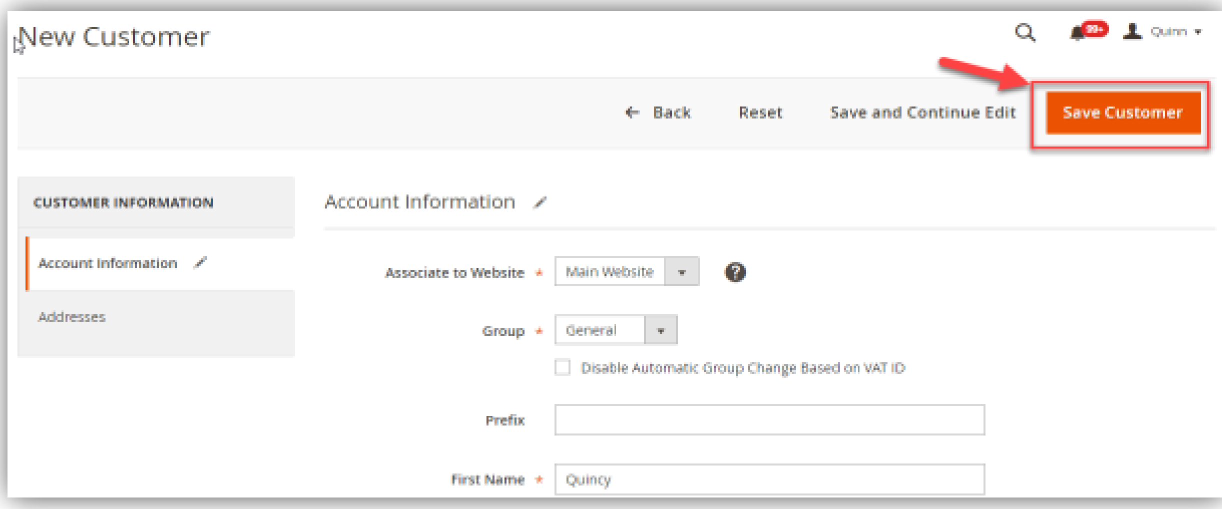


Click **Add New Customer**.



Fill out all the required fields with information of a customer.

- Associate to Website.
- Group.
- First Name.
- Last Name.
- Email.



Click **Save Customer** to complete the process.

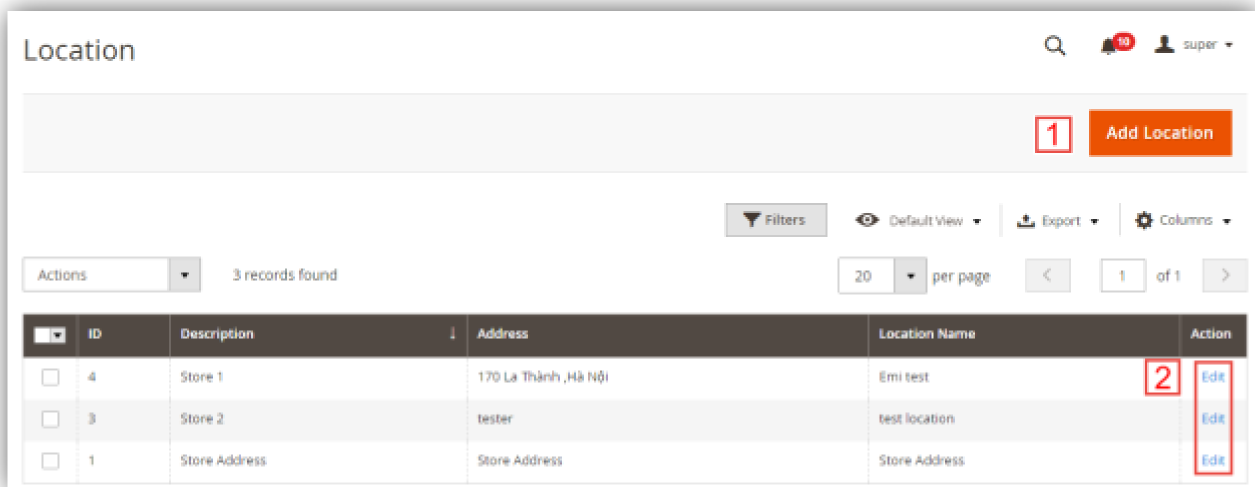
4.3. Warehouse

Path: **Inventory Management > Stock Listing** section **> Warehouse**

Please refer to Section 4.1.1.3. Warehouse for details.

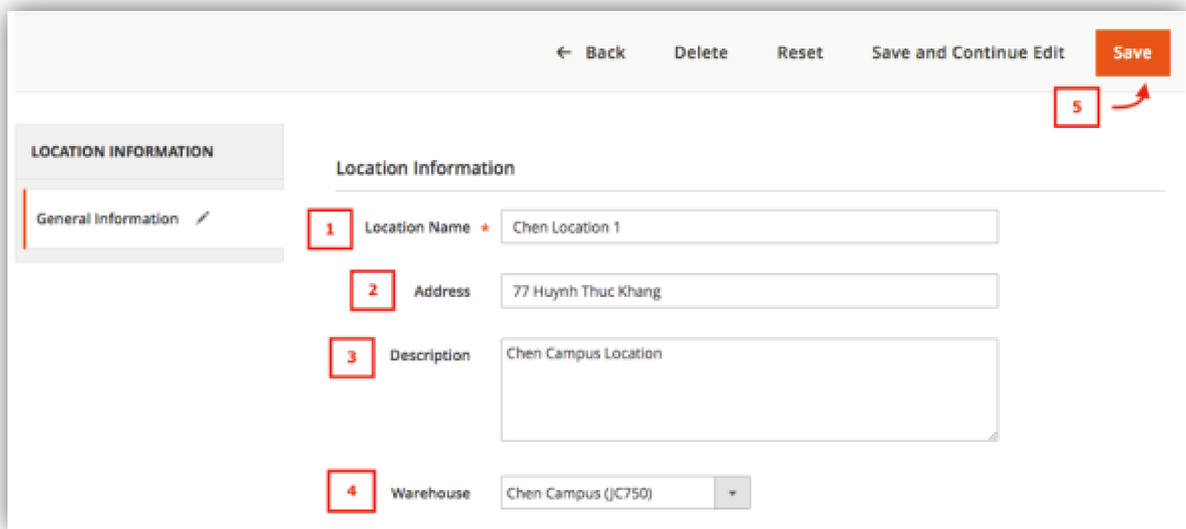
4.4. Location

Path: **Sales > Web POS** section **> Manage Locations**



(1) Click on **Add Location** to create new locations

(2) *Additional Guidance*: Click on **Edit** to amend existing locations' information.



On the pop-up screen:

(0) Fill in the **Location Name** (required)

(1) Fill in the location **Address** field

(2) Fill in the location **Description** field

(3) Choose the Warehouse.

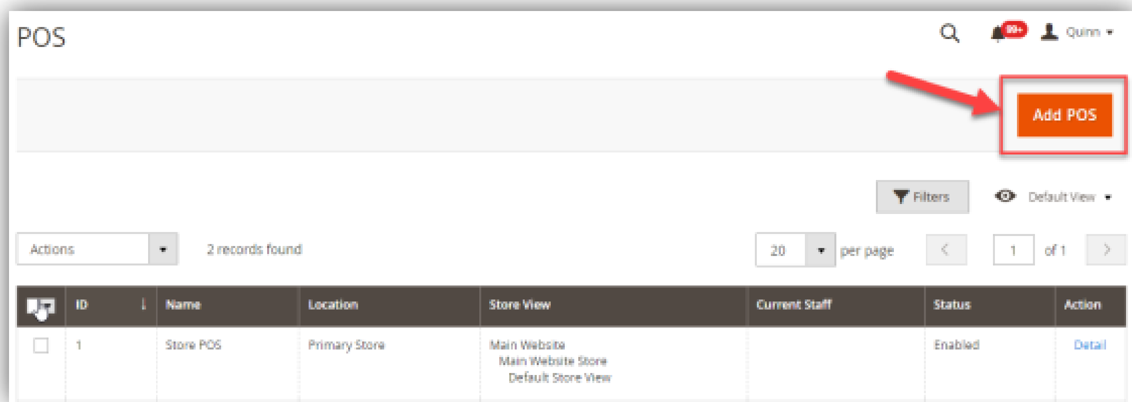
- If you already assign a location to your Primary Warehouse, you won't be able to assign it again here.
- If you want to assign a new location to your Primary Warehouse, you need to **Edit** this field of the currently assigned warehouse to **Don't link to any Warehouses**, then come back to the new location that you wish to assign and assign it to **Primary Warehouse.**

(4) Click on **Save**

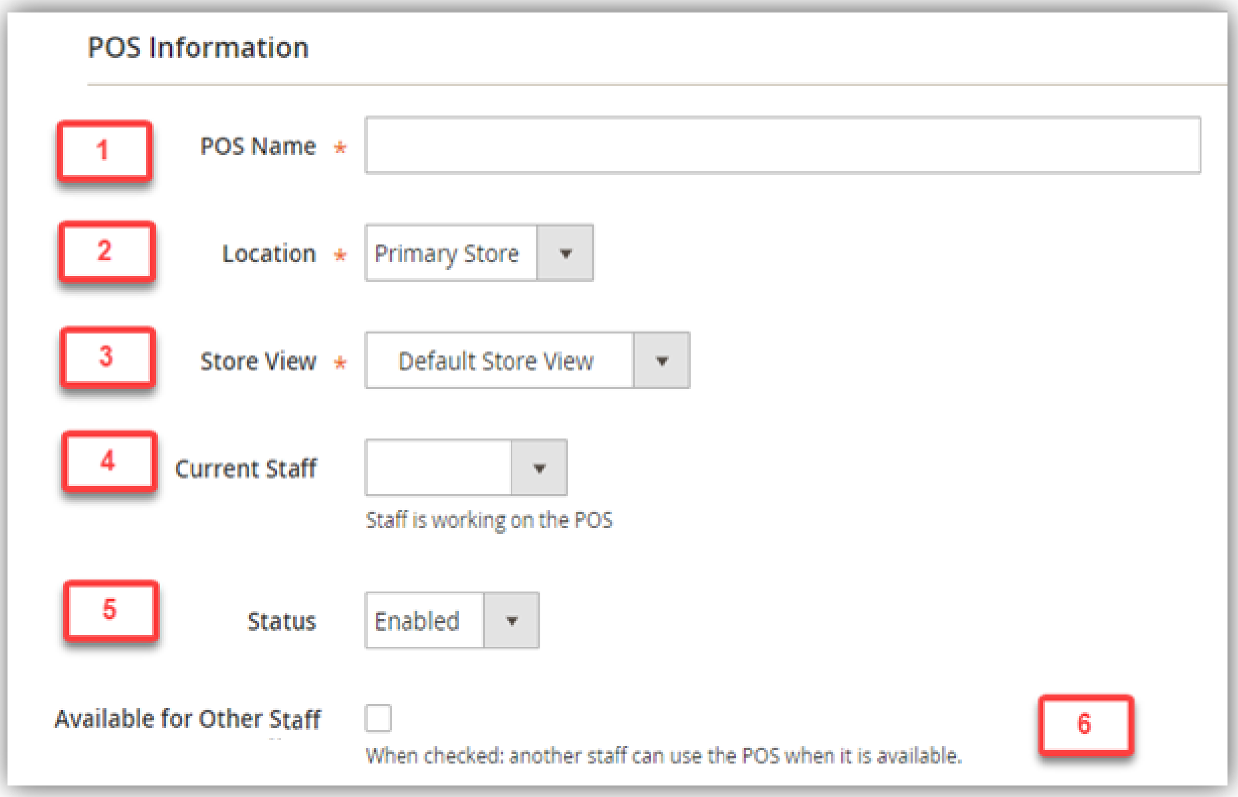
4.5. Store (POS)

Path: **Sales > Web POS** section **> Manage POS**

4.5.1. Create A New Web POS



Click **Add POS**



Fill out or select all the re quired fields.

(1) **POS Name**: POS's name. (re quired)

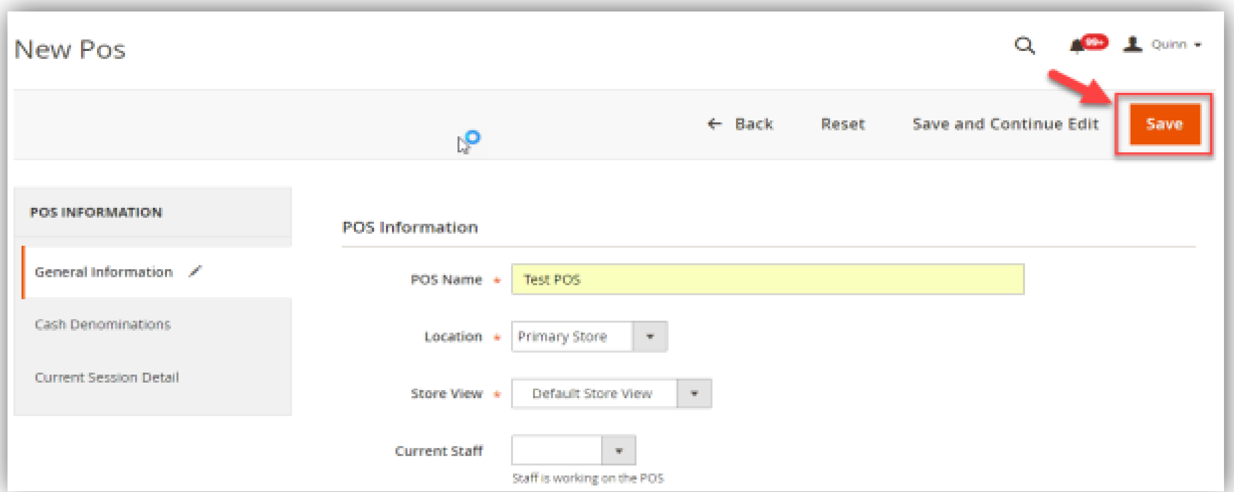
(2) **Location**: POS's location. (required). Here, admin can choose the location created and mapped to Warehouse. So that, the admin can control both warehouse and location easily.

(3) **Store View**: (required)

(4) **Current Staff**: Staff is working on the POS.

(5) **Status**: you Enable or Disable this POS

(6) **When checked**: another staff can use the POS when it is available.



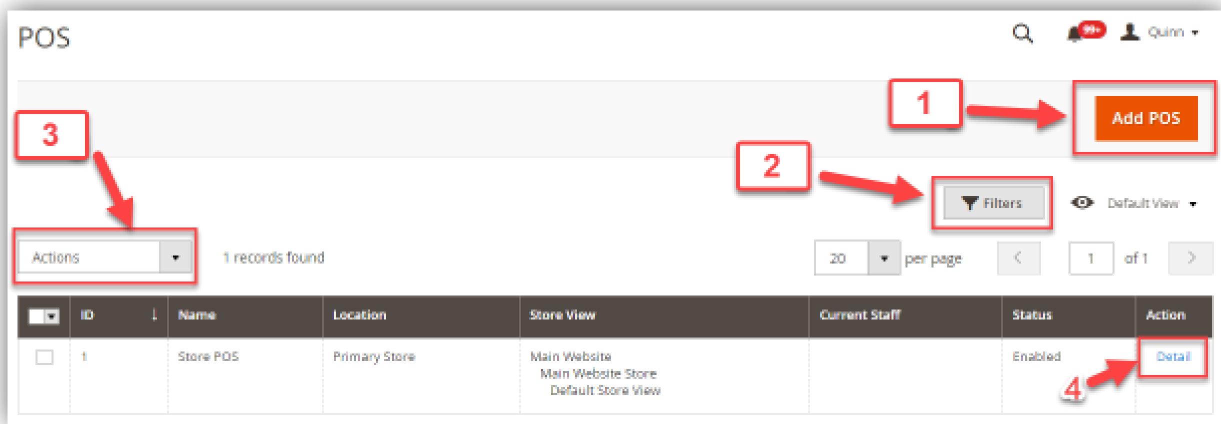
Click **Save** to complete the process.

Note: *Even when you set the warehouse to a certain location, with online store, admin can see clearly warehouse information in any location. HOWEVER, with offline store, only Sales Manager can view the warehouse information only in the mapped location.*

*IT Admin can give other admin permission to view the Inventory information in any location by going to **System > User Roles > Add new role** or **Edit role > Role Resource***

4.5.2. Manage Web POS

Path: **Sale > Web POS** section **> Manage POS**



(1) Click **Add POS** to create new POS.

(2) Click **Filters** to search POS information.

(3) If you want to delete a POS, first select a POS, then click **Actions**: choose **Delete**.

(4) Click **Detail** to view a POS's details or edit

5. HOW TO USE

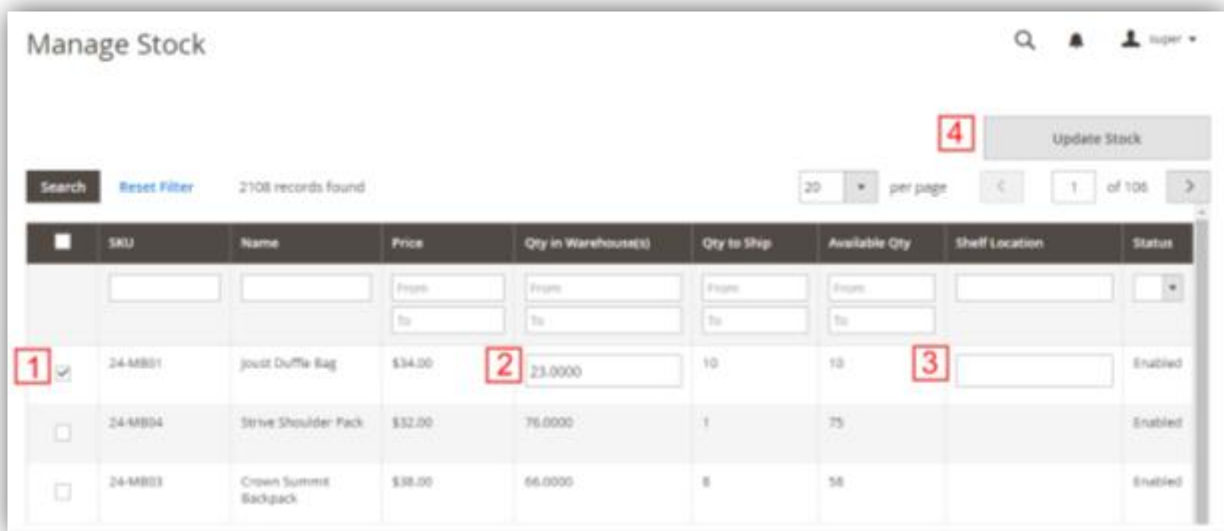
5.1. HOW TO USE INSTOCK MANAGEMENT MODULE

5.1.1. Stock listing

5.1.1.1. Stocks in Warehouse

Path: **Stock Management > Stock Listing** section **> Stocks in Warehouse**

Admin can have overview of Stock in the Warehouse and view stock details within the warehouse. These details include **Available Qty, Qty to Ship** and **Total Qty** and **Shelf Location** of each product in the warehouse.



You can easily edit Qty of products in-line within a few steps:

1) Mark the checkbox to select products
2) Edit product quantity in line
3) Input product location in the physical warehouse
4) Click on **Update Stock** to save changes

5.1.1.2. Non-warehouse product

When a product is newly created and not assigned to any warehouse yet, it will be automatically allocated in Non-warehouse.

From here admin can

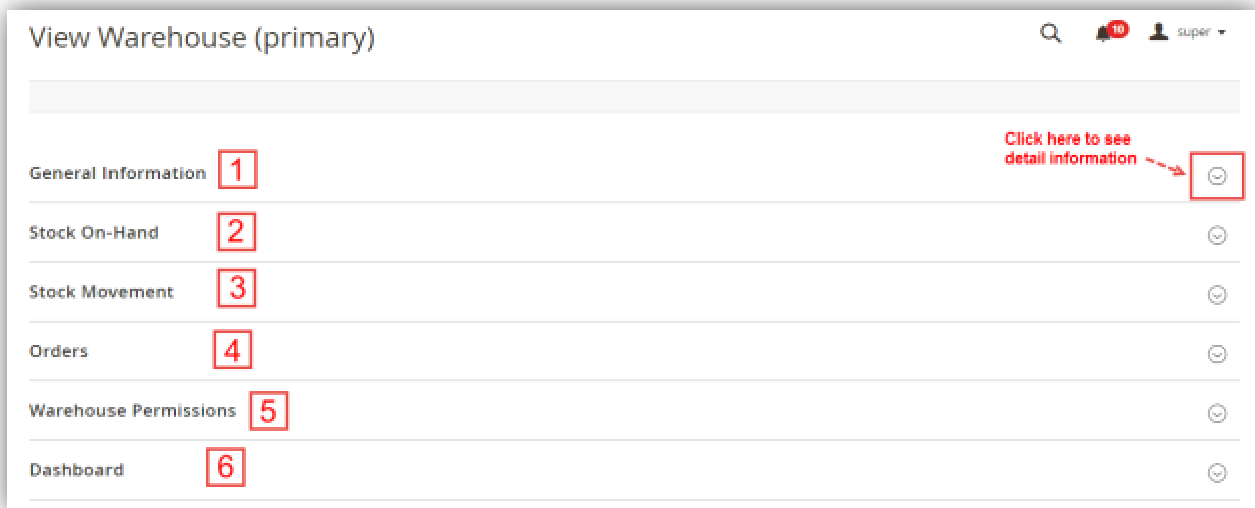
1) select the product by clicking on the checkbox
2) add it into warehouse by clicking on its Add to Warehouse column.

5.1.1.3 Warehouse

After installation, the system will automatically provide a **Primary Warehouse**. This warehouse cannot be deleted and can only be edited. All the existing products with stocks level of your website will be automatically allocated in this warehouse.

a. View Warehouse's detail information

The **Warehouse** menu allows you to control your warehouse with 6 tabs:



On the right side of each master data tab, click on the **Arrow button** to access the data:

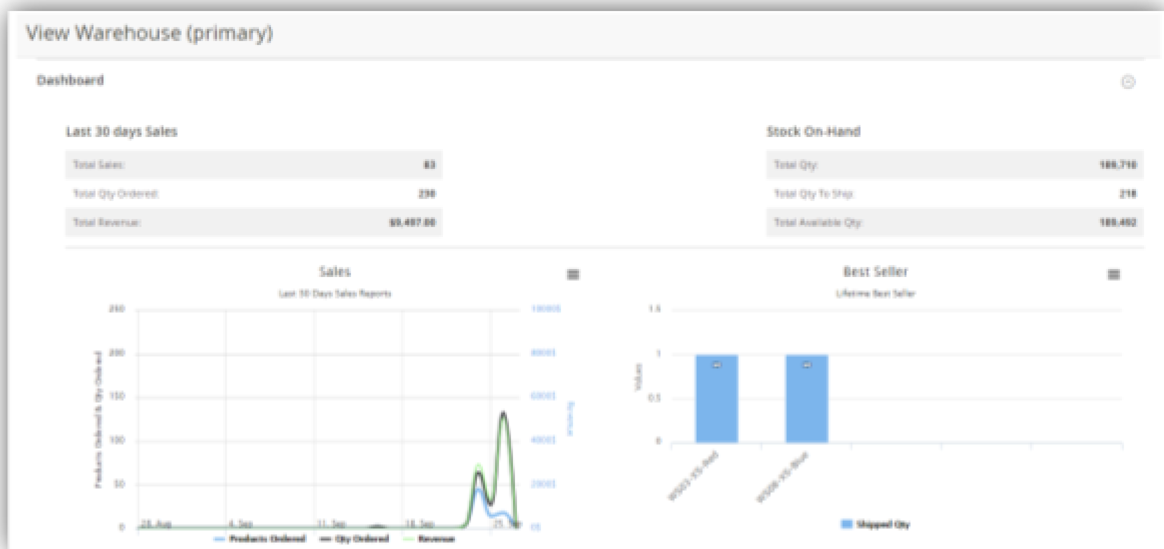
(1) **General information** about the Warehouse
(2) **Stock On-hand** displays the amount of goods that the warehouse has available at that time. Here, you can update each product's **Qty in Warehouse(s)** and its **Shelf Location** in-line.

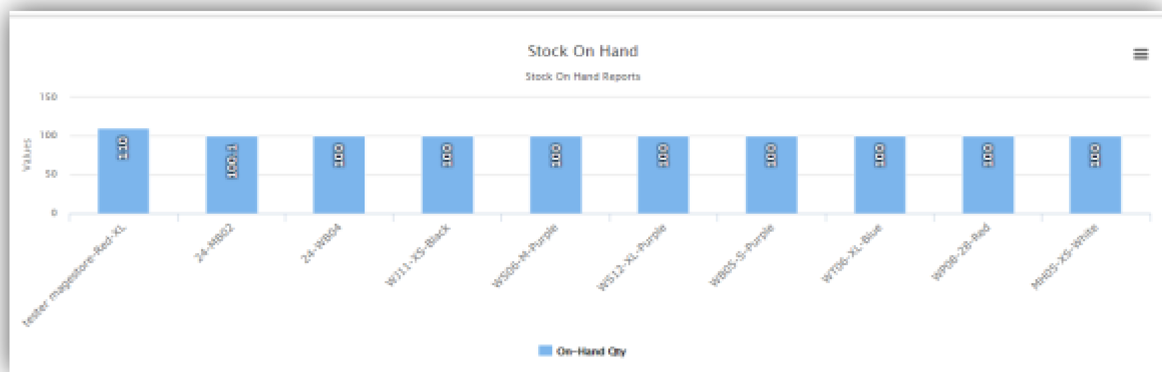
(3) **Stock Movement** shows the changes in stock quantities. Click on each record to view more details.

(4) **Orders** record detail information of each order including status, order ID, purchase date, customer that the order has been billed-to/shipped-to, order value.

(5) **Warehouse Permissions** manages staff access to the warehouse. Detailed guide is given in the next section ***b. Warehouse permissions***

(6) **Dashboard** contains reports that are illustrated as table and lines diagrams as below.

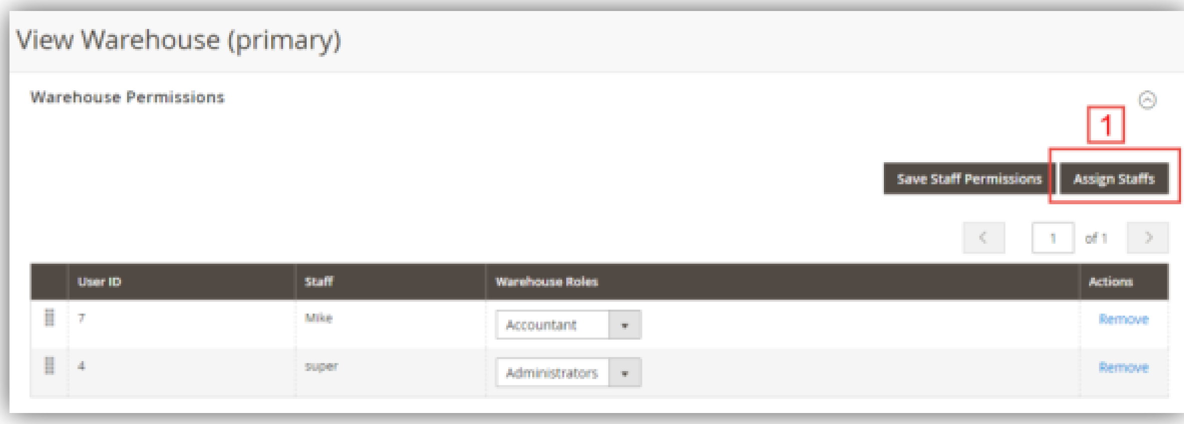




b. Warehouse permissions

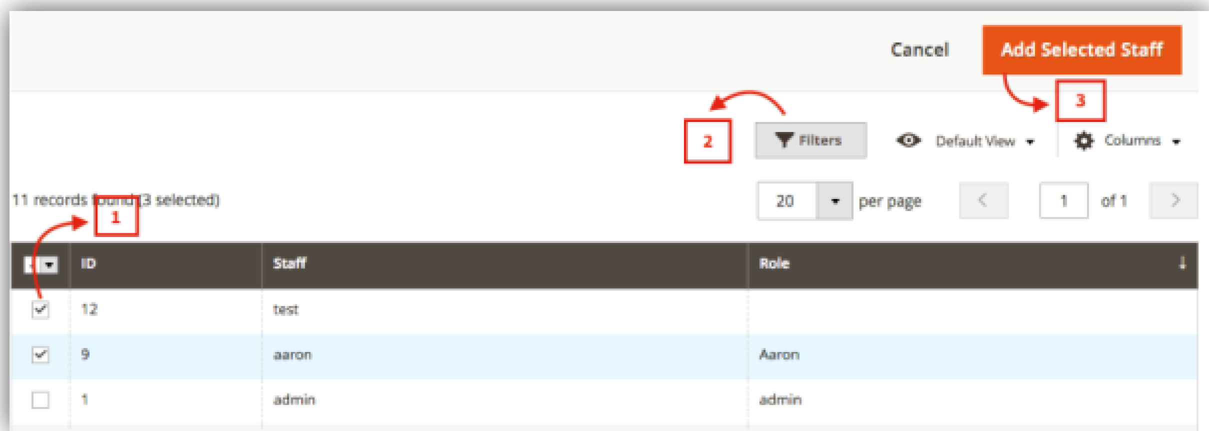
Path: **Stock Management > Stock Listing** section **> Warehouse > Warehouse Permissions**

In this section, Admin can give different warehouse access permissions to different (admin) users. Click on **View** to see the warehouse's detail information



(1) On the right hand side of the **Warehouse Permission** tab, click on **Assign Staff** to give different warehouse access permissions.

Then will be a new pop-up screen shown as below:

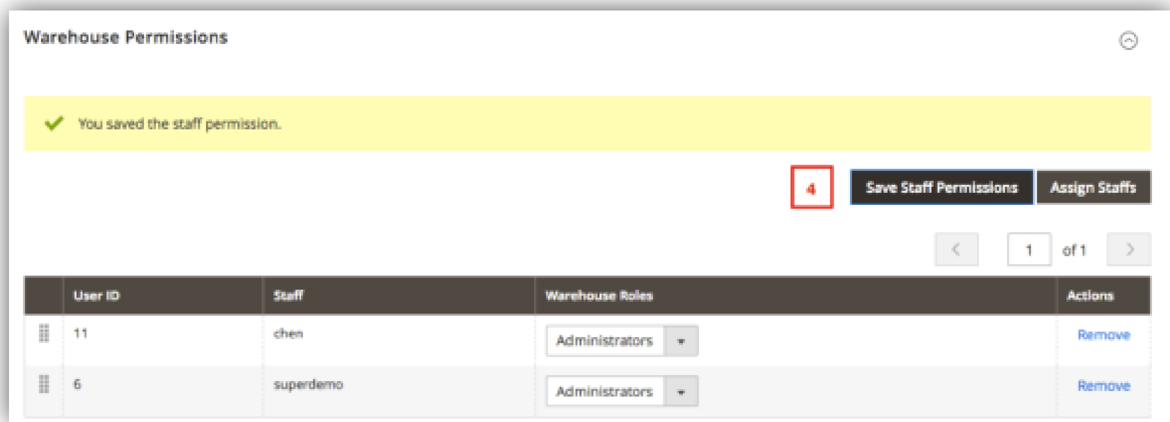


Select Staff users to assign permission

(1) Select Staff by marking the checkbox

(2) Click on **Filters** to search Staff information (if any)

(3) Click on **Add Selected Staff**



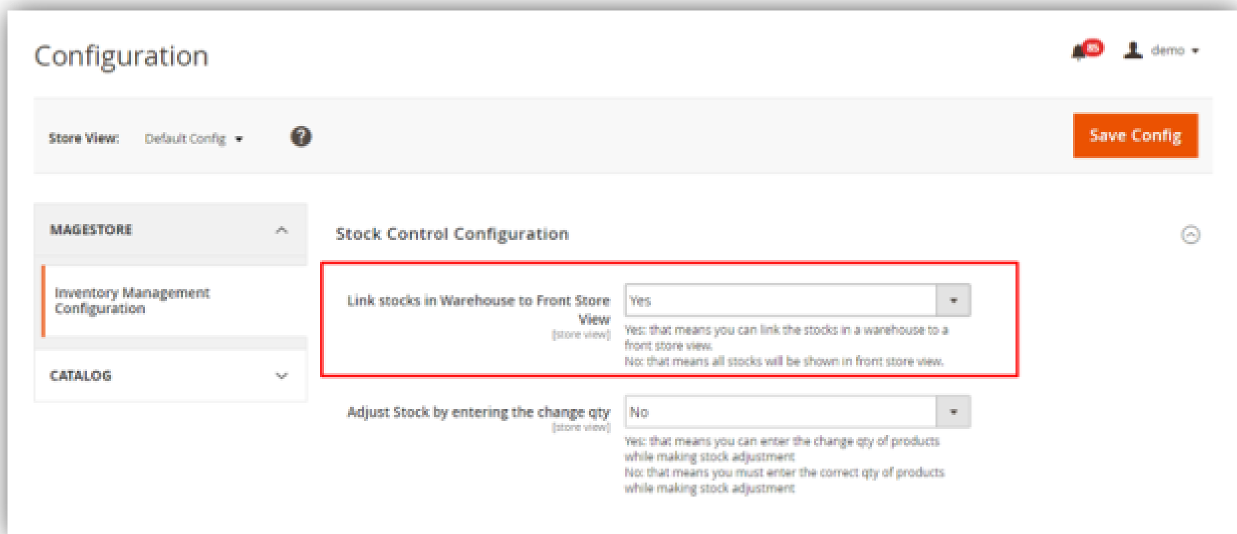
(4)Then click on **Save Staff Permissions**

5.1.2. Stock Control

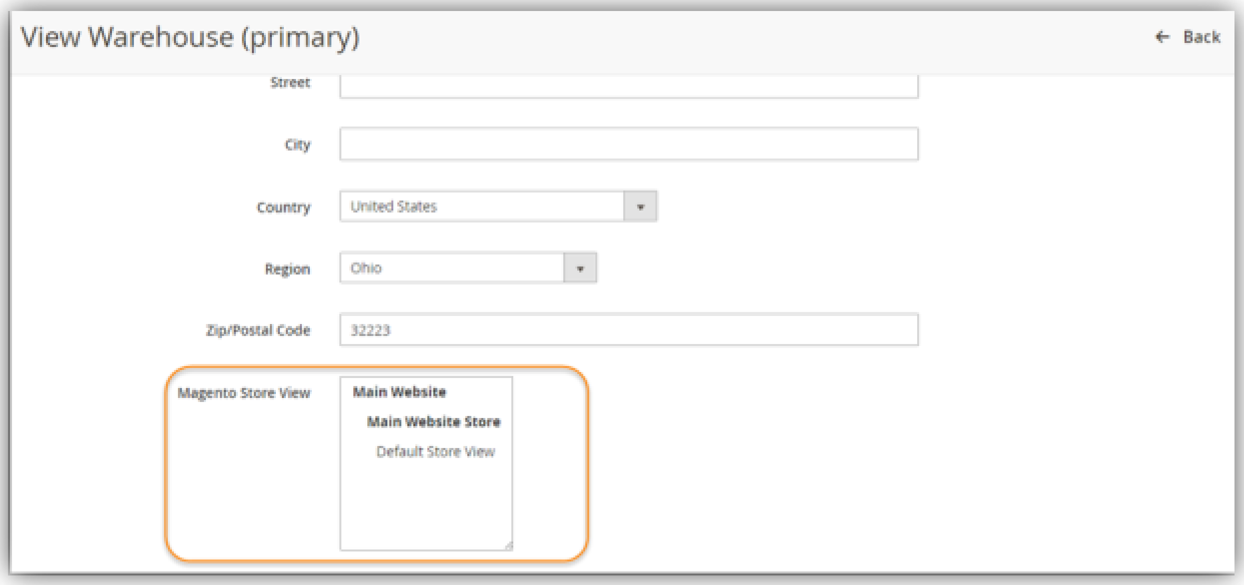
5.1.3.4. Stock Adjustment & Stock Adjustment History

a. Link stocks in Warehouse to Front Store View:

As mentioned in section [2.1.1. Stock Control Configuration](#), you can link products and stock data by choosing **Yes** on the **Link stocks in Warehouse to Front Store View** section

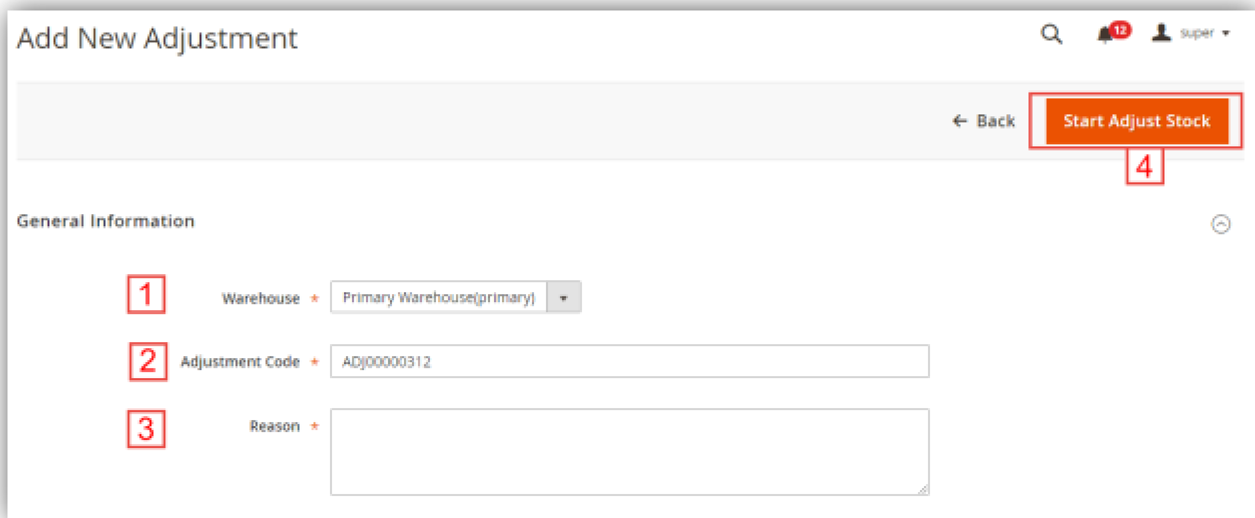


To link multiple Store View to a Warehouse, go to **Stock Management > Warehouse > General Information > Magento Store View**. Here, you can change the store view that links to the warehouse or select multiple store views as needed.



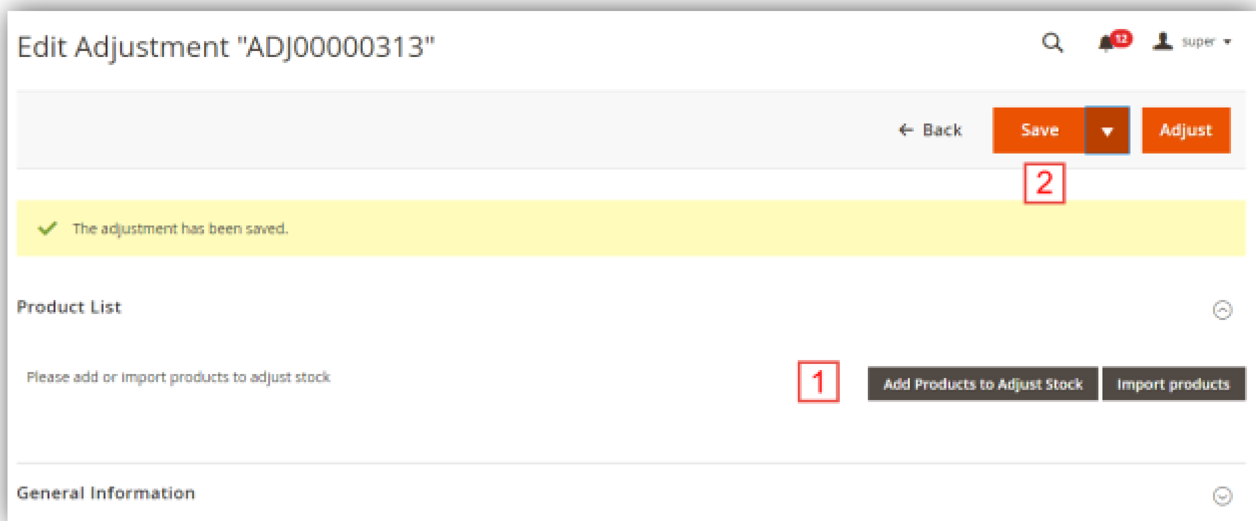
b. Add new Stock Adjustment

Path: **Stock Management > Stock Control** section **> New Stock Adjustment**



Under menu **Stock Control**, you can create new Stock Adjustment in a few steps:

1) Name of the warehouse. With the Starter Package, you can only choose Primary Warehouse (also set as default)
2) Adjustment code is automatically generated. All adjustments are saved in **Stock Management > Stock Control** section **> Adjust Stock History**
3) Fill the reason
4) Then click button **Start Adjust Stock**.

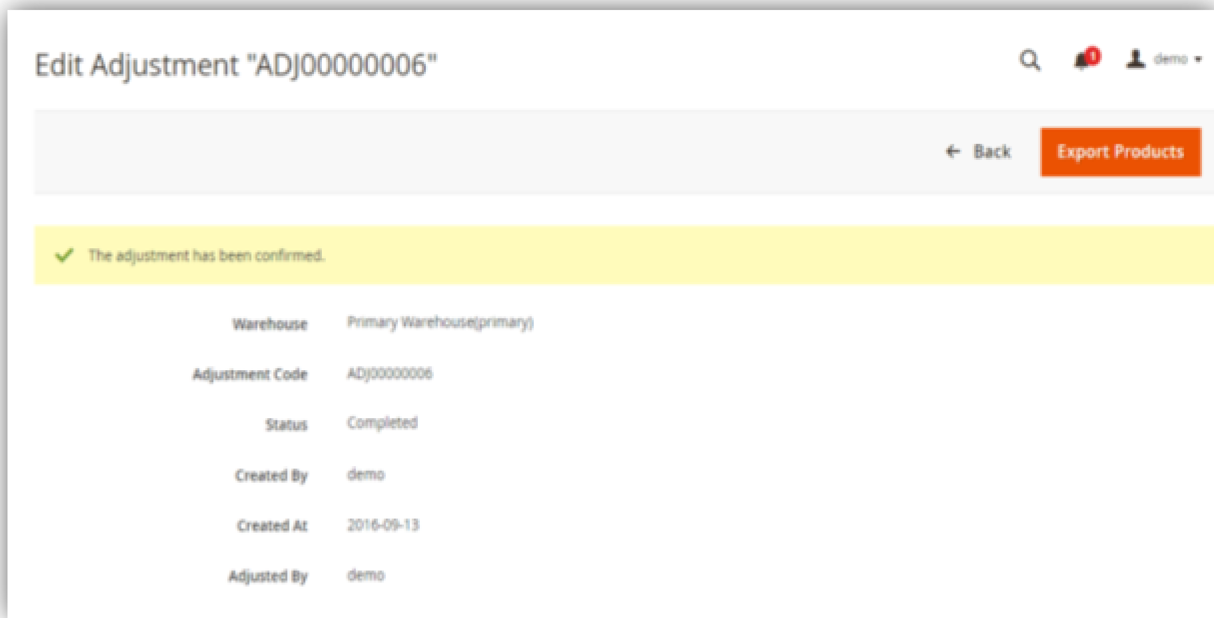


From here you have 2 options:

1) Go to product list and **Add products to adjust stocks** or **Import products** via CSV file
2) **Save** the Stock Adjustment. After being saved, this stock adjustment's status is now **Pending**. To change Stock Adjustment status to **Completed**, you need to hit button **Adjust**.

Note that the Qty here can be "Change Qty" or "Adjusted Qty", depending on how you configure in Store Configuration (please refer to section ***[2.1.1. Stock Control Configuration]***)

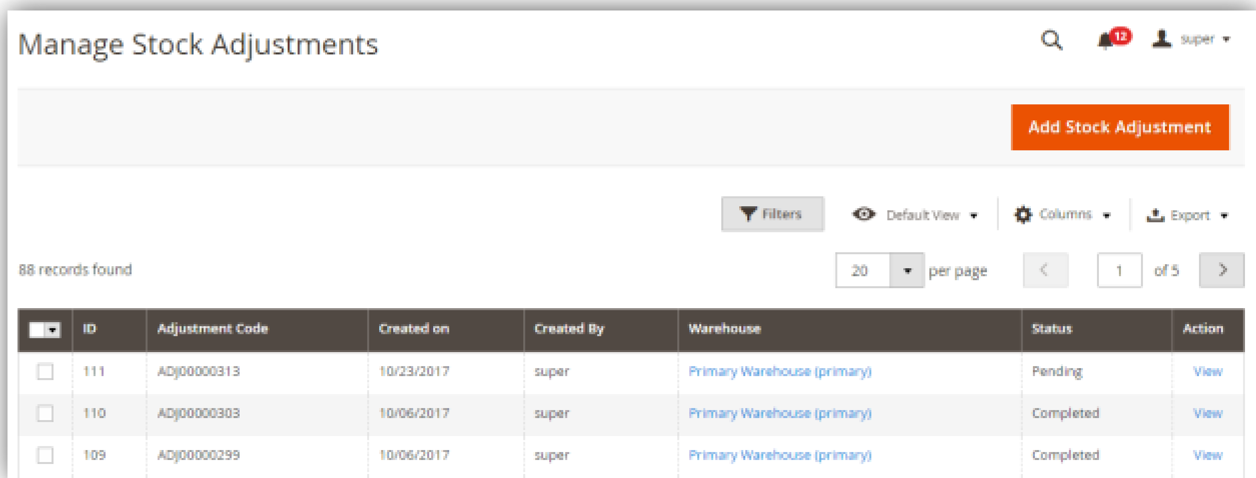
Stock is updated in the warehouse. Once the Adjustment is Complete, there is no way to edit it.



Stock level will be updated instantly in the corresponding warehouse.

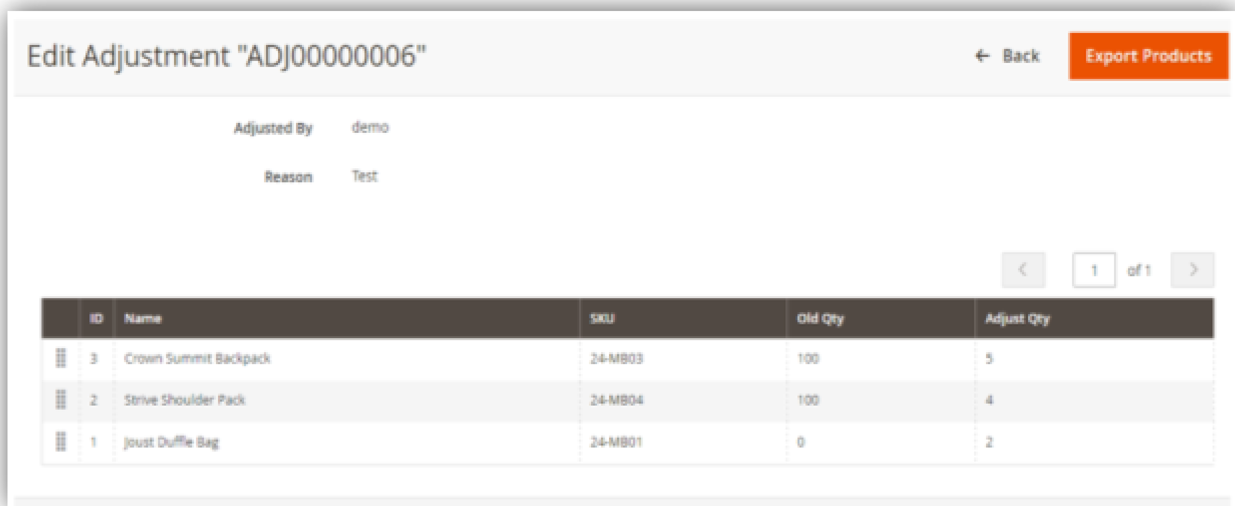
c. View Stock Adjustment History

Path: **Stock Management > Stock Control** section **> Stock Adjustment History**



You can view all records of Stock Adjustments in this page with information including Time created, staff created, warehouse and status… Click on each Adjustment, you can see stock adjustment details.

If you click on a **Completed** adjustment, you will be able to export the product list of that specific adjustment by clicking the button **Export Products**.



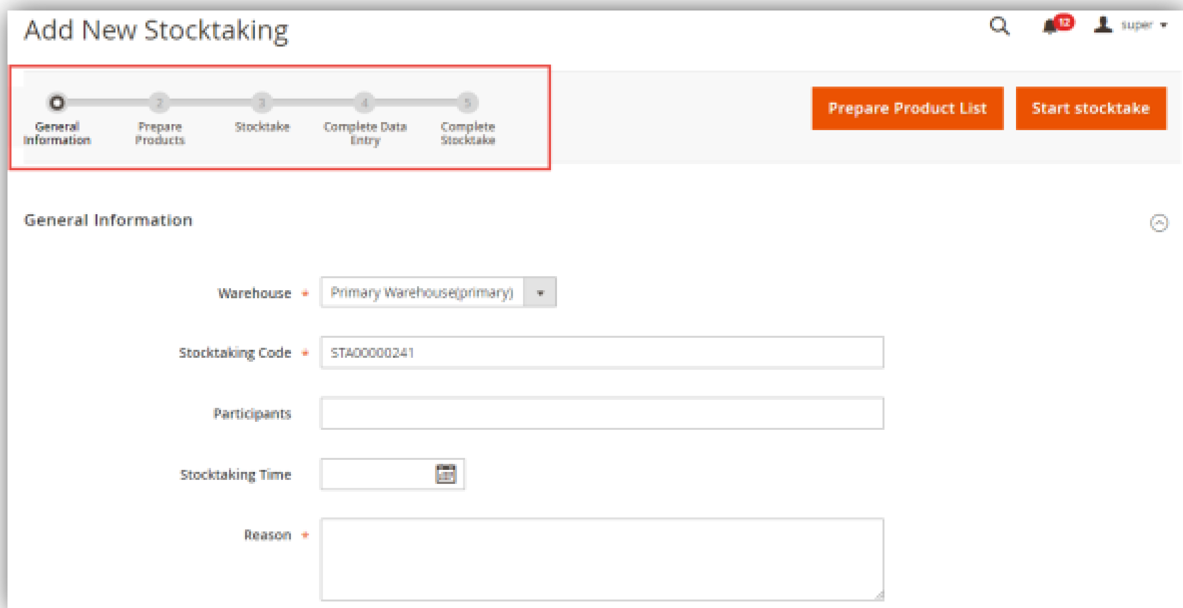
5.1.3.5. Stock Taking & Stock Taking History

Physical Stocktaking acts can be used at any time to double-check and correct inventory discrepancy amounts in Inventory Management vs. physical inventory in your warehouses. These consist of:

- A count, in which warehouse staff records the actual number of products in stock at the time of inspection & a manager can rely on it to update inventory in the system later
- Then a confirmation of that count performed by a warehouse manager to officially update the correct number of products in stock (Adjust Stock)

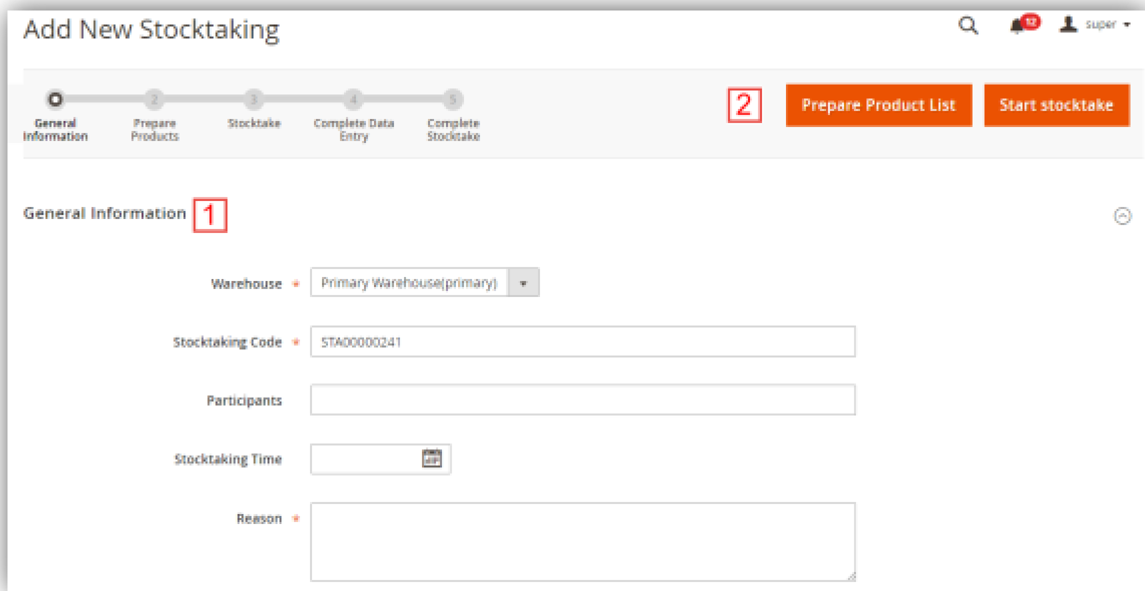
a. Stocktaking process

Path: **Stock Management > Stock Control** section **> New Stocktaking**



There are 5 steps in Stock taking using Instock Management module:

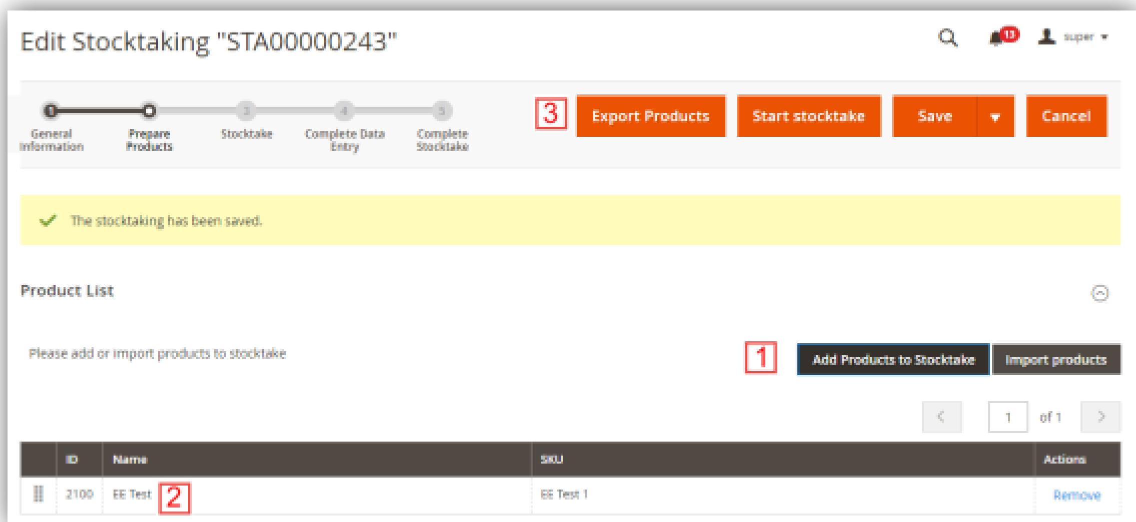
- **Step 1: Fill General information:** After finishing this step, Stock taking status is **Pending**



(1) Fill in the reason for stocktaking. You can also fill in the participants and the time of the action but it is optional

(2) Choose the products to be stock taken by clicking the **Prepare Product List** button (Stage 2) at the top right of the page. Alternatively, you can skip it to go straight to Stage 3 by clicking the **Start Stocktaking** button

- **Step 2: Prepare products before doing stock take:** Select or import products to prepare before doing stock take. Stock taking status will change to **Processing**

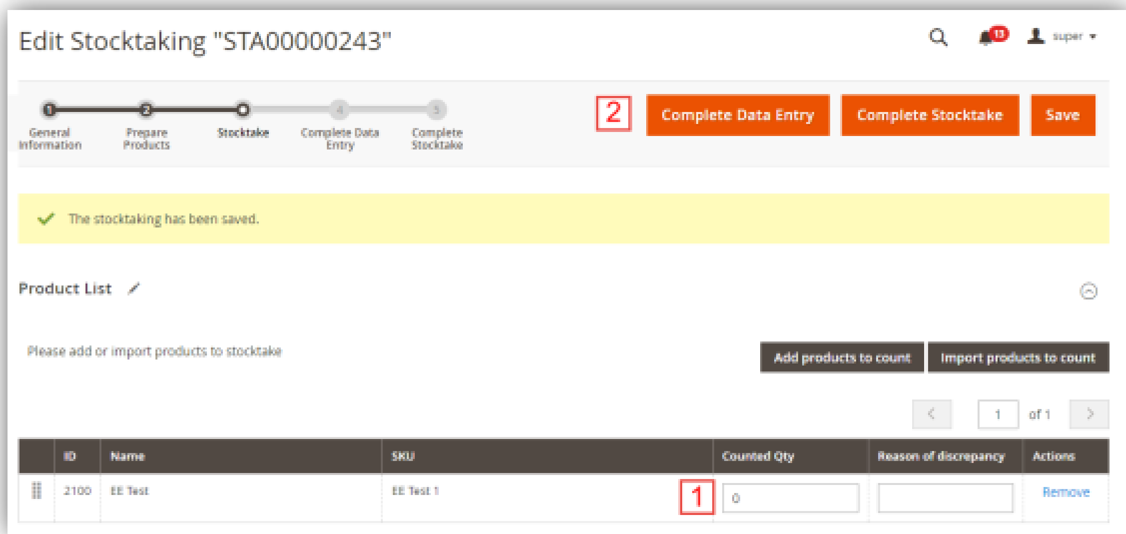


(1) Click on **Add Products to Stocktake** to select products from your product list or **Import products** from CSV file (template provided)

(2) Selected products will be displayed in the grid here

(3) Click **Save** to stay with your selected products for further edits, or click **Start Stocktake** to proceed Stage 3.

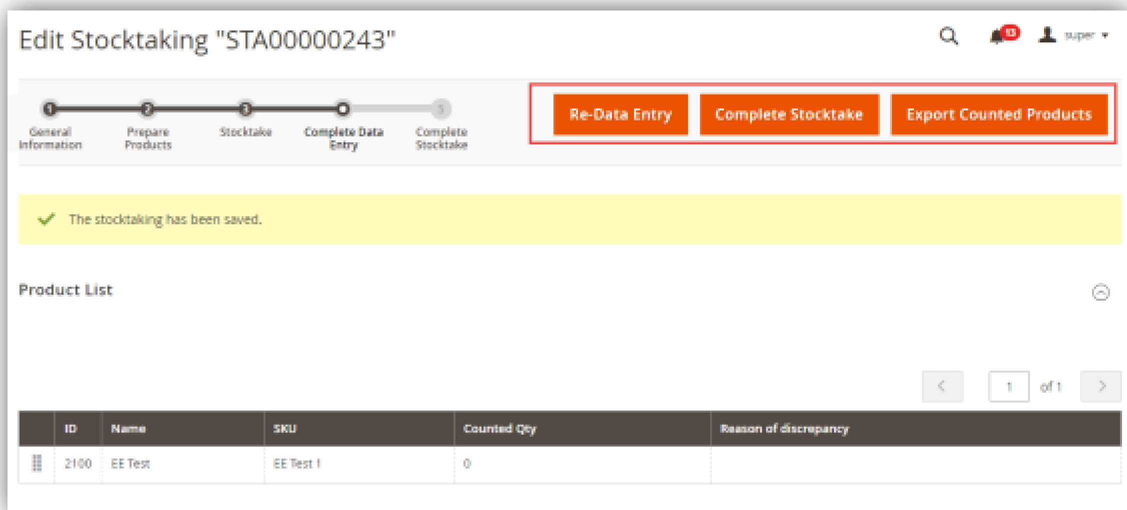
- **Step 3: Do Stock take:** Fill in the Qty of product. Now status is changed to **Verified**



(1) Enter the product quantity that you have recently counted and the reason why there is quantity difference.

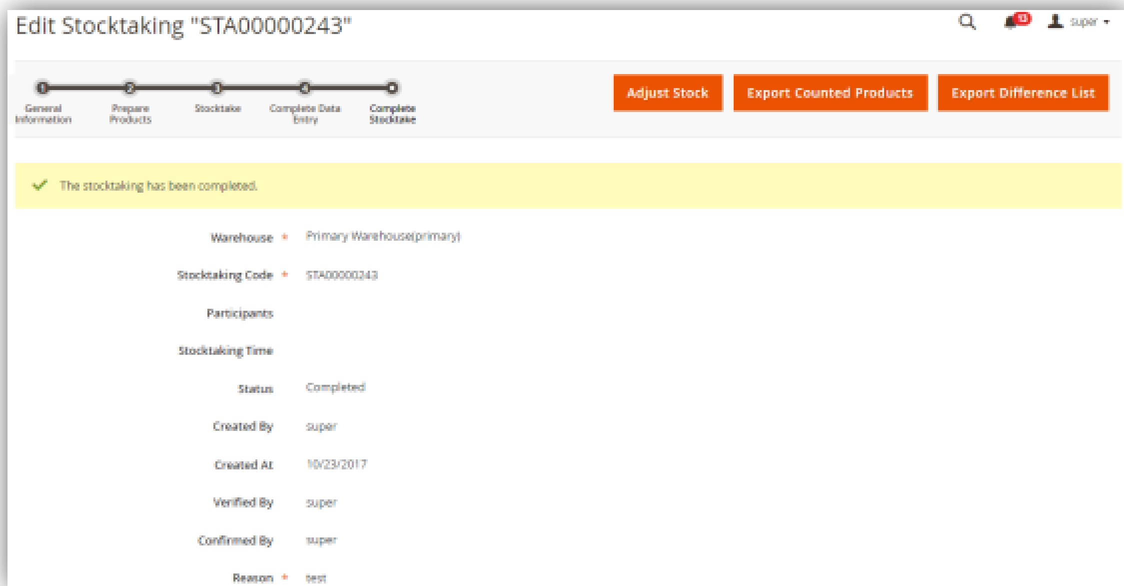
(2) Either click **Complete Data Entry** to proceed to Stage 4 and have a review of the changes; click **Complete Stocktake** to finish the process; or **Save** to continue editing.

- **Step 4: Complete data entry:** Save the data that has been stock taken and waiting for admin's approval.



This Stage allows you to have a final review of your recent quantity counts. Click either **Re-entry Data** to edit the quantity or **Complete Stocktaking** to move to Stage 5. If you are not an admin, your counting results will be submitted to the admin/ manager for approval before the new quantity is officially updated and the process is marked **Completed.**

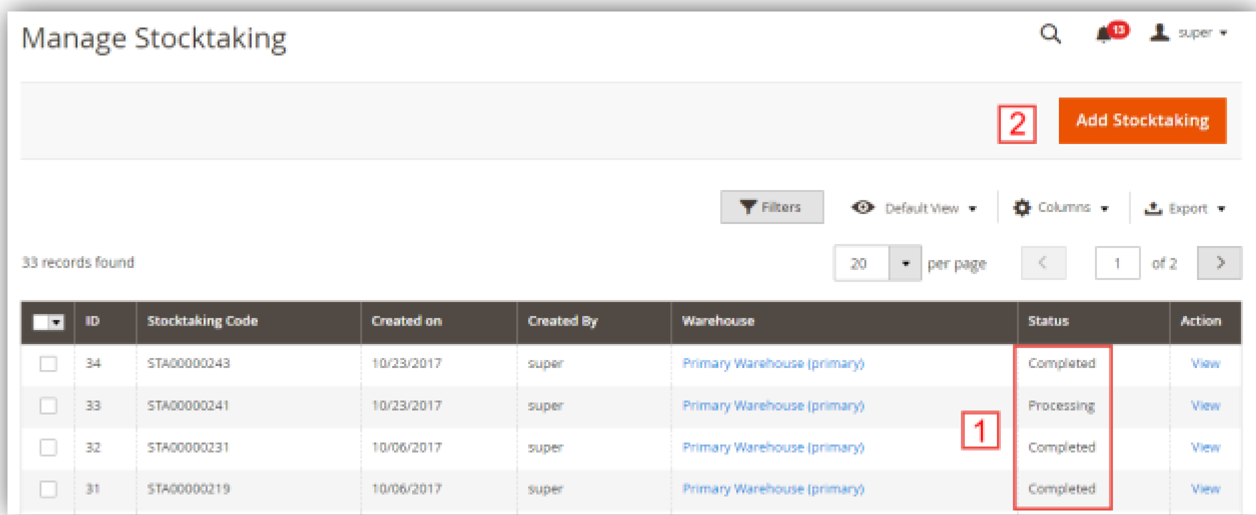
- **Step 5: Complete Stock take:** When admin does this, Stock taking status will be changed to **Completed**.



Qty is adjusted in the warehouse. Similar to Adjust Stock, stock taking cannot be edited after status is Completed. After doing stock take, admin can easily view and export the difference between real stock in the warehouse and the stock level updated by the system.

b. Stocktaking History

Path: **Stock Management > Stock Control** section **> Stocktaking History**



(1) All Stocktaking details are listed here. Click on each record to view all details of the process. Different status shows to which stage the stocktaking process is done:

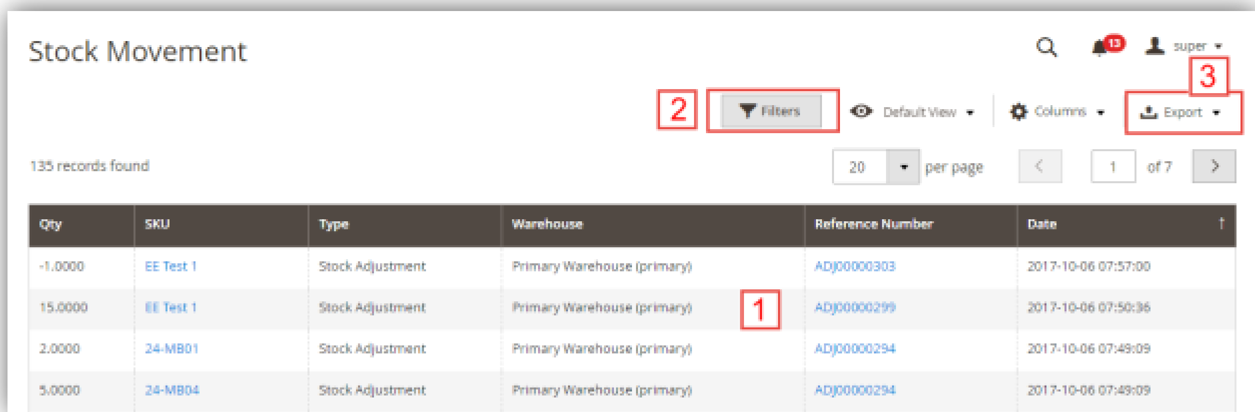
- Status **Pending** means Stage 1: **General Information** is done
- Status **Processing** means Stage 2: **Prepare Products** is done
- Status **Verified** means Stage 3: **Stock Counting** is done
- Status **Completed** means the whole stocktaking process is done

(2) You can also click on **Add Stocktaking** button to start a new stocktaking process from here.

5.1.3.6. Stock Movement

Path: **Stock Management > Stock Control** section **> Stock Movement History**

The module records all the movements of stocks in warehouse. These movements are reflected in **Stock Movement** report under **Stock Control** submenu.



(1) The table shows SKU of the products added or subtracted from warehouse, the changed Qty, Warehouse name, Date and Reference number to see the details on a click.

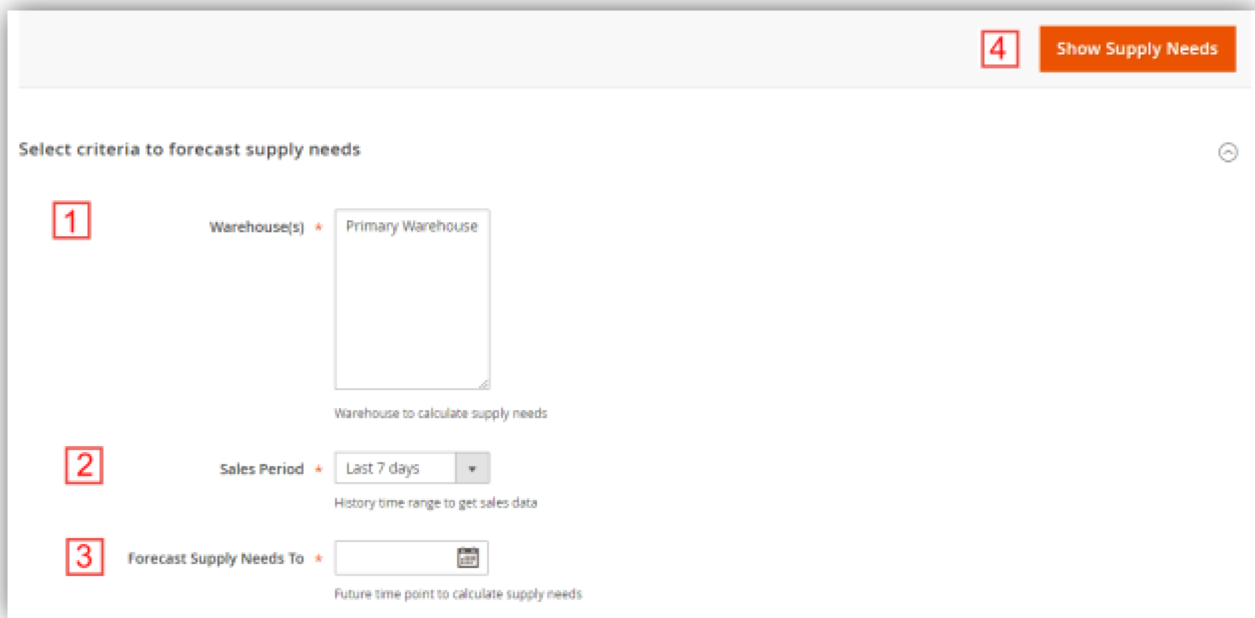
(2) Admin can filter the data basing on the variables in the table.

(3) Admin can also easily exports Stock Movement details into CSV or Excel XML.

5.1.3. Prediction

5.1.3.1. Supply Needs

This feature predicts how many inventory items your warehouse needs for each product within a future period. The system will calculate this number based on your sales history in the corresponding period in the past.



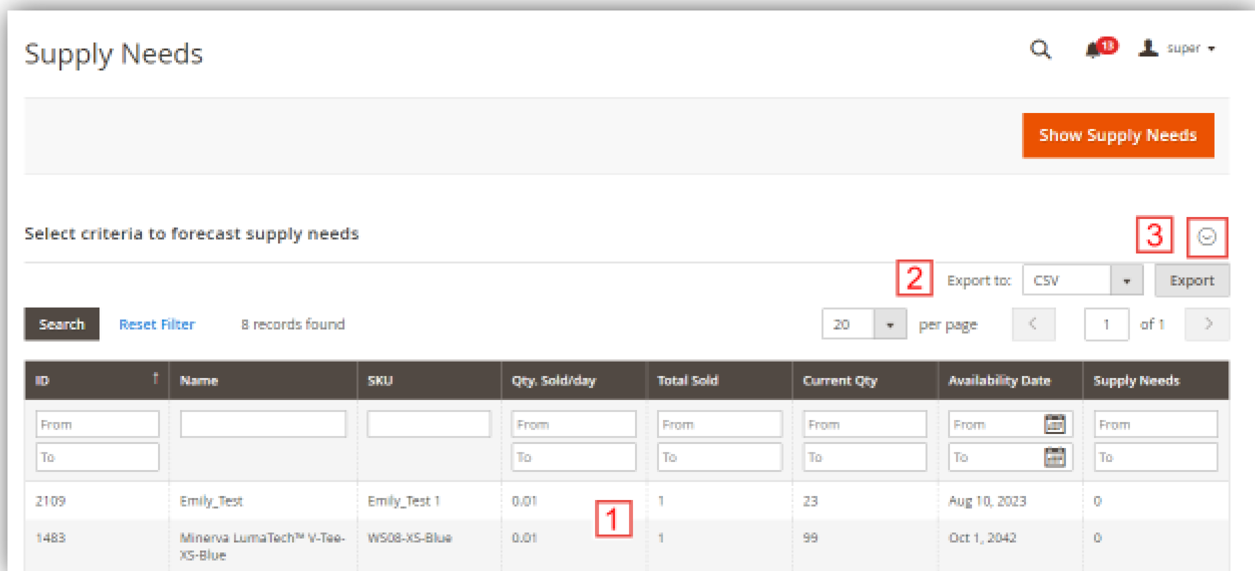
(1) To process a prediction, select the warehouse (in Instock Management module, you can only select 01 warehouse i.e. Primary Warehouse)

(2) Time range to collect sales data, based on which the system will calculate data for supply need

(3) Pick the date that you want to see forecast results.

(4) Click to **Show Supply Needs** button to finally view the prediction.

The forecast data will be shown in the table as below:



(1) The table displays supply needs information as below:

- Qty Sold/day: average quantity sold per day of the product during the chosen sales period

- Total Sold: total quantity of product that were sold during the chosen sales period
- Current Qty: the product quantity that you currently have in the warehouse
- Availability date: the system predicts your stock is enough to be sold until this date. After this date, your product is estimated to run out of stock.
- Supply needs: the quantity of product that expected to be sold until the time stamp you set.

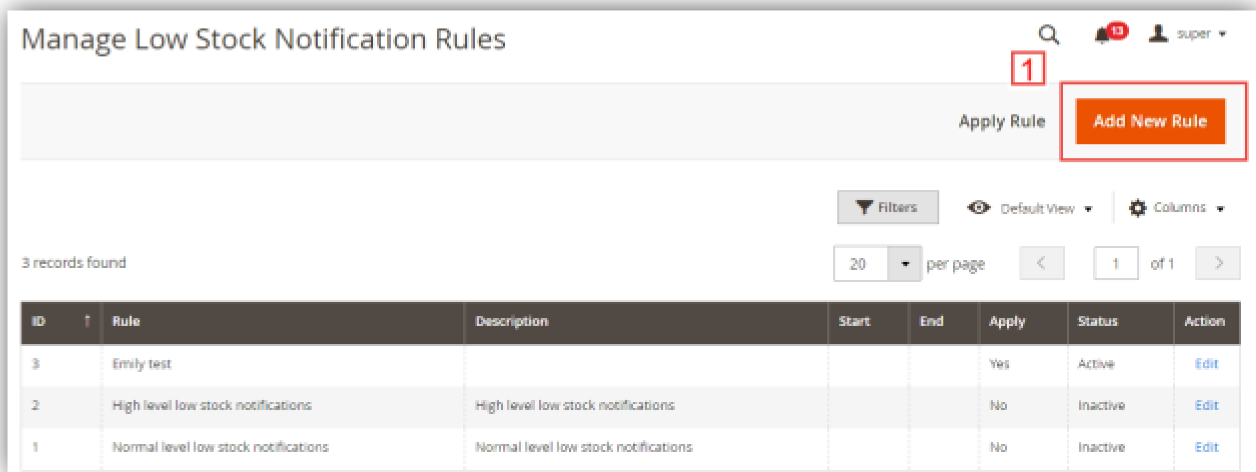
(2) The Supply Need Forecast can be exported to CSV or XML file by hitting **Export** button.

(3) You can start another prediction by expanding and editting criteria for supply forecast and hit **Show Supply Needs** again to refresh the prediction result.

5.1.3.2. Low Stock Rules

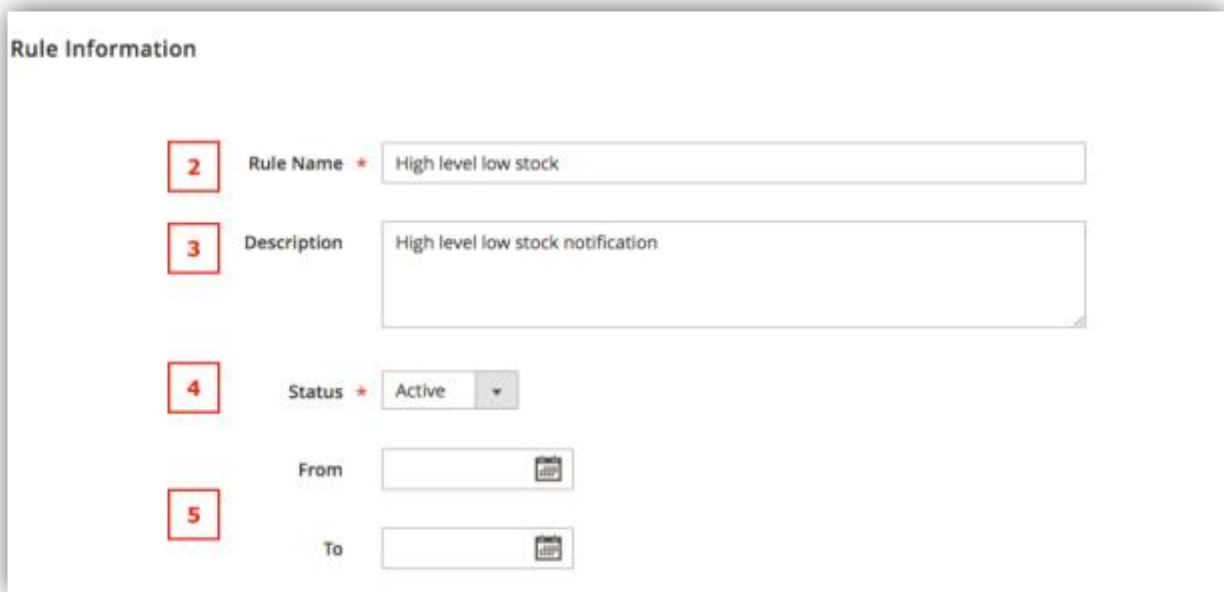
Path: **Stock Management > Prediction** section **> Low Stock Rules**

Note: Low Stock Alert *is when a type of product is on the verge of low-stock, Low Stock Alert will alert the Inventory manager to import more items. This feature avoids lack of items to supply for stores.*



(1) Select an existing rule to edit or click **Add New Rule** button at top right of the page. Admin can create unlimited rules to notify low stock status. One rule contains: **Rule Information, Conditions** & **Action**. There is no limitation in the quantity of rules set.

a. On the Rule Information tab:

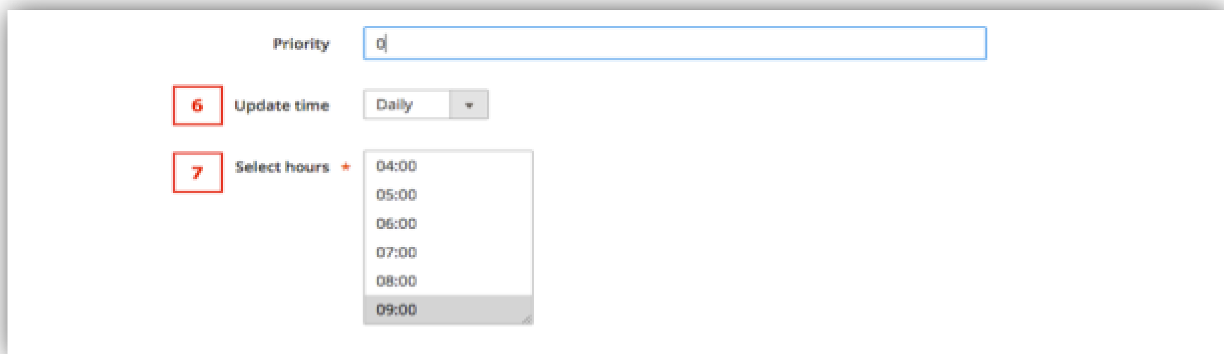


(2) Enter the low stock rule name

(3) Add a brief about the rule *(optional)*

(4) Select **Active** to enable the rule

(5) Use **Calendar** to choose **From** and **To** date for a term of validity *(optional)*



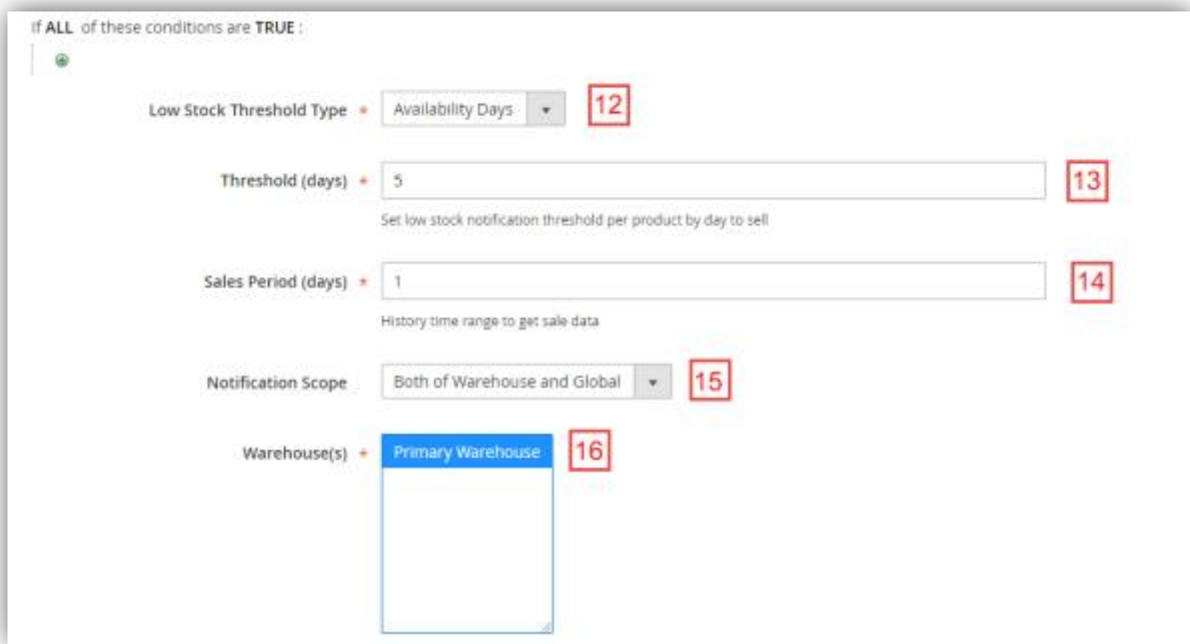
(6) Select an **update time**:

- Daily
- Monthly

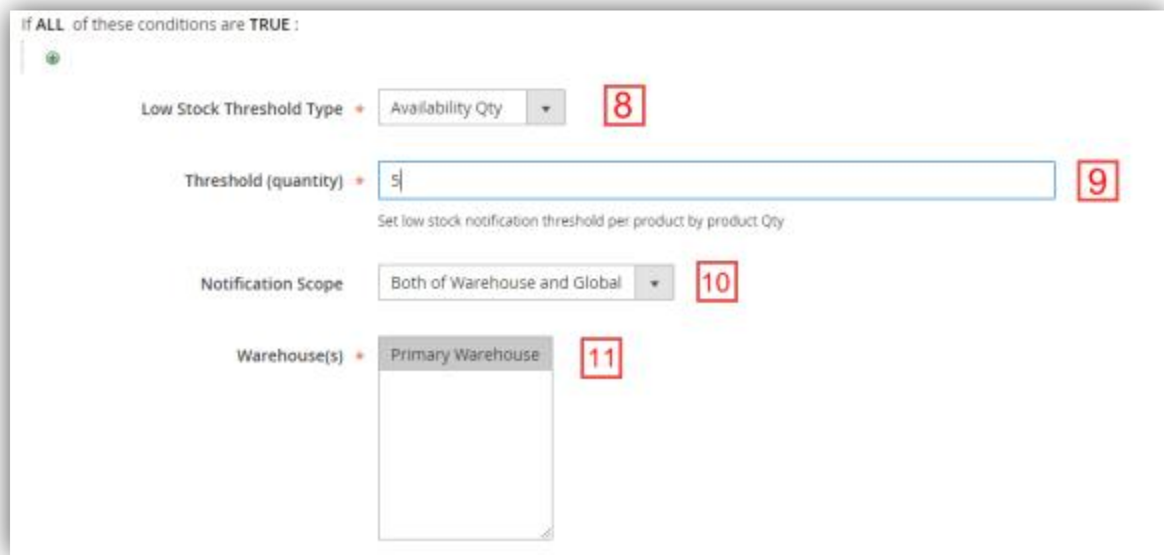
The system periodically check stock availability and automatically send email notifications admin and warehouse managers.

(7) **Select hours** the warning message will be sent

b. On the Conditions tab:



There are **2 types** of low stock rule:



<u>Type 1: Availability Qty.</u>

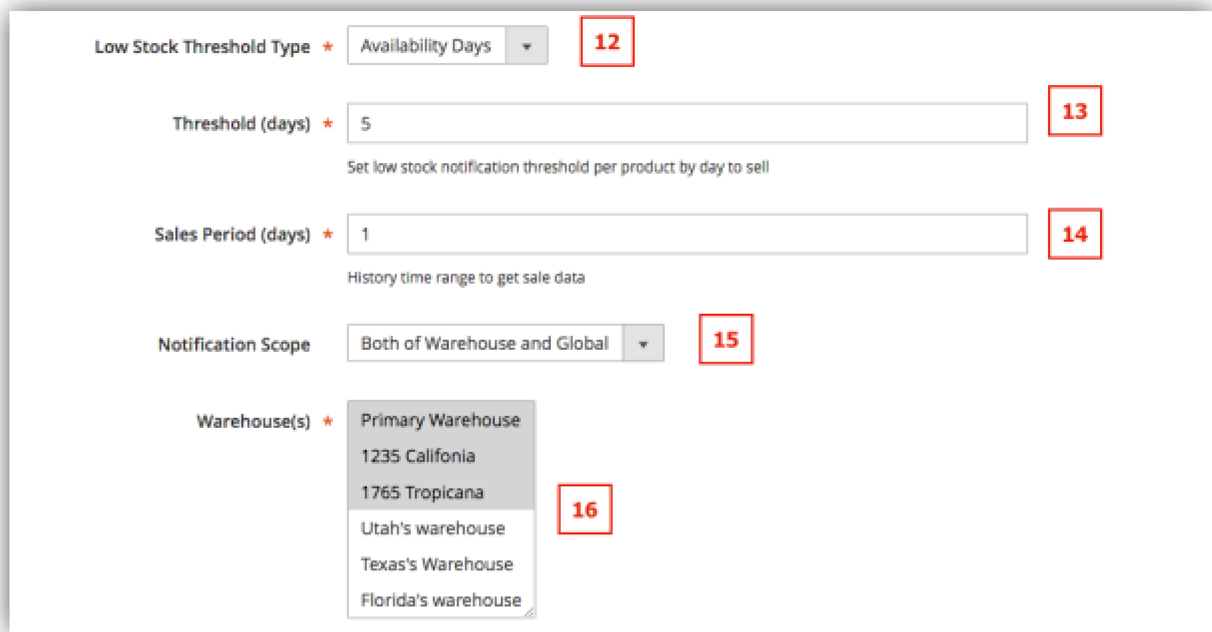
<u>Availability Qty.:</u> *you can select Qty. threshold that the system will notify to import.*

(8) Select **Availability Qty.**

(9) Set the number of **threshold** quantity

(10) Select **Both Warehouse and Global** for notification scope

(11) Select **Warehouses** for those rules will be applied



<u>Type 2: Availability Days</u>

<u>Availability Days</u>: *you can select Day Threshold that system can notify you to import items. You do not need to enter the Qty. here because the system will automatically calculate the selling rate based on the sale period you provided and the real Qty. in your warehouse and (store)*

(12) Select **Availability Days**

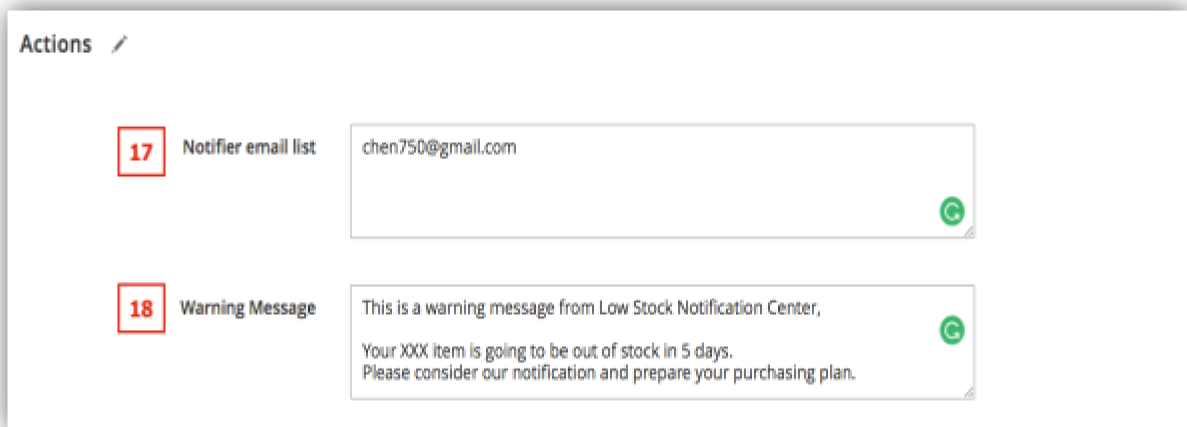
(13) Set the number of **threshold days**

(14) Set the number of **sales period days**

(15) Select **Both Warehouse and Global** for notification scope

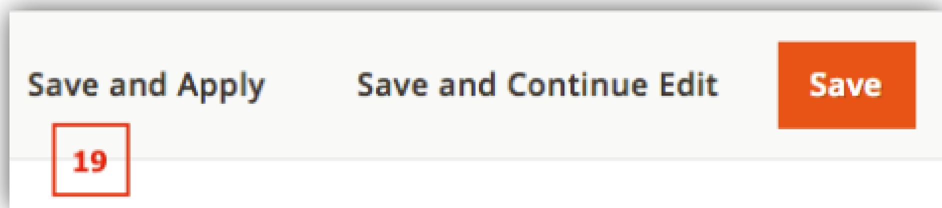
(16) Select **warehouses** for those rules will be applied

c. On Actions Tab:



(17) Enter an **email list** to send the low stock notifications to

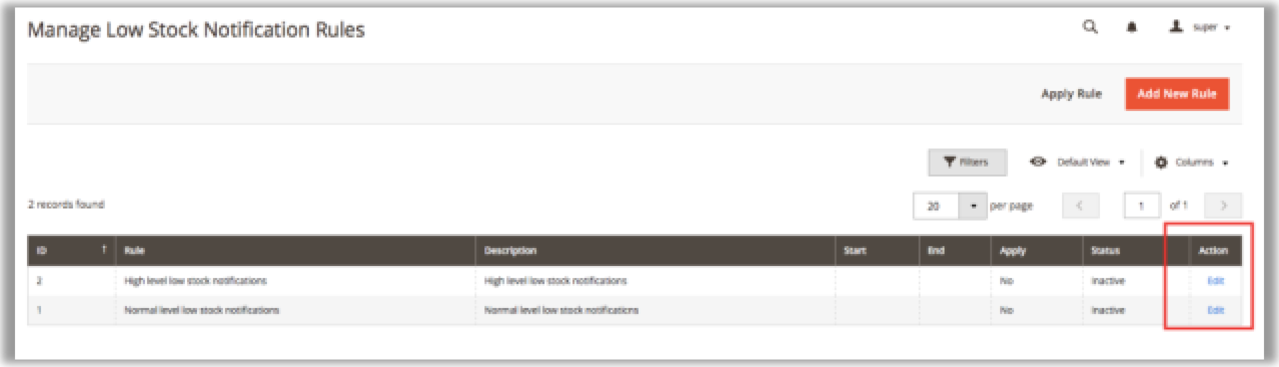
(18) Enter content of the **warning message**



(19) Click **Save** or **Save and Apply** to finish

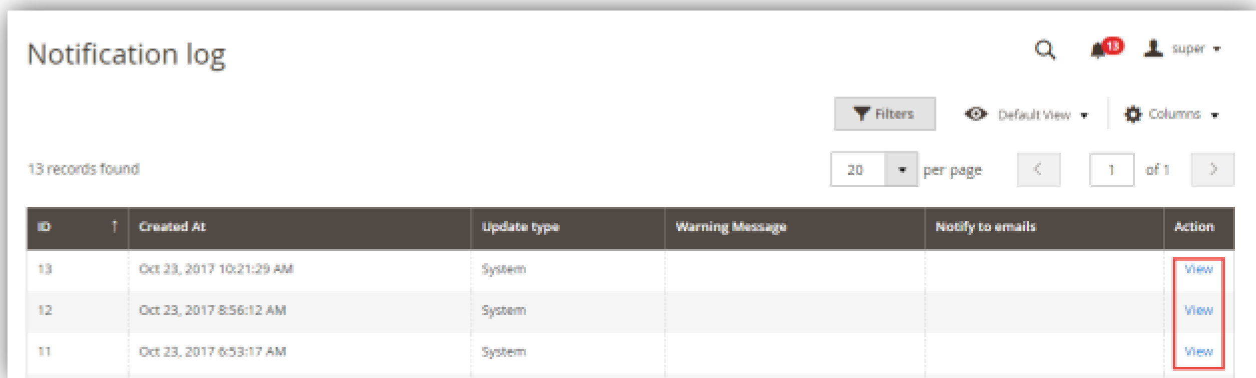
- **Save and Continue Edit**: to save the process and continue edit on the current page.
- **Save and Apply**: you can apply rule immediately
- **Save**: you can save the rule but it will not be applied, in case you need to ask for permission before applying or double-check with other people.

Note: *You can edit the rule that you* ***Save and Apply*** *or* ***Save*** *by going to* ***Stock Management > Prediction*** *section* ***> Low Stock Rules >*** *clicking on* *Edit*



5.1.3.3. Low Stock Notifications

Path: **Stock Management > Prediction** section **> Low Stock Notifications**

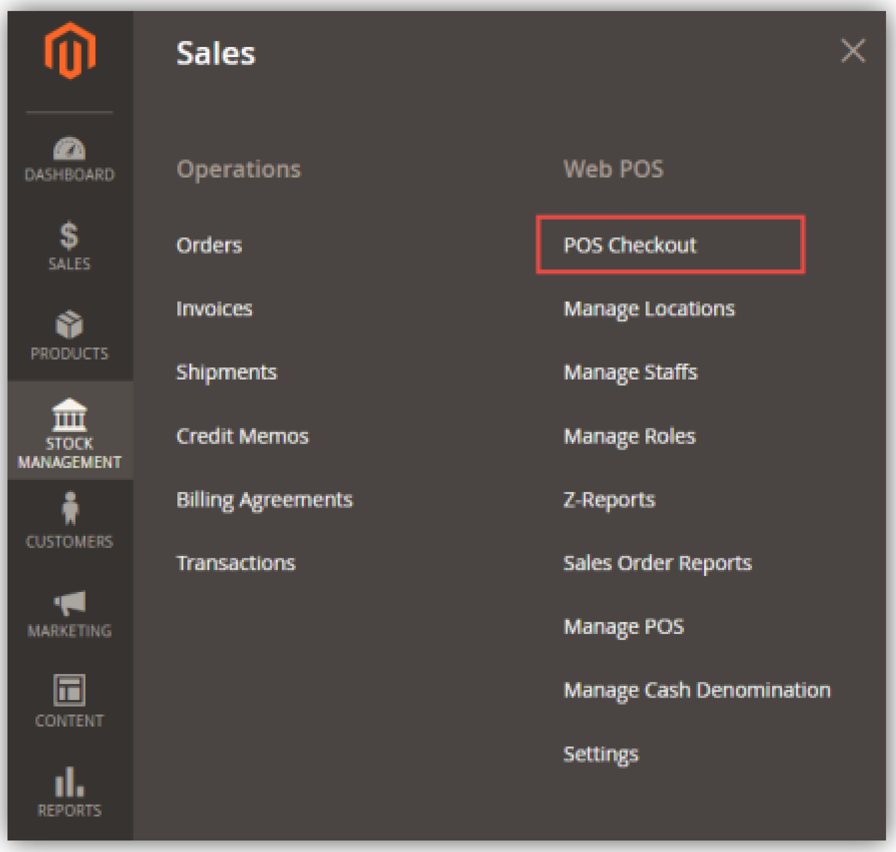


Low Stock Notifications displays warning messages about the products which are nearly out of stock in warehouses. It shows all notifications with information including Sent at, Update Type, Email received, Recipients and Action. Click view action on each notification log to see details of products that have been low stock including Name, SKU, Image, Qty Notified and Time Notified.

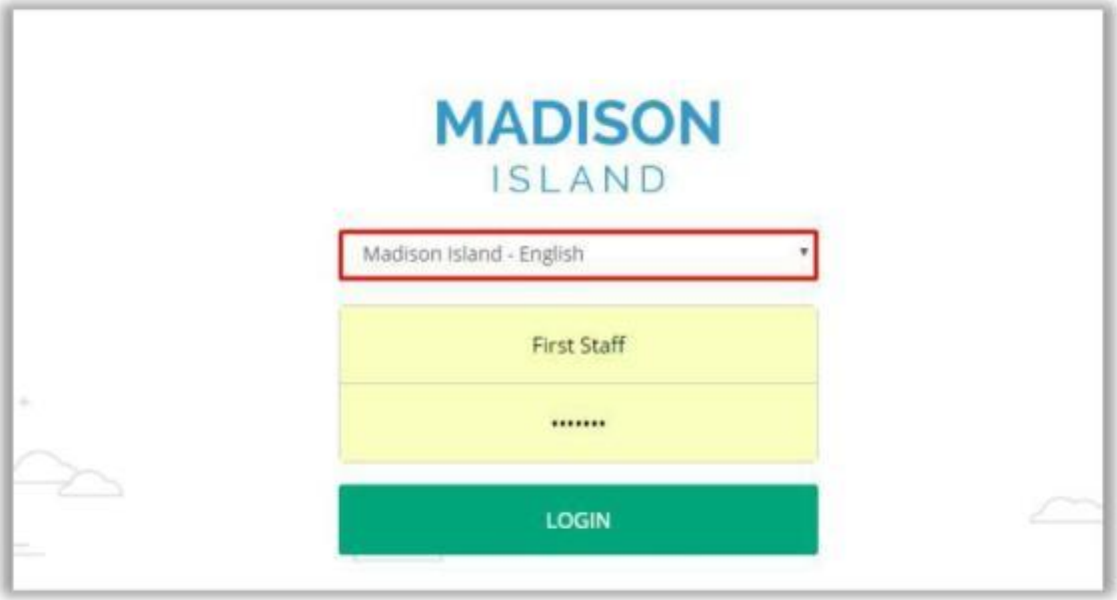
5.2. HOW TO USE WEB POS

5.2.1. How To Log In

Path: WebPOS Backend **> Sales > Web POS** section **> POS Checkout**

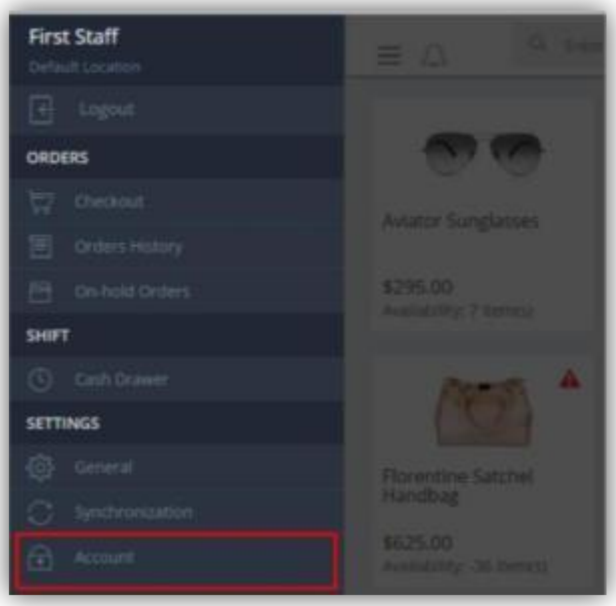


User get access from Web POS backend by going to **Sales > Web POS** section **> POS Checkout**

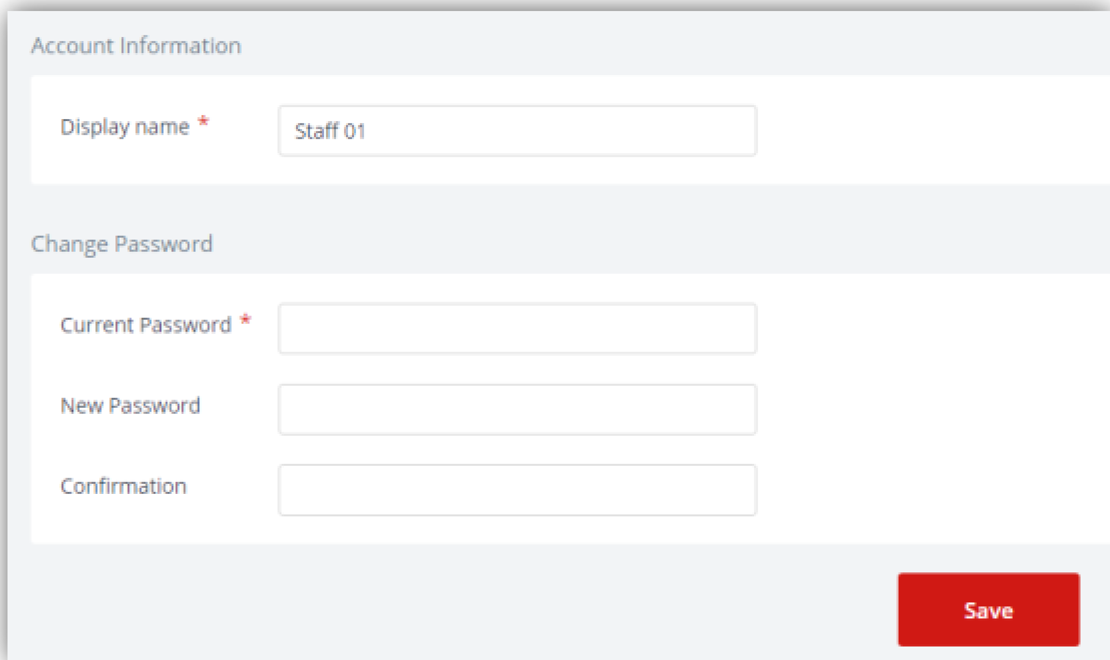


A log in form will appear, user has to choose store (if website has various store views), fill in their account & password and click **Login** to access successfully.

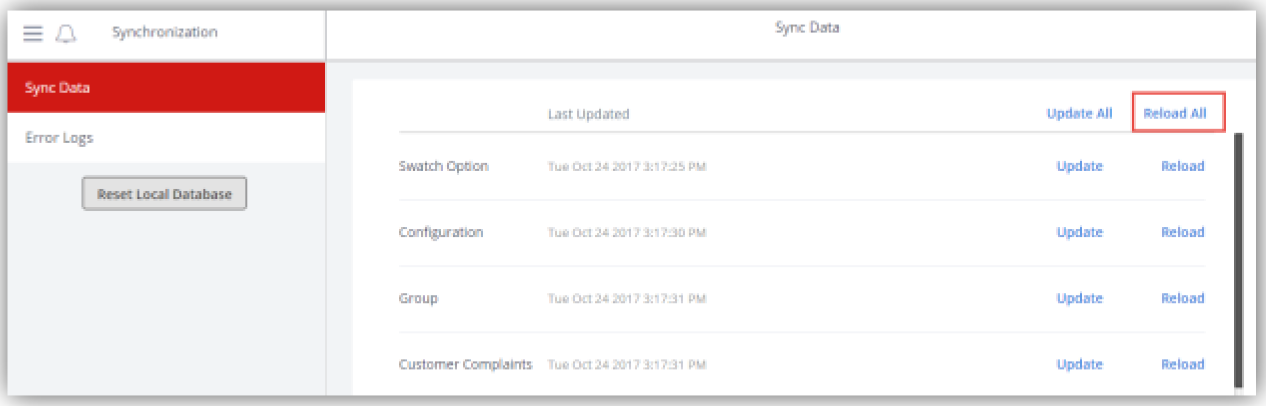
To manage account, users should go to **Settings** tab **> Account**



Then, click on **Account**, users could view and/or edit their personal information. User can change password if they want.



To reload data, user can go to **Settings > Synchronization** and choose **Reload** (to reload each category) or **Reload All** (to reload all data)

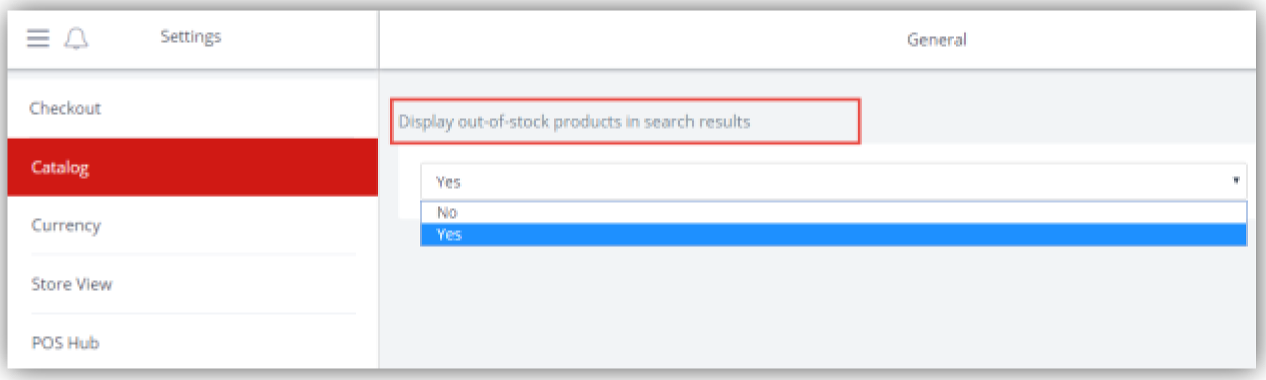


5.2.2. How To Do The Transaction

5.2.2.1. How To Filter And Search Product Quickly

a. How To Configure Process Of Searching Product

Users can configure to search products by going to **Settings** tab **> General.**



In **Catalog** tab:

Enable **Display out-of-stock products in search results (online mode)** by choosing **Yes** option. If you choose **No** option, out-of-stock products will not display in search results.

<u>**Note:**</u> This function is available for online mode only

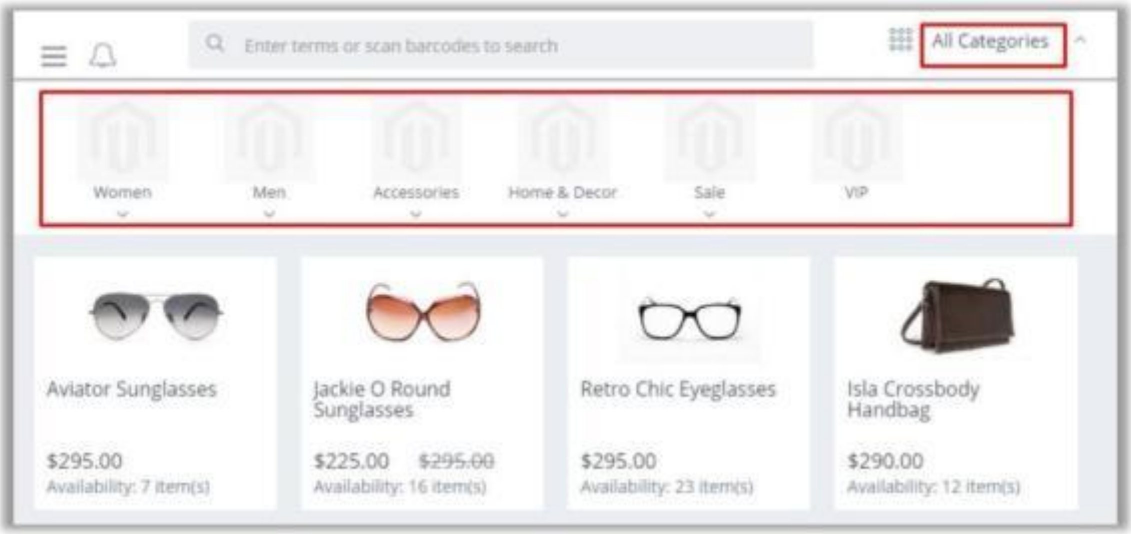
b. How To Search Product In Frontend

There are 3 ways that users can search products:

- Use Categories
- Use Products Attributes
- Use Barcode

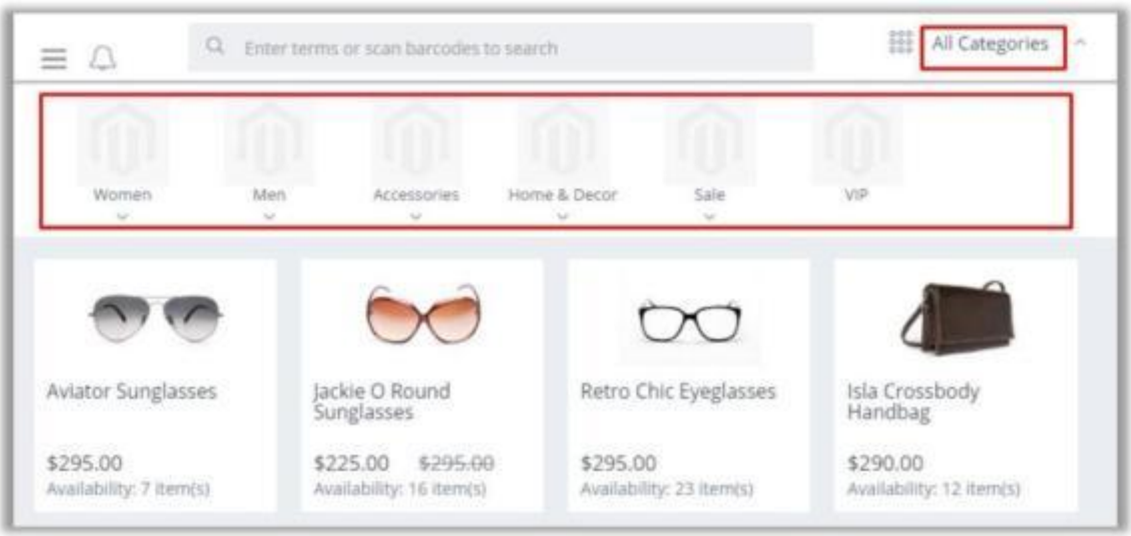
Use Categories

In frontend, you can click on All Categories link to quickly search products by categories. Choose the corresponding categories as you prefer.



Use Product Attributes

To search by product attributes, click on Search icon, then a search bar will be shown. Enter your search terms and matching products will display right away.



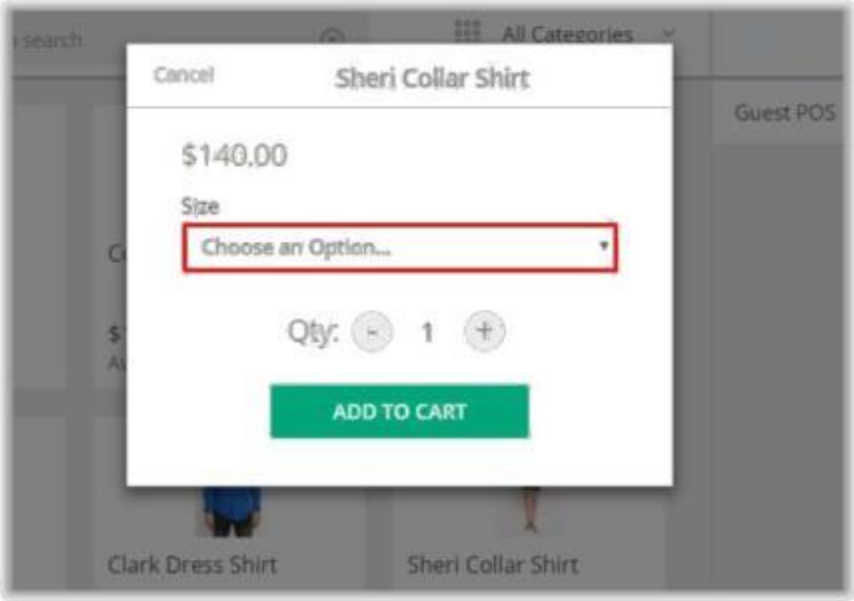
Use Barcode

- Connect Web POS with barcode reader devices (Please refer to **2.2.2. How Web POS works with peripheral devices**)
- Scan barcode and then the barcode attribute will be filled automatically in the search box
- The matching product will be shown in the list.

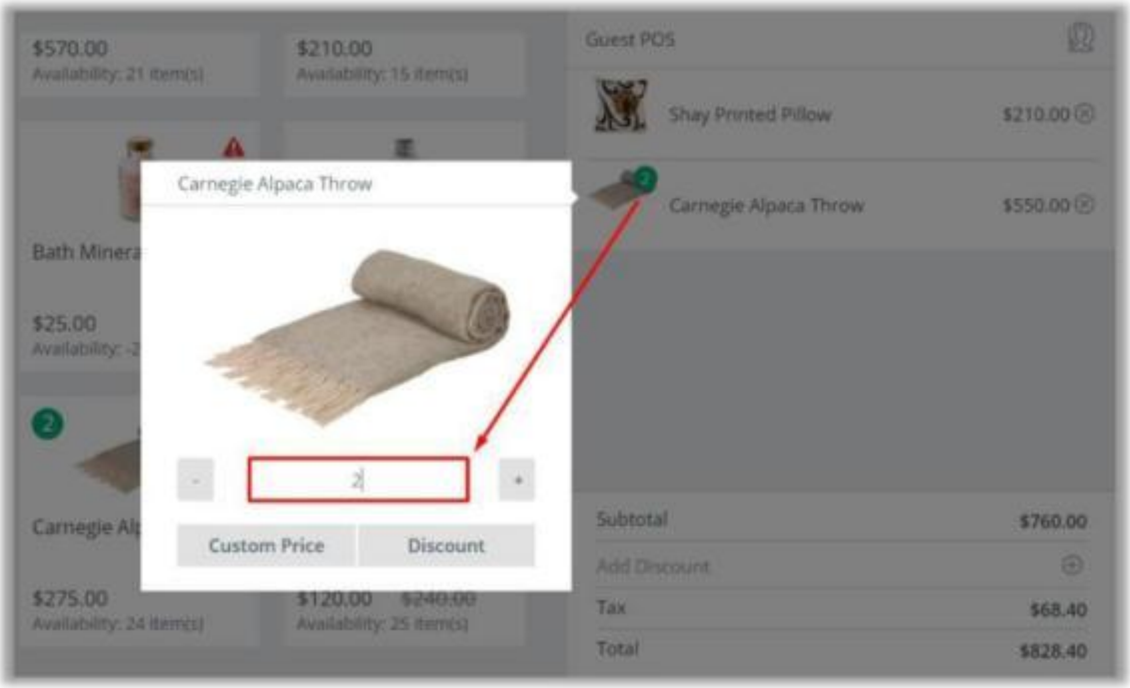
5.2.2.2. How To Add Products To Cart

a. Add Products To Card

- With simple products, you just need 1 click to add them to cart
- With configurable, bundle, grouped products, after clicking, you will see a popup shown to choose your option. Then, click on **Add to cart** button.

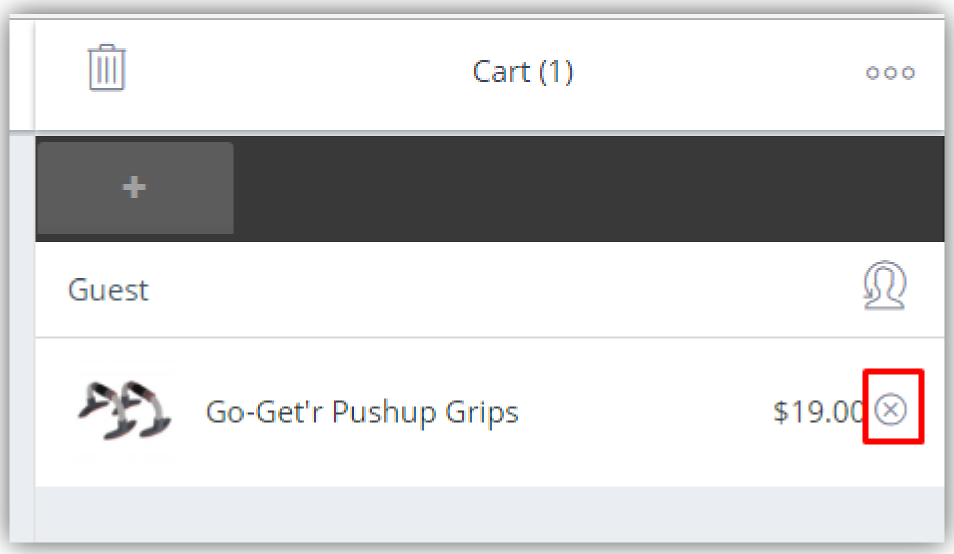


b. Edit Products In Cart



After adding products to cart, you can edit the quantity of each product by clicking on the product that needs editing. A popup will display with option to edit **Qty**. To edit Qty., just enter a wanted number or click on +/-. The number of products will be adjusted in the cart right away.

c. Remove Products In Cart



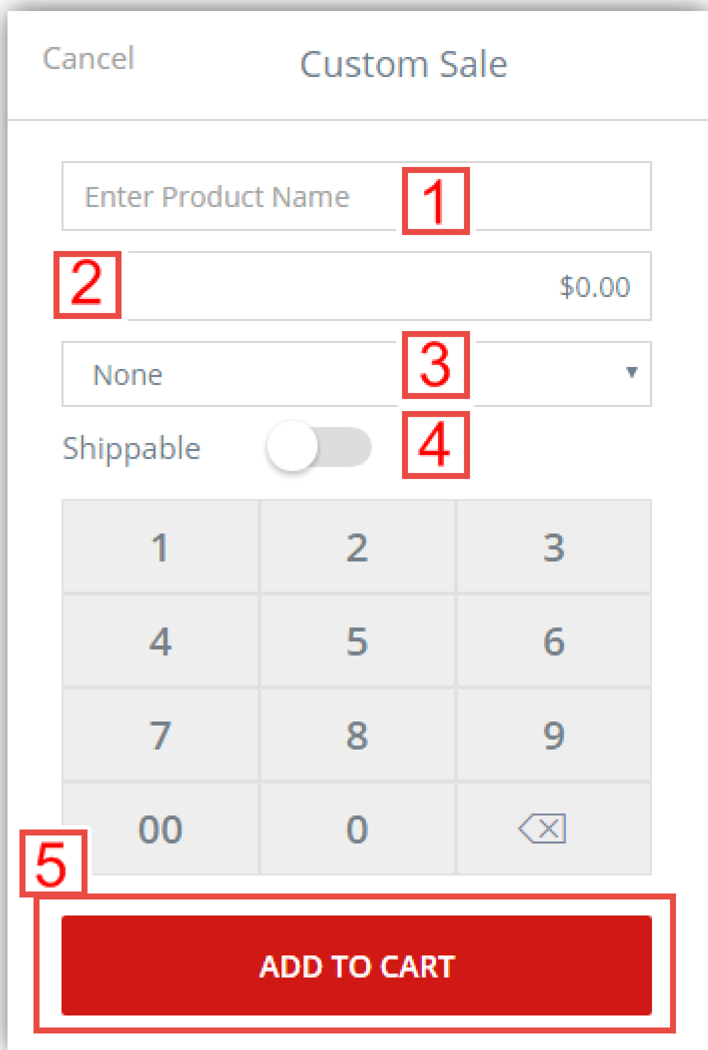
To remove products in cart one by one, click on **"x"** button of the corresponding product. After that, the cart will be updated immediately. Or you can click on the waste basket icon to clear cart.

5.2.2.3. How To Add A Custom Sale Item To Cart

Custom sale item is the item that Web POS user creates when checkout. It is used when the product hasn't been added to the system or Web POS user cannot find it in the product list.

In frontend, click on **Custom Sale** button if you want to add the custom product to cart

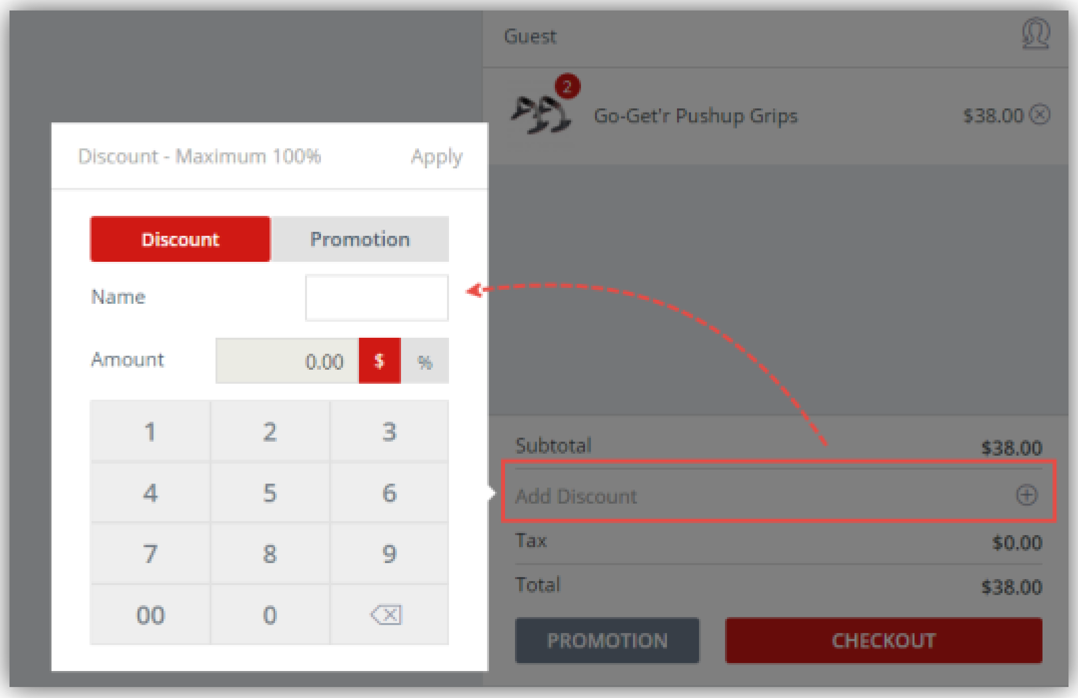
A screen will be shown for you to configure this custom product:



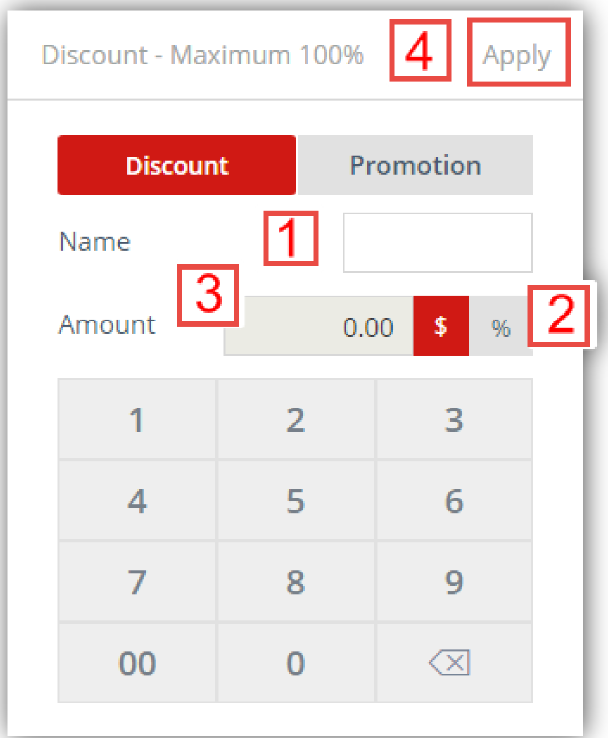
(1) **Name**: Enter the name of custom sale product
(2) **Price**: Enter the price of this product
(3) **None/ Taxable goods**: Choose whether the product is subject to tax or not
(4) **Shippable**: Choose whether the product will be shipped or not by turning on/off this option
(5) After finishing configuration, click on **Add to Cart** button and check out as normally. Please note that this custom sale product will not be saved for the next checkout.

5.2.2.4. How To Apply Coupon Code Or Card Discount

After adding products to cart, to apply a coupon code or discount on the whole cart, click on **Add Cart Discount** link.



Then, a popup will display as below, where you can choose between using **Discount** or **Promotion**



In Discount Tab:

(1) **Name:** Enter a name for this discount as you will easily check it again

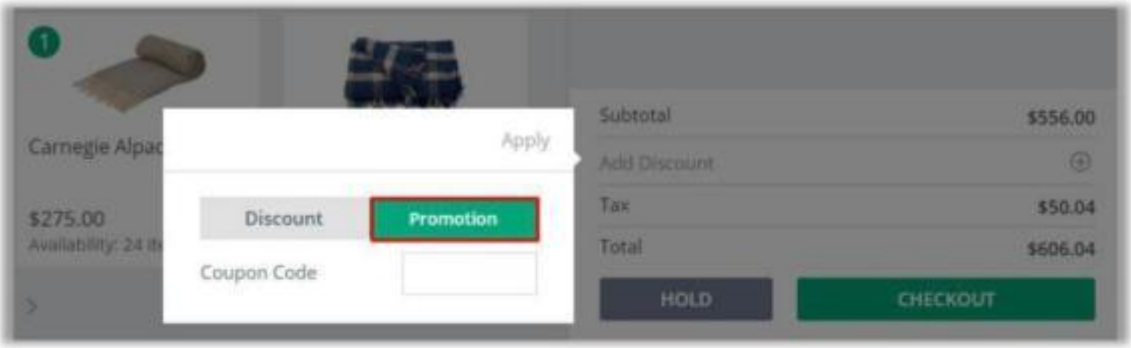
(2) **Discount Type:** Select discount by fixed amount or percentage

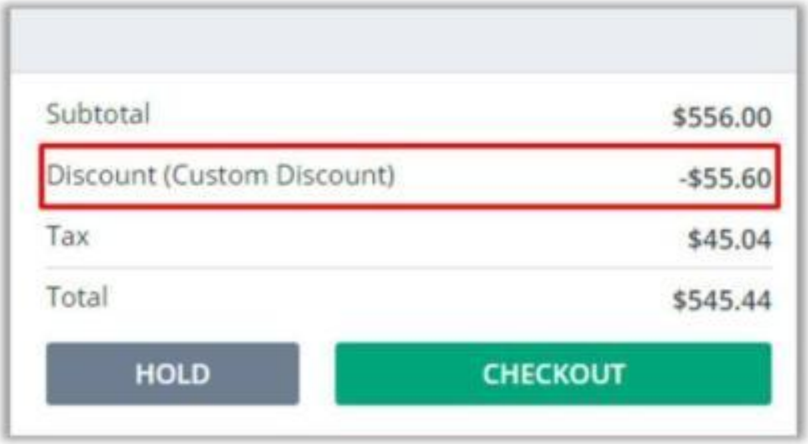
(3) **Amount:** Fill in discount value as you offer for your customers.

(4) Then, the cart will be updated automatically after you click on **Apply** button.

In Promotion Tab:

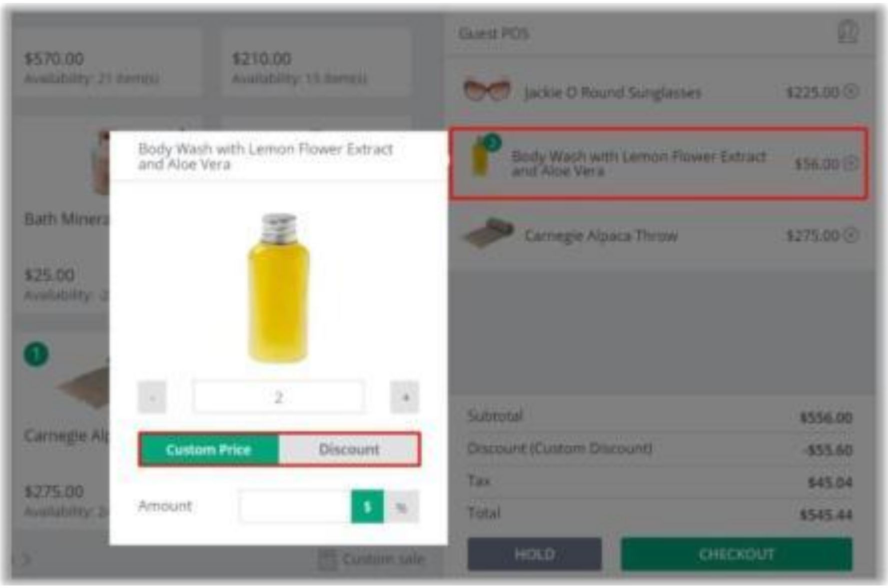
Just fill in available coupon you want to offer for your customers. The cart will be updated automatically after you click on **Apply** button.



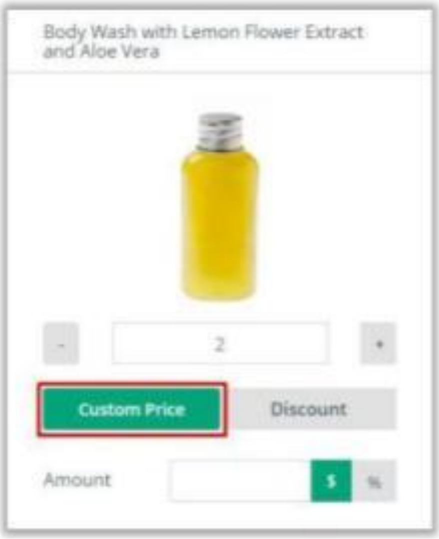


5.2.2.5. How To Apply Custom Discount Or Custom Price To A Product

After adding products to cart, besides editing the quantity of each product (refer to section **b. Edit products in cart** for more details), you can click on the product to edit other information. A popup will display with edit options for **Custom Price, Discount**. Remember that you can only change either Custom Price **OR** Discount for a product, instead of both at once.



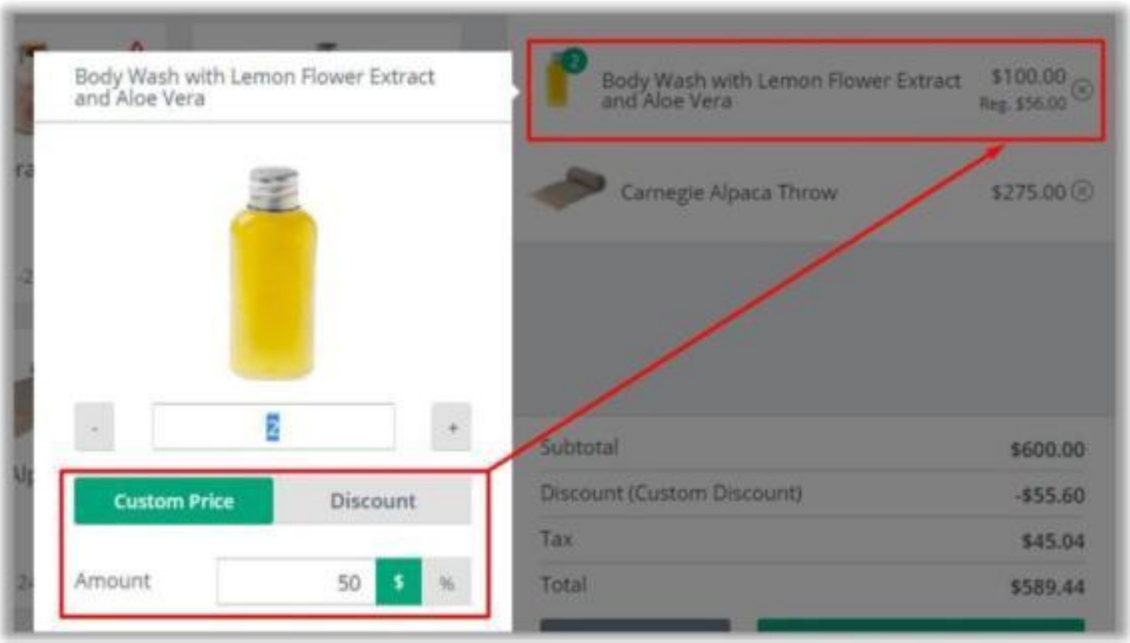
You can set custom price for products by click on **Custom Price** button. The next popup will be shown as below:



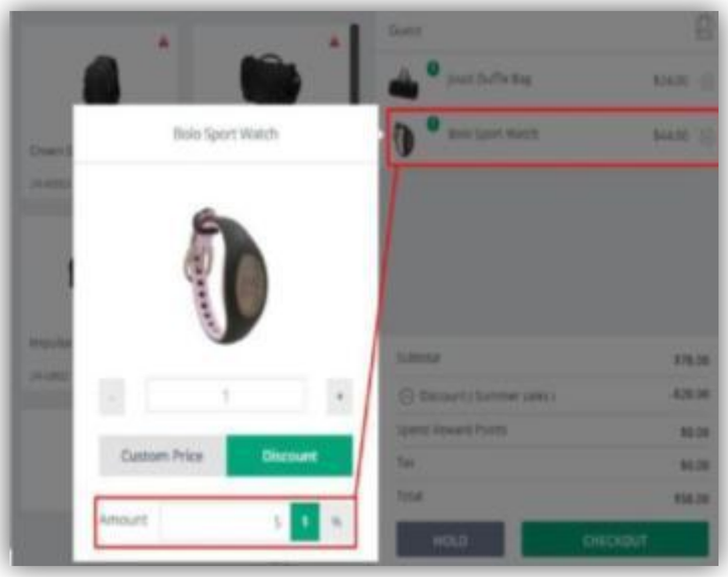
In this popup, please choose type you want to adjust for the price, either by a fixed number or percentage.

- If you adjust price by a fixed number, the checkout price will be the value you enter.
- If you adjust price by percentage, the price will be the result after multiplying the discount percentage rate by the original price.

Then, products in cart will be automatically updated with the price you enter.



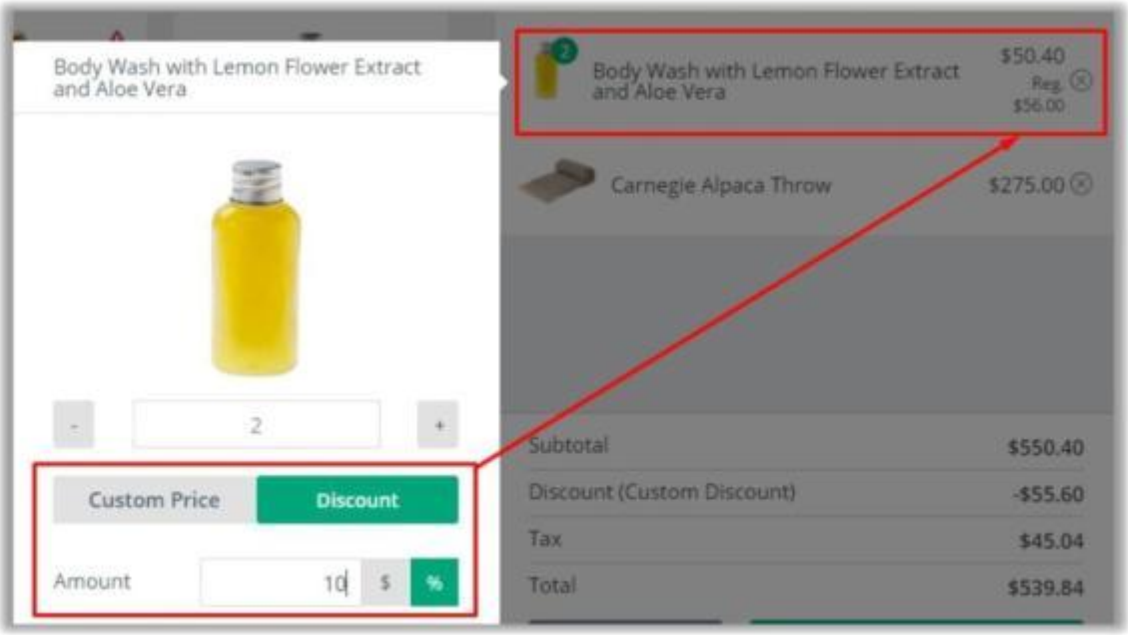
Editing discount for each product is similar to edit by Custom Price. Click on **Discount** button and choose types of discount–fixed discount or percentage–you want to adjust:



• If you edit discount by fixed number, the price will decrease by the exact value you have entered

• If you edit by percentage, the price will decrease by the percent you have entered (it is similar to Custom Price by percentage).

Then, the product price will be updated in the cart.

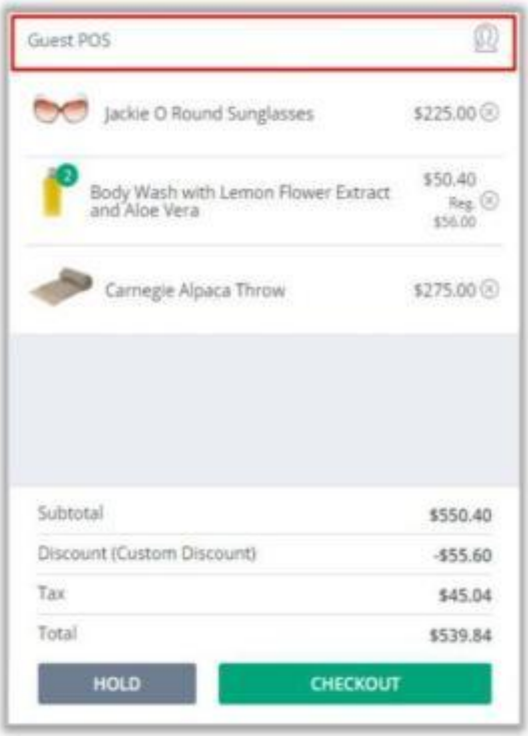


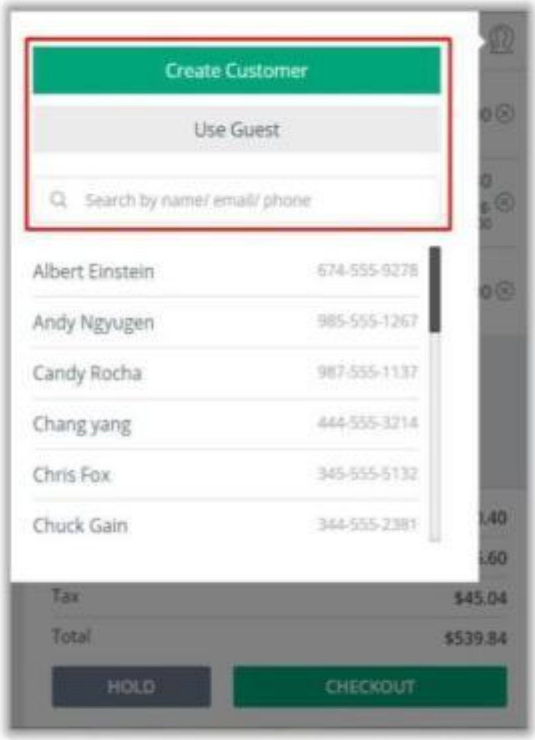
5.2.3. How To Manage Transaction

5.2.3.1. How To Handle Cutomer Information At Check Out

a. Customer Checkout

To use Customer Checkout, add customer by clicking on **Customer** icon on the right corner. You will see a screen as below:

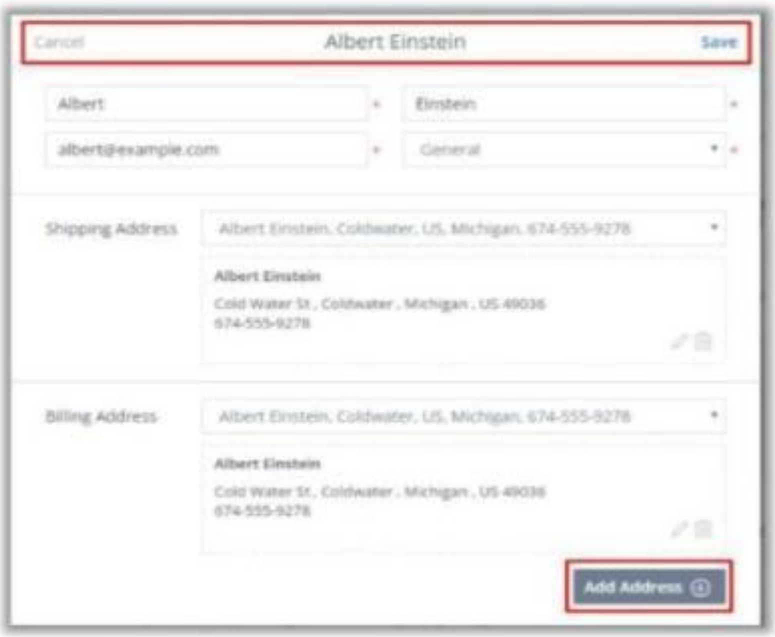




Search customers:

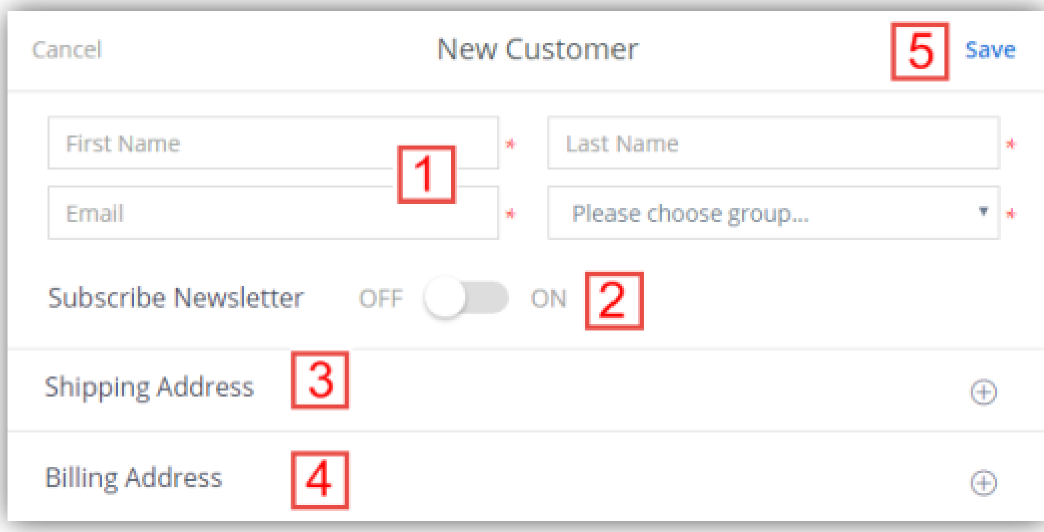
Using the search box, you can quickly find the customer by entering his name, email, phone or address. Choose customer from suggested results in the dropdown list.

The information of customer in the system will be auto updated in checkout step. To edit it, please click on name of customer. In the popup, just edit the pieces of information you want to change.



Create New Customer:

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



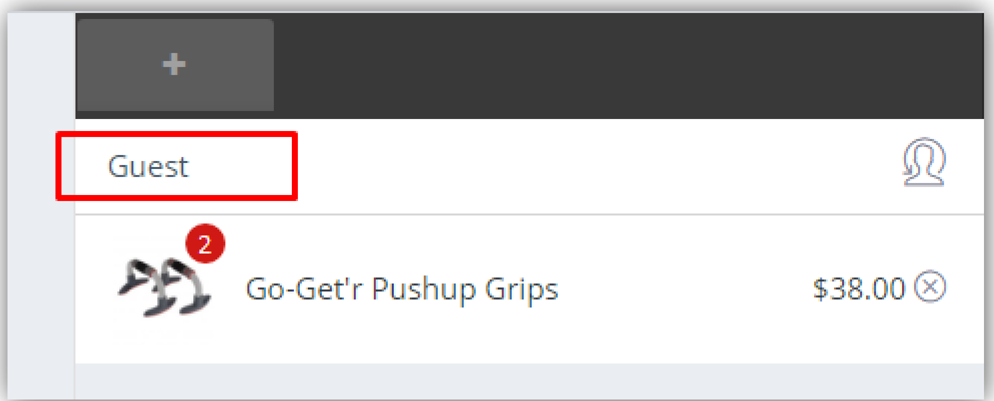
(1) Fill in required information including customer's **First Name, Last Name, Email, Group**

(2) Click to subscribe to customer to your newsletter or not.

(3) Fill in **Shipping & Billing Address**. You can choose whether Billing Address is similar to Shipping Address or not.

(4) Click **Save** button to save the customer information for the next checkout.

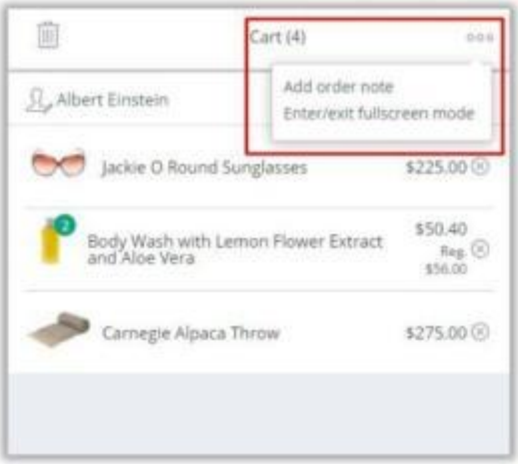
b. Guest Checkout

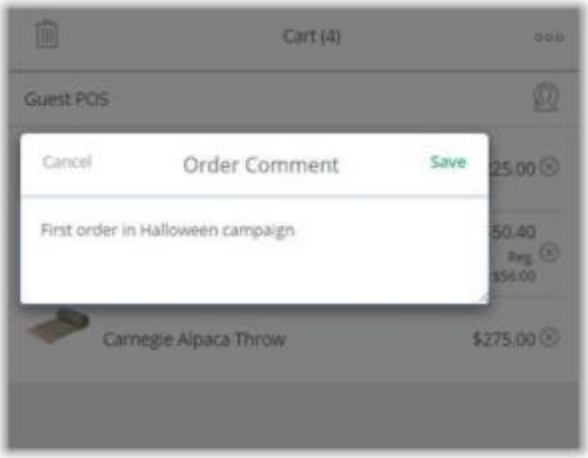


When you use Guest Checkout, the default customer information that you configure in backend will be used (Please go to the section **2.2.1. Default Guest Checkout** for more details). At checkout, all fields will be auto-filled with that default information.

5.2.3.2. How To Add Comment To An Order

Click on the icon on the top right corner and choose **Add Order Note**. In the **Order Comment** box, type the content that reminds you of this order. Then, save it.



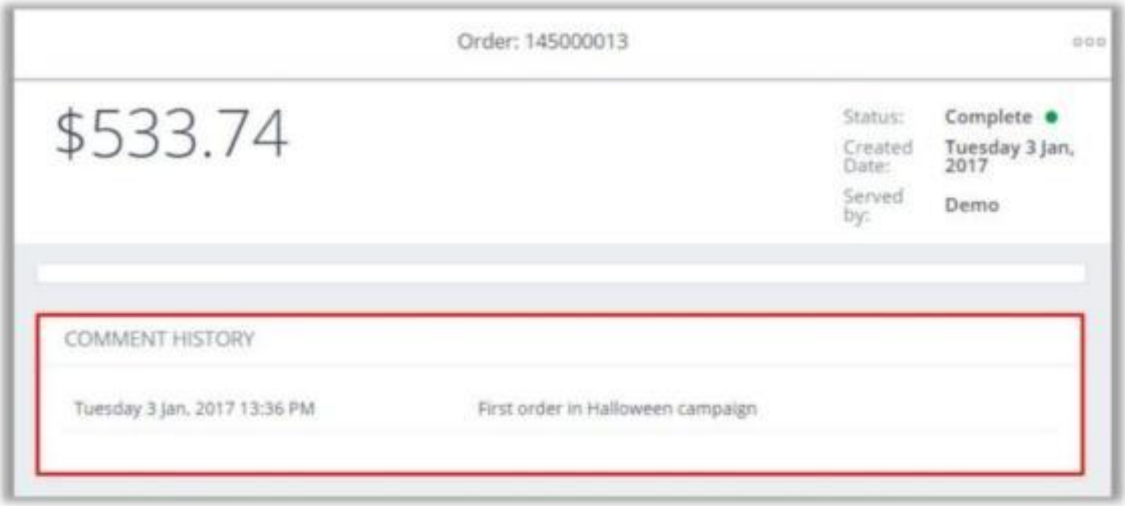


5.2.3.3. How To Check Order Comment

a. In Web POS Screen

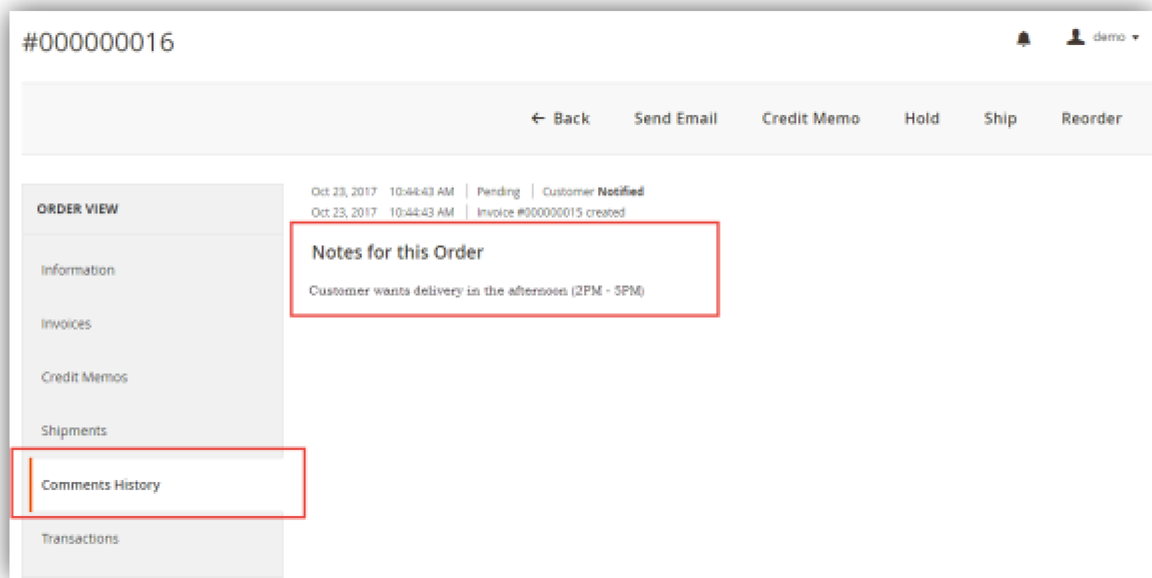
Path: **Orders > Orders History** or **Orders > On-hold Orders**

To view comment of order, you can go to **Orders** tab in Web POS screen, choose an order then scroll down to see Comment History.



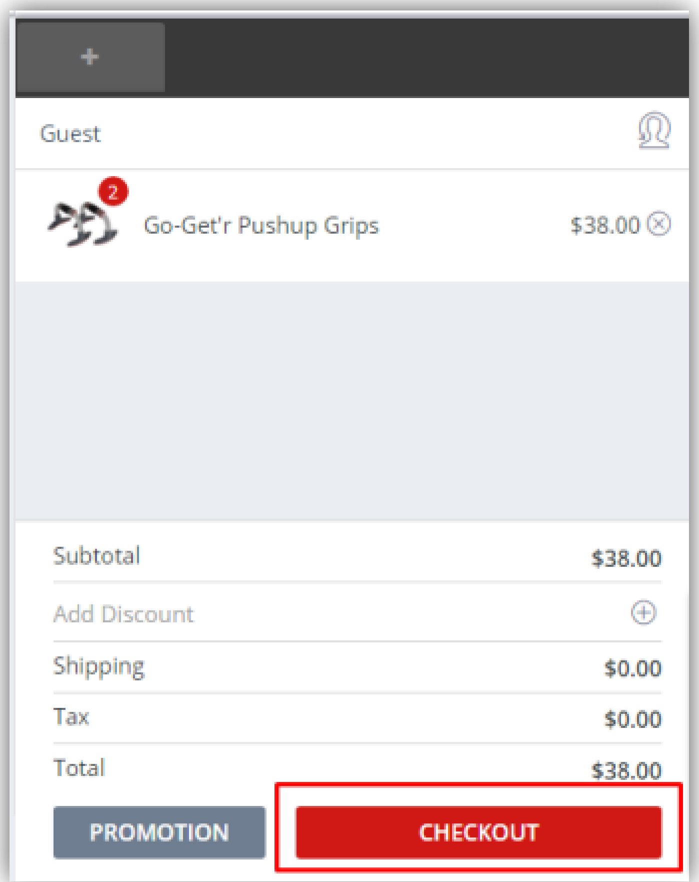
b. In Magento Backend

Go to **Sales > Orders** and click on a specific order. In order details page, go to **Commenó History** tab to check whether it has any notes or not.



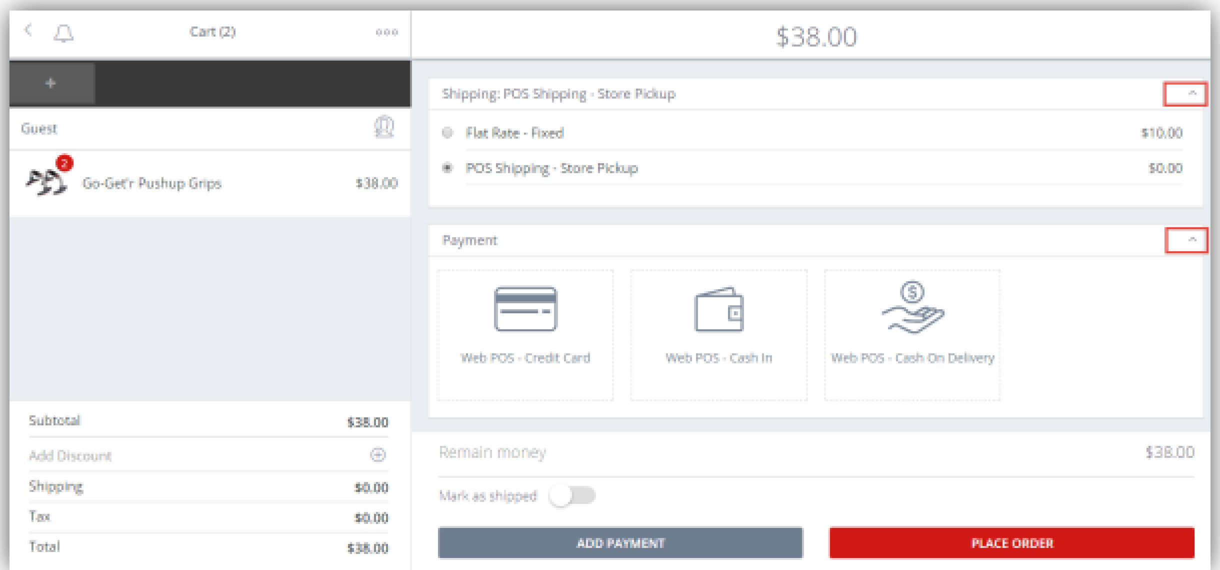
5.2.3.4. How To Process At Check Out For A Customer

You have been through steps to add products to cart and add customer, let's move to the checkout process.



When products are added to cart, click on **Checkout** button at the end of the cart page

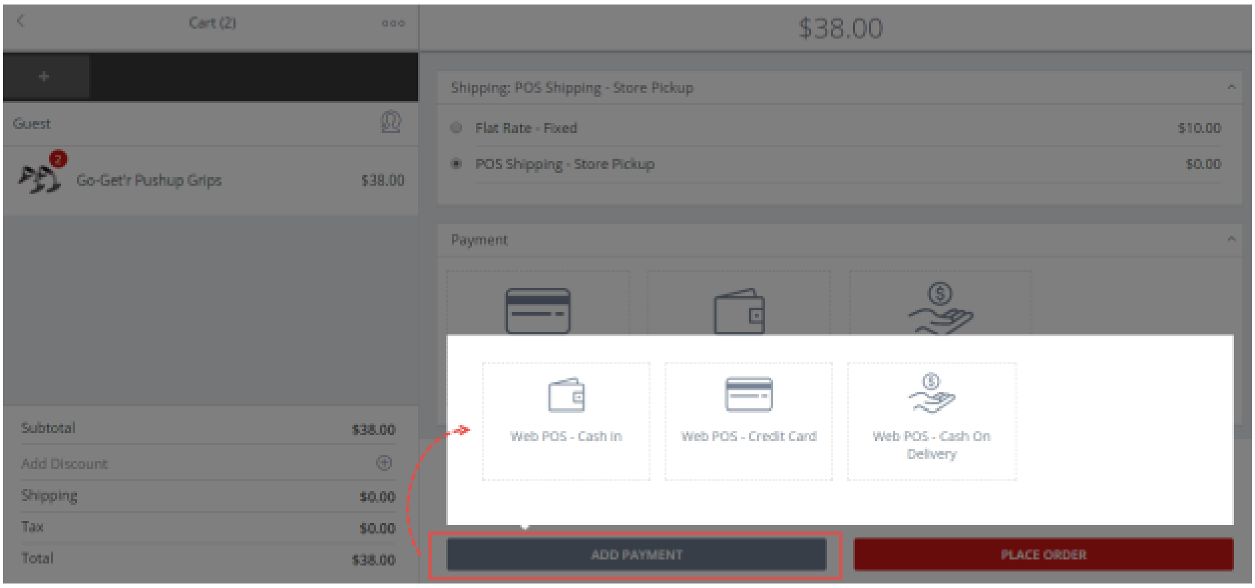
You will be redirected to the next page with information of Shipping & Payment Method



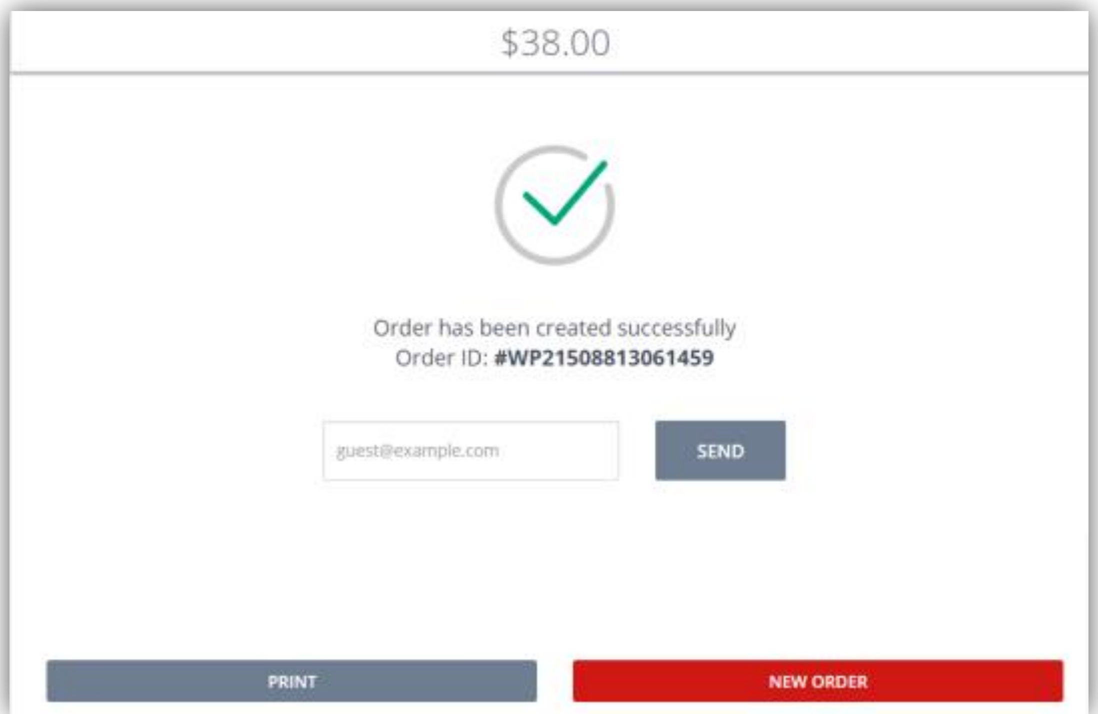
Click on the icon on the right to expand or collapse the Shipping/ Payment section.
Choose a shipping and payment method to proceed checkout. (Shipping and Payment methods can be added in the Magento core backend)

Credit Card: Magestore Web POS supports Authorize.net & Stripe. Sale staff can fill in card information manually or swipe card (if the POS system is connected with a card swiper). For more information, please go to section 2.2.2. How Web POS works with peripheral devices.

5.2.3.5. Slit payment with Web POS

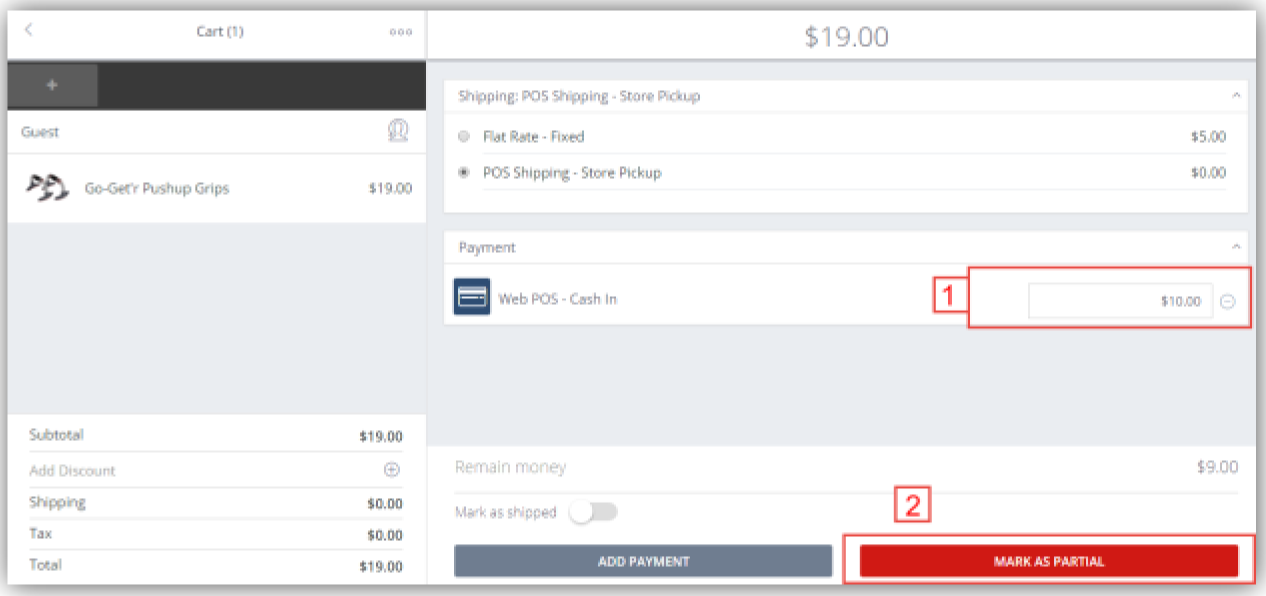


Customer can pay their order in maximum 2 different payment methods. Click **Add Payment** and select the second payment option. Then, click on **Place Order** button to complete checkout process. There will be a notification as is shown below:



5.2.3.6. Partial Payment with Web POS

Besides Split Payment feature (please refer to **4.2.3.5. Split Payment with Web POS**), our solution also allows customers to pay partially at the time of checkout and pay the rest later.

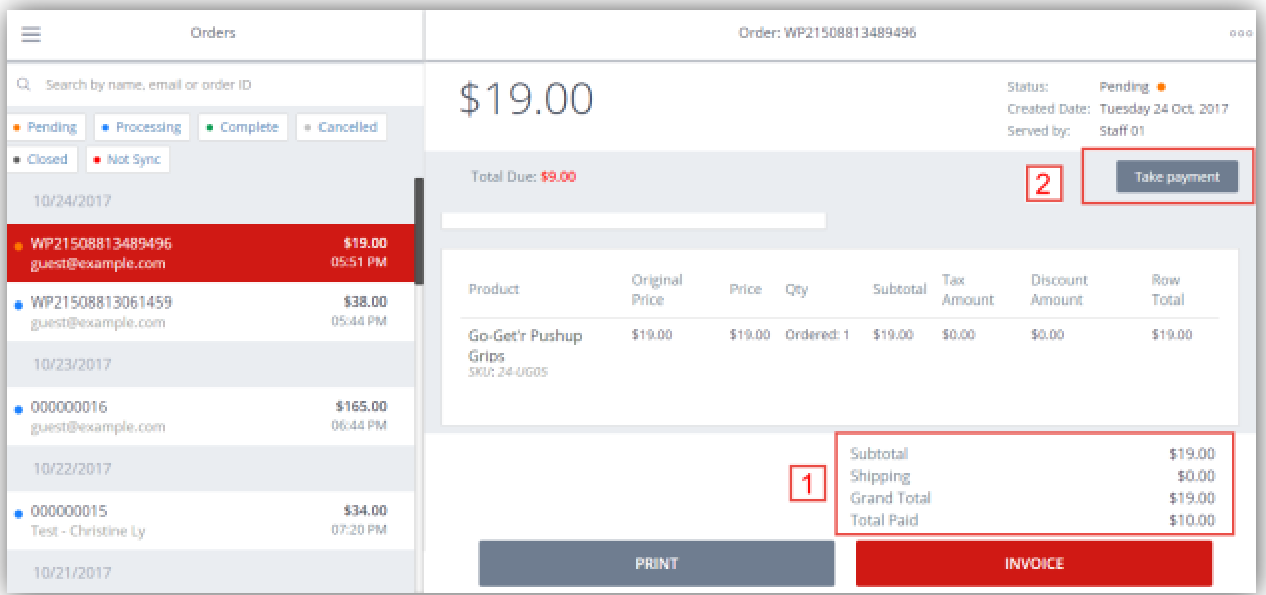


(1) Select the first payment method and enter the partial payment value at the checkout point

(2) Click **Mark as Partial** button

The order is now created and successful order notification is displayed

After finishing creating order, in the next step, when customers come back to pay the rest of order value, you can complete the order by going to **WebPOS frontend menu > Orders > Orders History**. The order is marked with **Pending** status.



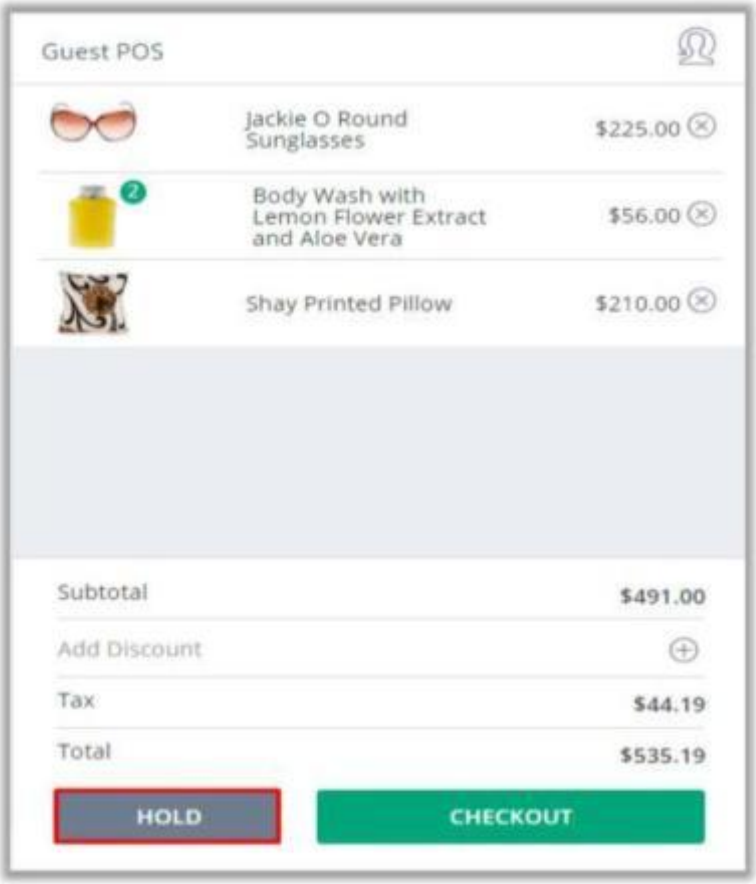
(1) You can view the summary of the order; the total value and the paid value.

(2) To complete the order payment, you click on **Take payment** button. Tick to choose the payment option or pay with multiple ones

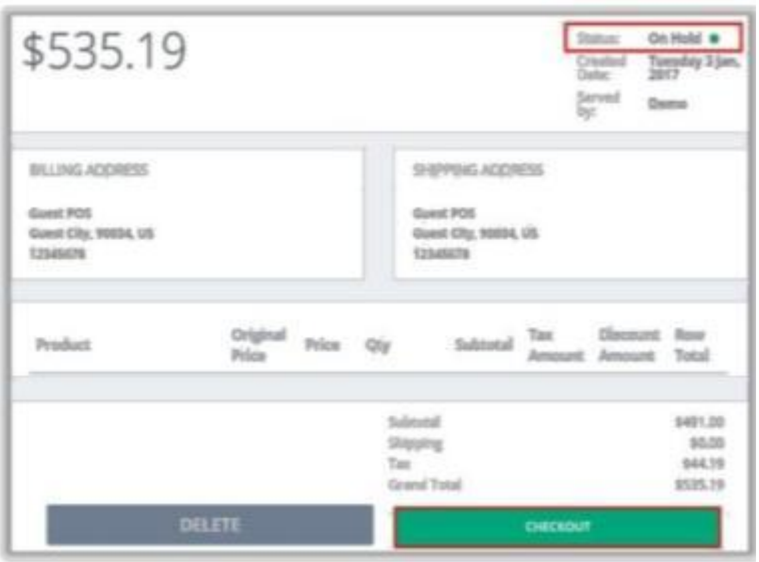
After filling in the due amount, click on **Submit** button to complete the payment action. Then the total paid is equal to the whole order's value

5.2.3.7. How to keep orders on hold for further processing

Your customers can't make up their minds yet, or are unable to make a payment meanwhile? They may want to purchase items that are for pre-order or currently out of stocks? You don't want to lose those potential customers, don't you? Then, Web POS's new feature can put these orders on hold - no limit in time - until they are ready to continue processing!



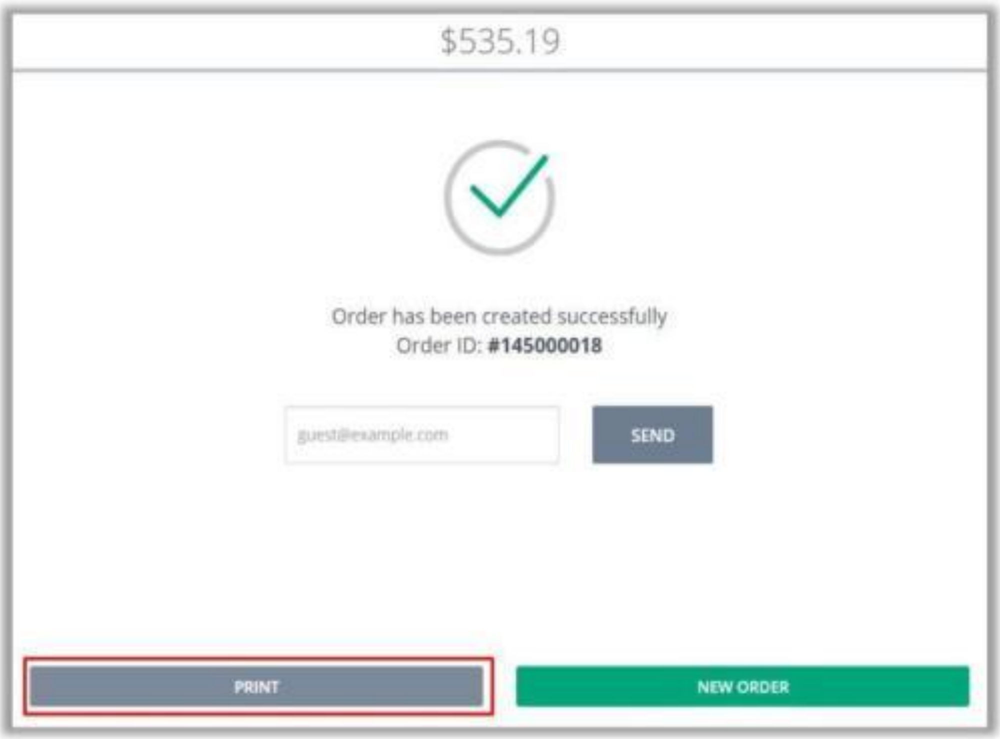
After adding products to cart, you can choose **Hold** to put the order into **On-hold Orders** section. A **Note for holding order** will appear for inserting any comment that you would like to keep, for example, “Waiting for payment”.



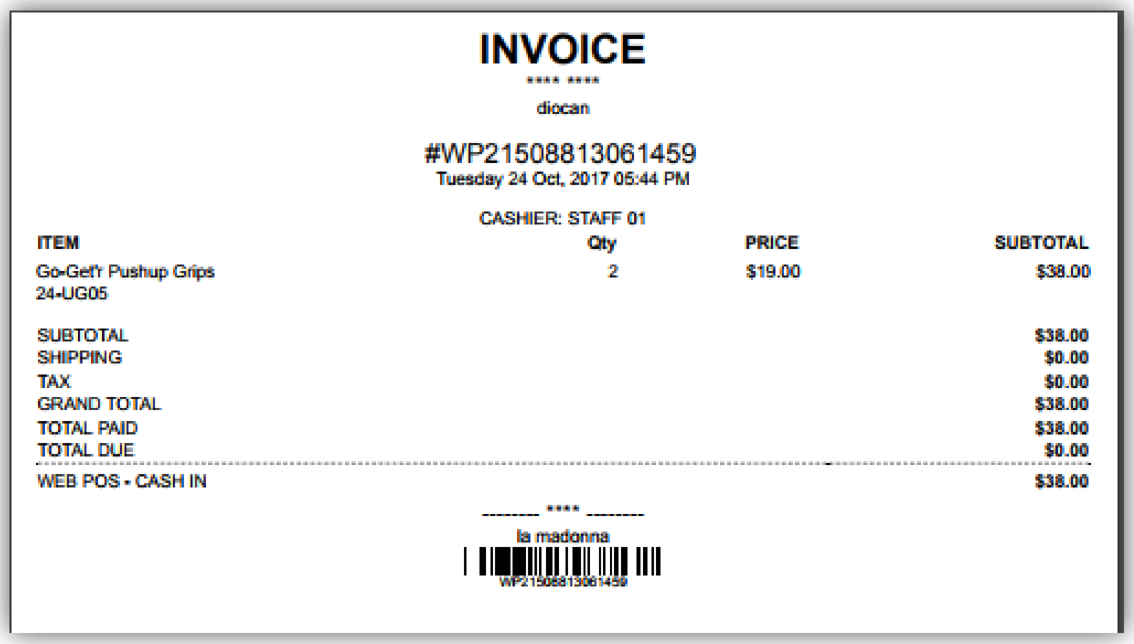
To check orders that have been put on hold, go to Web POS menu **> Orders > On-hold Orders**. List of on-hold orders is recorded with certain note for each order. You may select **Continue Processing** whenever customer is willing to take final action for payment or you may **Cancel** it if it is not effective anymore.

5.2.3.8. How to print receipt and email order information

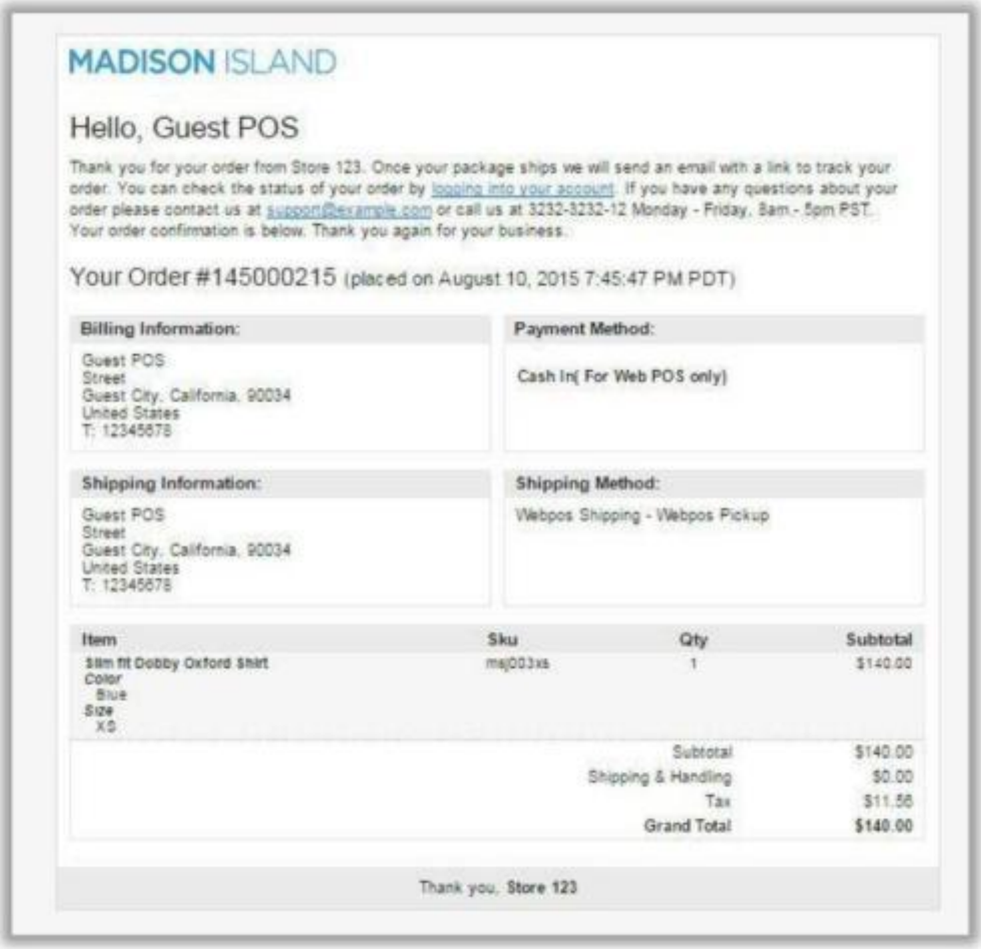
You can print receipt or email order information right after creating an order. Remember that you must be online and have permission to do these actions.



The receipt will look like the screenshot below:



And here is the email of order information:



MADISON ISLAND

Hello, Guest POS

Thank you for your order from Store 123. Once your package ships we will send an email with a link to track your order. You can check the status of your order by logging into your account. If you have any questions about your order please contact us at support@example.com or call us at 3232-3232-12 Monday - Friday, 8am - 5pm PST.
Your order confirmation is below. Thank you again for your business.

Your Order #145000215 (placed on August 10, 2015 7:45:47 PM PDT)

Billing Information:	Payment Method:
Guest POS Street Guest City, California, 90034 United States T: 12345678	Cash In(For Web POS only)

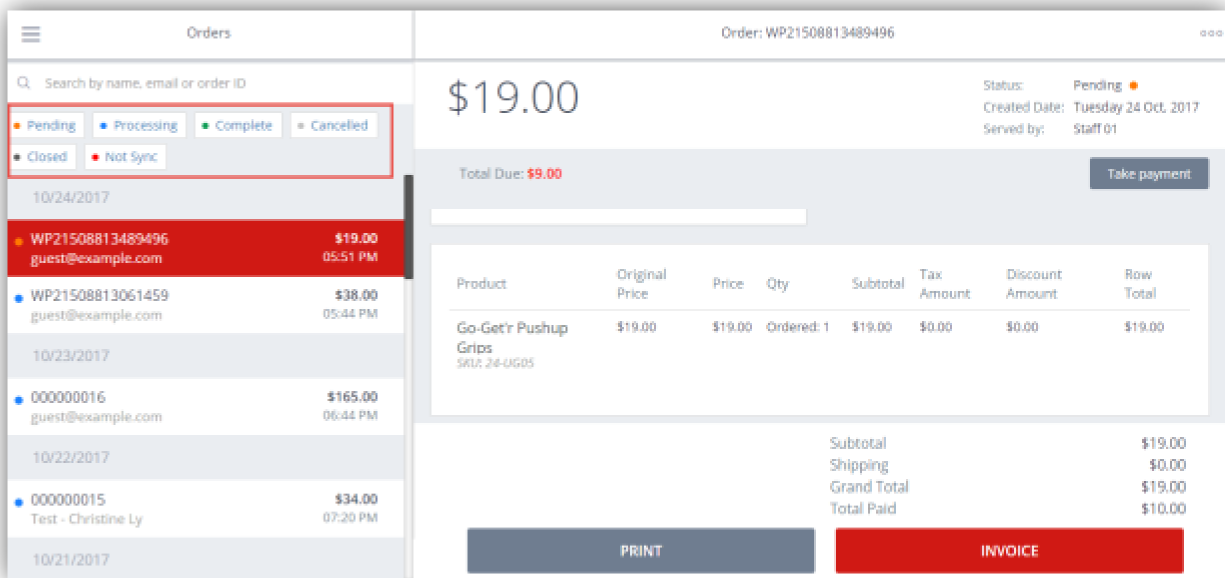
Shipping Information:	Shipping Method:
Guest POS Street Guest City, California, 90034 United States T: 12345678	Webpos Shipping - Webpos Pickup

Item	Sku	Qty	Subtotal
Slim fit Dobby Oxford Shirt Color Blue Size XS	msj003xs	1	$140.00
		Subtotal	$140.00
		Shipping & Handling	$0.00
		Tax	$11.56
		Grand Total	$140.00

Thank you, Store 123

5.2.3.9. How to review orders

In POS screen, you can review orders by go to **Web POS menu > Orders > Order History** tab. Here you can see the order list and order details:



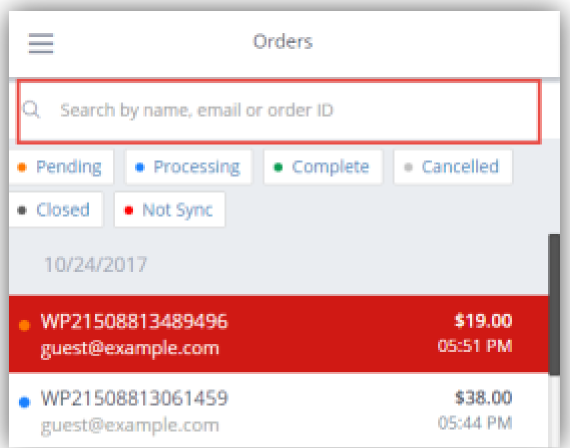
a. Order status

In order list, the status of order is distinguished by color

- **Complete:** Green (When you ship order AND create invoice
- **Processing:** Blue (When you ship order OR create invoice)
- **Pending:** Orange (When you create order successfully but have not shipped order and created invoice)
- **Canceled:** Gray (When you cancel the order)
- **Not synced:** Red (When order's data has not been synced to the system)
- **Closed:** Black (When order has been refunded)

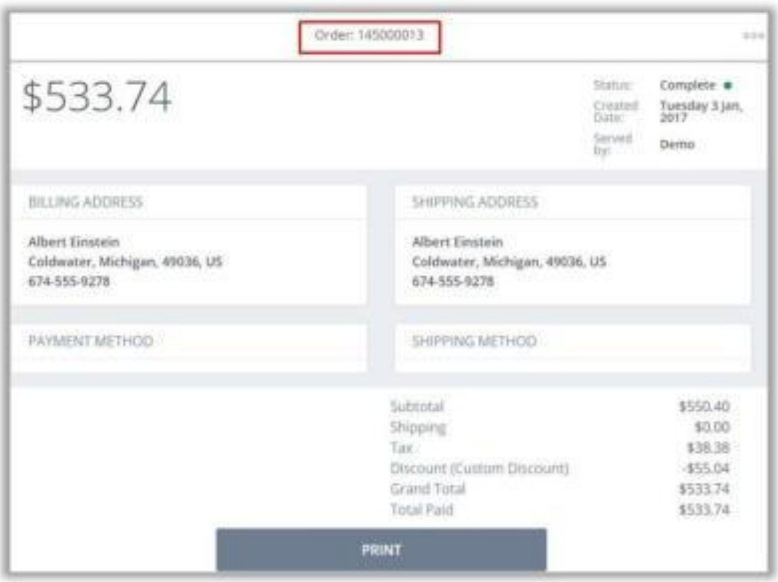
b. Order searching

To quickly find an order to review, you can search it by Order ID or Customer's Name/Email

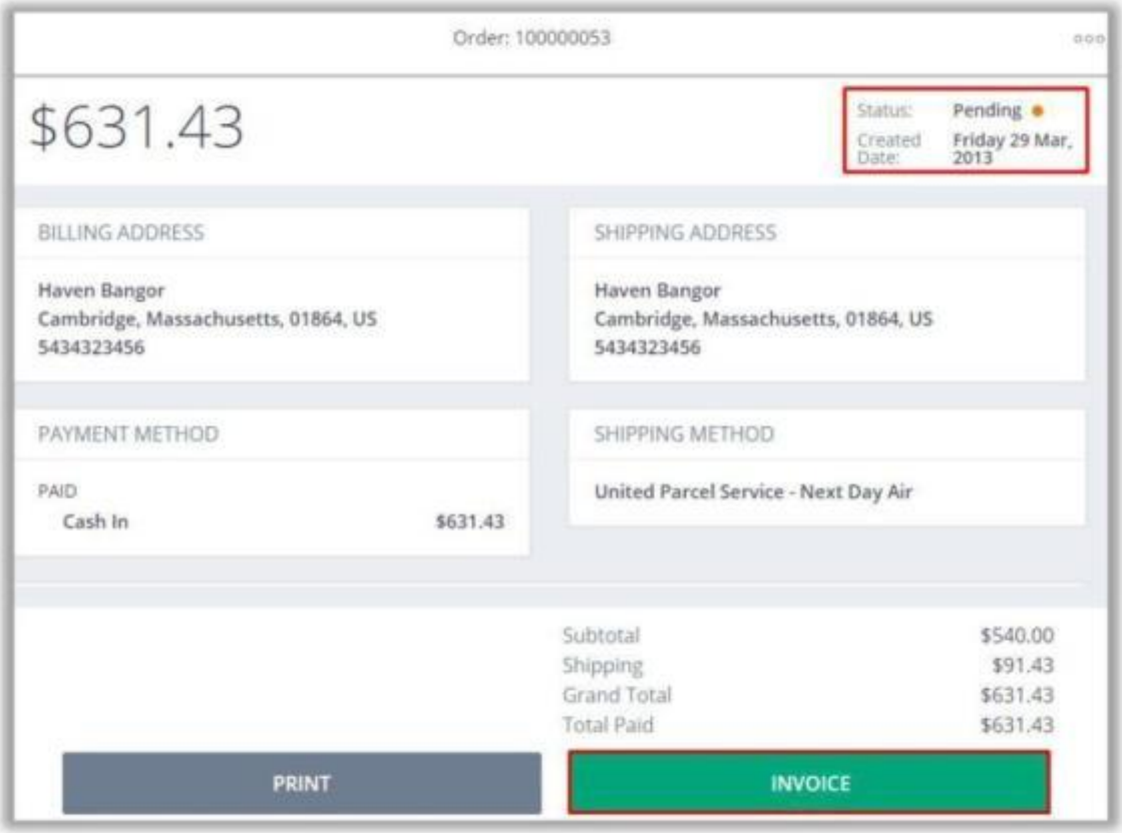


c. View order information

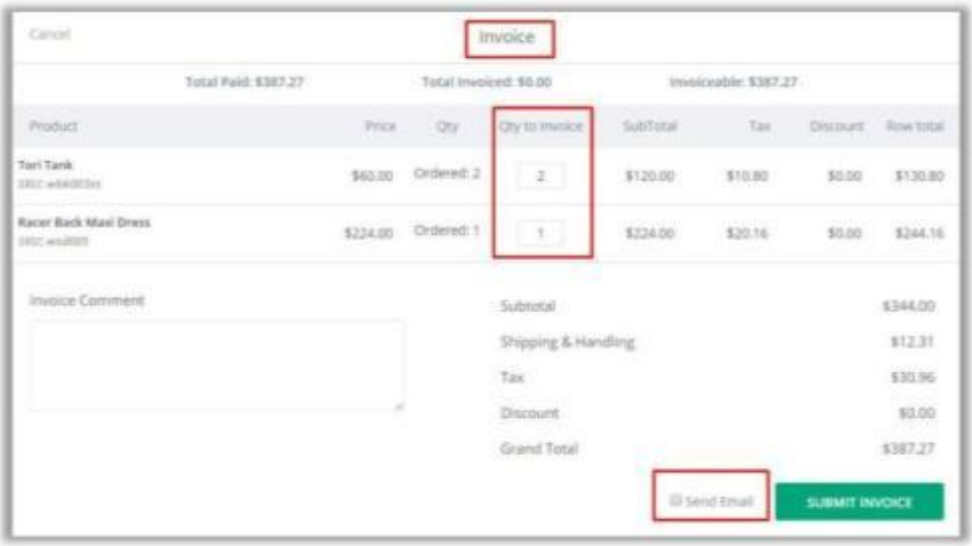
To view detailed information, click on your wanted order. Please make sure that you have permission to check it. The detailed order will be shown like this:



5.2.3.10. How to issue invoice for an order



The order can't be completed if you haven't issued invoice for customer. After the order is created successfully, you will find order's details on **WebPOS frontend menu > Orders > Orders History** then click on button **Invoice.**



A pop-up will appear so you can enter the quantity of item or the order amount to be invoiced. Then you click on button **Submit invoice** to complete the action. You can choose whether to send invoice to customer's email or not.

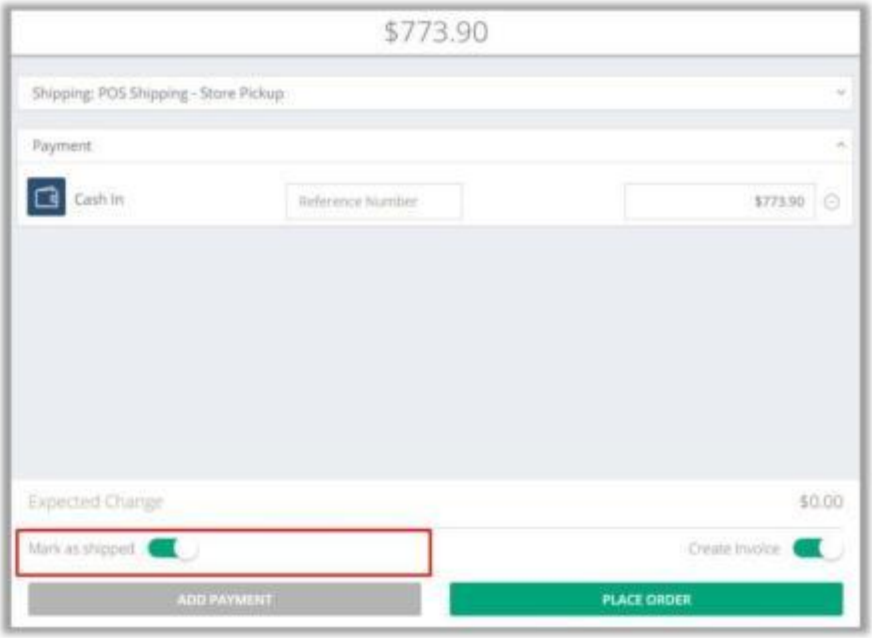
5.2.3.11. How To Create Shipment Or Issue Refund For An Order

a. Create Shipment

There are two ways to create shipment using Web POS: **before placing an order** and when **reviewing order**

Before Placing An Order:

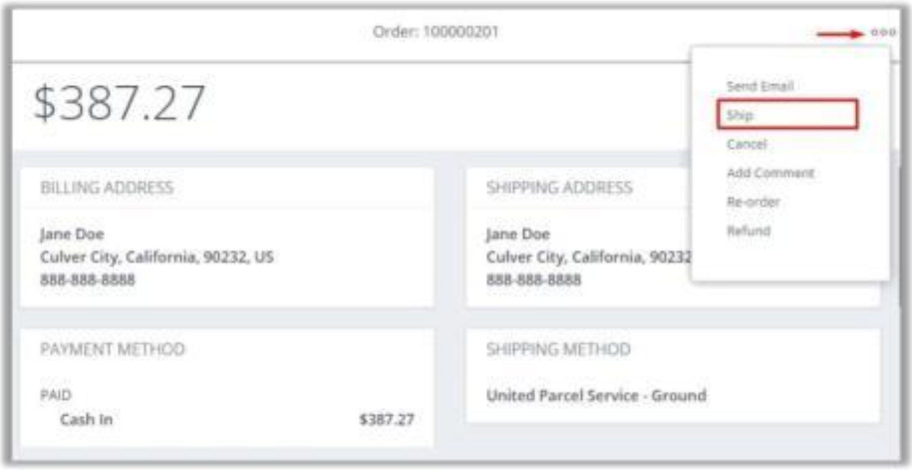
Before an order is created by clicking **Place Order** button, you can create shipment by turning on **Mark as Shipped** as below:



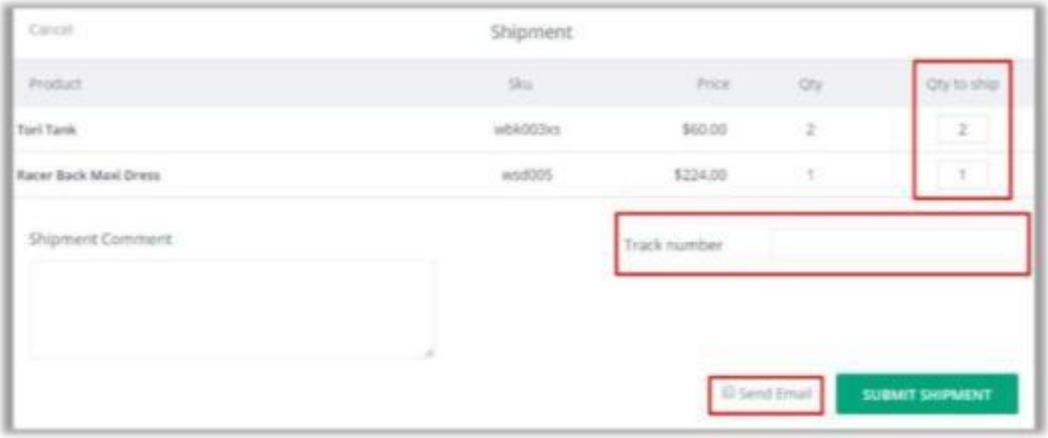
After verifying shipment method, the system will automatically load to Successful Order Page. There will be a message shown to notify you that shipment is created successfully. Please note that you need to have permission and be in online mode.

After Placing Order:

When order has been created successfully but hasn't been shipped, you can go to Order History and create shipment for that order.



b. Partial Shipment



If customers want the orders to be shipped in 2 or more consignments, sales staff can enable Partial Shipment function. When you create order, remember to turn off button **Mark as shipped**.

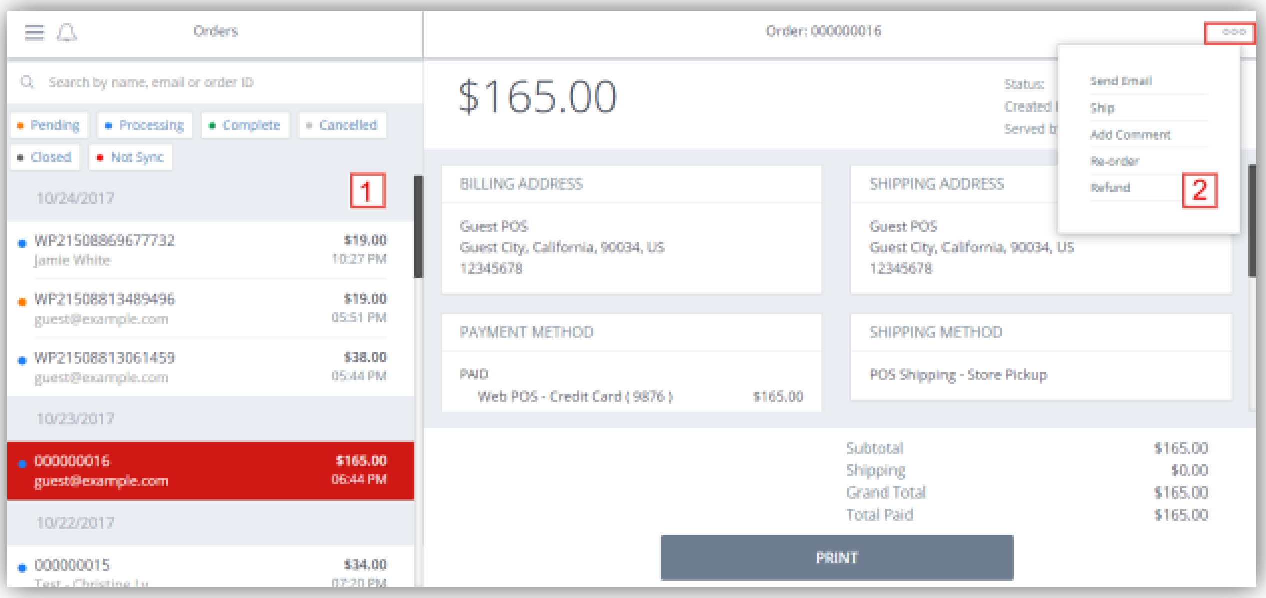
After placing order successfully, you find that order in **WebPos frontend menu > Orders > Orders History**. Then you click on the icon on the right corner and choose **Ship**. A pop-up then appears so you can enter the number of items to be shipped of each product.

<u>Note</u>: Only orders that have been synced can be shipped.

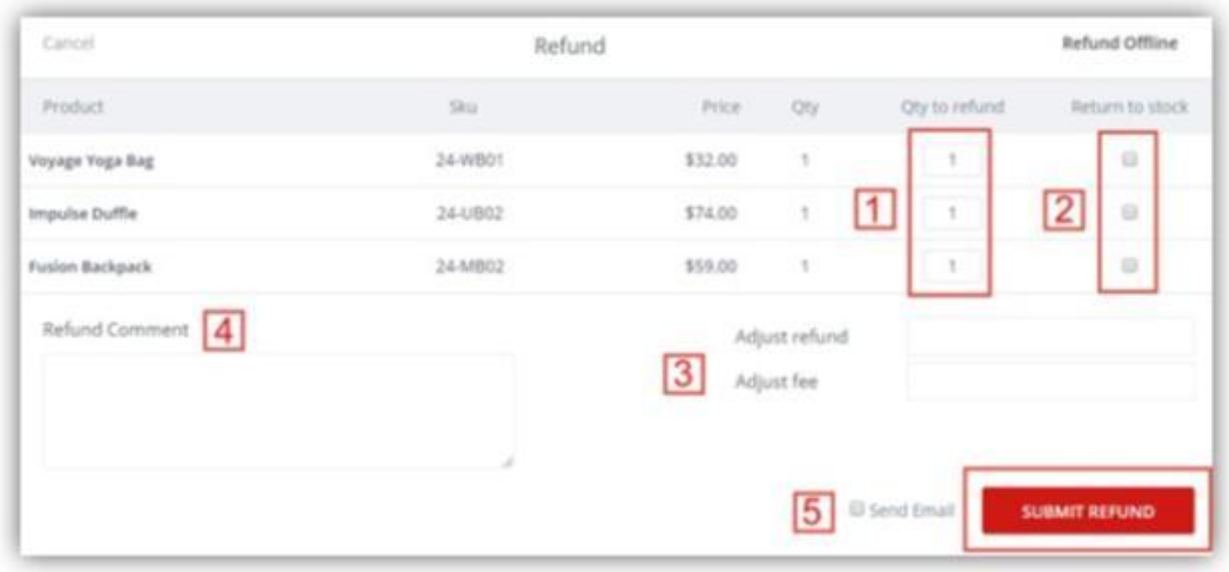
5.2.4. How To Issue Refund

Path: **Web POS menu > Orders > Orders History**

Only certain staffs have permission to issue refund (which is set by admin in backend. See [**3.2.1. Decentralize access permission of Web POS users**]() for more details).



To issue refund, go to **Web POS menu > Orders > Orders History**, and choose an order to refund. Note that you can only refund orders with **Processing** or **Complete** status. Click on **Refund** from the top right menu.



A popup will display so that you can fill in the information before making refund.

(1) Enter the product quantity to issue refund.

(2) Tick **Return to stock** if you want to return those items back to warehouse.

(3) Enter additional info including:

- **Adjust Refund**: The compensation customers get from your store if they have to request refund.
- **Adjust Fee**: The fee customers might have to pay for your store when requesting refund.

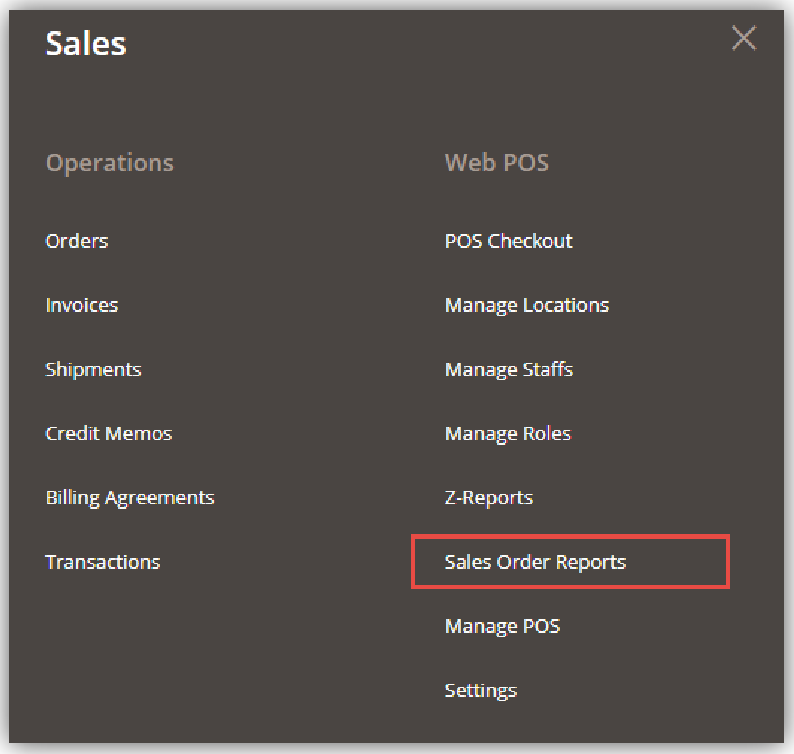
(4) Enter additional notes (if any)

(5) Check **Send Email** if you want a notification email to be sent to customer and click **Submit Refund** to finish

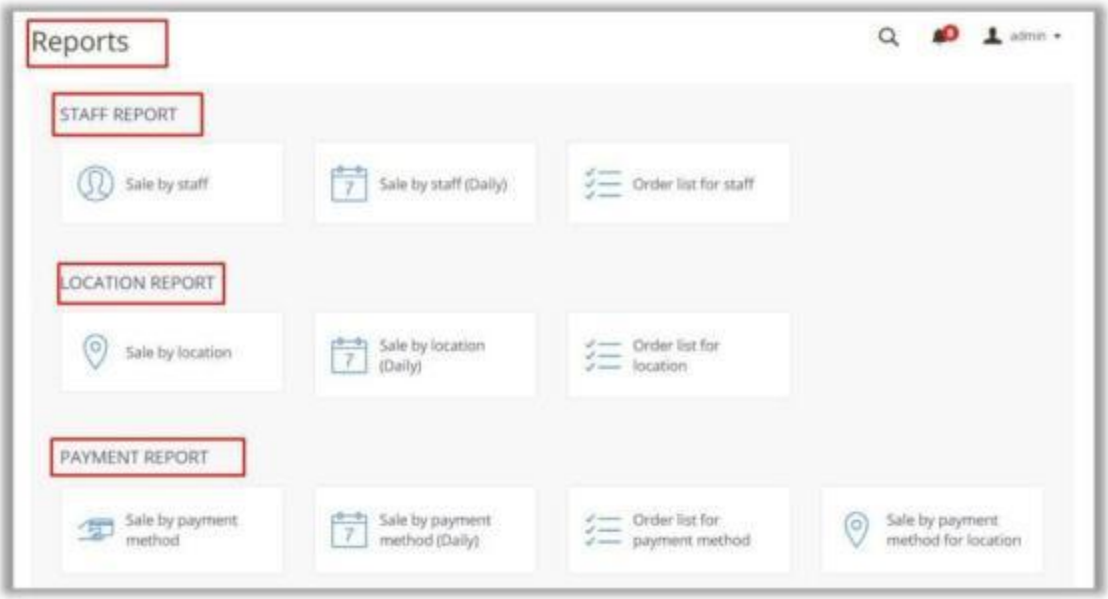
After that, you will get the message informing that credit memo is created successfully. Please make sure you have permission to issue refund and you are in online mode.

5.2.5. How To Review Report

Path: **Magento backend menu > Sales > Web POS** section **> Sales Order Reports**



Our Magento Web POS provides you 10 types of reports which help you get deeper into your business performance. To view reports, go to **Sales > Sales Order Reports** on Magento backend.



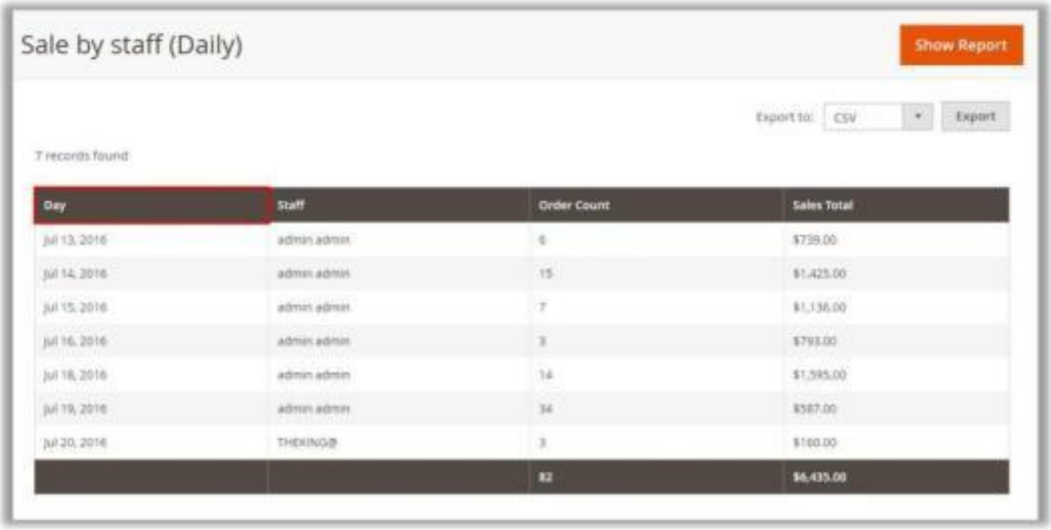
Note:

- You can export each report into Excel XML or CSV file.
- You can view report in any custom time period.

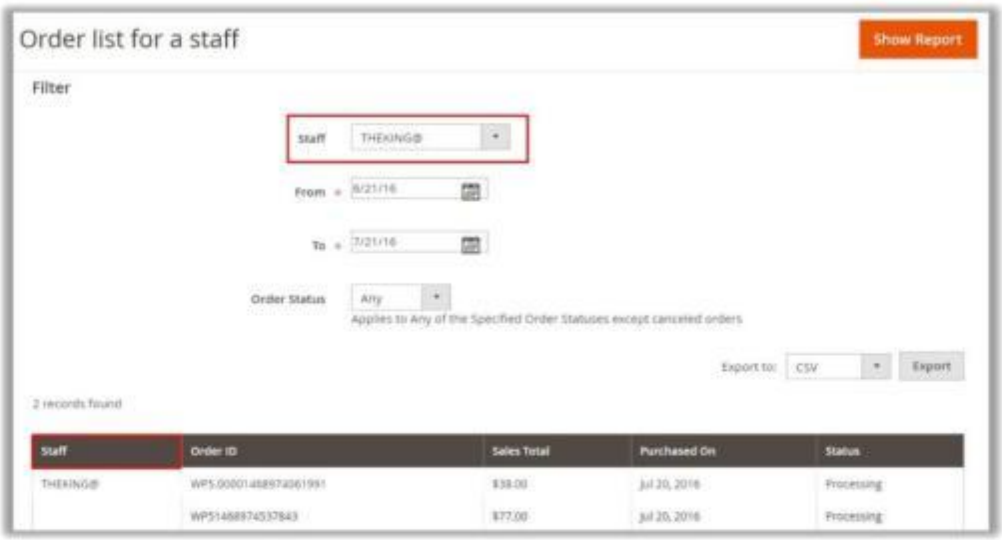
5.2.4.1. Staff Report

On **Staff report** section, there are 3 types of reports: **Sales by staff, Sales by staff (Daily)** and **Order list for staff**.

The **Sales by staff** report shows the number of orders and total sales created by each sale staff in any custom period.



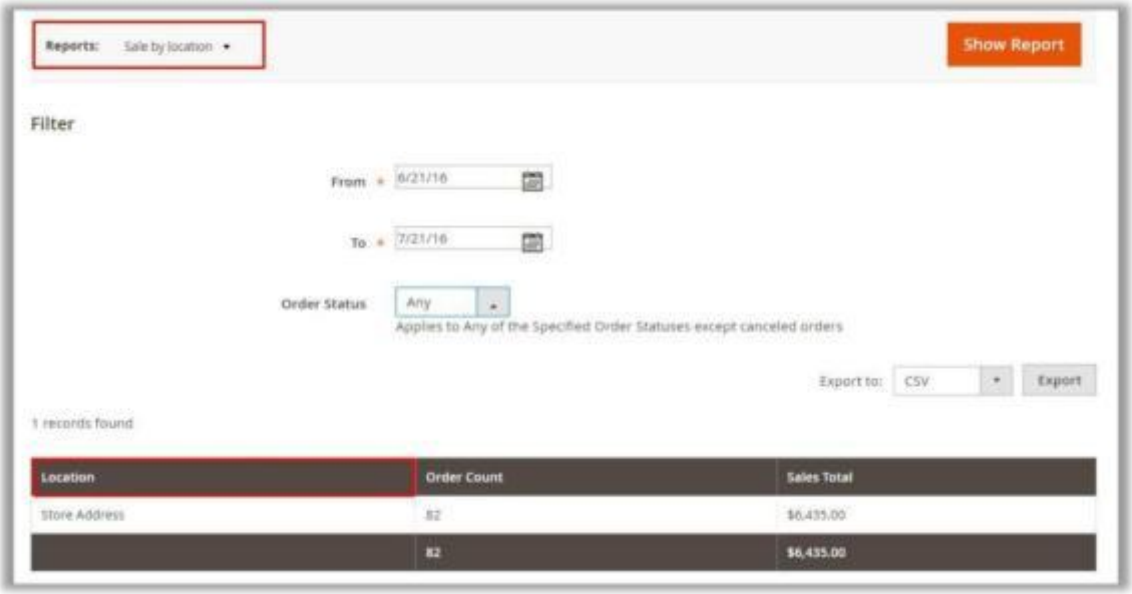
The **Sales by staff (Daily)** expresses the number of order and total sales created by each staff each day in the time period that you choose.



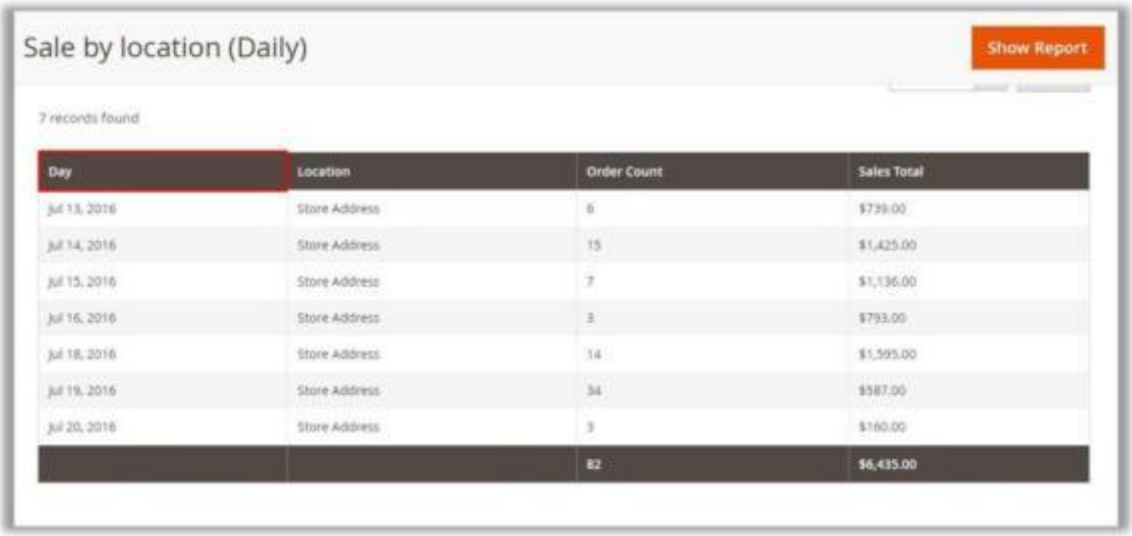
In the **Order list for sale staff** report, you can view all order information including ID, value, history and status of each order created by any or each specific sale staff.

5.2.4.2. Location Report

Similar to Staff report, the Location report has 3 different reports including **Sales by location, Sales by location (Daily)** and **Order list for location**.



The **Sales by location** report shows the number of orders and sales created in each location, in any custom time period.

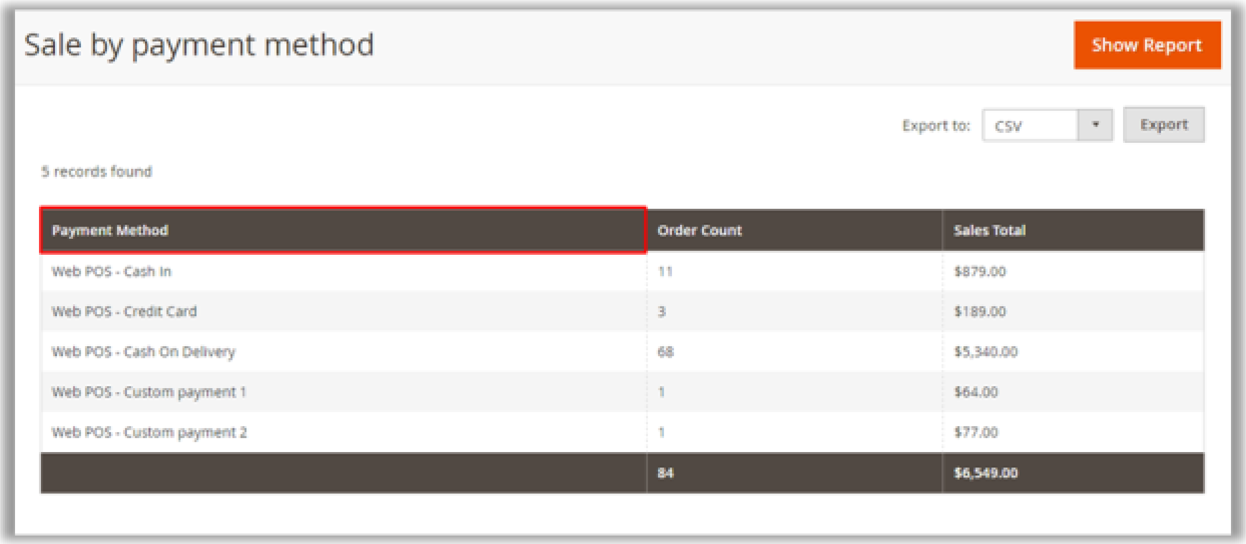


The **Sales by location (Daily)** report shows the number of orders and sales created in each location by each day.

In the Order list for location, you can view all order information including ID, value, history and status of each order created by all or each specific sale location.

5.2.4.3. Payment Report

The section of Payment Report has 4 different types of report including **Sales by payment method, Sales by payment method (Daily), Order list for payment method** and **Sales by payment method for location**.



Payment Method	Order Count	Sales Total
Web POS - Cash In	11	$879.00
Web POS - Credit Card	3	$189.00
Web POS - Cash On Delivery	68	$5,340.00
Web POS - Custom payment 1	1	$64.00
Web POS - Custom payment 2	1	$77.00
	84	$6,549.00

The **Sales by payment method** report displays the number of orders and sales paid by each payment method in a custom time period.

Sale by payment method (Daily)

Show Report

8 records found

Day	Payment Method	Order Count	Sales Total
Jul 13, 2016	Web POS - Credit Card	1	$76.00
	Web POS - Cash On Delivery	5	$663.00
Jul 14, 2016	Web POS - Cash In	3	$266.00
	Web POS - Credit Card	1	$65.00
	Web POS - Cash On Delivery	9	$953.00
	Web POS - Custom payment 1	1	$64.00
	Web POS - Custom payment 2	1	$77.00
Jul 15, 2016	Web POS - Cash In	2	$228.00
	Web POS - Credit Card	1	$48.00

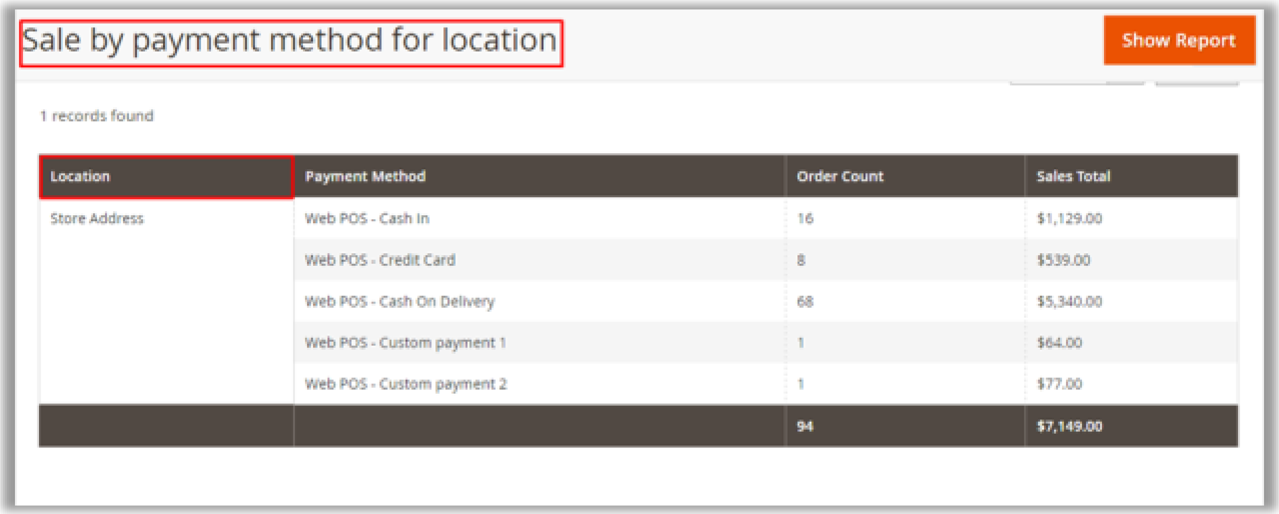
The **Sales by payment (Daily)** report shows the number of orders and sales created by each payment method by each day.

Order list for payment method

Show Report

Payment method	Order ID	Sales Total	Purchased On	Status
Web POS - Cash On Delivery	WP11468365006019	$32.00	Jul 13, 2016	Processing
	WP11468367703332	$32.00	Jul 13, 2016	Pending
	WP11468370540777	$443.00	Jul 13, 2016	Pending
	WP11468370631914	$56.00	Jul 13, 2016	Pending
	WP11468391927480	$100.00	Jul 13, 2016	Processing
	WP11468456050681	$100.00	Jul 14, 2016	Pending
	WP11468457389399	$153.00	Jul 14, 2016	Pending
	WP11468461964918	$97.00	Jul 14, 2016	Pending
	WP11468464416708	$64.00	Jul 14, 2016	Pending
	WP11468465918220	$193.00	Jul 14, 2016	Complete
	WP11468465931082	$165.00	Jul 14, 2016	Pending

In the **Order list for payment method**, you can view all order information including ID, value, history and status of each order created by all or each specific payment method.



Sale by payment method for location

Show Report

1 records found

Location	Payment Method	Order Count	Sales Total
Store Address	Web POS - Cash In	16	$1,129.00
	Web POS - Credit Card	8	$539.00
	Web POS - Cash On Delivery	68	$5,340.00
	Web POS - Custom payment 1	1	$64.00
	Web POS - Custom payment 2	1	$77.00
		94	$7,149.00

The **Sales by payment method for location** report displays the number of orders and sales created by each payment in each sale location.

5.2.4.4. Z- Report

Path: **Web POS backend menu > Sales > Web POS** section **> Z-Report**

Z - report
Demo

From:	Friday 6 Jan, 2017 09:20 AM
To:	Friday 6 Jan, 2017 10:49 AM

#Transaction

Opening Amount	$0.00
Cash sales	$1,121.61
Cash added	$0.00
Cash removed	$0.00
Balance	$1,121.61

#Sales

Total Sales	$1,366.86
Discount	$0.00
Refund	$0.00

#Sales by payment method

Cash In	$1,121.61
Custom payment 1	$245.25

Z-report shows the cash drawer balance in a certain time like a shift or a working day. All payment methods are listed down with the record of Grand Total in details respectively. If there is no customer use Cash on Delivery method to purchase orders, it will not appear in the Payment Method section.

The Z-report will be refreshed to serve new shift/working day after you select Close Store. Particularly, your cash drawer will be reset to 0 or to the certain amount that you set up in Cash Left. Each Z-report is automatically saved in Magento backend so you can check it back (go to **Sales > Web POS** section **> Z-report**)

This is the end of our Userguide for Magestore's Starter Package. 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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