

MAGENTO 2

STARTER PACKAGE

User guide

Updated October 2017



Confidential Information Notice

Copyright 2017. All Rights Reserved. Any unauthorized reproduction of this document is prohibited.

This document and the information it contains constitute a trade secret of Magestore and may not be reproduced or disclosed to non-authorized users without the prior written permission from Magestore. Permitted reproductions, in whole or in part, shall bear this notice.

Table of Contents

<u>1. INTRODUCTION</u>	5
<u>2. HOW TO CONFIGURE</u>	6
 2.1. Inventory	6
2.1.1. Stock Control Configuration	6
2.1.2. Inventory option.....	6
2.1.3. Low Stock Notification Rules	8
 2.2. Web POS	8
2.2.1. Default Guest Checkout	8
2.2.2. How Web POS works with peripheral devices	9
<u>3. HOW TO MANAGE USER PERMISSION</u>	10
3.1. How to manage User Roles and Users	10
3.2. How to manage staff	14
<u>4. HOW TO MANAGE MASTER DATA</u>	19
 4.1. Product	19
4.1.1. Attribute.....	19
4.1.2. Attribute Set	23
4.1.3. Categories.....	26
4.1.4. Product Types	31
 4.2. Customer	60
 4.3. Warehouse	62
 4.4. Location	62
 4.5. Store (POS)	63
4.5.1. Create A New Web POS	63
4.5.2. Manage Web POS	65
<u>5. HOW TO USE</u>	66
 5.1. HOW TO USE INSTOCK MANAGEMENT MODULE	66
5.1.1. Stock listing.....	66
5.1.2. Stock Control	70

5.1.3. Prediction.....	77
5.2. HOW TO USE WEB POS	84
5.2.1. How To Log In	84
5.2.2. How To Do The Transaction	86
5.2.3. How To Manage Transaction	94
5.2.4. How To Issue Refund	108
5.2.5. How To Review Report	109

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.

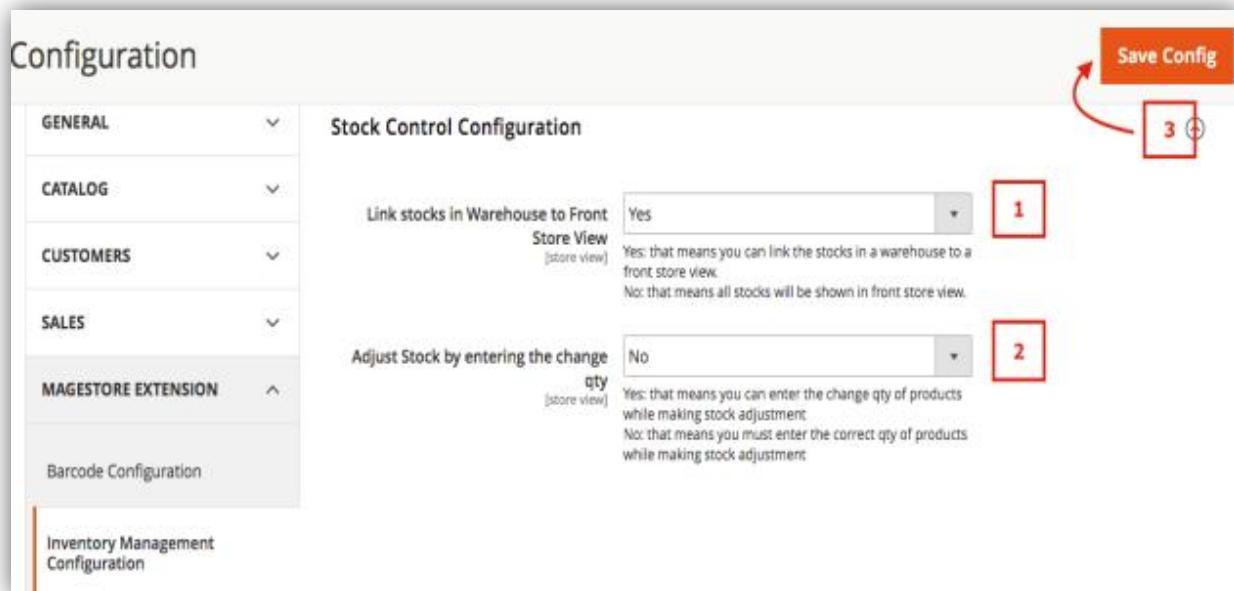
Thanks and Best regards,
Magestore Team

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

Stock Options

Decrease Stock When Order is Placed [global] Yes Use system value **1**

Set Items' Status to be In Stock When Order is Cancelled [global] Yes Use system value **2**

Display Out of Stock Products [global] Yes Use system value **3**
Products will still be shown by direct product URLs.

Only X left Threshold [website] 3 Use system value **4**

Display Products Availability in Stock on Storefront [store view] Yes Use system value **5**

- 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**

Product Stock Options

Please note that these settings apply to individual items in the cart, not to the entire cart.

Manage Stock [global] Yes Use system value **1**
Changing can take some time due to processing whole catalog.

Backorders [global] No Backorders Use system value **2**
Changing can take some time due to processing whole catalog.

Maximum Qty Allowed in Shopping Cart [global] 10000 Use system value **3**

Out-of-Stock Threshold [global] 0 Use system value **4**

Customer Group	Minimum Qty	Action	<input checked="" type="checkbox"/> Use system value 5
Add			

- (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,

Notify for Quantity Below [global]	1	<input checked="" type="checkbox"/> Use system value	6
Enable Qty Increments [global]	No	<input checked="" type="checkbox"/> Use system value	7
Automatically Return Credit Memo Item to Stock [global]	No		8

- (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.

Default Guest Checkout

The screenshot shows a form titled "Default Guest Checkout". It contains the following fields:

- First Name** [global]: Guest
- Last Name** [global]: POS
- Street** [global]: Street
- Country** [global]: United States
- Region/State** [website]: California
- City** [global]: Guest City
- Zip/Postal Code** [global]: 90034
- Telephone** [global]: 12345678
- Email**: guest@example.com

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

The screenshot shows a table titled 'Roles' with two records found. The columns are 'ID' and 'Role'. The first record has ID 1 and Role 'Administrators'. The second record has ID 3 and Role 'ordersuccess'. A red box highlights the 'Search' button at the top left. A red arrow labeled '1' points to the 'Add New Role' button at the top right. Another red arrow labeled '2' points to the 'Role' column header. A third red box labeled '3' points to the search input field.

ID	Role
1	Administrators
3	ordersuccess

- (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

The screenshot shows the same 'Roles' page as before, but the 'Add New Role' button at the top right is now highlighted with a red box and a red arrow pointing to it.

ID	Role
1	Administrators
3	ordersuccess

Click **Add New Role**

New Role

Role Information

Role Name * quinn

Your Password *

Save Role

In tab Role Info

Fill in all required fields

Role Information

Role Info

Role Resources

Roles Resources

Resource Access Custom

Resources

- Dashboard
- Order Success
- Force Edit Qty
- Inventory Management
 - Stock Listing
 - Stocks in Warehouse
 - Non-Warehouse Products
 - Warehouse
 - Create Warehouse
 - Edit Warehouse
 - Manage Permissions
 - View Warehouse Info
 - Delete Warehouse
 - Remove Products from Warehouse
 - Stock Control
 - Adjust Stock
 - Create a new Stock Adjustment
 - Adjust Stock History
 - Confirm Stock Adjustment

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

The screenshot shows a table of users with columns: ID, User Name, First Name, Last Name, Email, and Status. Two users are listed: aaron (Aaron Vu) and admin (demo m2). The interface includes a search bar at the top left, a 'Reset Filter' link, and pagination controls (20 per page, 1 of 1).

ID	User Name	First Name	Last Name	Email	Status
9	aaron	Aaron	Vu	aaron@trueplus.vn	Active
1	admin	demo	m2	demo@magestore.com	Active

- (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

The screenshot shows the same user management interface as the previous one, but with a red arrow pointing specifically to the 'Add New User' button.

ID	User Name	First Name	Last Name	Email	Status
9	aaron	Aaron	Vu	aaron@trueplus.vn	Active
1	admin	demo	m2	demo@magestore.com	Active

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

Account Information

1	User Name *	<input type="text"/>
2	First Name *	<input type="text"/>
3	Last Name *	<input type="text"/>
4	Email *	<input type="text"/>
5	Password *	<input type="password"/>
6	Password Confirmation *	<input type="password"/>
7	Interface Locale	<input type="text" value="English (United States) / English (United States)"/>
8	This account is	<input type="button" value="Active"/>
Current User Identity Verification		
9	Your Password *	<input type="password"/>

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

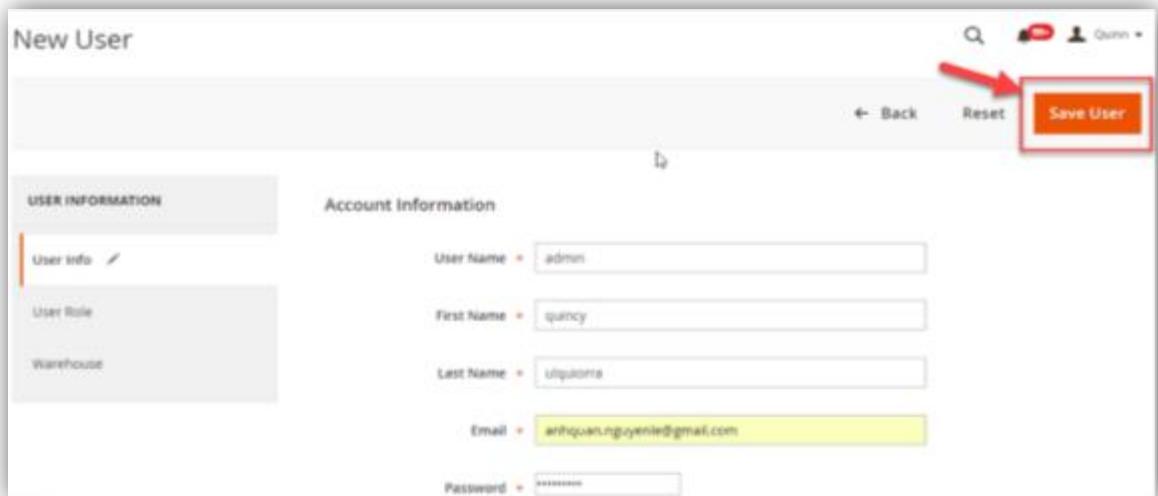
- (1) **User Name** (required)
- (2) **First Name** (required)
- (3) **Last Name** (required)
- (4) **Email** (required)
- (5) **Password** (required)
- (6) **Password Confirmation** (required)
- (7) **Interface Locale**: you can select different location.
- (8) **This account is**: Active or Inactive.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

USER INFORMATION							
User Info	<div style="display: flex; justify-content: space-between;"> Assigned Role </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">Any</td> <td style="padding: 5px;"></td> </tr> <tr> <td style="padding: 5px;"><input checked="" type="radio"/></td> <td style="padding: 5px;">Administrators</td> </tr> <tr> <td style="padding: 5px;"><input checked="" type="radio"/></td> <td style="padding: 5px;">ordersuccess</td> </tr> </table>	Any		<input checked="" type="radio"/>	Administrators	<input checked="" type="radio"/>	ordersuccess
Any							
<input checked="" type="radio"/>	Administrators						
<input checked="" type="radio"/>	ordersuccess						
User Role							
Warehouse							

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

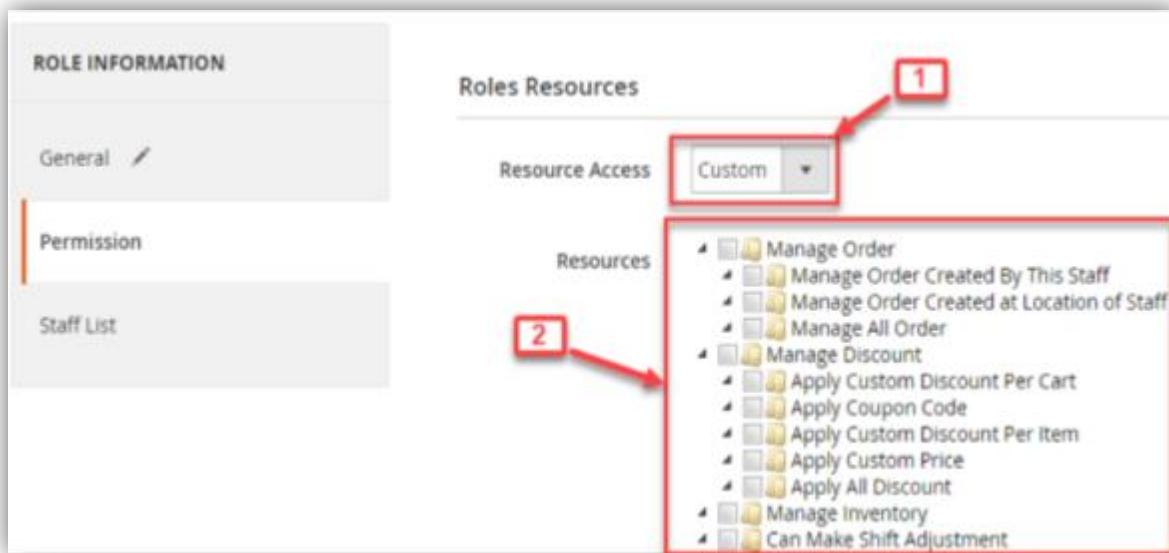


Click **Add Role** to add a new role.

The screenshot shows the 'Role Information' form. On the left, there is a sidebar with tabs: General (selected), Permission, and Staff List. The main area has a tab labeled 'Role Information'. It contains three fields: 'Role Name *' (numbered 1), 'Maximum discount percent(%)' (numbered 2), and 'Description' (numbered 3). The 'Maximum discount percent(%)' field includes a note: 'Maximum discount percent cannot be higher than 100.'

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**

The screenshot shows the 'Staff' management page. At the top, there's a search bar, a user profile icon, and a dropdown for 'Quinn'. Below the header, there are three numbered callouts: '1' points to a red 'Add Staff' button; '2' points to a 'Filters' button; and '3' points to an 'Actions' dropdown menu. The main area displays a table with 7 records found. The table has columns: ID, Username, Email, Display Name, Location, Role, Status, and Action. The data in the table is as follows:

ID	Username	Email	Display Name	Location	Role	Status	Action
4	aaron	aaron@trueplus.vn	Aaron	Primary Store, Bakery store, Tirunelveli	admin	Enabled	Edit
5	chen	krys@trueplus.vn	Chen	Primary Store, Bakery store, Tirunelveli	admin	Enabled	Edit
1	admin	demo@magestore.com	demo m2	Primary Store	admin	Enabled	Edit
2	demo	demo.magestore@gmail.com	Demo Staff	Primary Store	admin	Enabled	Edit
6	quinn	quinn@trueplus.vn	Quinn	Primary Store, Bakery store, Tirunelveli	admin	Enabled	Edit
3	vinnie	vinnie@trueplus.vn	Vinnie	Primary Store	admin	Enabled	Edit

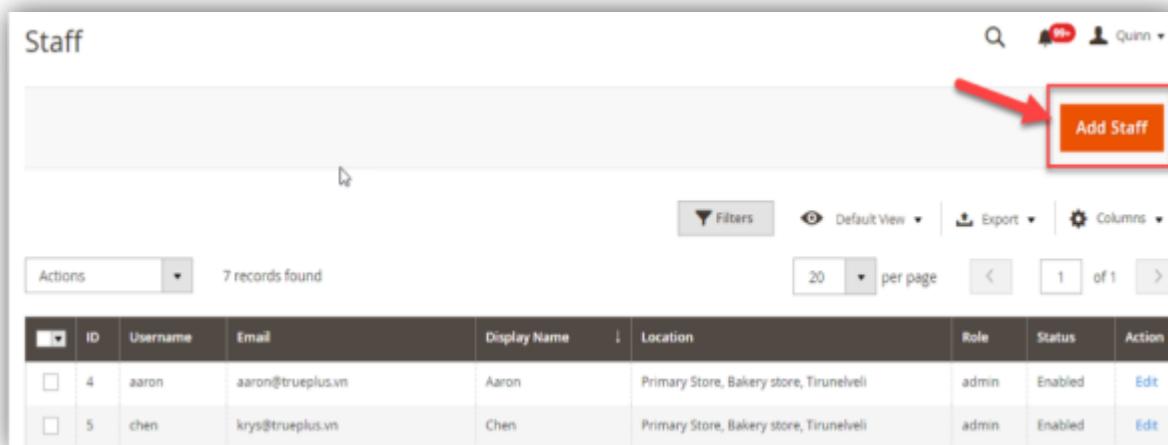
- (1) Click **Add Staff** to create a new staff.
- (2) Click **Filters** to search staff information.

- (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.

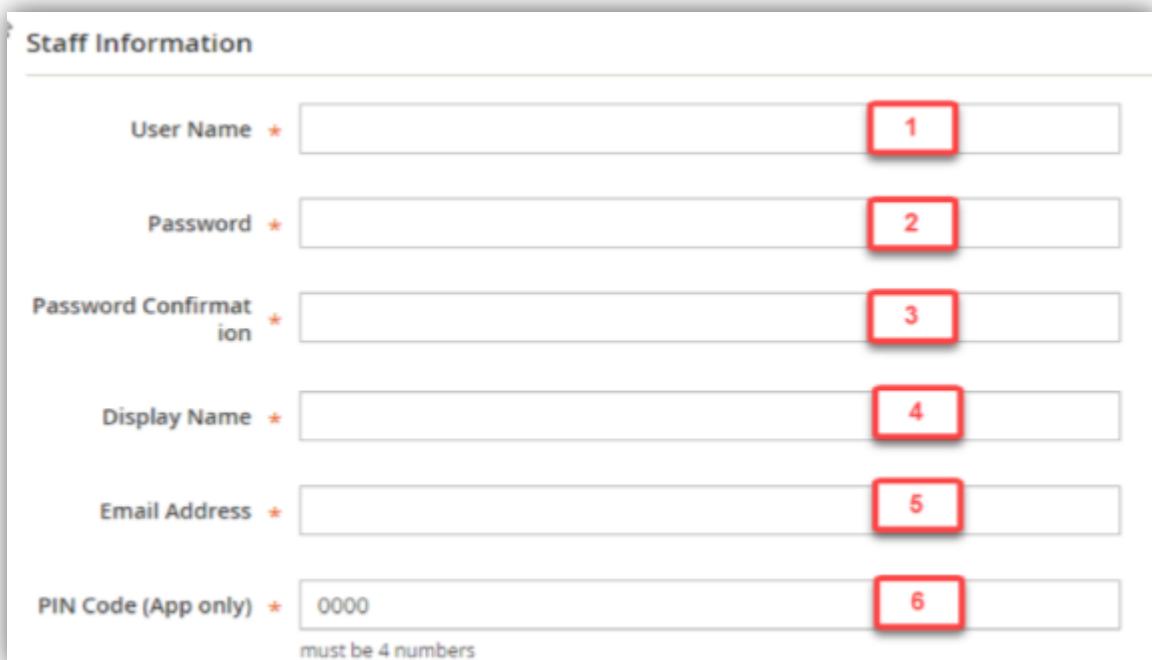
3.2.2.2. Create a new staff

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



Staff								
		Actions					Filters	
		Default View					Export	
		Actions					Columns	
ID	Username	Email	Display Name	Location	Role	Status	Action	Action
4	aaron	aaron@trueplus.vn	Aaron	Primary Store, Bakery store, Tirunelveli	admin	Enabled	Edit	Delete
5	chen	krys@trueplus.vn	Chen	Primary Store, Bakery store, Tirunelveli	admin	Enabled	Edit	Delete

Click **Add Staff**.



Staff Information

User Name *

Password *

Password Confirmation *

Display Name *

Email Address *

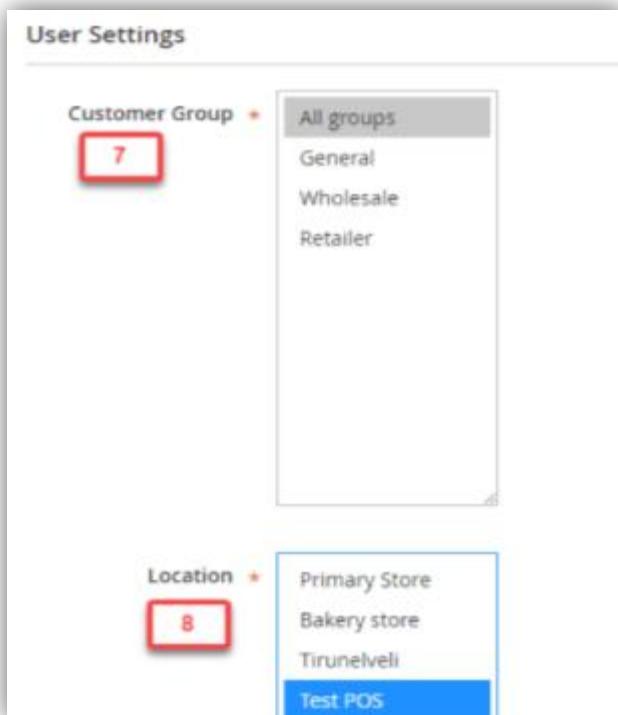
PIN Code (App only) *

must be 4 numbers

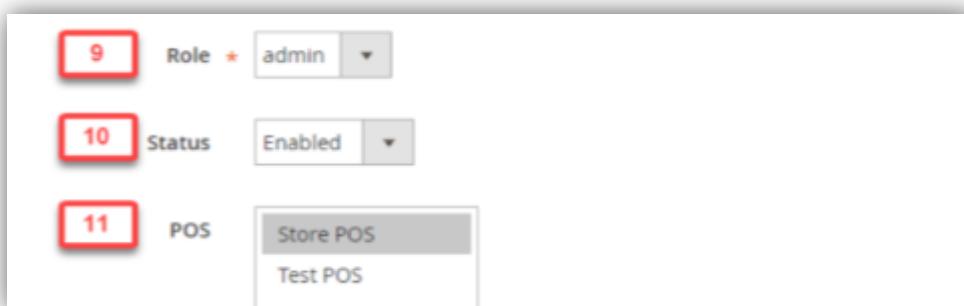
Fill out all the required fields or select:

- (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

The screenshot shows the 'Product Attributes' page. At the top right, there is a search bar, a user icon, and a dropdown menu. Below the header, there is a button labeled 'Add New Attribute' with a red box and arrow around it. In the center, there is a search bar with a red box and arrow around it, followed by a 'Reset Filter' button and a message '67 records found'. To the right of the search bar are buttons for '20 per page' and navigation arrows. A table below has columns: Attribute Code, Default Label, Required, System, Visible, Scope, Searchable, Use in Layered Navigation, and Comparable. The 'Scope' column is highlighted with a red box and arrow. Two rows of data are visible: 'activity' and 'category_gear'. The 'activity' row has values: Activity, No, No, Yes, Global, No, Filterable (with results), and Yes. The 'category_gear' row has values: Category Gear, No, No, Yes, Global, No, Filterable (with results), and No.

- (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

Product Attributes								
<input style="background-color: red; color: white; padding: 5px; border: none; float: right; margin-right: 10px;" type="button" value="Add New Attribute"/>								
<input type="button" value="Search"/> <input type="button" value="Reset Filter"/> 67 records found 20 per page < 1 of 4 >								
<input type="checkbox"/> Attribute Code <input type="checkbox"/> Default Label <input type="checkbox"/> Required <input type="checkbox"/> System <input type="checkbox"/> Visible <input type="checkbox"/> Scope <input type="checkbox"/> Searchable <input type="checkbox"/> Use in Layered Navigation <input type="checkbox"/> Comparable								
activity	Activity	No	No	Yes	Global	No	Filterable (with results)	Yes
category_gear	Category Gear	No	No	Yes	Global	No	Filterable (with results)	No

Click Add New Attribute

Attribute Properties

Default Label *	<input type="text" value="test attribute"/>	1
Catalog Input Type f or Store Owner	<input type="button" value="Dropdown"/>	2
Values Required	<input type="button" value="No"/>	3

Manage Options (Values of Your Attribute)

Is Default Admin*	Default Store View	
<input type="radio"/>	<input type="text" value="test attribute1"/>	<input type="button" value="Delete"/>
<input type="radio"/>	<input type="text" value="test attribute2"/>	<input type="button" value="Delete"/>

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 Attribute Properties

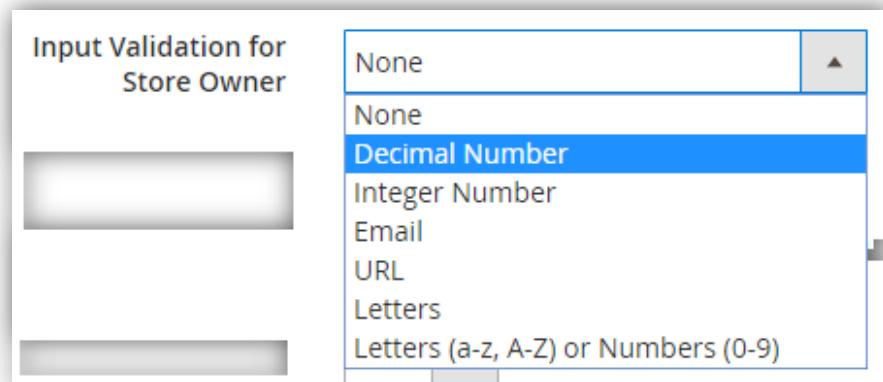
1 Attribute Code	test_attribute
This is used internally. Make sure you don't use spaces or more than 30 symbols.	
Scope	Store View 2
Declare attribute value saving scope.	
Unique Value	No 3
Not shared with other products.	
Input Validation for Store Owner	None 4
Add to Column Options	Yes 5
Select "Yes" to add this attribute to the list of column options in the product grid.	
Use in Filter Options	Yes 6
Select "Yes" to add this attribute to the list of filter options in the product grid.	

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.

ATTRIBUTE INFORMATION

- Properties
- Manage Labels**
- Storefront Properties

Manage Titles (Size, Color, etc.)

Default Store View

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.

Storefront Properties

Properties	Use in Search No	1
Manage Labels	Comparable on Storefront No	2
Storefront Properties	Use in Layered Navigation No	3
	Can be used only with catalog input type Dropdown, Multiple Select and Price.	
	Use in Search Results Layered Navigation No	4
	Can be used only with catalog input type Dropdown, Multiple Select and Price.	
	Position 5	6
	Position of attribute in layered navigation block.	
	Use for Promo Rule Conditions No	7
	Allow HTML Tags on Storefront Yes	8
	Visible on Catalog Pages on St orefront No	9
	Depends on design theme.	
	Used in Product Listing No	
	Depends on design theme.	
	Used for Sorting in Product Lis ting No	
	Depends on design theme.	

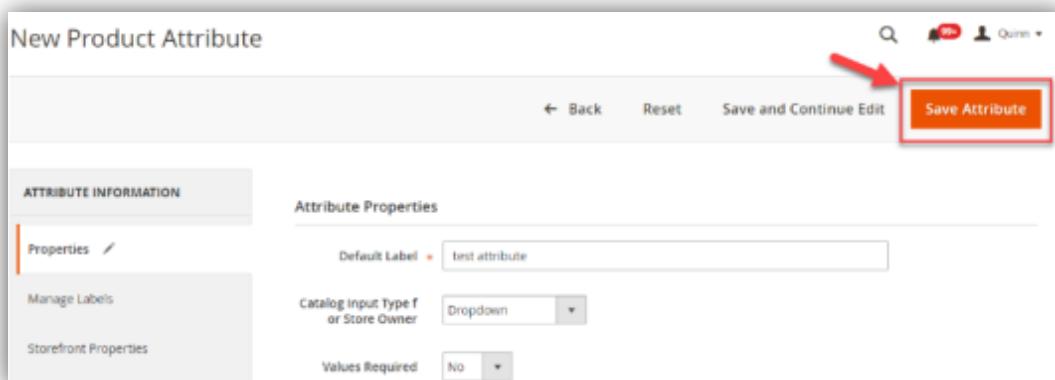
In tab **Storefront Properties**

- (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**

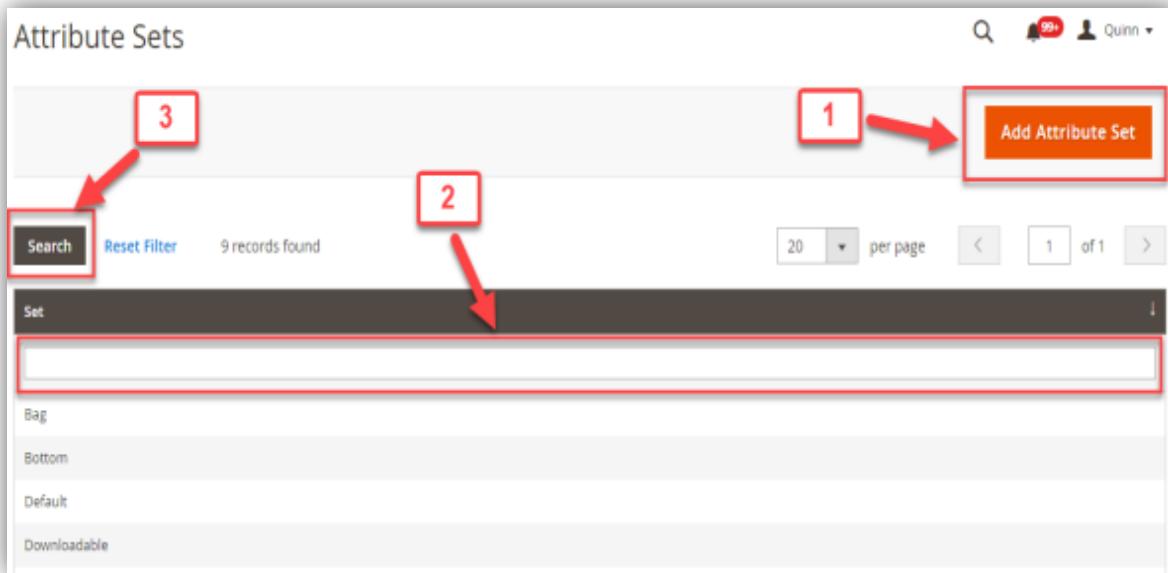


When complete, click **Save Attribute**.

4.1.2. Attribute Set

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

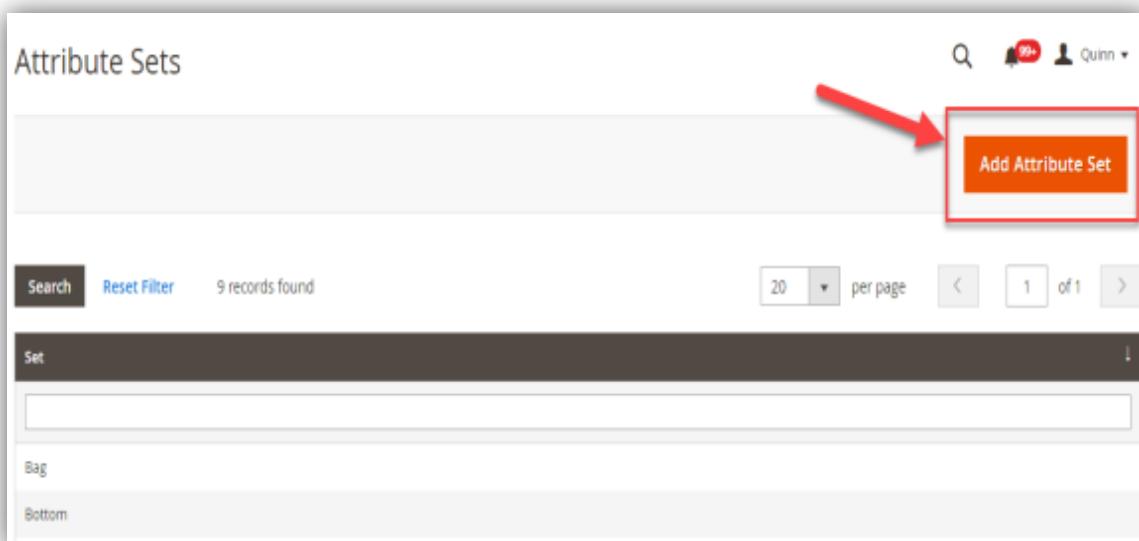
4.1.1.1. Manage Attribute Set



- (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.

New Attribute Set

Edit Attribute Set Name

Name * 1

For internal use

Based On * 2

3 Save

- (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

test attribute set

Edit Attribute Set Name

Name * 1

For internal use

Groups

Add New Delete Selected Group

Double click on a group to rename it.

- General
 - status
 - name
 - sku
 - sku_type
 - price
 - price_type
 - tax_class_id
 - quantity_and_stock_status
 - weight
 - weight_type
 - category_ids
 - visibility
 - news_from_date
 - news_to_date

Unassigned Attributes

- activity
- category_gear
- climate
- collar
- color
- eco_collection
- erin_recommends
- features_bags
- format
- gender
- manufacturer
- material
- new
- pattern
- performance_fabric
- sale
- size
- sleeve

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 right.

Women

Store View: All Store Views

Add Root Category

Add Subcategory

Collapse All | Expand All

- Default Category (1182)
 - What's New (1)
 - Women (1)
 - Tops (75)
 - Bottoms (228)
 - Men (2)
 - Gear (48)
 - Collections (13)
 - Training (6)
 - Sale (1)
 - Promotions (1)
 - Booth (2)

All information of category

Enable Category [store view]

Include in Menu [store view]

Category Name *

Content

Display Settings

Delete Save

4.1.1.2. Create A New Category

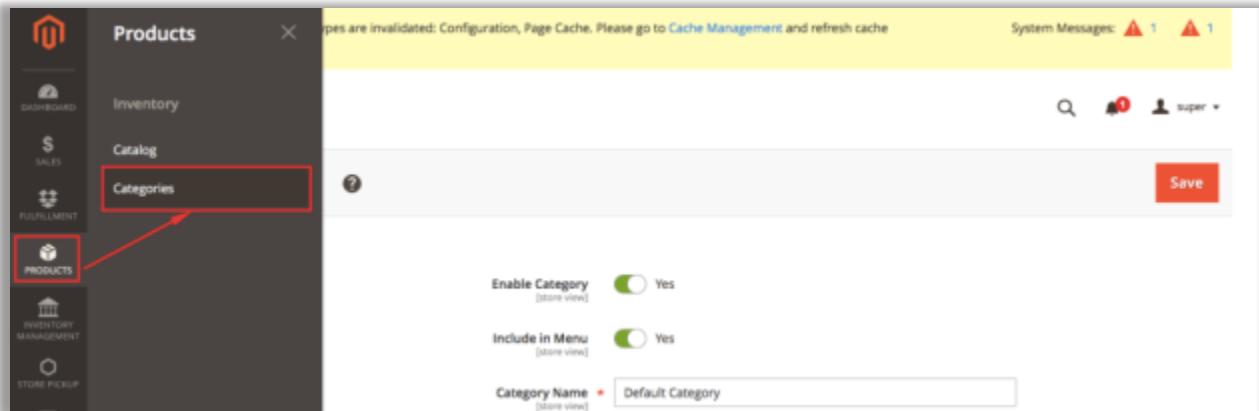
Add Root Category

Add Subcategory

Collapse All | Expand All

- Default Category (1182)
 - What's New (1)
 - Women (1)
 - Men (2)
 - Gear (48)
 - Collections (13)
 - Training (6)
 - Sale (1)
 - Promotions (1)
 - Booth (2)
 - Test 1 (0)

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.

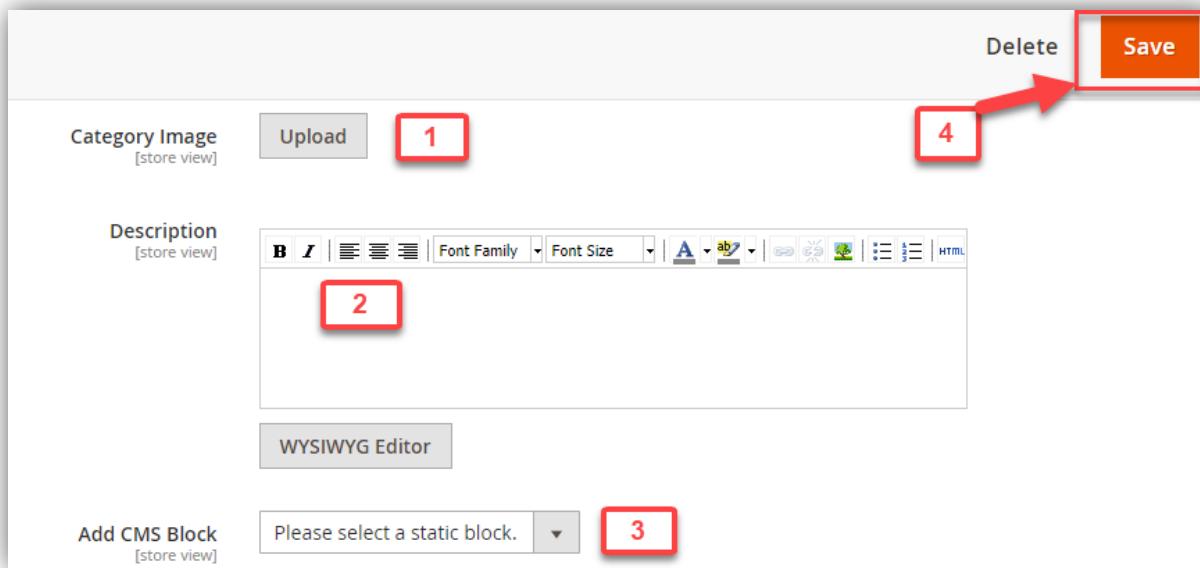
If you're starting from the beginning without any data, there might be only two categories in the list: **Default Category**, which is the root, and an **Example Category**.

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



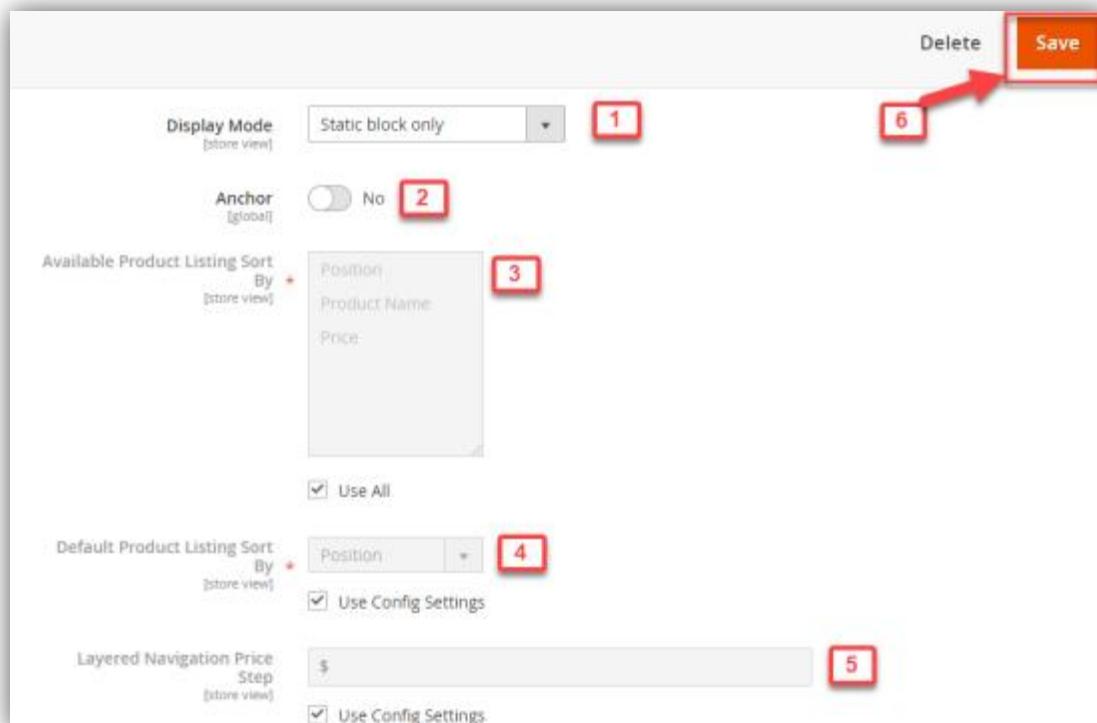
Complete the Basic information

- (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:

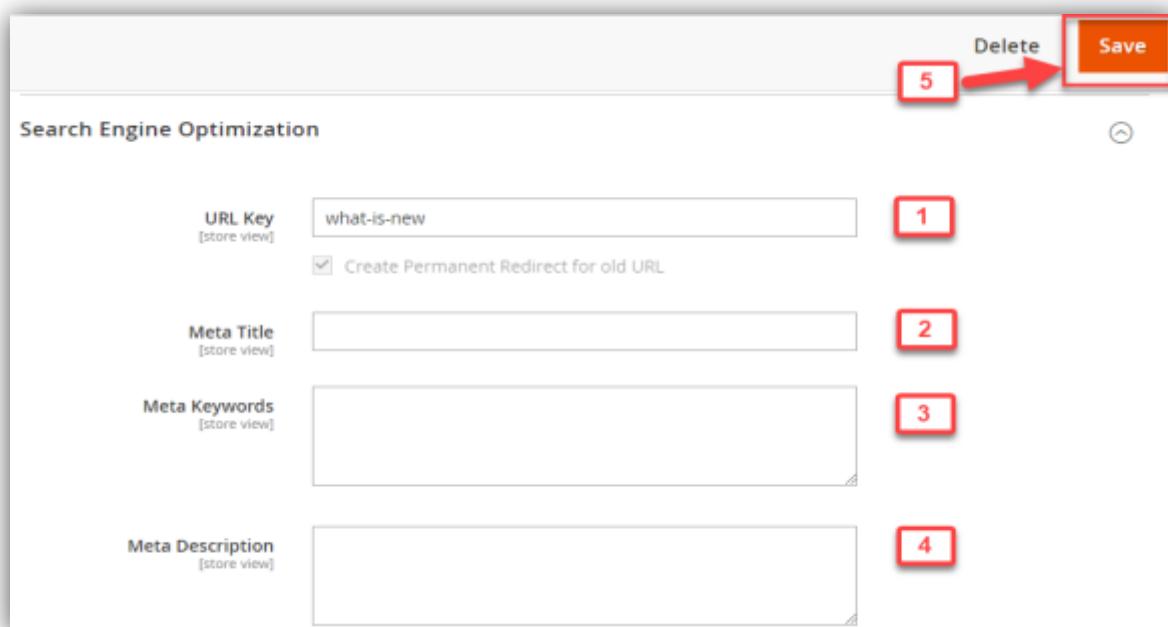
- Clear the **Use All checkbox**.
- Select one or more of the available values to be available for customers to sort the list. By default, all available values are included. For example, the values might include:
 - Position.
 - Product Name.
 - Price 5.

(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**

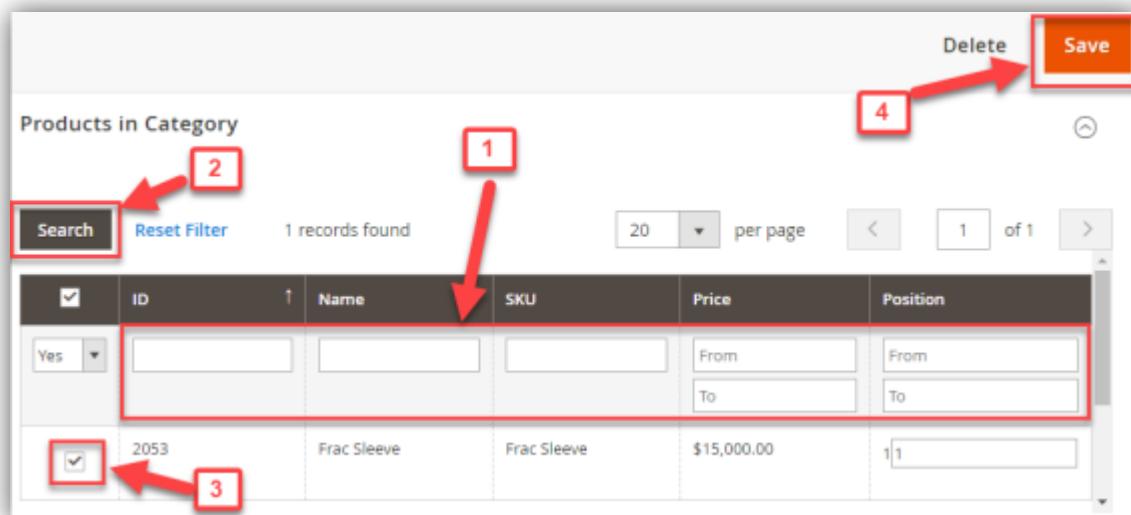
Expand the Products in Category section. Then, use one of the following methods to add products to the category.

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**

The screenshot shows the Magestore Catalog interface. At the top right, there's a user profile for 'Quinn'. Below the header, there's a search bar and some navigation links. The main area is titled 'Catalog' and displays a grid of products. The grid columns include: Actions, ID, Thumbnail, Name, Type, Attribute Set, SKU, Price, Quantity, Visibility, Status, Websites, Action, and test attribute. Two products are listed: 'Joust Duffle Bag' and 'Strive Shoulder Pack'. The 'Actions' column for each product has a dropdown menu. The 'Edit' link in the 'Action' column for the 'Joust Duffle Bag' is highlighted with a red box and arrow (number 4). A red box and arrow (number 1) points to the 'Add Product' button at the top right of the grid. A red box and arrow (number 2) points to the 'Actions' dropdown menu. A red box and arrow (number 3) points to the 'Filters' button.

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: <ul style="list-style-type: none"> Simple Product. Configurable Product. Grouped Product. Virtual Product. Bundle Product. 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: <ul style="list-style-type: none"> Delete. Change Status. 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 anywhere on the row.

4.1.4.3. Create A New Product

Simple product

The screenshot shows the Magento Catalog grid interface. At the top right, there is a red arrow pointing to the 'Add Product' button in a dropdown menu. The dropdown menu lists several product types: Simple Product (which is highlighted with a red border), Configurable Product, Grouped Product, Virtual Product, Bundle Product, Downloadable Product, and Custom Sale.

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

The screenshot shows the 'Add New Product' form. Under the 'Attribute Set' section, a dropdown menu is open, showing 'Default' as the selected option. A red box highlights this dropdown menu. Below it, there is a search bar and a list of attribute sets: 'Bag', 'Bottom', and 'Default'. The 'Default' option is also highlighted with a red border.

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

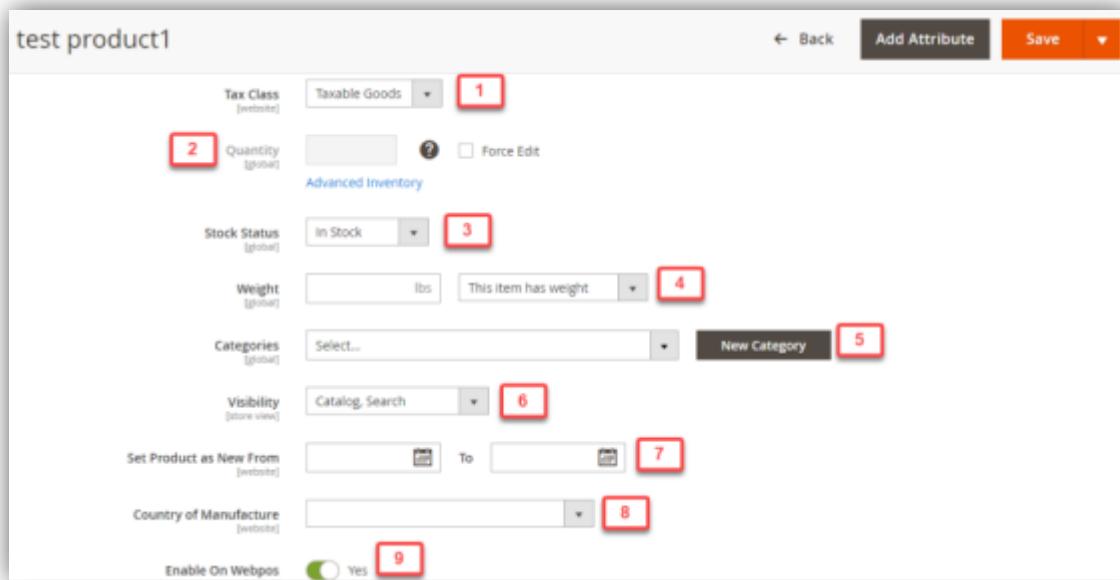
The screenshot shows the 'Add New Product' form. The 'Save' button at the top right is highlighted with a red box and a red arrow pointing to it. Below the 'Save' button, there are three numbered steps: 1. A red box highlights the 'Product Name' field. 2. A red box highlights the 'SKU' field. 3. A red box highlights the 'Price' field.

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 **Select** 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

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

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

The screenshot shows a catalog grid with various product types listed on the right side of the screen. The 'Configurable Product' option is highlighted with a red box.

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

The screenshot shows the 'Add Product' configuration page. The 'Attribute Set' dropdown is highlighted with a red box and set to 'Default'. Other fields include 'Enable Product' (Yes), 'Product Name' (Bag), 'SKU' (Bottom), and 'Default'.

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

The screenshot shows the 'Add Product' configuration page with three numbered fields: 1. Product Name, 2. SKU, and 3. Price. The 'Save' button is highlighted with a red box and has a red arrow pointing to it.

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.

The screenshot shows the 'test product1' configuration page. The 'Tax Class' dropdown is set to 'Taxable Goods' (1). The 'Quantity' input field is highlighted with a red box (2). The 'Stock Status' dropdown is set to 'In Stock' (3). The 'Weight' input field is highlighted with a red box (4). The 'Categories' dropdown is set to 'Select...' and has a red box (5) over the 'New Category' button. The 'Visibility' dropdown is set to 'Catalog, Search' (6). The 'Set Product as New From' section has a red box (7) over the 'To' checkbox. The 'Country of Manufacture' dropdown is highlighted with a red box (8). The 'Enable On Webpos' toggle switch is set to 'Yes' (9).

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.

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

Complete the product information.

Adding configurations



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

Create Product Configurations

When you remove or add an attribute, we automatically update all configurations and you will need to recreate current configurations manually.

Step 1: Select Attributes

Selected Attributes: Color, Size

3 records found (2 selected)

	Use in Layered Navigation	Attribute Code	Attribute Label	Required	System	Visible	Scope	Searchable	Comparable
<input checked="" type="checkbox"/>	Filterable (with results)	color	Color	No	Yes	Yes	Global	No	No
<input type="checkbox"/>	Filterable (with results)	format	Format	No	Yes	Yes	Global	No	No
<input checked="" type="checkbox"/>	Filterable (with results)	size	Size	No	Yes	Yes	Global	No	No

Progress bar: Step 1 of 4

Cancel Back Next

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.

Step 2: Attribute Values
Select values from each attribute to include in this product. Each unique combination of values creates a unique product SKU.

Color (12 Options)		
<input type="checkbox"/> Black	<input checked="" type="checkbox"/> Blue	<input type="checkbox"/> Brown
<input type="checkbox"/> Gray	<input type="checkbox"/> Green	<input type="checkbox"/> Lavender
<input type="checkbox"/> Multi	<input type="checkbox"/> Orange	<input type="checkbox"/> Purple
<input checked="" type="checkbox"/> Red	<input type="checkbox"/> White	<input checked="" type="checkbox"/> Yellow

Size (10 options)		
<input type="checkbox"/> 35 cm	<input type="checkbox"/> XS	<input type="checkbox"/> 65 cm
<input type="checkbox"/> S	<input type="checkbox"/> 75 cm	<input type="checkbox"/> M
<input type="checkbox"/> 8 foot	<input type="checkbox"/> L	<input type="checkbox"/> a foot
<input type="checkbox"/> XL	<input type="checkbox"/> 10 foot	<input type="checkbox"/> 28
<input type="checkbox"/> 28	<input checked="" type="checkbox"/> 30	<input checked="" type="checkbox"/> 31
<input checked="" type="checkbox"/> 32	<input type="checkbox"/> 33	<input type="checkbox"/> 34

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

Click **Next** to continue

Step 3: Bulk Images, Price and Quantity
Based on your selections 9 new products will be created. Use this step to customize images and price for your new products.

Images

Apply single set of images to all SKUs
 Apply unique images by attribute to each SKU
 Skip image uploading at this time

Price

Apply single price to all SKUs
 Apply unique prices by attribute to each SKU
 Skip price at this time

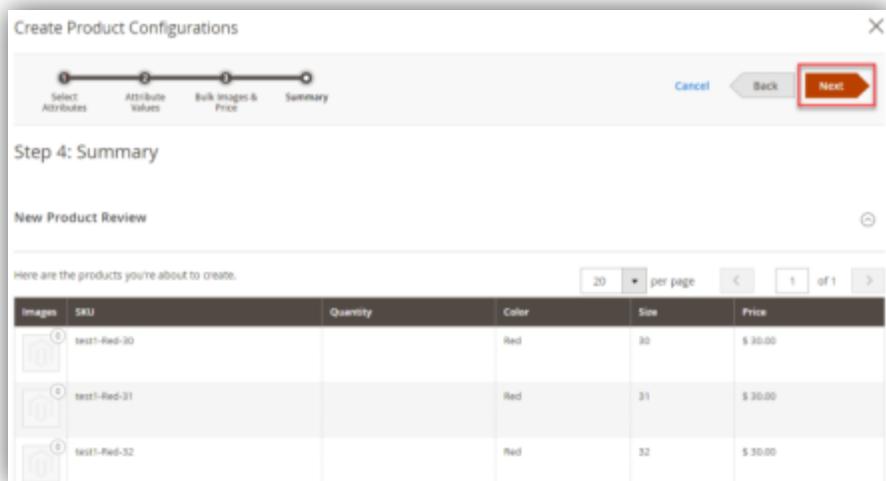
Quantity

Apply single quantity to each SKUs
 Apply unique quantity by attribute to each SKU
 Skip quantity at this time

Configure the Images, Price, and Quantity.

Click **Next** to continue.

You will see list product.

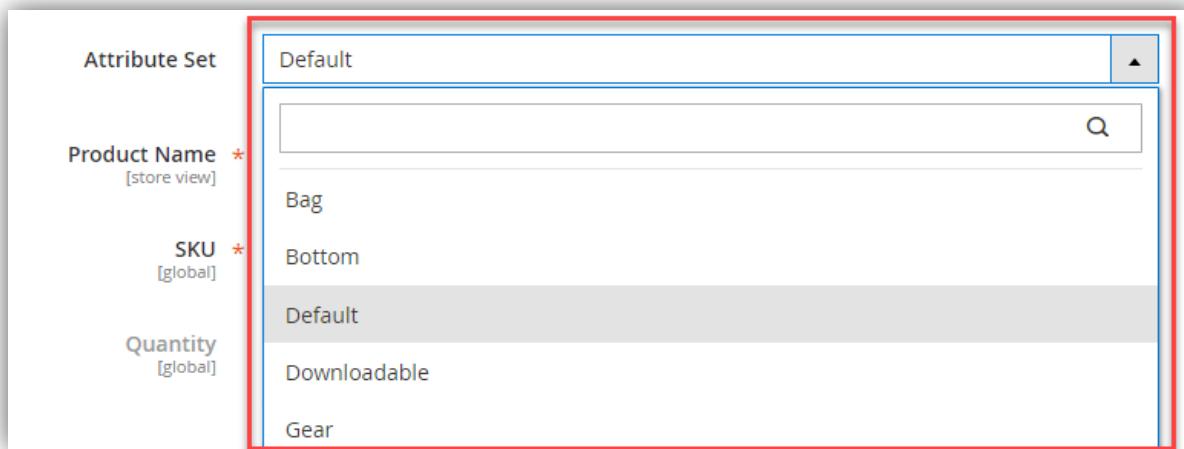


Click **Next** to finish the process.

Grouped product

The screenshot shows the Magento Catalog grid interface. At the top right, there is a search bar, user profile, and a red 'Add Product' button. Below it, a dropdown menu is open, listing various product types: Simple Product, Configurable Product, Grouped Product (which is highlighted with a red box), Virtual Product, Bundle Product, Downloadable Product, and Custom Sale. The main grid displays a list of products with columns for Actions, ID, Thumbnail, Name, Type, Attribute Set, SKU, Price, Quantity, Visibility, and Status. Two products are visible: one named 'test1' (Simple Product) and another named 'test product1' (Configurable 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.

Enable Product [website] Yes

Attribute Set Default

Product Name * [store view] 1

SKU * [global] 2

Price * [website] 3

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**.

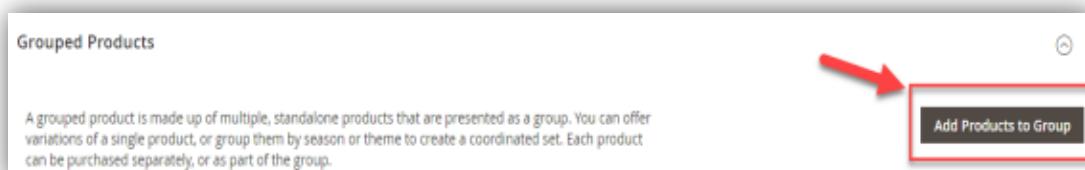
The screenshot shows the 'test product1' configuration page. The top right features 'Back', 'Add Attribute', 'Save', and a dropdown menu. The main area contains several input fields with red boxes numbered 1 through 9 highlighting specific settings:

- 1**: Tax Class dropdown set to 'Taxable Goods'.
- 2**: Quantity (global) input field.
- 3**: Stock Status dropdown set to 'In Stock'.
- 4**: Weight (global) input field and unit 'lbs'.
- 5**: Categories dropdown with 'Select...' placeholder and 'New Category' button.
- 6**: Visibility dropdown set to 'Catalog, Search'.
- 7**: Set Product as New From (website) dropdown.
- 8**: Country of Manufacture (website) dropdown.
- 9**: Enable On Webpos toggle switch set to 'Yes'.

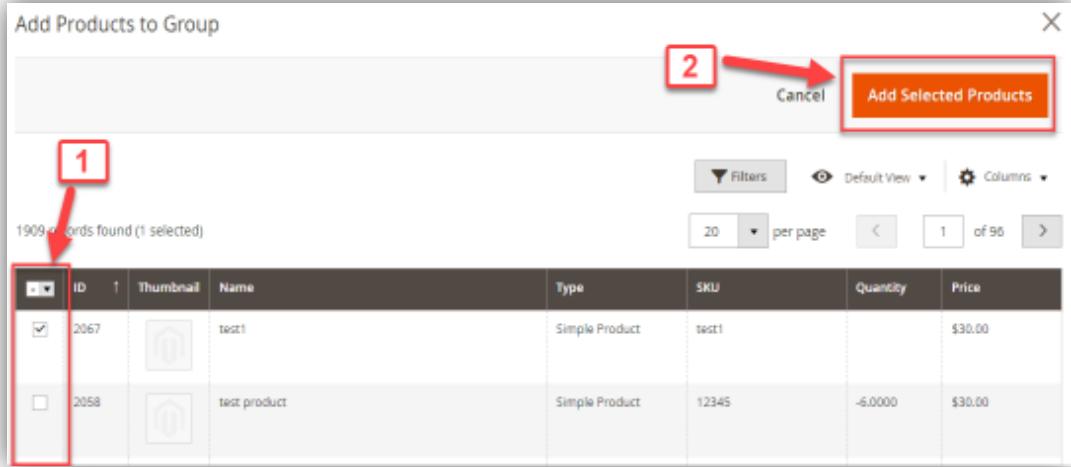
Complete the basic settings

- (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.

Grouped Products

A grouped product is made up of multiple, standalone products that are presented as a group. You can offer variations of a single product, or group them by season or theme to create a coordinated set. Each product can be purchased separately, or as part of the group.

ID	Thumbnail	Name	Attribute Set	Status	SKU	Price	Default Quantity	Actions
2067		test1	Attribute Set Default	Enabled	test1	\$30.00	<input type="text"/>	Remove
2058		test product	Attribute Set Default	Enabled	12345	\$30.00	<input type="text"/>	Remove

- (1) Enter a quantity.
 - (2) Remove a product from group.
- Click **Save** to finish the process.

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

Complete the product information

Virtual product

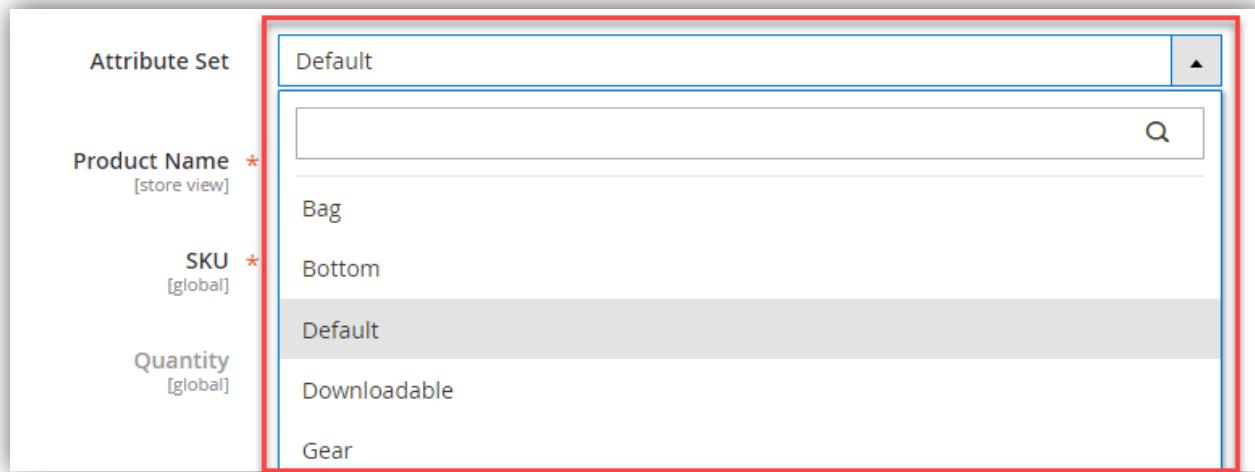
Aside from the absence of the Weight field, the process of creating a virtual product and a simple product is the same.

Bundle product

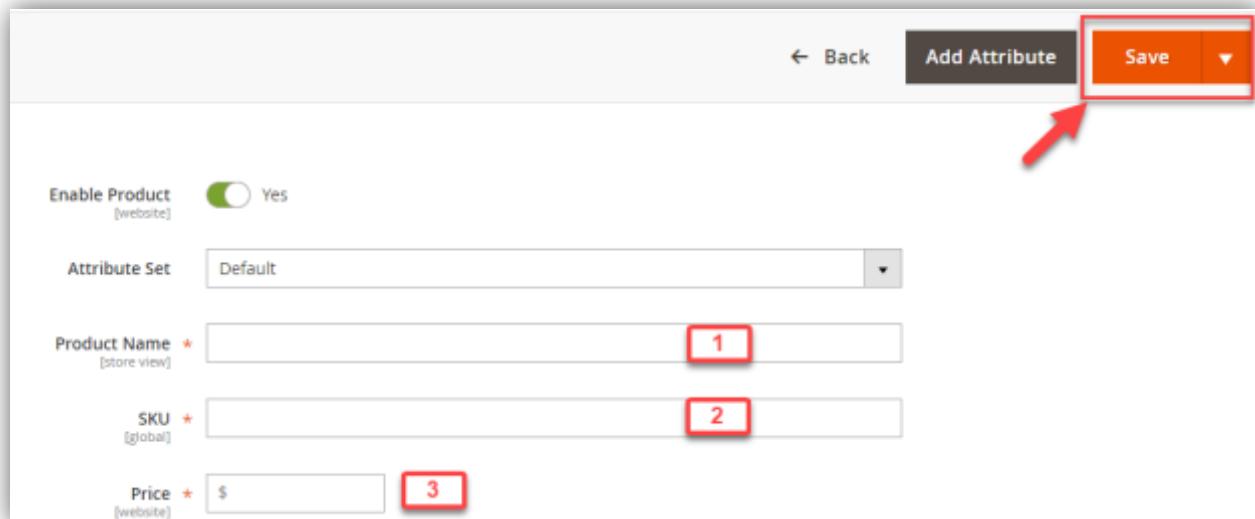
The screenshot shows the Magestore Admin Panel Catalog page. At the top right, there is a search bar, a user icon, and a dropdown for 'Quinn'. Below the search bar is an 'Add Product' button with an upward arrow. A context menu is open over a product row, listing several options: Simple Product, Configurable Product, Grouped Product, Virtual Product, Bundle Product (which is highlighted with a red box), Downloadable Product, and Custom Sale. The main catalog table below shows a single row for a 'test bundle product'.

Actions	ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status
<input type="checkbox"/>	2068		test bundle product	Bundle Product	Default	test bundle product	0.0000	Catalog, Search	Enabled	Normal

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



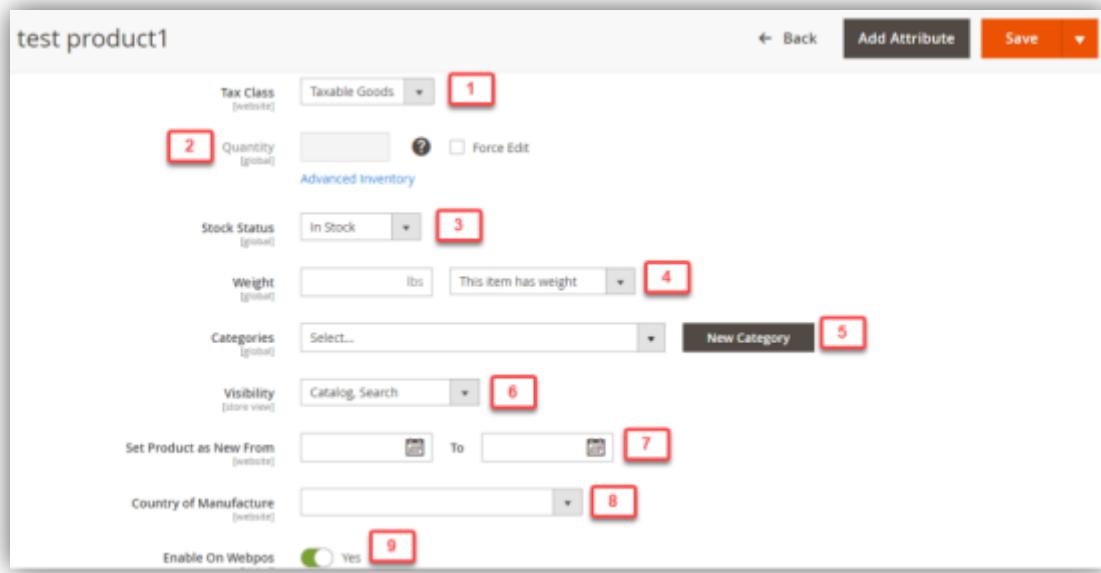
Choose the attribute set that is used as a template for the product



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**

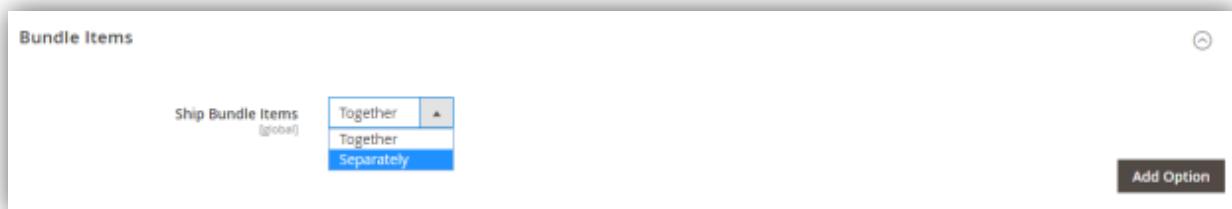
(6) Accept the default **Visibility** setting, **Catalog, Search**

(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.

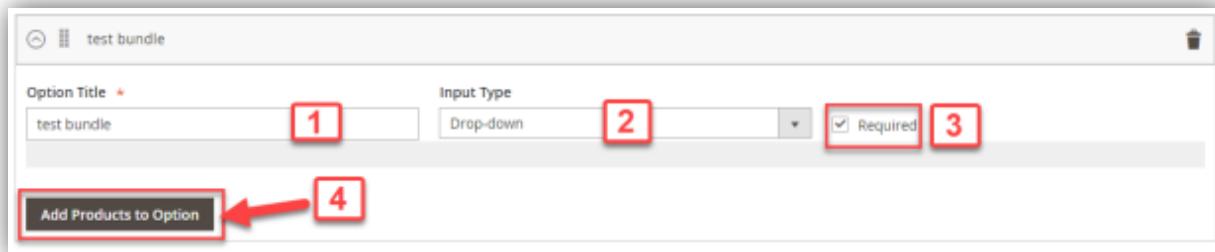


Add **Bundle items**

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.

ID	Thumbnail	Name	Type	SKU	Quantity	Price
2067		test1	Simple Product	test1		\$30.00
2057		Ooty Varkey	Simple Product	Ooty Varkey	985.0000	\$10.00
2056		Tirunelveli Halwa	Simple Product	Tirunelveli Halwa	100.0000	\$15.00

Mark the checkbox of each product.

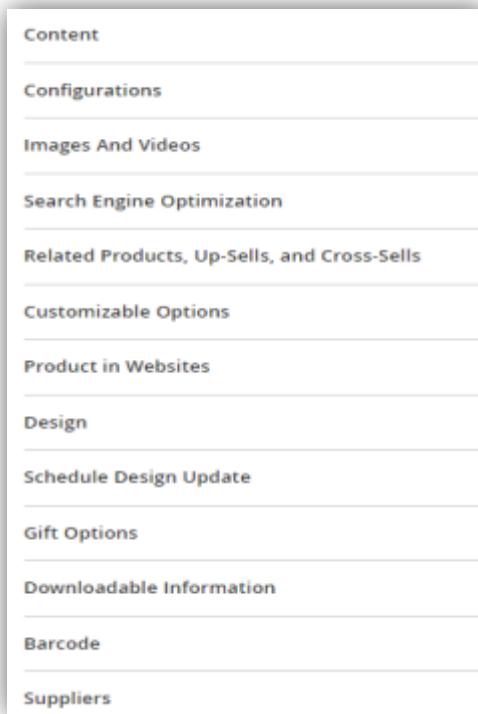
Click **Add Selected Products**, you will see.

Is Default	Name	SKU	Default Quantity	User Defined
<input checked="" type="checkbox"/>	Ooty Varkey	Ooty Varkey	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Tirunelveli Halwa	Tirunelveli Halwa	<input type="text"/>	<input type="checkbox"/>

(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

The image shows the Magestore Admin Catalog interface. The main area displays a list of products with columns for Actions, ID, Thumbnail, Name, Type, Attribute Set, SKU, Price, Quantity, Visibility, and Status. A search bar and filter options are at the top. On the right, there's an 'Add Product' dropdown menu with several options: Simple Product, Configurable Product, Grouped Product, Virtual Product, Bundle Product (which is highlighted with a red box), Downloadable Product, and Custom Sale.

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

Attribute Set Default

Product Name *	[store view]	<input type="text"/>	<input type="button" value="Search"/>
SKU *	[global]	Bag	
Price *	[website]	Bottom	
		Default	
		Downloadable	
		Gear	

Choose **Downloadable** as the attribute set

← Back Add Attribute **Save** ▾

Enable Product [website] Yes

Attribute Set Default

Product Name * [store view] **1**

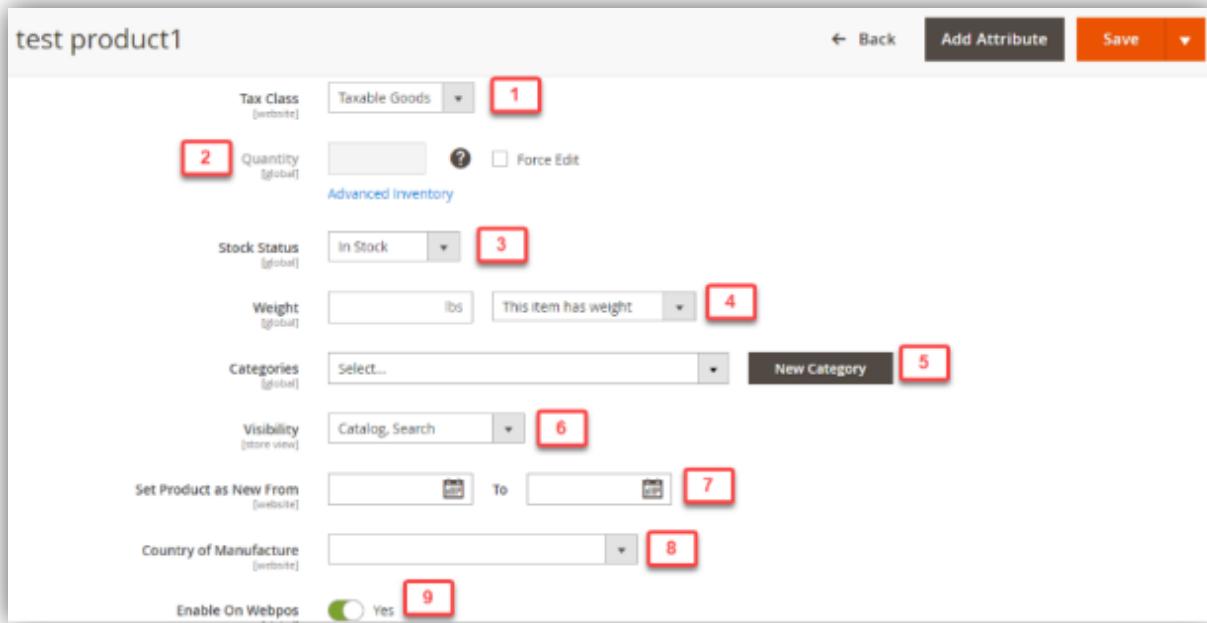
SKU * [global] **2**

Price * [website] **3**

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.

Is this downloadable Product? **1**

Links

Title [store view] **2**

(global) Links can be purchased separately

Title	Price	File	Sample	Shareable	Max. Downloads
Add Link					

Alphanumeric, dash and underscore characters are recommended for filenames. Improper characters are replaced with '_'.
Samples

Title [store view] **4**

Title	File
Add Link	

5

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 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.

Samples

Title [store view] **1**

Title	File
2	3

4

Add Link

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.

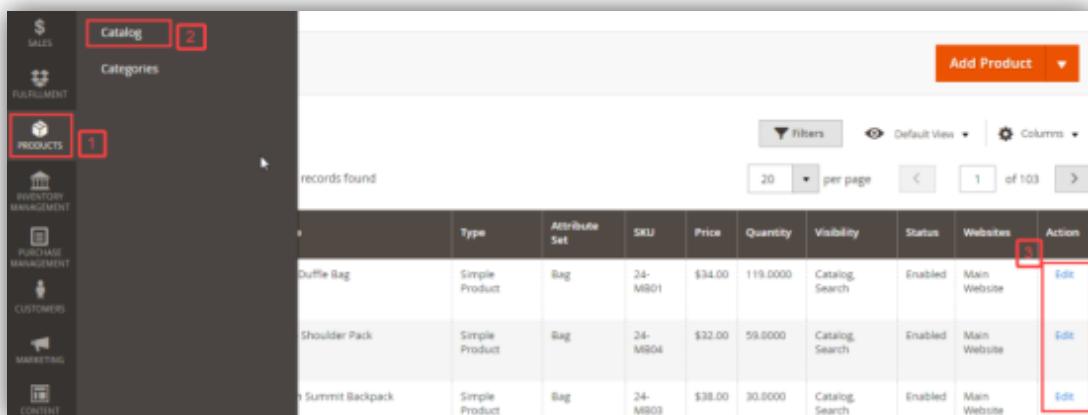
When complete, click **Save**.

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

Complete the product information

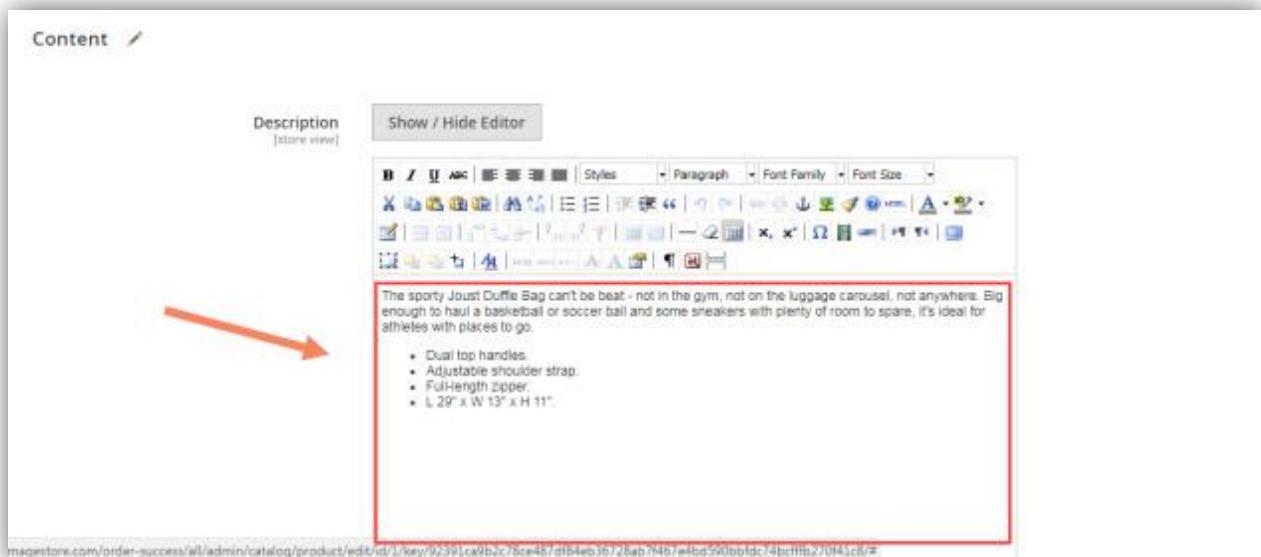
4.1.4.4. Product Setting

a. Content



	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites	Action
Duffle Bag	Simple Product	Bag	24-MB01	\$34.00	119.0000	Catalog, Search	Enabled	Main Website	Edit
Shoulder Pack	Simple Product	Bag	24-MB04	\$32.00	59.0000	Catalog, Search	Enabled	Main Website	Edit
Summit Backpack	Simple Product	Bag	24-MB03	\$38.00	30.0000	Catalog, Search	Enabled	Main Website	Edit

- (1) Click on **Products**
- (2) Click on **Catalog**
- (3) Click on **Edit**

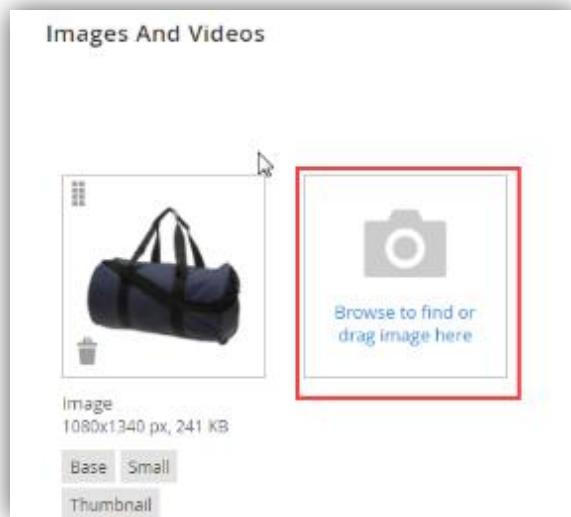


Scroll down to **Content**, and click on , then write the description for the product, and the click **Save** on top right of the screen

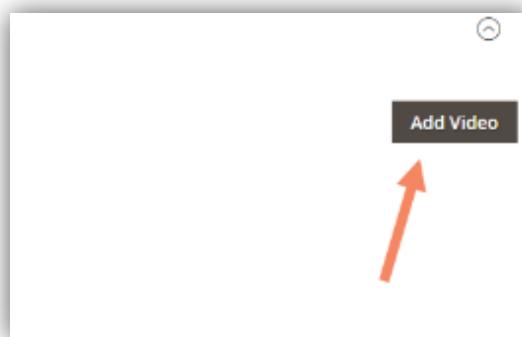
b. Images and Videos

Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites	Action
Duffle Bag	Simple Product	Bag	24-MB01	\$34.00	119.0000	Catalog, Search	Enabled	Main Website	Edit
Shoulder Pack	Simple Product	Bag	24-MB04	\$32.00	59.0000	Catalog, Search	Enabled	Main Website	Edit
Un Summit Backpack	Simple Product	Bag	24-MB03	\$38.00	30.0000	Catalog, Search	Enabled	Main Website	Edit

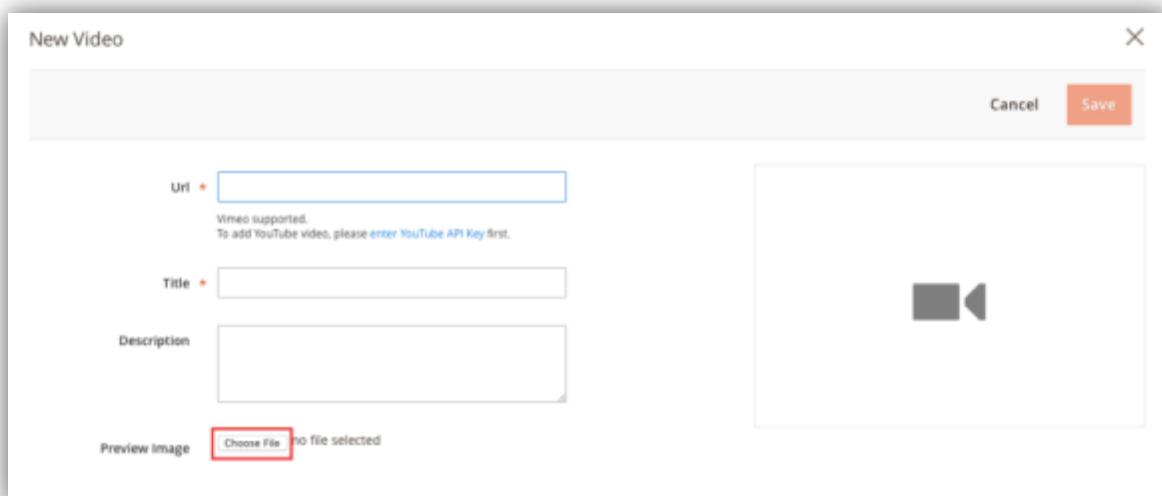
- (1) Click on **products**
- (2) Click on **catalog**
- (3) Click on **edit** of product



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

Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites	Action
Duffle Bag	Simple Product	Bag	24-MB01	\$34.00	119.0000	Catalog, Search	Enabled	Main Website	3 Edit
Shoulder Pack	Simple Product	Bag	24-MB04	\$32.00	59.0000	Catalog, Search	Enabled	Main Website	3 Edit
Summit Backpack	Simple Product	Bag	24-MB03	\$38.00	30.0000	Catalog, Search	Enabled	Main Website	3 Edit

- (1) Click on **Products**
- (2) Click on **Catalog**
- (3) Click on **Edit** of product

Search Engine Optimization

URL Key
[Store View]

Create Permanent Redirect for old URL

Meta Title
[Store View]

Meta Keywords
[Store View]

Meta Description
[Store View]

Maximum 255 chars. Meta Description should optimally be between 150-160 characters

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

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

Related Products, Up-Sells, and Cross-Sells

Related Products
Related products are shown to customers in addition to the item the customer is looking at.

Up-Sell Products
An up-sell item is offered to the customer as a pricer or higher-quality alternative to the product the customer is looking at.

Cross-Sell Products
These "impulse-buy" products appear next to the shopping cart as cross-sells to the items already in the shopping cart.

1 Add Up-Sell Products

Add Related Products

Add Cross-Sell Products

Click on respectively

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

Add Related Products

Cancel **Add Selected Products**

2059 records found per page of 103

3

ID	Thumbnail	Name	Attribute Set	Status	Type	SKU	Price
2		Strive Shoulder Pack	Bag	Enabled	Simple Product	24-MB04	\$32.00
3		Crown Summit Backpack	Bag	Enabled	Simple Product	24-MB03	\$38.00

- (2) Mark the checkbox to select products
- (3) Click on Add Selected Product

Joust Duffle Bag

Related Products
Related products are shown to customers in addition to the item the customer is looking at.

ID	Thumbnail	Name	Status	Attribute Set	SKU	Price	Actions
15		Affirm Water Bottle	Enabled	Gear	24-UG06	\$7.00	<input type="button" value="Remove"/>

Up-Sell Products
An up-sell item is offered to the customer as a pricier or higher-quality alternative to the product the customer is looking at.

Cross-Sell Products
These "impulse-buy" products appear next to the shopping cart as cross-sells to the items already in the shopping cart.

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

f. Customizable Options

The screenshot shows the 'Customizable Options' section. At the top right are 'Import Options' and 'Add Option' buttons. A red box labeled '1' points to the 'Add Option' button. Below is a table for the 'Warranty' option:

Option Title	Option Type	Required	
Warranty	Radio Buttons	<input checked="" type="checkbox"/>	
Title: 6 Price: 7 Price Type: 8 SKU: 9			
Warranty included	\$ 25	Percent: Fixed	HLC800-WI
Warranty excluded	\$ 0	Fixed	HLC800-WE
Add Value 5			

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 title**
- (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

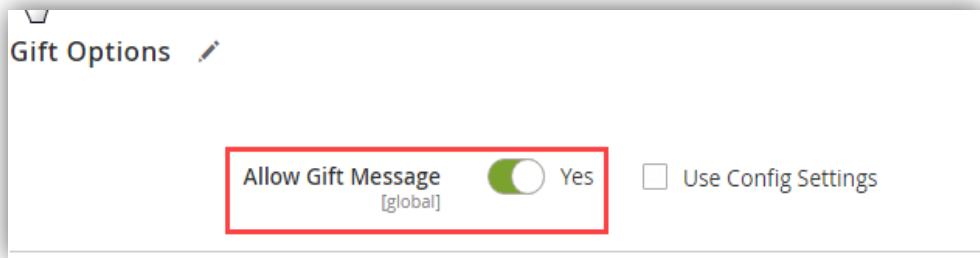
To remove a value, click on the right hand-side of the column

g. Gift Option

The screenshot shows the product catalog interface. The left sidebar has 'SALES' (Catalog, Categories), 'FULFILLMENT' (Products, Inventory Management, Purchase Management), 'CUSTOMERS' (Marketing, Content). A red box labeled '1' is over the 'Products' icon. Another red box labeled '2' is over the 'Catalog' button. The main area shows a table of products:

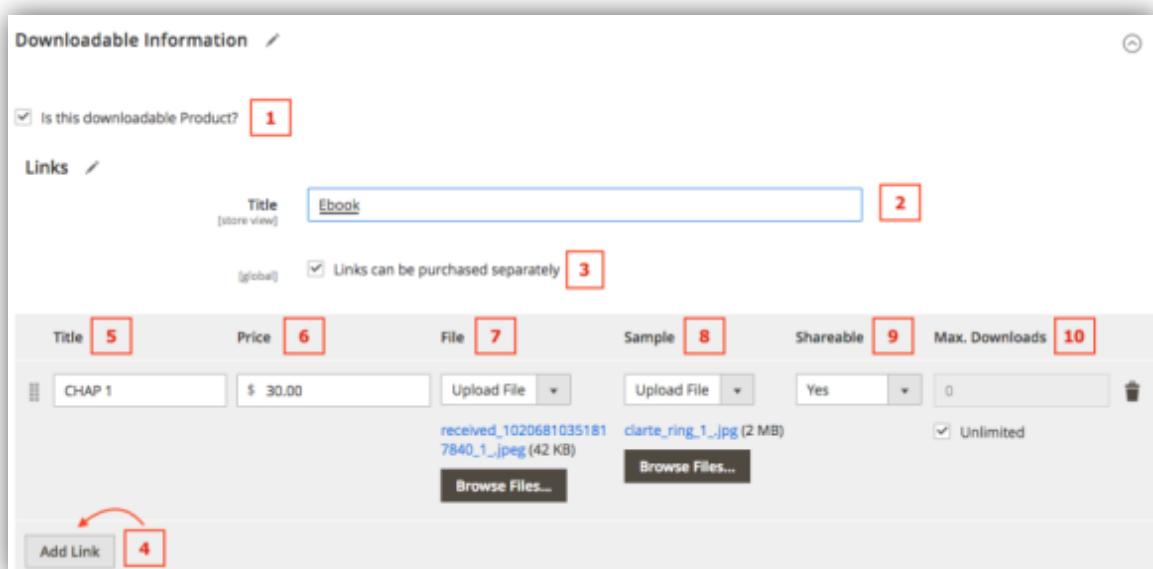
	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites	Action
Duffle Bag	Simple Product	Bag	24-MB01	\$34.00	119.0000	Catalog, Search	Enabled	Main Website	Edit 3
Shoulder Pack	Simple Product	Bag	24-MB04	\$32.00	59.0000	Catalog, Search	Enabled	Main Website	Edit
Summit Backpack	Simple Product	Bag	24-MB03	\$38.00	30.0000	Catalog, Search	Enabled	Main Website	Edit

- (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 message to **Yes**

h. Downloadable Information

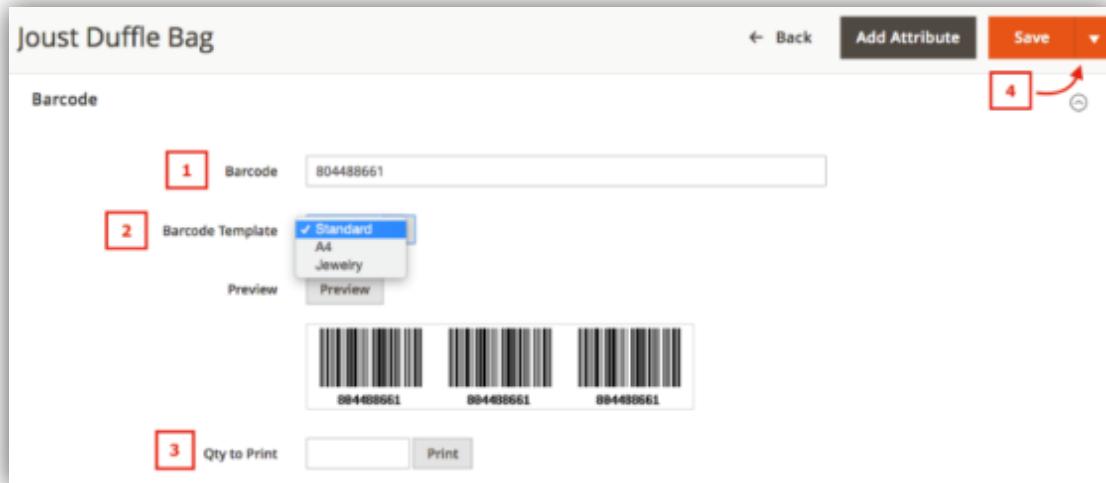


- (1) Mark the checkbox
- (2) Enter a title for the download link
- (3) Mark the checkbox (if applicable)
- (4) Click “**Add Link**”, then do the following:
 - (5) Enter a title for the download
 - (6) Enter a number as a price for the download
 - (7) Select an upload method for a file (**Upload File/ 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

Suppliers					
Supplier Id	Supplier Name	Supplier SKU	Cost	Tax	Actions
					1

Add Supplier			
<input type="button" value="Add Selected Supplier"/> 3			
Filters Default View Columns			
14 records found (7 selected)			
Supplier Code	Contact Name	Contact Email	
<input checked="" type="checkbox"/> SA1654	sa1654-supplier	michael@magestore.com	
<input checked="" type="checkbox"/> demo supplier	Demo	demo@magestore.com	

- (1) Click on **Add Supplier**
- (2) Mark the checkbox to select suppliers
- (3) Click on **Add Selected Supplier**

Supplier Id	Supplier Name	Supplier SKU	Cost	Tax	Actions
1	SA1654	BAT-MB01	7.0000	0	Remove
2	demo supplier	HLC-750	8.0000	0	Remove

- (4) Enter the **Supplier SKU, Cost, Tax**
- (5) Click **Save** to finish

4.2. Customer

Path: **Customers > All customers**

4.2.1. Manage Customer

ID	Name	Email	Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed Email	Account Created In	Date of Birth	Tax VAT Number	Gender	Action
1	Veronica Castillo	rani_cost@example.com	General	(555) 329-3326	49628-7978	United States	Michigan	Nov 14, 2016 7:15:09 AM	Main Website	Confirmation Not Required	Default Store View	Dec 15, 1975		Female	Edit
2	Winnie Luk	test@gmail.com	General	27583736		Hong Kong SAR China		Oct 8, 2016 9:38:15 AM	Main Website	Confirmation Not Required	Default Store View			Edit	

- (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

The screenshot shows the 'Customers' grid in the Magento Admin. A red arrow points to the 'Add New Customer' button in the top right corner of the grid area.

Click Add New Customer.

The screenshot shows the 'Add New Customer' form with fields numbered 1 through 5:

- 1** Associate to Website * Main Website ▾
- 2** Group * General ▾
 Disable Automatic Group Change Based on VAT ID
- 3** First Name *
- 4** Middle Name/Initial
- 5** Last Name *
- Suffix
- Email * @email:
- Date of Birth
- Tax/VAT Number
- Gender
- Send Welcome Email From Default Store View ▾

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

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

New Customer

Back Reset Save and Continue Edit **Save Customer**

CUSTOMER INFORMATION

Account Information

Associate to Website: Main Website

Group: General

Disable Automatic Group Change Based on VAT ID

Prefix:

First Name: Quincy

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**

Location

Add Location

Filters Default View Export Columns

Actions 3 records found 20 per page 1 of 1

ID	Description	Address	Location Name	Action
4	Store 1	170 Lê Thành ,Hà Nội	Emi test	Edit
3	Store 2	tester	test location	Edit
1	Store Address	Store Address	Store Address	Edit

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

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

The screenshot shows a 'Location Information' form with the following fields:

- General Information** (selected tab)
- Location Name**: Chen Location 1 (Field 1)
- Address**: 77 Huynh Thuc Khang (Field 2)
- Description**: Chen Campus Location (Field 3)
- Warehouse**: Chen Campus (JC750) (Field 4)

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

The screenshot shows a table titled 'POS' with the following columns:

	ID	Name	Location	Store View	Current Staff	Status	Action
<input type="checkbox"/>	1	Store POS	Primary Store	Main Website Main Website Store Default Store View		Enabled	Detail

Actions: 2 records found. 20 per page. 1 of 1.

Click **Add POS**

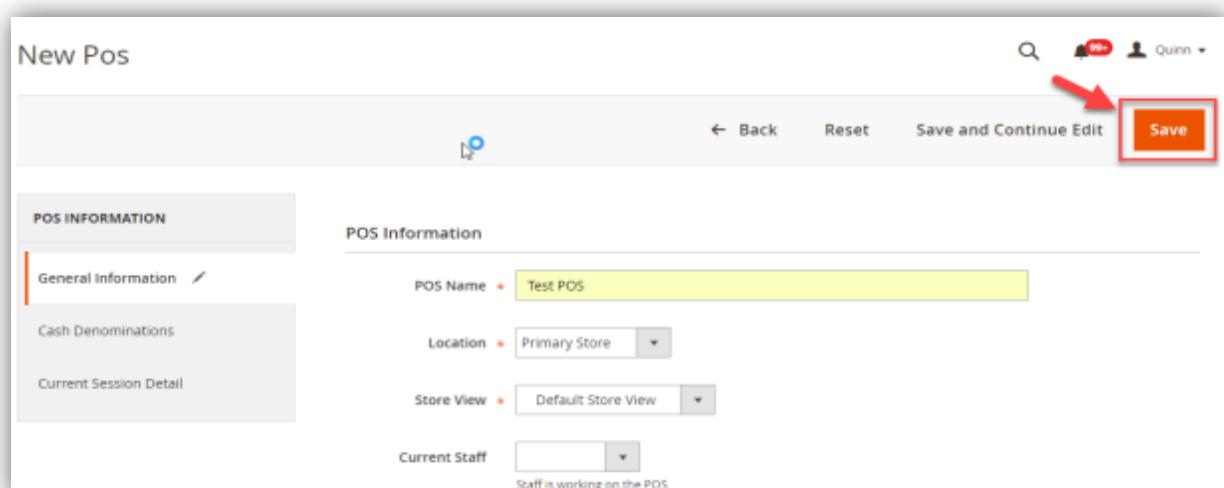
POS Information

1	POS Name *	<input type="text"/>
2	Location *	Primary Store <input type="button" value="▼"/>
3	Store View *	Default Store View <input type="button" value="▼"/>
4	Current Staff	<input type="button" value="▼"/> Staff is working on the POS
5	Status	Enabled <input type="button" value="▼"/>
Available for Other Staff		<input type="checkbox"/> When checked: another staff can use the POS when it is available.

Fill out or select all the required fields.

- (1) **POS Name:** POS's name. (required)
- (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.

New Pos



The screenshot shows the 'New Pos' form in the Magestore Admin Panel. The 'Save' button at the top right is highlighted with a red box and an arrow pointing to it. The form contains sections for 'POS INFORMATION' and 'POS Information'. The 'POS INFORMATION' section includes 'General Information' (with 'Test POS' selected), 'Cash Denominations', and 'Current Session Detail'. The 'POS Information' section includes fields for 'POS Name' (Test POS), 'Location' (Primary Store), 'Store View' (Default Store View), and 'Current Staff' (with a note: 'Staff is working on the POS').

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**

The screenshot shows a table of POS records. A red box labeled '1' highlights the 'Add POS' button. A red box labeled '2' highlights the 'Filters' button. A red box labeled '3' highlights the 'Actions' dropdown menu. A red box labeled '4' highlights the 'Detail' link in the 'Action' column of the first record.

	ID	Name	Location	Store View	Current Staff	Status	Action
<input type="checkbox"/>	1	Store POS	Primary Store	Main Website Main Website Store Default Store View		Enabled	Detail

- (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.

SKU	Name	Price	Qty in Warehouse(s)	Qty to Ship	Available Qty	Shelf Location	Status
24-MB01	joust Duffle Bag	\$34.00	23.0000	10	10		Enabled
24-MB04	Strive Shoulder Pack	\$32.00	76.0000	1	75		Enabled
24-MB03	Crown Summit Backpack	\$38.00	66.0000	8	58		Enabled

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.

Non-Warehouse Products						
Actions		SKU			Name	Qty
		ID	SKU	Name	Qty	Add to Warehouse
<input checked="" type="checkbox"/>	2110	Ltr Test	Ltr Test	25.5000		Click here to add products to warehouse
	1					View Product

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:

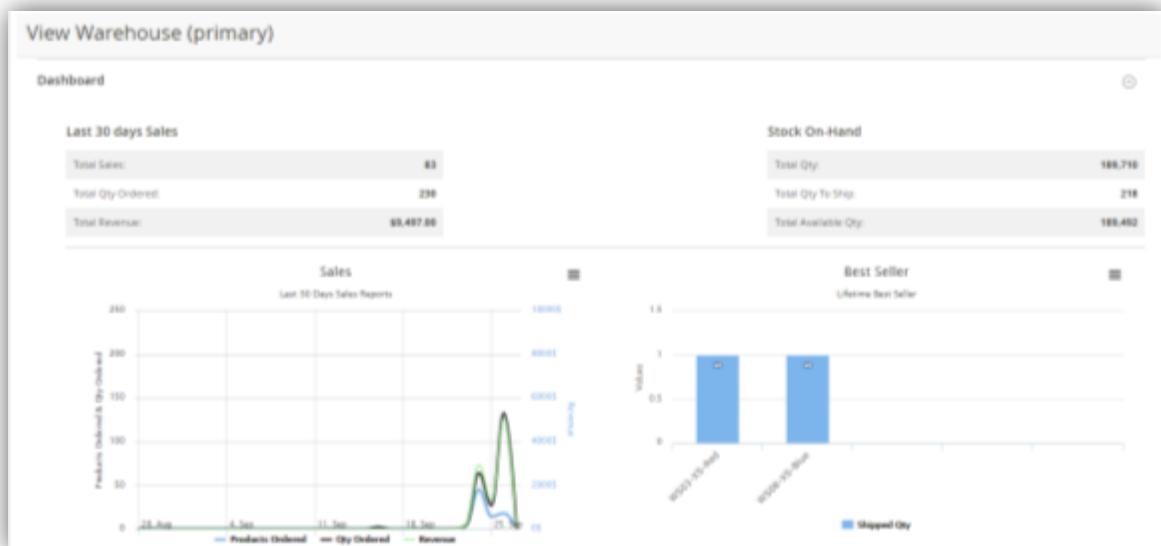
View Warehouse (primary)	
General Information	1
Stock On-Hand	2
Stock Movement	3
Orders	4
Warehouse Permissions	5
Dashboard	6

[Click here to see detail information](#) 

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

View Warehouse (primary)

Warehouse Permissions

User ID	Staff	Warehouse Roles	Actions
7	Mike	Accountant	Remove
4	super	Administrators	Remove

Save Staff Permissions **Assign Staffs**

1 of 1

- (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:

ID	Staff	Role
<input checked="" type="checkbox"/> 12	test	
<input checked="" type="checkbox"/> 9	aaron	Aaron
<input type="checkbox"/> 1	admin	admin

11 records found (3 selected)

20 per page 1 of 1

Cancel **Add Selected Staff**

2 Filters 3 Default View Columns

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**

Warehouse Permissions

User ID	Staff	Warehouse Roles	Actions
11	chen	Administrators	Remove
6	superdemo	Administrators	Remove

4 Save Staff Permissions Assign Staffs

1 of 1

- (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

The screenshot shows the 'Configuration' screen in the Magestore Admin Panel. On the left, there's a sidebar with 'MAGESTORE' and 'Inventory Management Configuration' selected. The main area is titled 'Stock Control Configuration'. It contains two dropdown menus: one for 'Link stocks in Warehouse to Front Store View' (set to 'Yes') and another for 'Adjust Stock by entering the change qty' (set to 'No'). Both dropdowns have explanatory text below them. A red box highlights the first dropdown.

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.

The screenshot shows the 'View Warehouse (primary)' form. It includes fields for Street, City, Country (United States), Region (Ohio), and Zip/Postal Code (32223). Below these, there's a dropdown for 'Magento Store View' which is currently set to 'Main Website Main Website Store Default Store View'. This dropdown is highlighted with a yellow box.

b. Add new Stock Adjustment

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

The screenshot shows the 'Add New Adjustment' page. At the top right are icons for search, notifications (12), user, and dropdown. Below is a header 'Add New Adjustment'. A red box labeled '4' highlights the 'Start Adjust Stock' button. The main area is titled 'General Information' with three fields: 'Warehouse' (Primary Warehouse(primary)), 'Adjustment Code' (ADJ00000312), and 'Reason' (empty). To the right is a circular refresh icon.

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**.

The screenshot shows the 'Edit Adjustment "ADJ00000313"' page. At the top right are icons for search, notifications (1), user, and dropdown. Below is a header 'Edit Adjustment "ADJ00000313"'. A red box labeled '2' highlights the 'Save' button. A yellow bar at the top says 'The adjustment has been saved.' A red box labeled '1' highlights the 'Add Products to Adjust Stock' button. The page also includes sections for 'Product List' (with a note to add products) and 'General Information'.

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.

The screenshot shows the 'Edit Adjustment' page with the ID 'ADJ00000006'. A yellow success message at the top states: 'The adjustment has been confirmed.' Below this, the following details are listed:

Warehouse	Primary Warehouse(primary)
Adjustment Code	ADJ00000006
Status	Completed
Created By	demo
Created At	2016-09-13
Adjusted By	demo

Stock level will be updated instantly in the corresponding warehouse.

c. View Stock Adjustment History

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

The screenshot shows the 'Manage Stock Adjustments' page with 88 records found. The table includes columns for ID, Adjustment Code, Created on, Created By, Warehouse, Status, and Action. The first three rows of data are:

ID	Adjustment Code	Created on	Created By	Warehouse	Status	Action
111	Adj00000313	10/23/2017	super	Primary Warehouse (primary)	Pending	View
110	Adj00000303	10/06/2017	super	Primary Warehouse (primary)	Completed	View
109	Adj00000299	10/06/2017	super	Primary Warehouse (primary)	Completed	View

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**.

Edit Adjustment "ADJ00000006"

← Back Export Products

Adjusted By	demo
Reason	Test

1 of 1

ID	Name	SKU	Old Qty	Adjust Qty
3	Crown Summit Backpack	24-MB03	100	5
2	Strive Shoulder Pack	24-MB04	100	4
1	Joust Duffle Bag	24-MB01	0	2

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**

Add New Stocktaking

General Information

Warehouse: Primary Warehouse(primary)

Stocktaking Code: STA00000241

Participants: [empty]

Stocktaking Time: [empty]

Reason: [empty]

Prepare Product List Start stocktake

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**

The screenshot shows the 'Add New Stocktaking' interface. At the top, a progress bar indicates Step 1 (General Information) is selected. Below the progress bar, there are five fields: Warehouse (Primary Warehouse(primary)), Stocktaking Code (STA00000241), Participants (empty), Stocktaking Time (empty), and Reason (empty). A red box labeled '1' highlights the 'Reason' field. At the top right, there are two buttons: 'Prepare Product List' (red) and 'Start stocktake' (orange).

- (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**

The screenshot shows the 'Edit Stocktaking' interface for 'STA00000243'. The progress bar shows Step 2 (Prepare Products) is selected. A green message bar at the top states 'The stocktaking has been saved.' Below it, a product list table is shown with one item: 'EE Test' (ID: 2100, SKU: EE Test 1). A red box labeled '2' highlights the 'EE Test' entry. At the top right, there are three buttons: 'Export Products' (red), 'Start stocktake' (orange), and 'Save' (orange). A red box labeled '1' highlights the 'Add Products to Stocktake' button.

- (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**

The screenshot shows the 'Edit Stocktaking' interface with the title 'Edit Stocktaking "STA00000243"'. At the top, there is a progress bar with five steps: General Information, Prepare Products, Stocktake, Complete Data Entry, and Complete Stocktake. The 'Stocktake' step is currently active. Below the progress bar, a green success message says 'The stocktaking has been saved.' On the left, there is a 'Product List' section with a message 'Please add or import products to stocktake'. Two buttons are available: 'Add products to count' and 'Import products to count'. On the right, there is a table showing a single product entry. The table has columns for ID, Name, SKU, Counted Qty, Reason of discrepancy, and Actions. The product details are: ID 2100, Name EE Test, SKU EE Test 1, Counted Qty 0, and Reason of discrepancy empty. The 'Counted Qty' cell is highlighted with a red box. The 'Actions' column contains a 'Remove' link. At the bottom right, there is a page number '1 of 1'.

- (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.

The screenshot shows the 'Edit Stocktaking' interface with the title 'Edit Stocktaking "STA00000243"'. The progress bar shows the 'Complete Data Entry' step is active. A green success message says 'The stocktaking has been saved.' On the left, there is a 'Product List' section. On the right, there is a table showing a single product entry. The table has columns for ID, Name, SKU, Counted Qty, and Reason of discrepancy. The product details are: ID 2100, Name EE Test, SKU EE Test 1, Counted Qty 0, and Reason of discrepancy empty. The 'Counted Qty' cell is highlighted with a red box. At the bottom right, there is a page number '1 of 1'.

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**.

The screenshot shows the 'Edit Stocktaking' interface for stock code 'STA00000243'. At the top, a progress bar indicates the process is complete. Below it, a yellow banner says 'The stocktaking has been completed.' The form contains the following data:

Warehouse	*	Primary Warehouse(primary)
Stocktaking Code	*	STA00000243
Participants		
Stocktaking Time		
Status	Completed	
Created By	super	
Created At	10/23/2017	
Verified By	super	
Confirmed By	super	
Reason	*	test

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**

The screenshot shows the 'Manage Stocktaking' page with 33 records found. The table includes columns for ID, Stocktaking Code, Created on, Created By, Warehouse, Status, and Action. A red box labeled '2' highlights the 'Add Stocktaking' button. A red box labeled '1' highlights the 'Status' column for the first four records, which are all marked as 'Completed'.

ID	Stocktaking Code	Created on	Created By	Warehouse	Status	Action
34	STA00000243	10/23/2017	super	Primary Warehouse (primary)	Completed	View
33	STA00000241	10/23/2017	super	Primary Warehouse (primary)	Processing	View
32	STA00000231	10/06/2017	super	Primary Warehouse (primary)	Completed	View
31	STA00000219	10/06/2017	super	Primary Warehouse (primary)	Completed	View

- (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.

Qty	SKU	Type	Warehouse	Reference Number	Date
-1.0000	EE Test 1	Stock Adjustment	Primary Warehouse (primary)	ADJ00000303	2017-10-06 07:57:00
15.0000	EE Test 1	Stock Adjustment	Primary Warehouse (primary)	ADJ00000299	2017-10-06 07:50:36
2.0000	24-MB01	Stock Adjustment	Primary Warehouse (primary)	ADJ00000294	2017-10-06 07:49:09
5.0000	24-MB04	Stock Adjustment	Primary Warehouse (primary)	ADJ00000294	2017-10-06 07:49:09

- (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.

Select criteria to forecast supply needs

Warehouse(s) * Primary Warehouse

Sales Period * Last 7 days

Forecast Supply Needs To *

Show Supply Needs

- (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:

Supply Needs

Show Supply Needs

Select criteria to forecast supply needs

ID	Name	SKU	Qty. Sold/day	Total Sold	Current Qty	Availability Date	Supply Needs
From			From	From	From	From	From
To			To	To	To	To	To
2109	Emily_Test	Emily_Test_1	0.01	1	23	Aug 10, 2023	0
1483	Minerva LumaTech™ V-Tee-XS-Blue	WS08-XS-Blue	0.01	1	99	Oct 1, 2042	0

Search Reset Filter 8 records found

Export to: CSV Export

20 per page 1 of 1

- (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.

ID	Rule	Description	Start	End	Apply	Status	Action
3	Emily test				Yes	Active	Edit
2	High level low stock notifications	High level low stock notifications			No	Inactive	Edit
1	Normal level low stock notifications	Normal level low stock notifications			No	Inactive	Edit

- (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:

The screenshot shows the 'Rule Information' tab with the following fields:

- Rule Name**: High level low stock (marked with a red box labeled 2)
- Description**: High level low stock notification (marked with a red box labeled 3)
- Status**: Active (marked with a red box labeled 4)
- From**: Calendar icon (marked with a red box labeled 5)
- To**: Calendar icon

- (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*)

The screenshot shows the 'Rule Information' tab with the following fields:

- Priority**: Input field (empty)
- Update time**: Daily (marked with a red box labeled 6)
- Select hours**: A dropdown menu showing hour options from 04:00 to 09:00, with 04:00 selected (marked with a red box labeled 7)

- (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:

If ALL of these conditions are TRUE :

Low Stock Threshold Type : Availability Days [12]

Threshold (days) : 5 [13]
Set low stock notification threshold per product by day to sell

Sales Period (days) : 1 [14]
History time range to get sale data

Notification Scope : Both of Warehouse and Global [15]

Warehouse(s) : Primary Warehouse [16]

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

If ALL of these conditions are TRUE :

Low Stock Threshold Type : Availability Qty [8]

Threshold (quantity) : 5 [9]
Set low stock notification threshold per product by product Qty

Notification Scope : Both of Warehouse and Global [10]

Warehouse(s) : Primary Warehouse [11]

Type 1: Availability Qty.

Availability Qty.: 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

Low Stock Threshold Type *

Availability Days 12

Threshold (days) *

13

Set low stock notification threshold per product by day to sell

Sales Period (days) *

14

History time range to get sale data

Notification Scope

Both of Warehouse and Global 15

Warehouse(s) *

Primary Warehouse
1235 California
1765 Tropicana
Utah's warehouse 16
Texas's Warehouse
Florida's warehouse

Type 2: Availability Days

Availability Days: 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

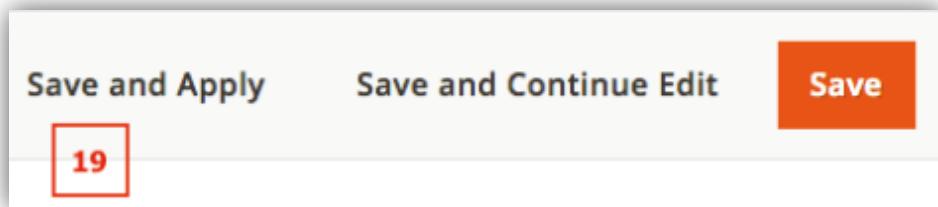
c. On Actions Tab:

Actions /

Notifier email list 17 chen750@gmail.com G

Warning Message 18 This is a warning message from Low Stock Notification Center,
Your XXX item is going to be out of stock in 5 days.
Please consider our notification and prepare your purchasing plan. G

- (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**

Manage Low Stock Notification Rules						
Apply Rule Add New Rule						
 <input type="button" value="Filters"/> Default View <input type="button" value="Columns"/> 						
2 records found						
ID	Rule	Description	Start	End	Apply	Status
2	High level low stock notifications	High level low stock notifications			No	Inactive
1	Normal level low stock notifications	Normal level low stock notifications			No	Inactive
<input type="button" value="Edit"/> <input type="button" value="View"/>						

5.1.3.3. Low Stock Notifications

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

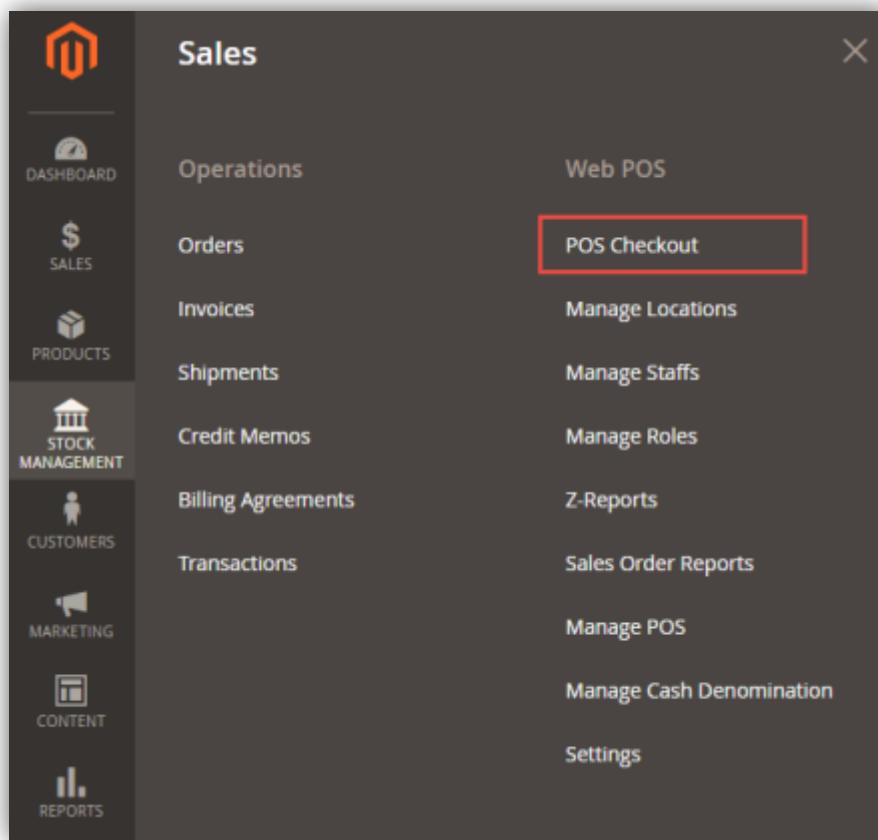
Notification log						
Apply Rule Add New Rule						
 <input type="button" value="Filters"/> Default View <input type="button" value="Columns"/> 						
13 records found						
ID	Created At	Update type	Warning Message	Notify to emails	Action	
13	Oct 23, 2017 10:21:29 AM	System			<input type="button" value="View"/>	
12	Oct 23, 2017 8:56:12 AM	System			<input type="button" value="View"/>	
11	Oct 23, 2017 6:53:17 AM	System			<input type="button" value="View"/>	
<input type="button" value="Edit"/> <input type="button" value="View"/>						

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.

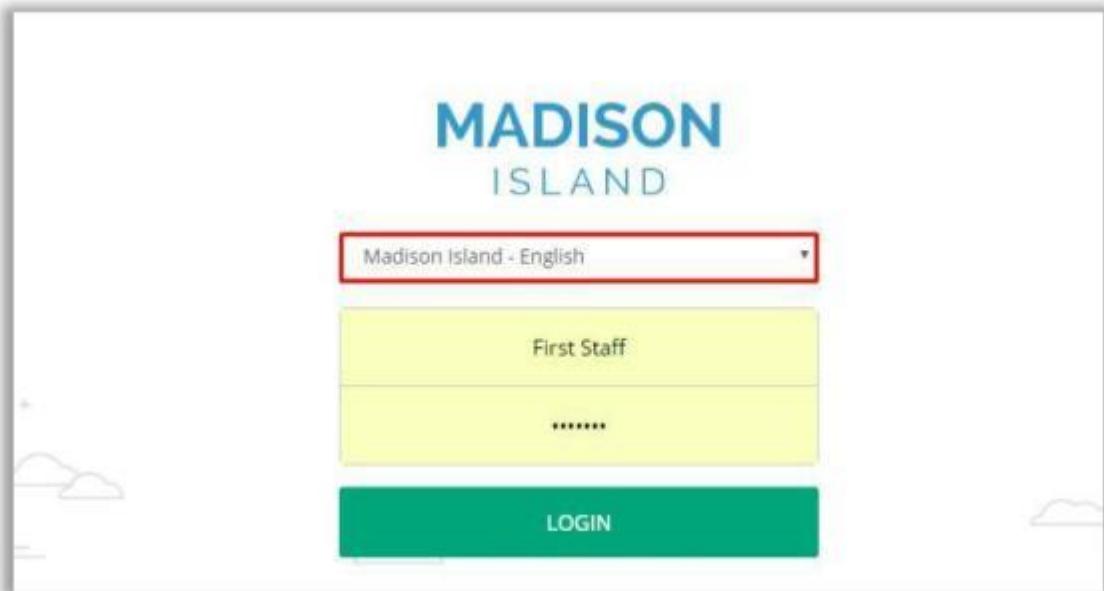
5.2. HOW TO USE WEB POS

5.2.1. How To Log In

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

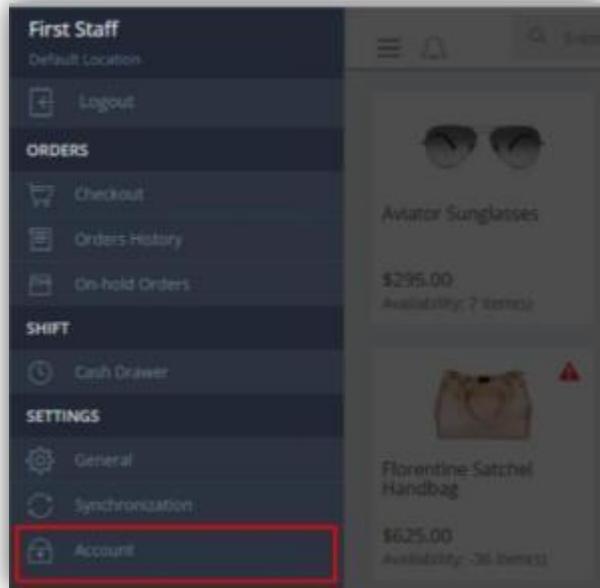


User get access from Web POS backend by going to **Sales > Web POS** section > **POS Checkout**



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**
MAGESTORE USER GUIDE



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

A screenshot of the 'Account Information' form. It has two main sections. The first section, 'Display name *', contains a label 'Display name *' and a text input field containing 'Staff 01'. The second section, 'Change Password', contains three input fields: 'Current Password *', 'New Password', and 'Confirmation'. A large red 'Save' button is located at the bottom right of the form.

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

Sync Data	
Last Updated	
Swatch Option	Tue Oct 24 2017 3:17:25 PM
Configuration	Tue Oct 24 2017 3:17:30 PM
Group	Tue Oct 24 2017 3:17:31 PM
Customer Complaints	Tue Oct 24 2017 3:17:31 PM
Update All	Update All
Reload All	Reload All

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**.

Settings		General
Checkout		
Catalog	Display out-of-stock products in search results	
Currency		
Store View		
POS Hub		

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.

Note: This function is available for online mode only

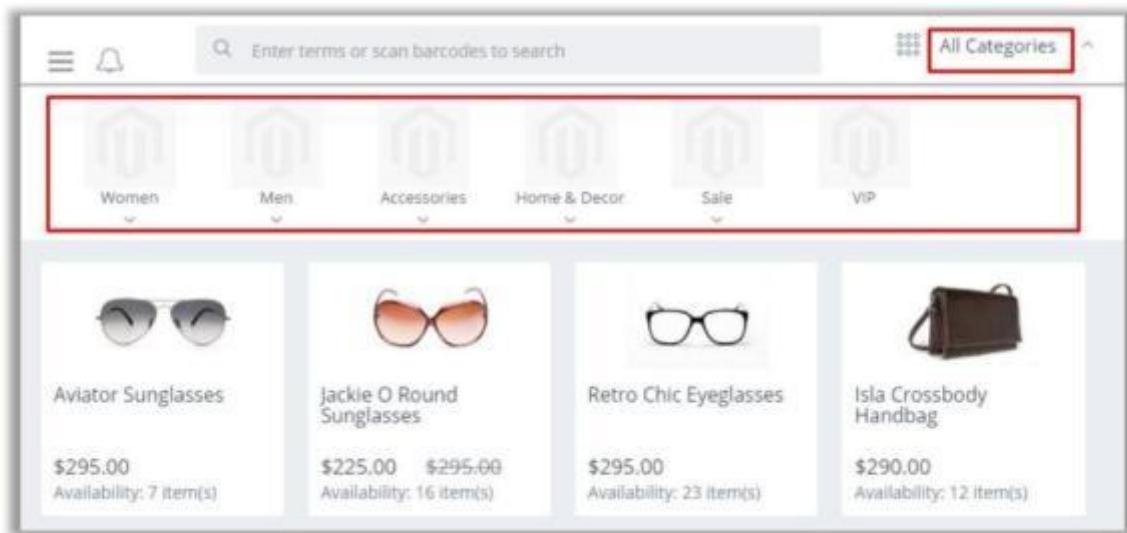
b. How To Search Product In Frontend

There are 3 ways that users can search products:

- Use Categories
- Use Products Attributes
- Use Barcode

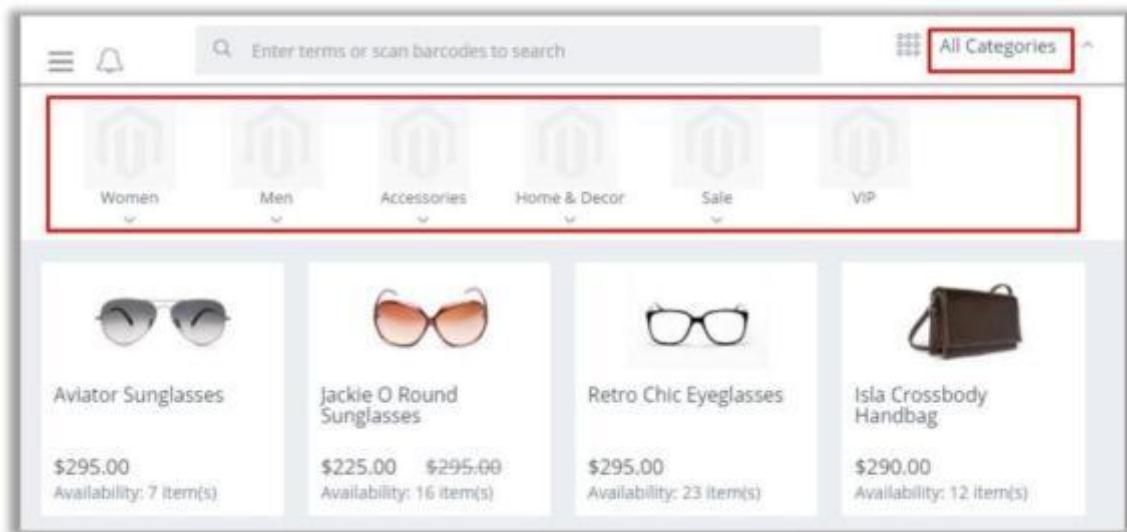
Use Categories

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.



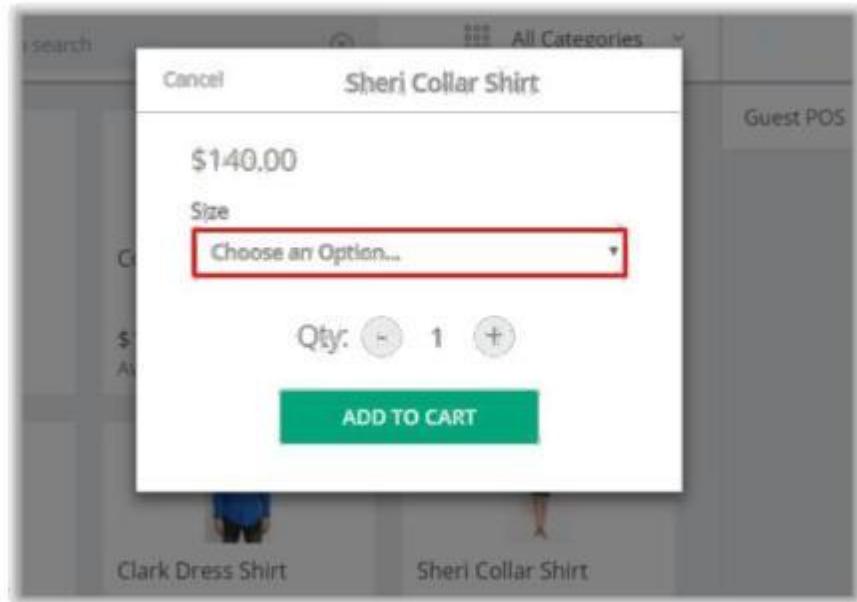
Use Barcode

- 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.

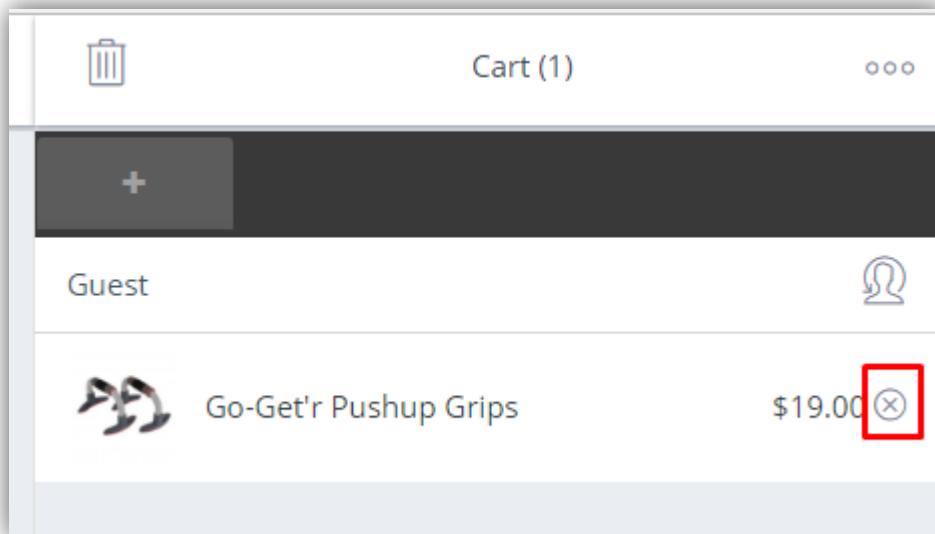


b. Edit Products In Cart

A screenshot of a shopping cart interface. The cart contains two items: 'Shay Printed Pillow' (\$210.00) and 'Carnegie Alpaca Throw' (\$550.00). A red arrow points from the quantity input field of the 'Carnegie Alpaca Throw' item to a larger inset dialog. This dialog shows a detailed view of the 'Carnegie Alpaca Throw' product, including its image, current quantity (2), and a field where the quantity can be edited. The quantity input field in the dialog is also highlighted with a red box. The cart summary at the bottom shows Subtotal \$760.00, Tax \$68.40, and Total \$828.40.

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

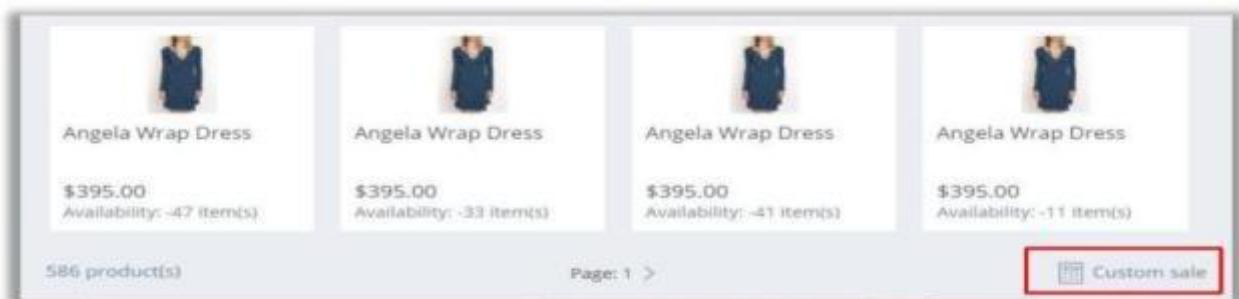


To remove products in cart one by one, click on “x” button of the corresponding product. After that, the cart will be updated immediately. Or you can click on the waste basket icon to clear cart.

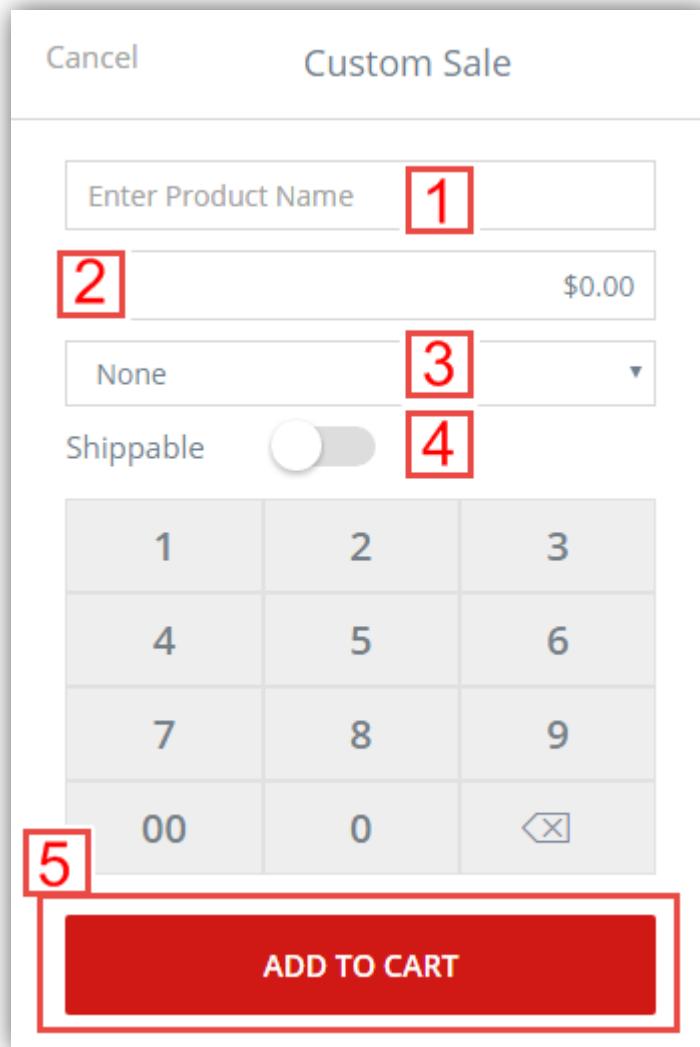
5.2.2.3. How To Add A Custom Sale Item To Cart

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



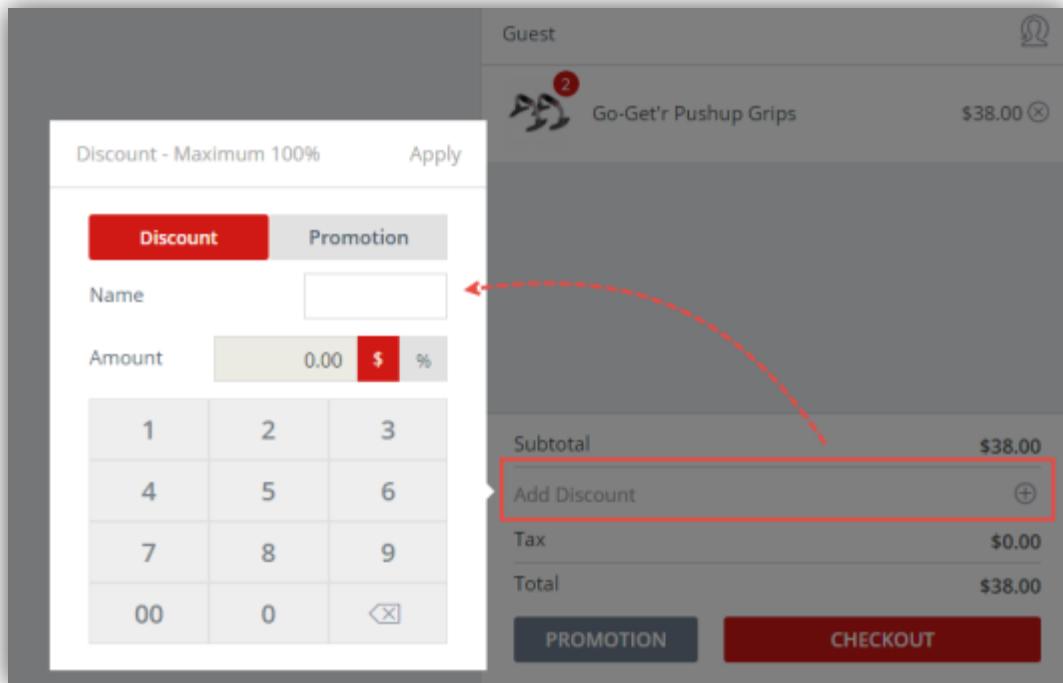
A screen will be shown for you to configure this custom product:



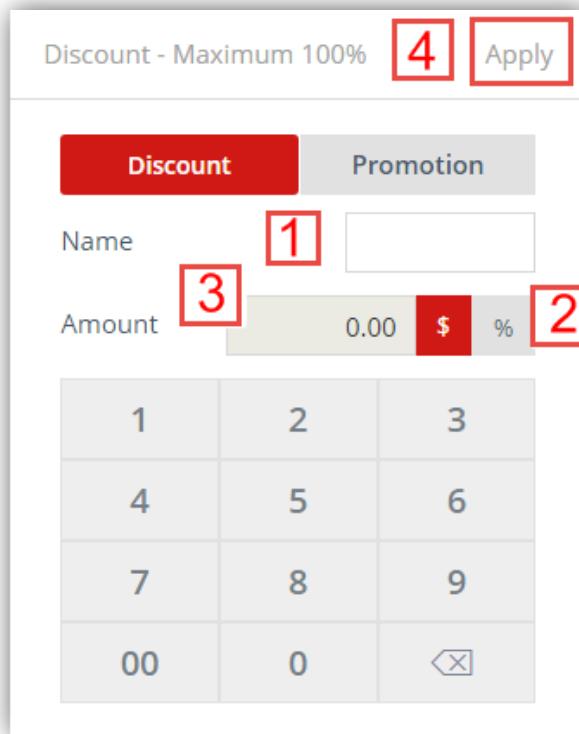
- (1) **Name:** Enter the name of custom sale product
- (2) **Price:** Enter the price of this product
- (3) **None/ Taxable goods:** Choose whether the product is subject to tax or not
- (4) **Shippable:** Choose whether the product will be shipped or not by turning on/off this option
- (5) After finishing 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**

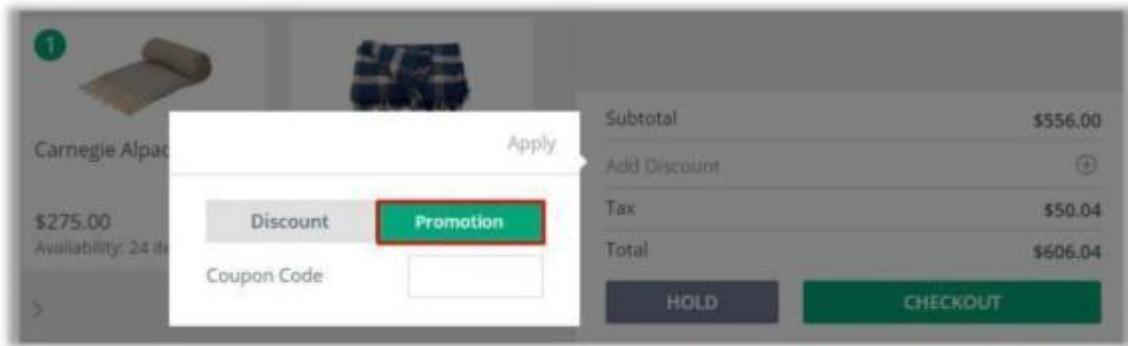
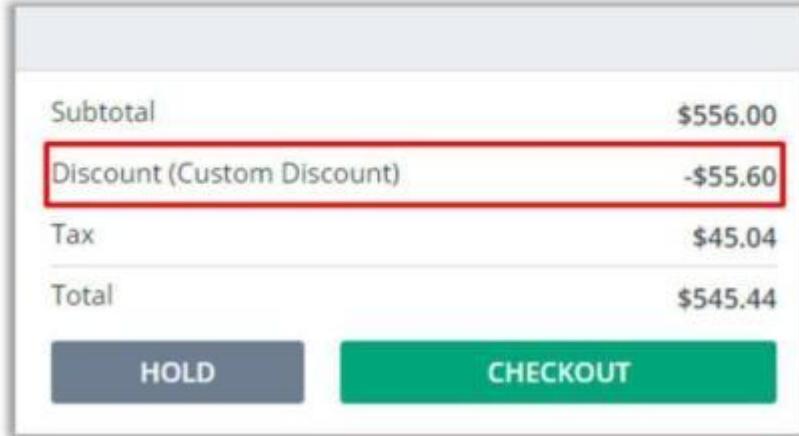


In Discount Tab:

- (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.

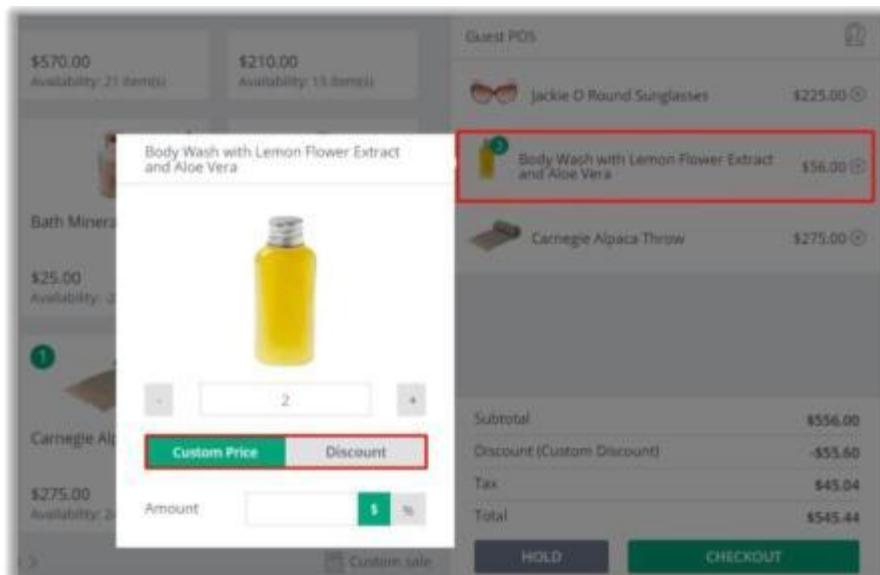
In Promotion Tab:

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

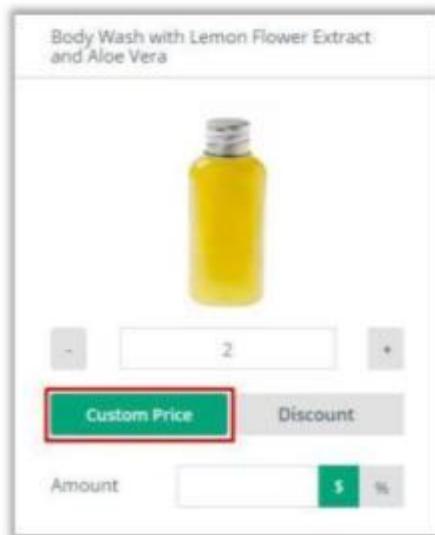



5.2.2.5. How To Apply Custom Discount Or Custom Price To A Product

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:



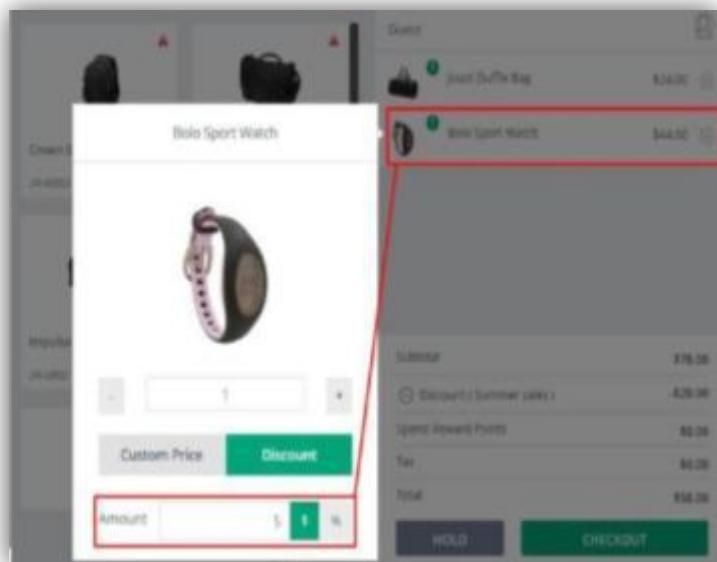
In this popup, please choose type you want to adjust for the price, either by a fixed number or percentage.

- 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.

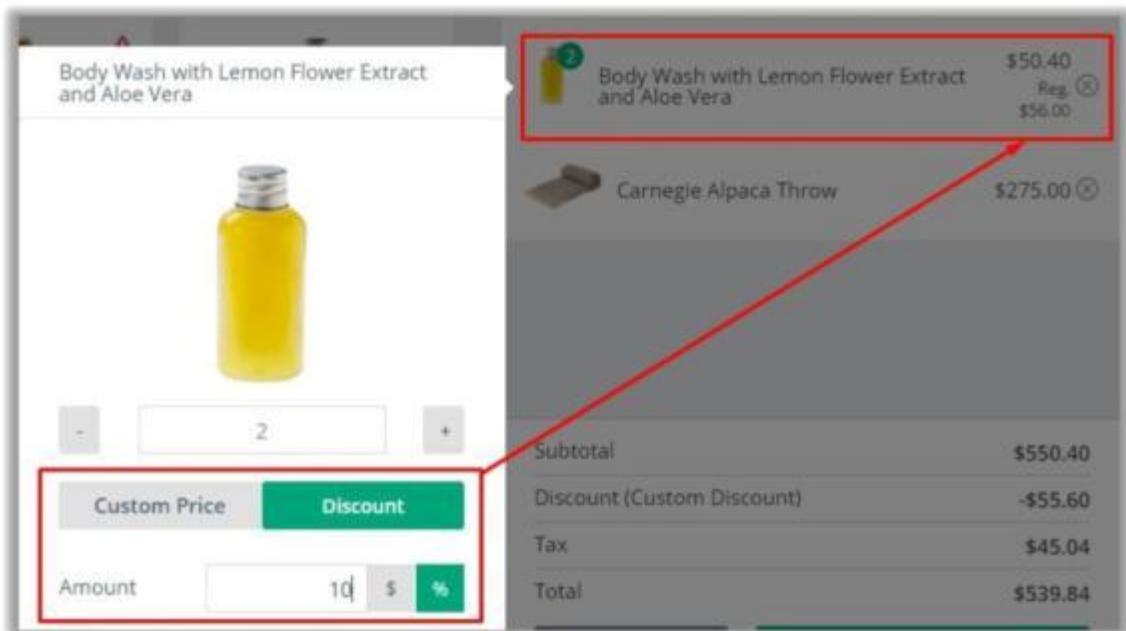
Subtotal	\$600.00
Discount (Custom Discount)	-\$55.60
Tax	\$45.04
Total	\$589.44

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 Customer 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.

New Customer

Cancel 5 Save

First Name 1 * Last Name *

Email 1 * Please choose group... *

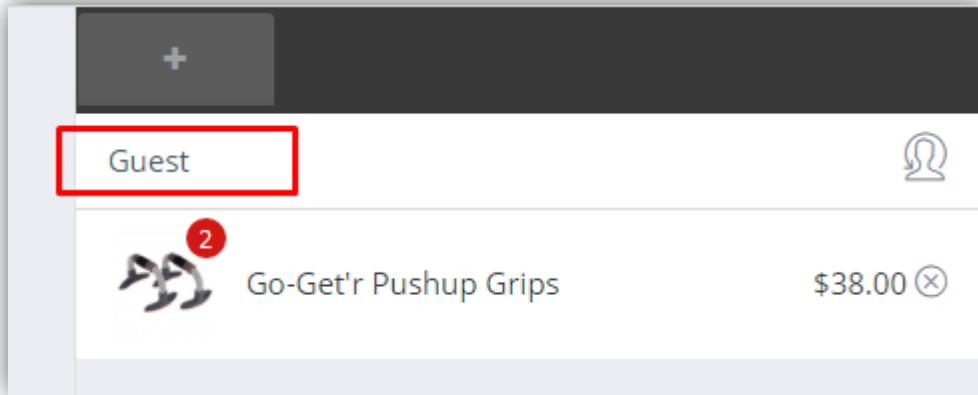
Subscribe Newsletter OFF ON 2

Shipping Address 3 +

Billing Address 4 +

- (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.

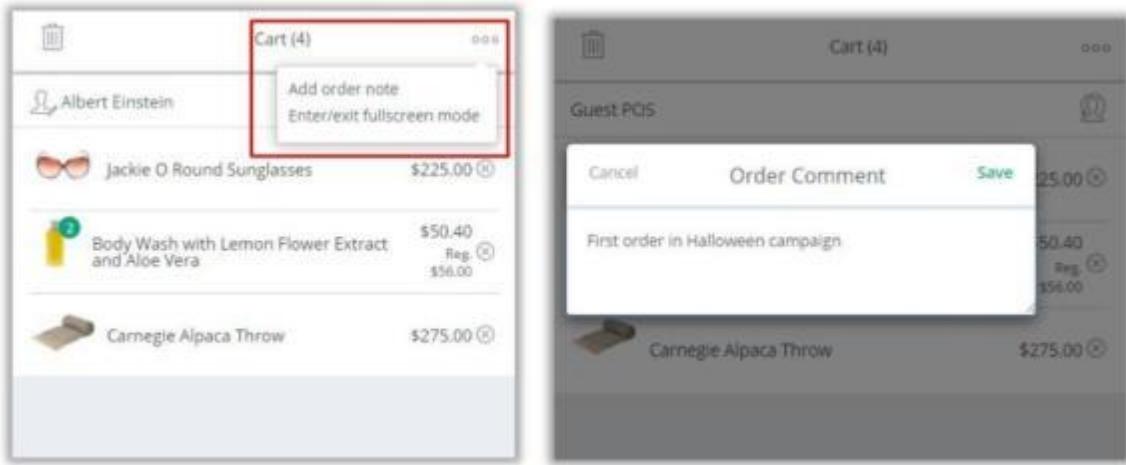
b. Guest Checkout



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.

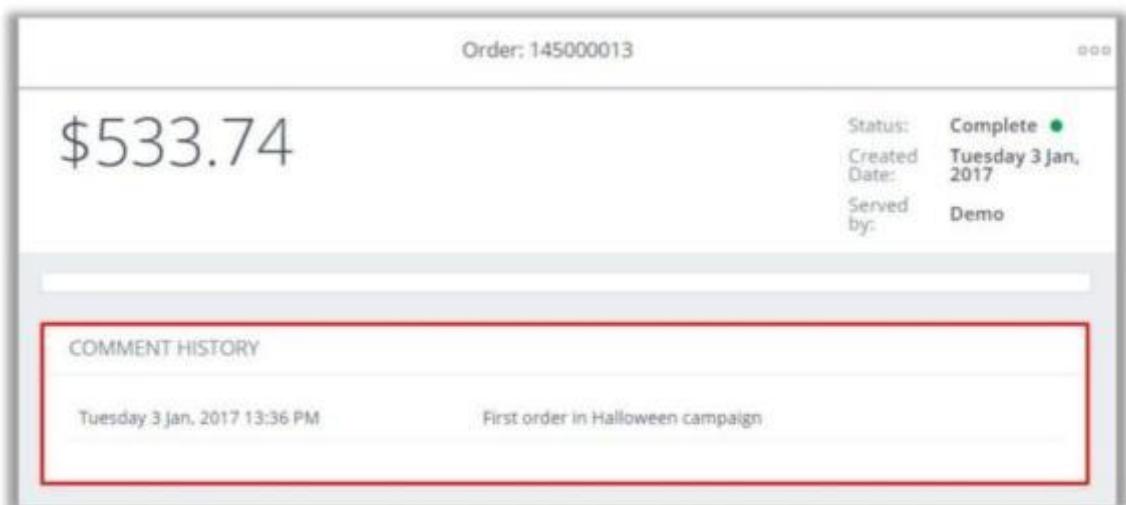


5.2.3.3. How To Check Order Comment

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 **Comments History** tab to check whether it has any notes or not.

#000000016

Oct 23, 2017 10:44:43 AM | Pending | Customer Notified
Oct 23, 2017 10:44:43 AM | Invoice #00000015 created

Notes for this Order

Customer wants delivery in the afternoon (2PM - 3PM)

ORDER VIEW

- Information
- Invoices
- Credit Memos
- Shipments
- Comments History
- Transactions

← Back Send Email Credit Memo Hold Ship Reorder

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.

Guest

Go-Get'r Pushup Grips \$38.00

Subtotal \$38.00

Add Discount

Shipping \$0.00

Tax \$0.00

Total \$38.00

PROMOTION

CHECKOUT

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

The screenshot shows the Magestore Web POS checkout interface. At the top, it displays "Cart (2)" with a total of \$38.00. Below this, the "Shipping" section is expanded, showing two options: "Flat Rate - Fixed" (\$10.00) and "POS Shipping - Store Pickup" (\$0.00). The "Payment" section is also expanded, showing three options: "Web POS - Credit Card", "Web POS - Cash In", and "Web POS - Cash On Delivery". Below the shipping and payment sections, there is a summary table:

Subtotal	\$38.00
Add Discount	(+)
Shipping	\$0.00
Tax	\$0.00
Total	\$38.00

At the bottom, there are two buttons: "ADD PAYMENT" and "PLACE ORDER". A red box highlights the "ADD PAYMENT" button.

Click on the icon on the right to expand or collapse the Shipping/ Payment section.

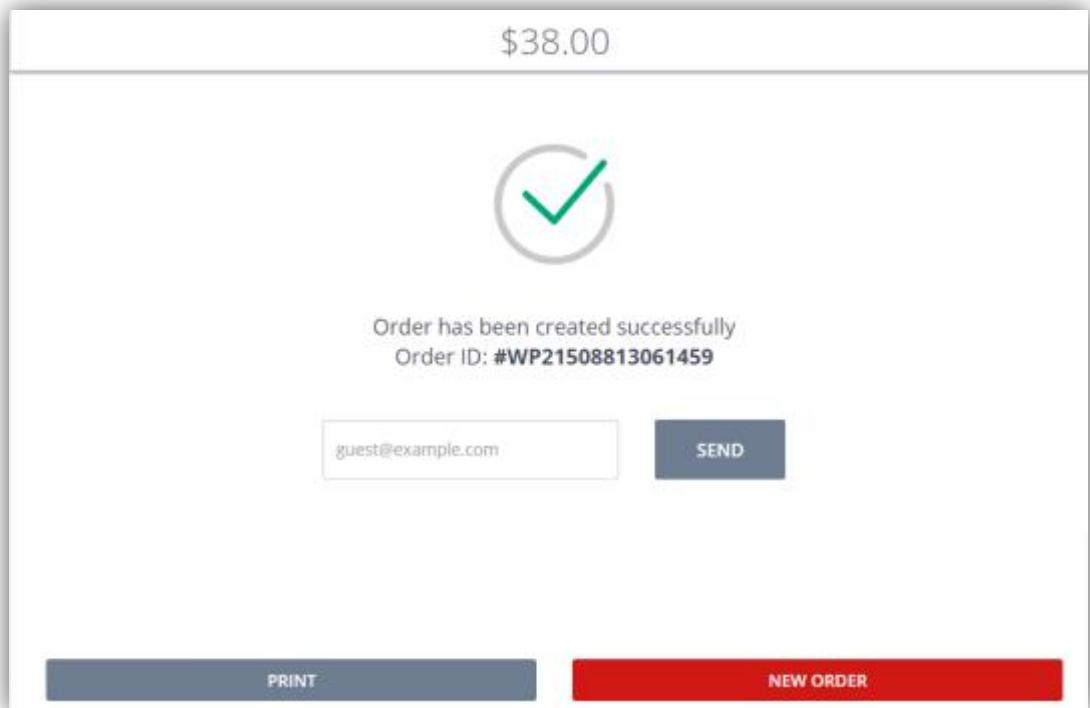
Choose a shipping and payment method to proceed checkout. (Shipping and Payment methods can be added in the Magento core backend)

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

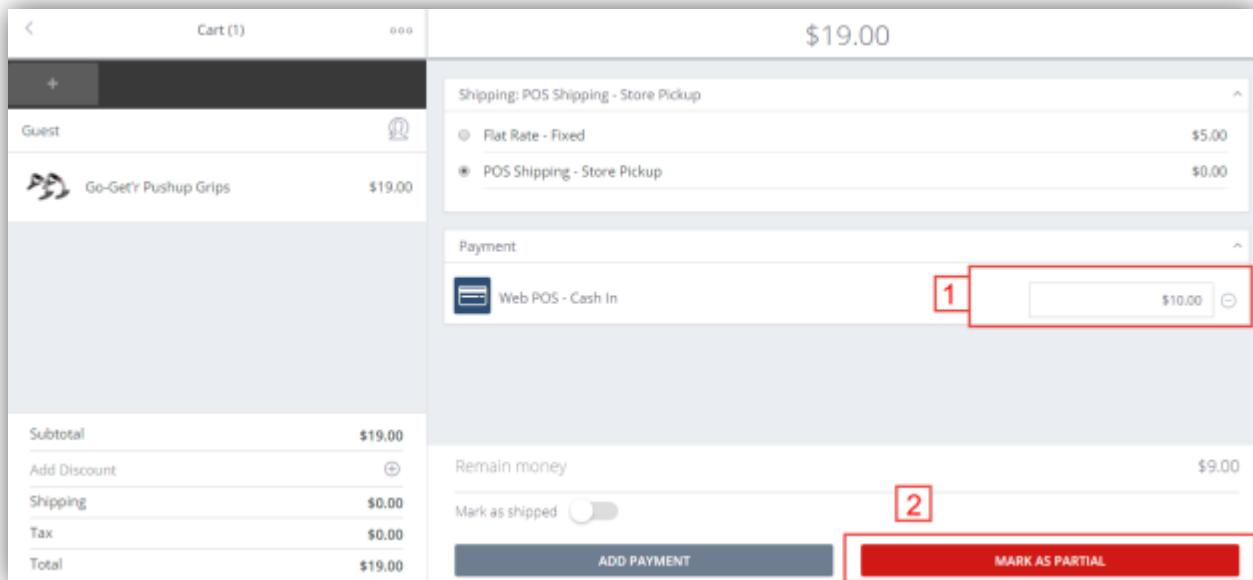
This screenshot is similar to the one above, but it highlights the "ADD PAYMENT" button with a red arrow. The "Payment" section is expanded, showing the same three options: "Web POS - Credit Card", "Web POS - Cash In", and "Web POS - Cash On Delivery". The "ADD PAYMENT" button is also highlighted with a red box.

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.

The screenshot shows the WebPOS Orders History page. On the left, a sidebar lists orders with their IDs, dates, and email addresses. The main area displays a single order with a total due of \$9.00. The order details include:

Product	Original Price	Price	Qty	Subtotal	Tax Amount	Discount Amount	Row Total
Go-Get'r Pushup Grips SKU: 24-UG05	\$19.00	\$19.00	Ordered: 1	\$19.00	\$0.00	\$0.00	\$19.00

Below the table, there are buttons for PRINT and INVOICE. To the right of the table, a summary box shows:

Subtotal	\$19.00
Shipping	\$0.00
Grand Total	\$19.00
Total Paid	\$10.00

At the top right, order details are shown: Status: Pending, Created Date: Tuesday 24 Oct, 2017, Served by: Staff 01.

- (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

The screenshot shows the 'Take Payment' dialog box. It contains three payment method options:

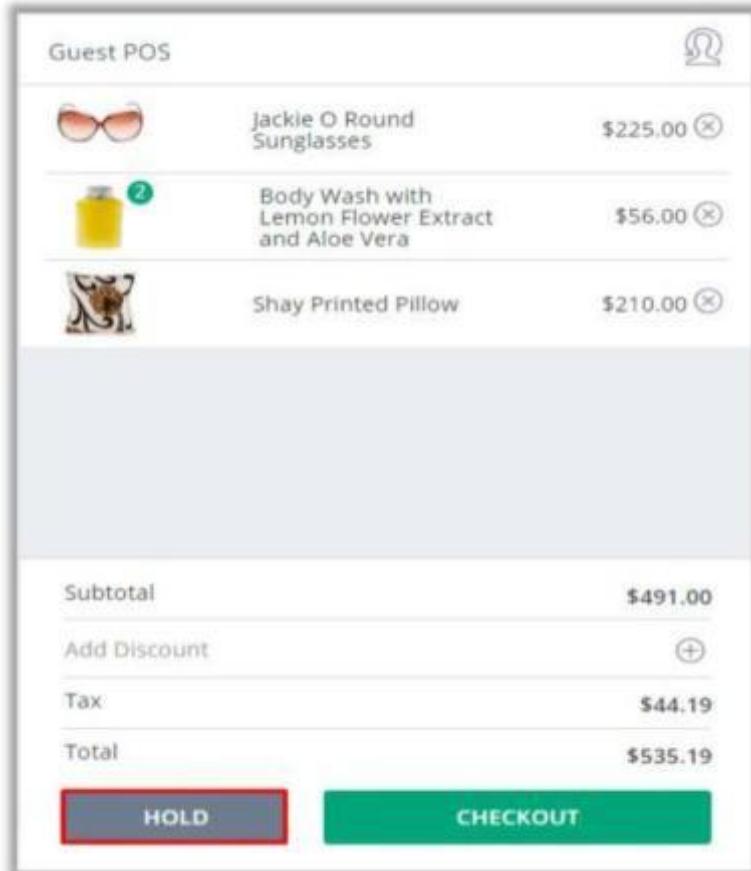
- Cash in
- Custom payment 1
- Cash On Delivery

The 'Cash in' option is selected. At the bottom, there are 'ADD MORE PAYMENT METHOD' and 'SUBMIT' buttons. A message 'Remain Money \$306.04' is displayed at the bottom left.

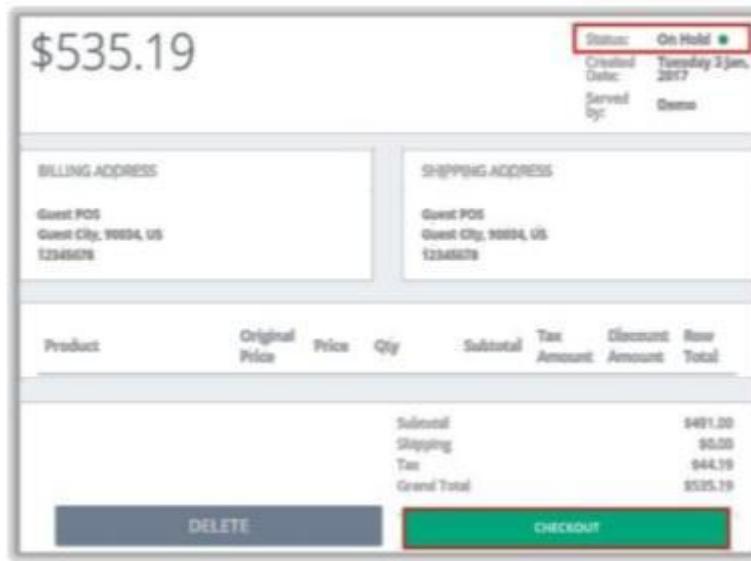
After filling in the due amount, click on **Submit** button to complete the payment action. Then the total paid is equal to the whole order's value

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!



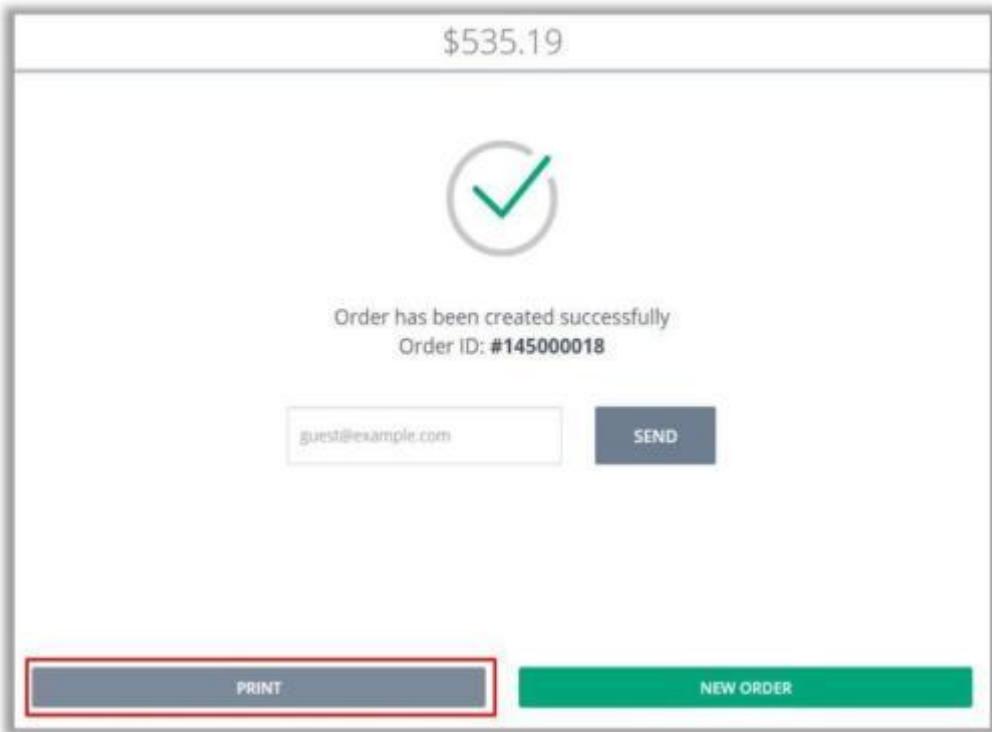
After adding products to cart, you can choose **Hold** to put the order into **On-hold Orders** section. A **Note for holding order** will appear for inserting any comment that you would like to keep, for example, "Waiting for payment".



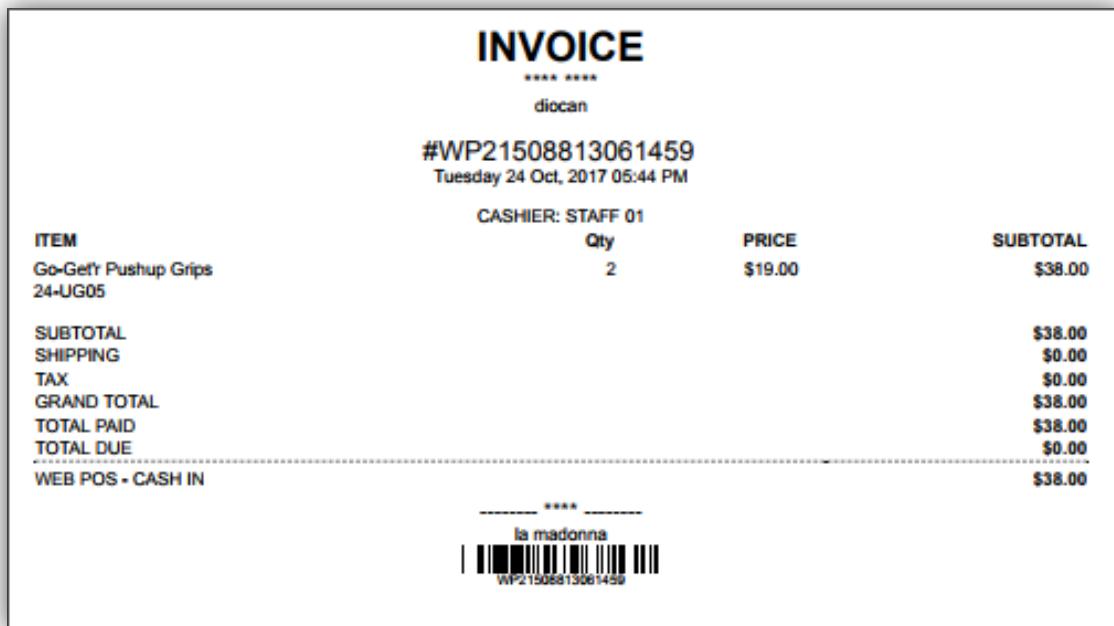
To check orders that have been put on hold, go to Web POS menu > **Orders > On-hold Orders**. List of on-hold orders is recorded with certain note for each order. You may select **Continue Processing** whenever customer is willing to take final action for payment or you may **Cancel** it if it is not 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																								
<table border="1"> <thead> <tr> <th>Item</th> <th>Sku</th> <th>Qty</th> <th>Subtotal</th> </tr> </thead> <tbody> <tr> <td>slim fit Dobby Oxford Shirt Color: Blue Size: XS</td> <td>maj003xs</td> <td>1</td> <td>\$140.00</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Subtotal \$140.00</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Shipping & Handling \$0.00</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Tax \$11.50</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Grand Total \$140.00</td> </tr> </tbody> </table>		Item	Sku	Qty	Subtotal	slim fit Dobby Oxford Shirt Color: Blue Size: XS	maj003xs	1	\$140.00				Subtotal \$140.00				Shipping & Handling \$0.00				Tax \$11.50				Grand Total \$140.00
Item	Sku	Qty	Subtotal																						
slim fit Dobby Oxford Shirt Color: Blue Size: XS	maj003xs	1	\$140.00																						
			Subtotal \$140.00																						
			Shipping & Handling \$0.00																						
			Tax \$11.50																						
			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:

The screenshot shows the 'Orders' section of the Web POS interface. On the left, a sidebar lists orders by date, showing items like 'WP21508813489496' and 'WP21508813061459'. On the right, a detailed view of order 'WP21508813489496' is displayed. The order total is \$19.00, and it includes a single item: 'Go-Get'r Pushup Grips' (SKU: 24-UG05). The order was placed on 10/24/2017 at 05:51 PM by guest@example.com. The status is Pending. The right side also shows a breakdown of taxes and payment information.

Product	Original Price	Price	Qty	Subtotal	Tax Amount	Discount Amount	Row Total
Go-Get'r Pushup Grips SKU: 24-UG05	\$19.00	\$19.00	Ordered: 1	\$19.00	\$0.00	\$0.00	\$19.00

	Subtotal	\$19.00
Shipping	\$0.00	
Grand Total	\$19.00	
Total Paid	\$10.00	

PRINT **INVOICE**

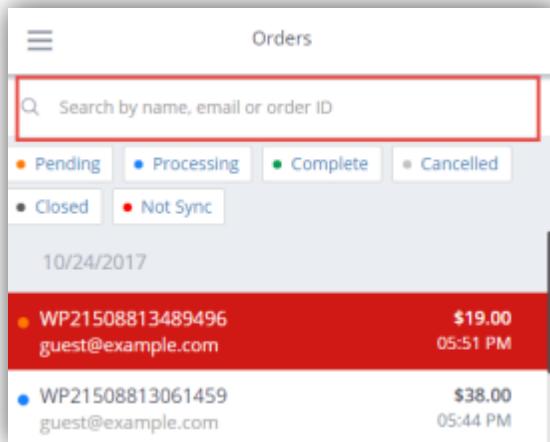
a. Order status

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:

	Subtotal	\$550.40
Shipping		\$0.00
Tax		\$38.38
Discount (Custom Discount)		-\$55.04
Grand Total		\$533.74
Total Paid		\$533.74

5.2.3.10. How to issue invoice for an order

The screenshot shows the order details for order number 100000053. The total amount is \$631.43. The status is Pending. The payment method is Cash In, and the shipping method is United Parcel Service - Next Day Air. The shipping address and billing address are both Haven Bangor, Cambridge, Massachusetts, 01864, US, 5434323456. The subtotal is \$540.00, shipping is \$91.43, grand total is \$631.43, and total paid is \$631.43. There are 'PRINT' and 'INVOICE' buttons at the bottom.

	Subtotal	\$540.00
Shipping		\$91.43
Grand Total		\$631.43
Total Paid		\$631.43

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**.

The pop-up window shows the invoice details for order #100000053. The total field is \$387.27, total invoiced is \$0.00, and invoiceable is \$387.27. The table lists items: Tari Tank (Qty: 2) and Racer Back Mail Dress (Qty: 1). The summary table shows Subtotal (\$344.00), Shipping & Handling (\$12.31), Tax (\$30.96), Discount (\$0.00), and Grand Total (\$387.27). There are 'Send Email' and 'SUBMIT INVOICE' buttons at the bottom.

Subtotal	\$344.00
Shipping & Handling	\$12.31
Tax	\$30.96
Discount	\$0.00
Grand Total	\$387.27

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.

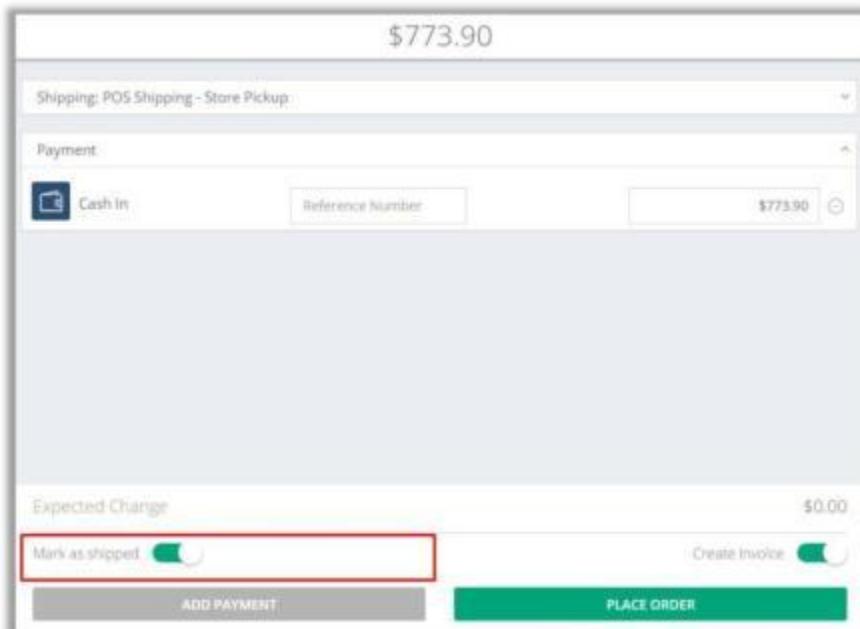
5.2.3.11. How To Create Shipment Or Issue Refund For An Order

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:

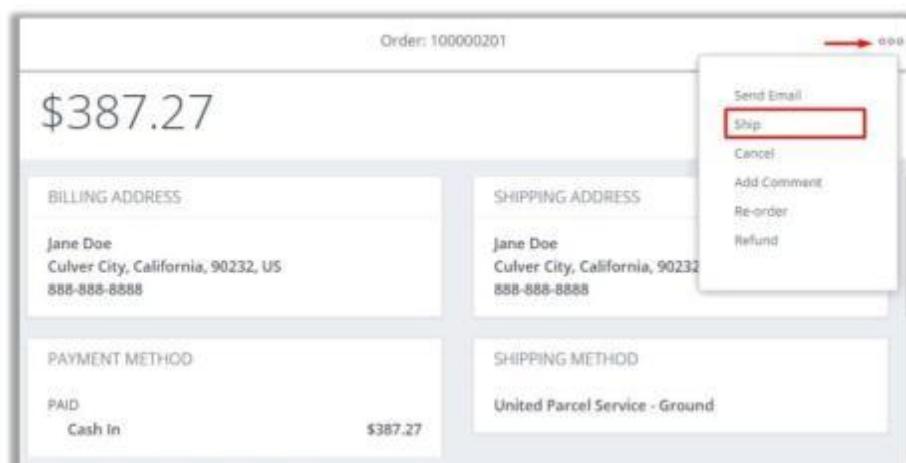
Before an order is created by clicking **Place Order** button, you can create shipment by turning on **Mark as Shipped** as below:



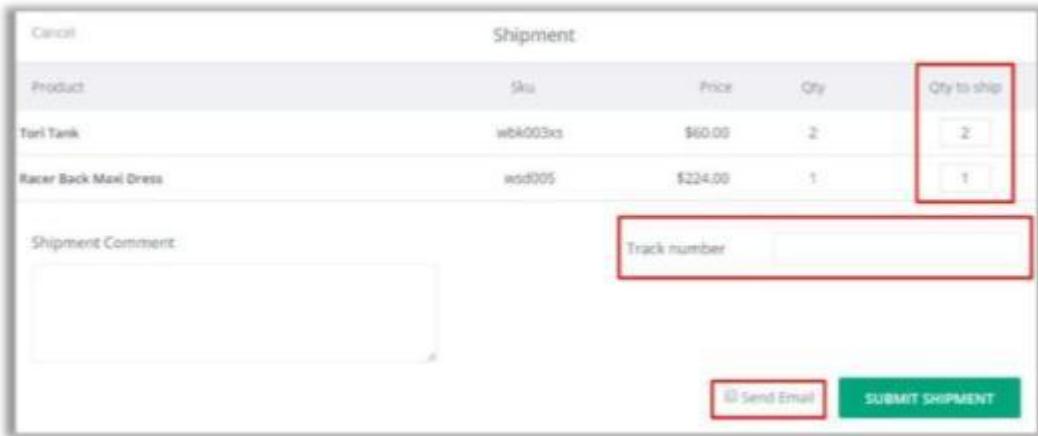
After verifying shipment method, the system will automatically load to Successful Order Page. There will be a message shown to notify you that shipment is created successfully. Please note that you need to have permission and be in online mode.

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.

Note: Only orders that have been synced can be shipped.

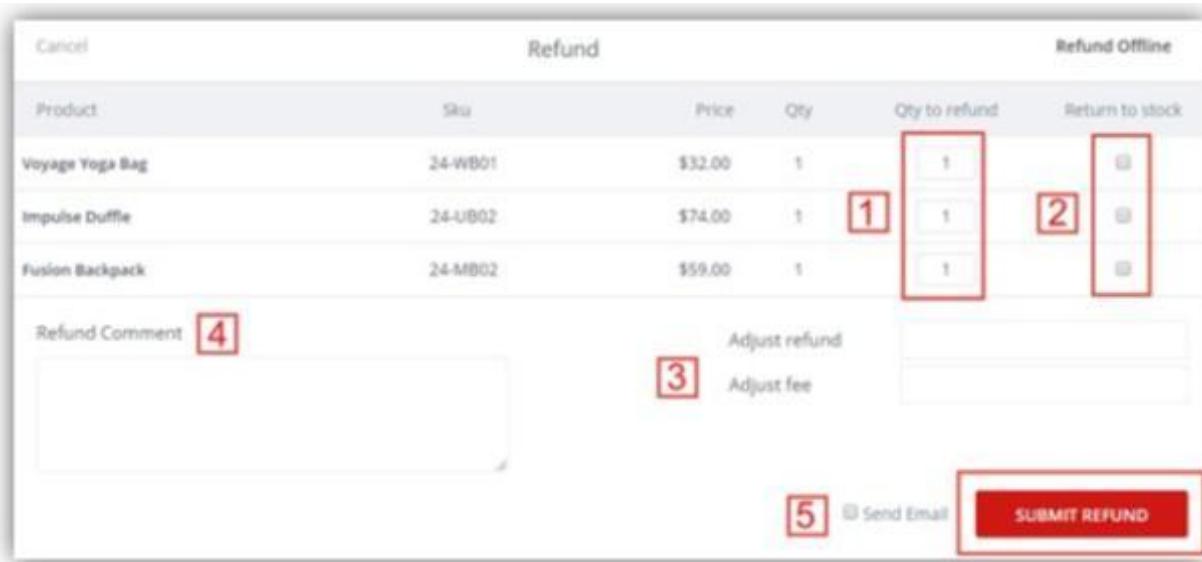
5.2.4. How To Issue Refund

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).

Subtotal	\$165.00
Shipping	\$0.00
Grand Total	\$165.00
Total Paid	\$165.00

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.



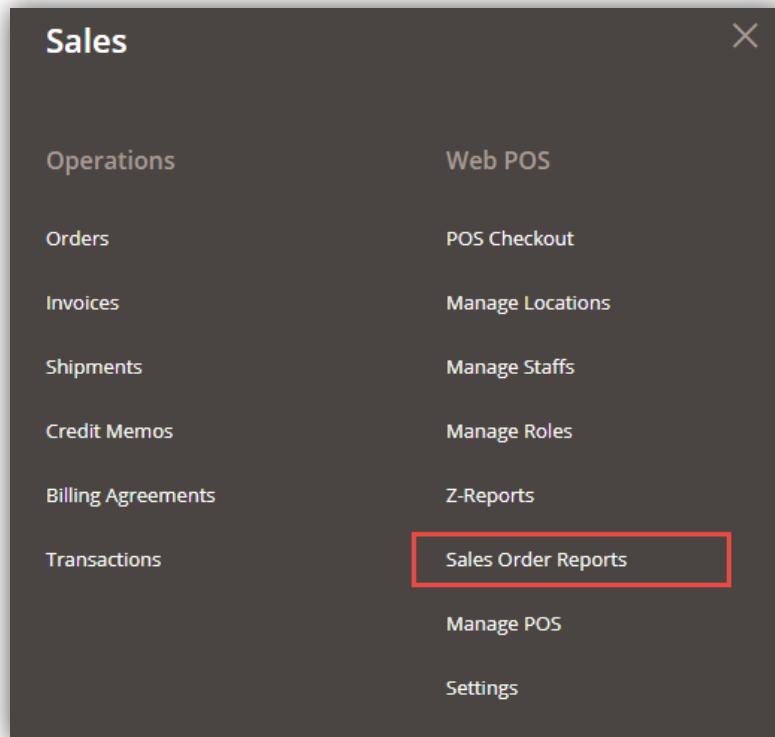
A popup will display so that you can fill in the information before making refund.

- (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

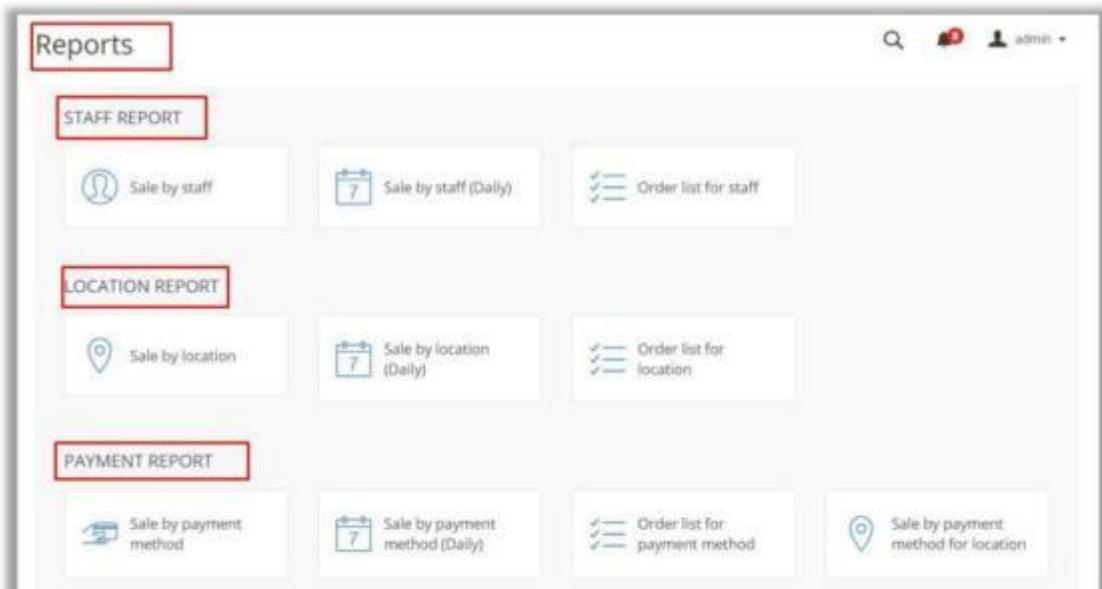
After that, you will get the message informing that credit memo is created successfully. Please make sure you have permission to issue refund and you are in online mode.

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**.

Sale by staff			
Order Status		Any	Applies to Any of the Specified Order Statuses except canceled orders.
		Export to:	CSV Export
3 records found			
Staff	Order Count	Sales Total	
admin admin	2	\$122.00	
THEKING@	1	\$98.00	
	32	\$6,435.00	

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

Sale by staff (Daily)			
		Export to:	CSV Export
7 records found			
Day	Staff	Order Count	Sales Total
Jul 13, 2016	admin admin	6	\$739.00
Jul 14, 2016	admin admin	15	\$1,425.00
Jul 15, 2016	admin admin	7	\$1,136.00
Jul 16, 2016	admin admin	3	\$793.00
Jul 18, 2016	admin admin	14	\$1,595.00
Jul 19, 2016	admin admin	34	\$587.00
Jul 20, 2016	THEKING@	3	\$160.00
		32	\$6,435.00

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.

Order list for a staff				
Filter				
staff	THEKING@			
From	8/21/16			
To	8/21/16			
Order Status	Any			
	Applies to Any of the Specified Order Statuses except canceled orders.			
		Export to:	CSV	Export
2 records found				
Staff	Order ID	Sales Total	Purchased On	Status
THEKING@	WP5.0000148874061991	\$38.00	Jul 20, 2016	Processing
	WP5148874537843	\$77.00	Jul 20, 2016	Processing

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 screenshot shows a report interface titled "Sale by location". At the top, there is a "Reports" dropdown set to "Sale by location" and an orange "Show Report" button. Below the dropdown is a "Filter" section with date range inputs ("From: 6/21/16" and "To: 7/21/16"), an "Order Status" dropdown set to "Any" with a note "Applies to Any of the Specified Order Statuses except canceled orders", and an "Export to:" button with options for CSV and PDF.

Below the filter section, it says "1 records found". A table is displayed with three columns: "Location", "Order Count", and "Sales Total". The single record shows "Store Address" with "82" orders and a total of "\$6,435.00".

Location	Order Count	Sales Total
Store Address	82	\$6,435.00
	82	\$6,435.00

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

The screenshot shows a report interface titled "Sale by location (Daily)". At the top, there is a "Show Report" button. Below the title, it says "7 records found". A table is displayed with four columns: "Day", "Location", "Order Count", and "Sales Total". The data shows daily sales for "Store Address" from July 13 to July 20, 2016, with a total of 82 orders and \$6,435.00.

Day	Location	Order Count	Sales Total
Jul 13, 2016	Store Address	6	\$739.00
Jul 14, 2016	Store Address	15	\$1,425.00
Jul 15, 2016	Store Address	7	\$1,136.00
Jul 16, 2016	Store Address	3	\$793.00
Jul 18, 2016	Store Address	14	\$1,395.00
Jul 19, 2016	Store Address	34	\$587.00
Jul 20, 2016	Store Address	3	\$160.00
		82	\$6,435.00

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

Order list for location					Show Report
Location	Store Address	From	To	Order Status	
		6/21/16	7/21/16	Any	Applies to Any of the Specified Order Statuses except Canceled orders.
				Export to:	CSV Export
1 records found					
Location	Order ID	Sales Total	Purchased On	Status	
STORE ADDRESS	WP11488202006019	\$12.00	Jul 13, 2016	Processing	
	WP114882020060332	\$12.00	Jul 13, 2016	Pending	
	WP11488202040777	\$443.00	Jul 13, 2016	Pending	

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**.

Sale by payment method			Show Report
			Export to: CSV Export
5 records found			
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
Jul 15, 2016	Web POS - Custom payment 2	1	\$77.00
	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
	WP11468436050681	\$100.00	Jul 14, 2016	Pending
	WP1146845389399	\$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.

Contact us:

-  www.magestore.com
-  magestore.zendesk.com
-  support@magestore.com
-  +1-606-657-0768
-  1750 Montgomery Street 1st Floor,
San Francisco, CA 94111, United States.

