

ConnectPOS

V 1.0.2

2019 USER GUIDE



ConnectPOS – A Leading Magento POS for Omnichannel Retail
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Introduction to ConnectPOS

ConnectPOS is the leading Magento Point of Sale software for Omnichannel retail. If you have an e-commerce website built on Magento and are finding a Point of Sale software for your physical store(s) that synchronizes data between sales channels, ConnectPOS is the software you need.

ConnectPOS works with Magento 1 (1.8 and above) and Magento 2 (2.1 and above). It connects to Magento using a connector (API); thus, it utilizes the database and synchronizes in real time with Magento but is not affected by its speed.

ConnectPOS is now available in the web-based version, which means it works on PC and Mac. There is also an iOS version that have been released on App Store.



Main ConnectPOS features

1. Synchronize database with Magento, including product/ category, customer, price, tax and promotion settings
2. Keep track of product stock and product details
3. Order and check out in 3 steps: (1) add products to cart by scanning barcode or searching, (2) choose the payment method(s), (3) complete and choose to print/ email receipt(s)
4. Order functions: add note and add shipment, save and retrieve on-hold orders, send cart to customer's wish list, duplicate order, refund & exchange...
5. Support both manual/ non-integrated payments and integrated payments like Tyro (and can be customized to integrate any other payment gateway). Accept multiple payments in one order (split payments) and deposits (layaway)
6. Add and manage users, registers and outlets (stores)
7. Customizable dashboard and reports to help manage your business effectively

Technical specifications

- Magento version: Magento 1 (1.8 and above) and Magento 2 (2.1 and above)
- Browser compatibility: Firefox or Chrome (recommended, other browsers are just not guaranteed to work).
- Barcode scanning compatible with standard USB/KBW scanning devices
- Receipt Printer: ConnectPOS works with any receipt printers supported by Windows and Mac.
- Supported receipt print sizes: 80mm (3 inches), 58mm (2 inches)
- Cash drawer: ConnectPOS does not interact directly with any cash drawers, but can be configured to control a cash drawer via a receipt printer.
- Card Reader: support all terminal devices which are verified by Tyro payment gateway

ConnectPOS Structure

ConnectPOS consists of two areas:

1. Admin Area (also known as C-Retail Cloud)

- Can be accessed at <http://accounts.connectpos.com>
- This is the main area for shop owners. Shop owners will view the reports, manage users and roles (cashiers, store managers...) and manage their own accounts (licenses, invoices...) here.

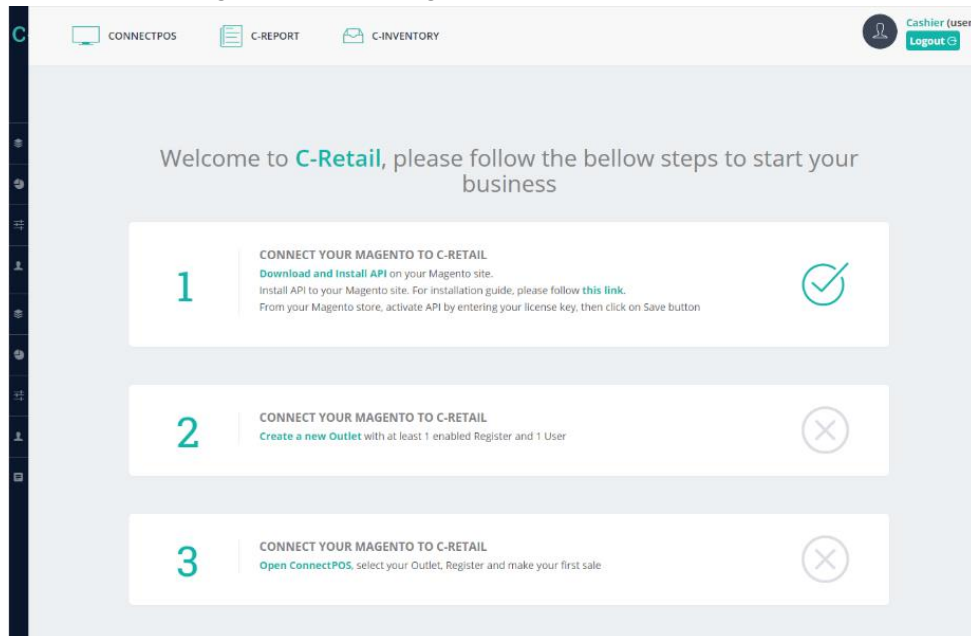


Figure 1: Admin Area

2. POS Area (also known as Sell Screen)

- Can be accessed directly at sales.connectpos.com or indirectly from C-Retail Cloud by clicking "ConnectPOS" on the top menu bar
- This is the main area for cashiers/ store operators. They can open shifts, place orders, take payments and perform other daily store tasks.

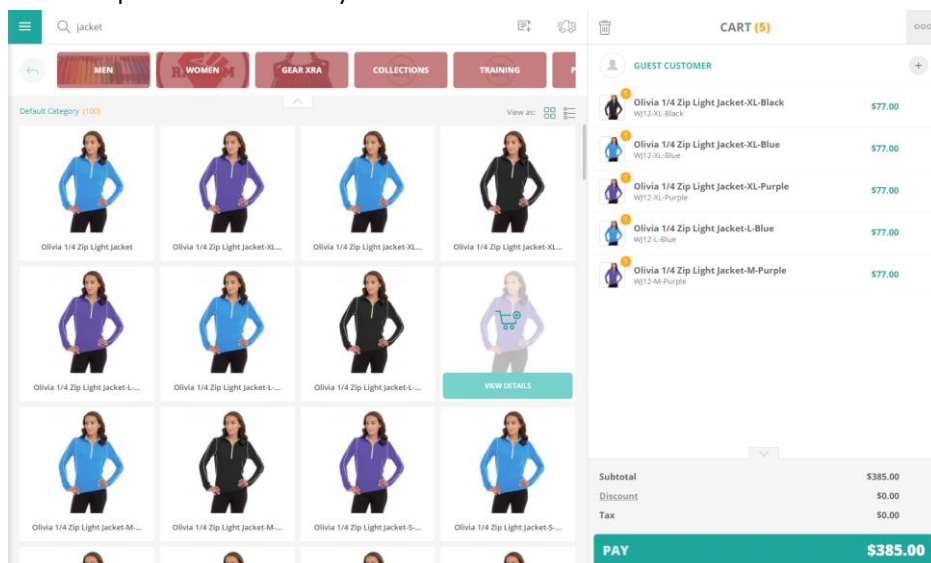


Figure 2: POS Area

Flow chart of ConnectPOS functionality

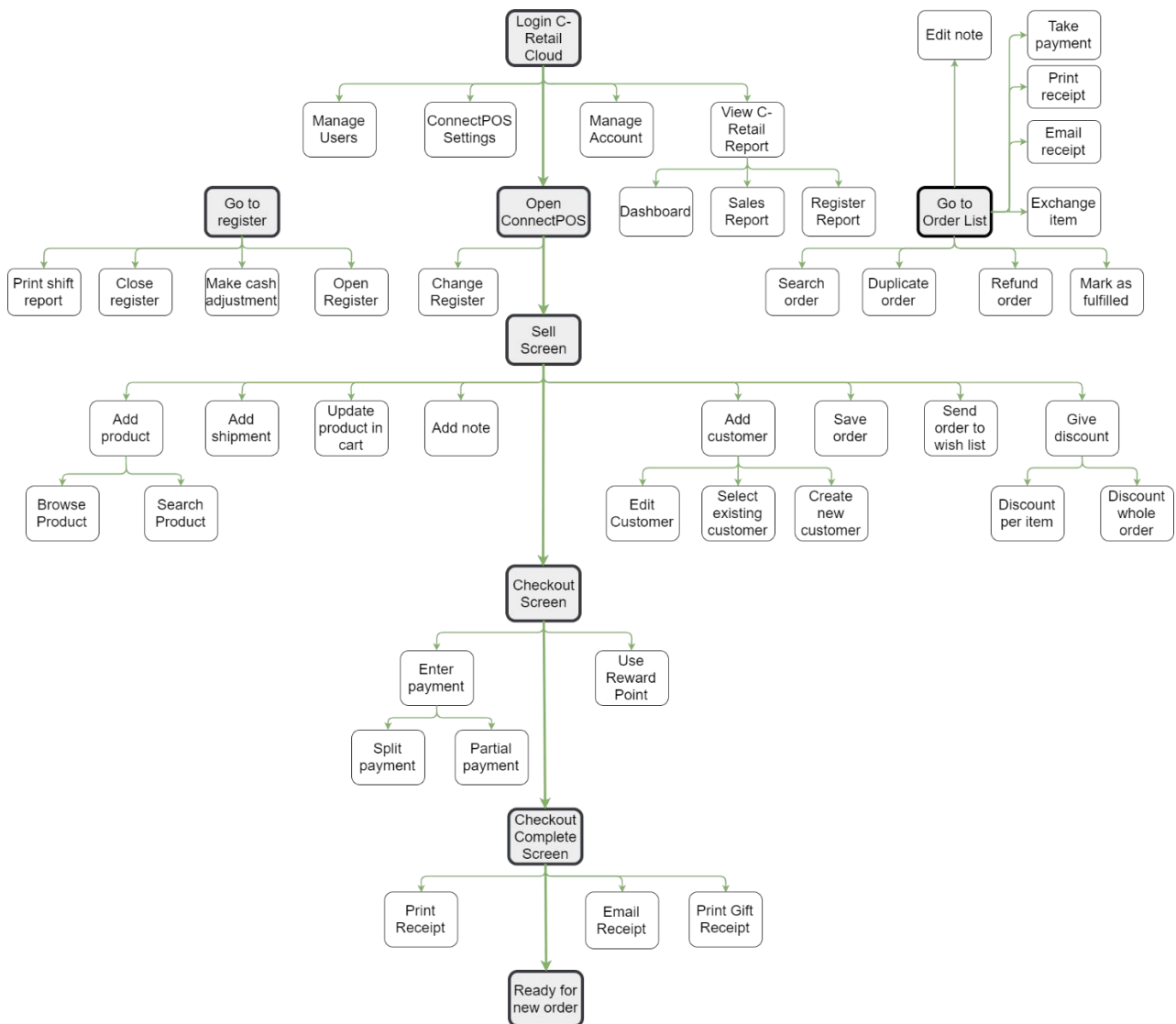


Figure 3: ConnectPOS Usage Flow

Setup ConnectPOS

After registering for a Free Trial on [ConnectPOS website](#), you will receive an email from our sales representative with the following information:

- The latest API package for Magento 1 and 2, along with User Guide and Installation Guide
- Your license key and our request for your site URL
- Your account username and password

If you don't receive any email from us **within 12 hours** since your registration or have any question, please contact us at support@connectpos.com



Figure 4: Setup ConnectPOS

Install API On Your Magento

ConnectPOS uses a connector (API) to connect and synchronize data with Magento. You can find the API in the email, and install it into your Magento. Please refer to the **Installation Guide** for the detailed instructions.

Activate API with License Key

After installing API on your Magento, please go to **Configurations > X-POS** in your Magento back end, enter the license key provided in the email to activate the API. You can refer to the **Installation Guide** for more details.

Set Up Your First Outlet

To start selling, you will need at least one outlet and one register. An outlet is normally equal to a physical store and a register is equal to a till in that store.

For the detailed instruction on creating an outlet and a register, please go [here](#).

Select Register

After creating an outlet and a register in POS, click "Back" to go back to "Select Register" screen. Click on the register you've just created to go to Sell Screen. Open a new shift and you can start selling!

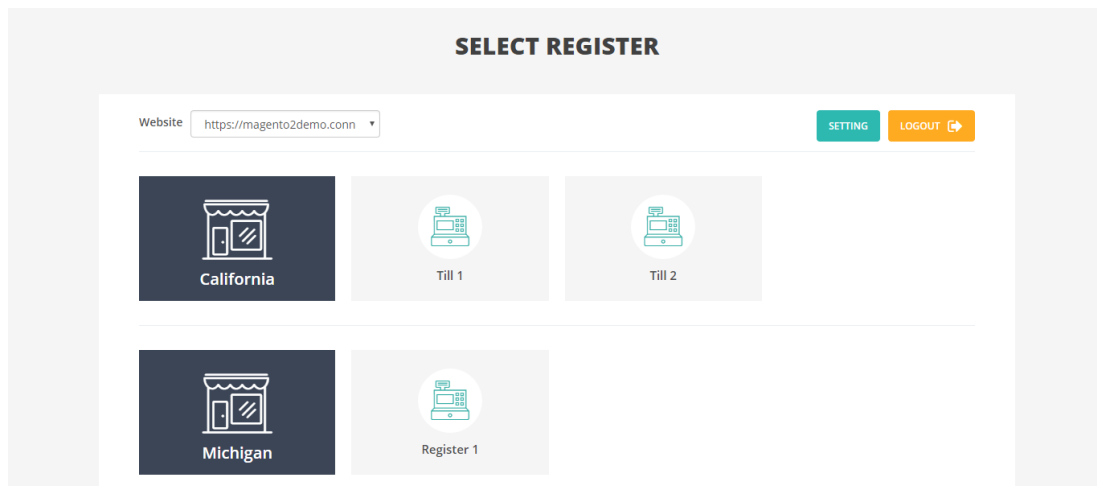


Figure 5: "Select Register" Screen

Continue reading as we will help you explore more functions of ConnectPOS!

Place Orders

You will place orders in Sell Screen, which will appear after you select a register. The first time you access this Sell Screen, you will find the data loading from Magento to POS – the amount of time it takes to load depends on the amount of data. It will be quicker next time as the browser you're using POS on now has cache of your data.

Add Products to Cart

Supported Product Types

ConnectPOS supports all product types of Magento, except Downloadable Product and custom product types you created in Magento.

Complex Products and Products with Custom Options

1. Complex Products:

Complex products refer to Configurable products, Group products and Bundled products. When a complex product is selected to add to cart, a pop up will appear for you to configure.

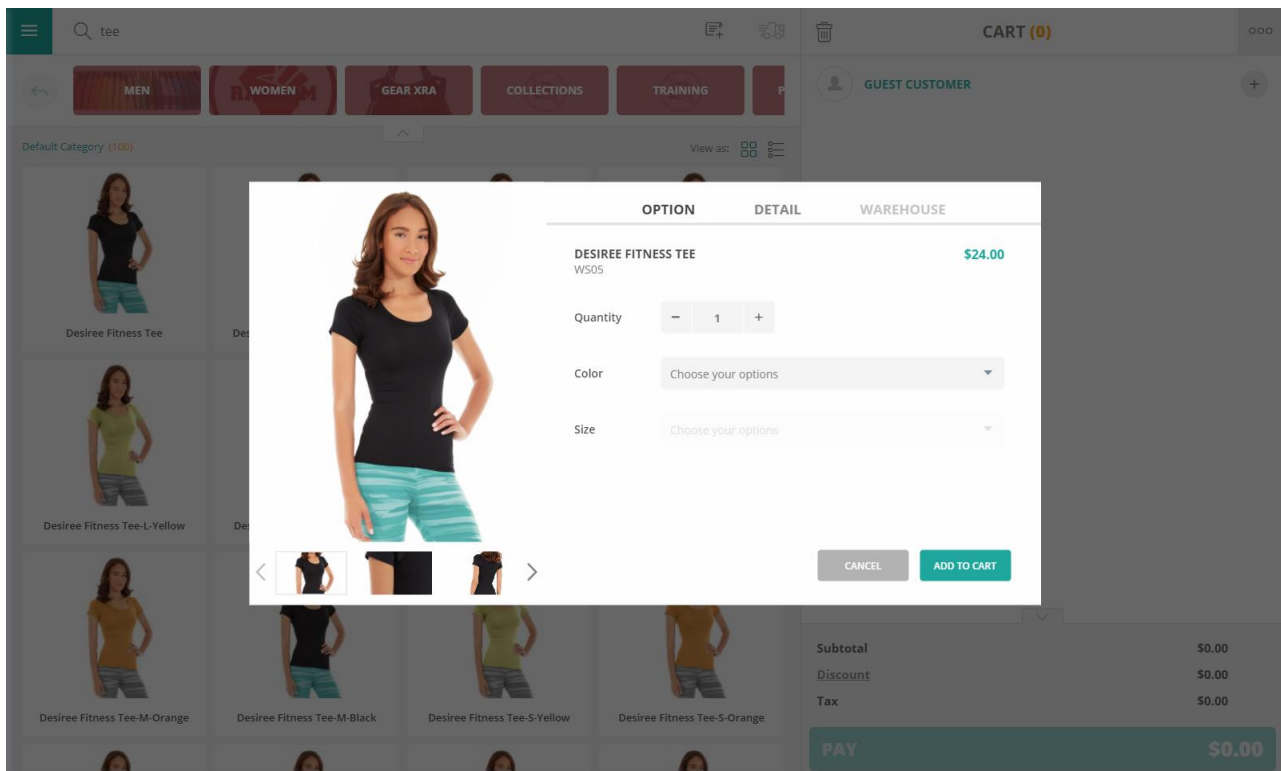


Figure 6: Popup for Configurable Product

2. Custom Options:

For Simple, Configurable or Virtual products, ConnectPOS also supports Custom Options. When you choose to add a product with Custom Options to cart, a pop up will appear to let you choose.



Type of custom options supported: Text: text field, text area; Select: drop-down, radio buttons, checkbox, multiple select; Date: date, time, date & time (except File: file)



The SKU field from a Custom Option product is not similar to a default SKU from Magento, and it will not be used in search or barcode scanning.

Ways to add products to cart

You can add a product to cart by either searching for that product or scanning a barcode. ConnectPOS can be configured to use the attributes you wish to search or scan (see [here](#) for detailed instruction).

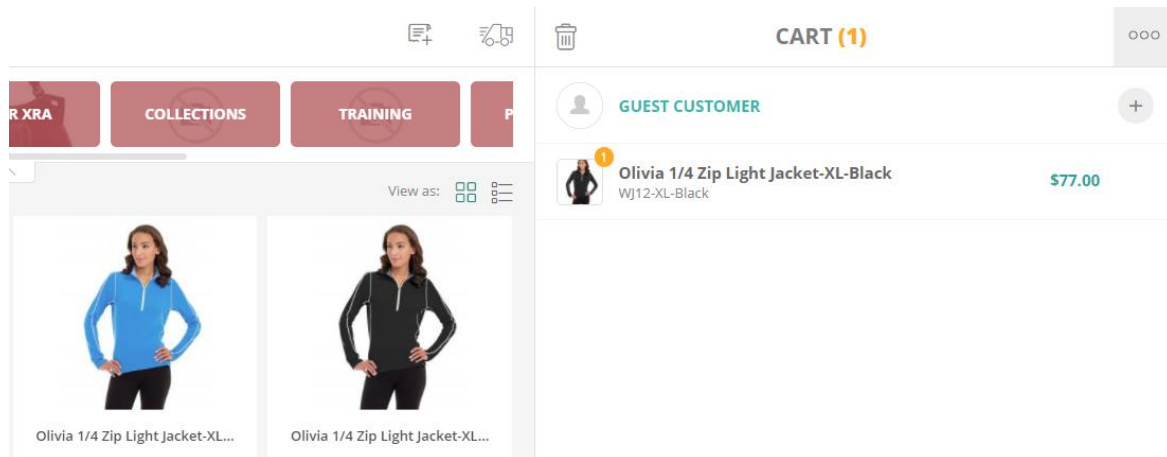


Figure 7: Add Product to Cart

1. Add a product by barcode scanning

Click in the search bar and scan the barcode. The barcode scanned will appear in the search bar automatically (standard configuration) and if it returns only one result, the item will be added to cart with the quantity of 1. Scan the product barcode again if you want to add more to cart.



The field used for barcodes need to only contain unique values in order to be able to add products by barcode scanning.

2. Add a product by searching

By entering the product's **name**, **SKU**, **Product ID**... in the search bar, you will be able to find the product that **matches completely** with your search keyword.

If there is only one product that matches the search query, it will be added to the current order instantly with the quantity of 1. Click on the product again if you want to add more to cart.

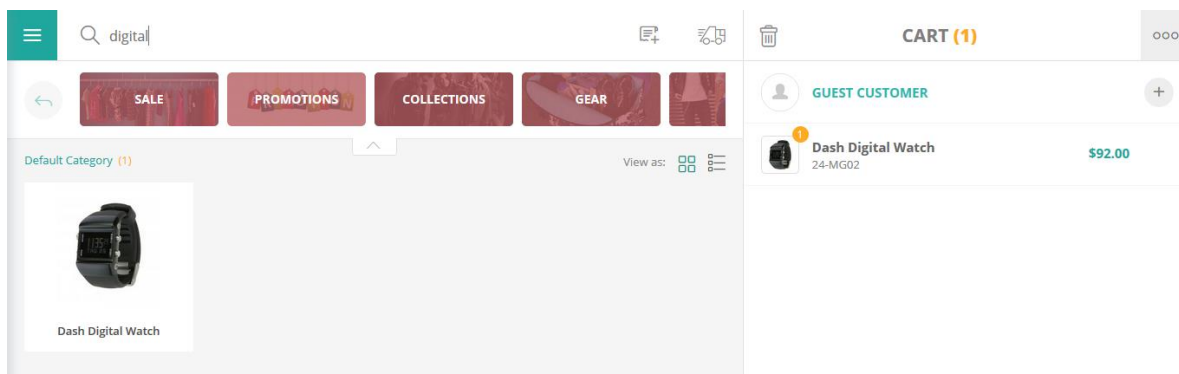


Figure 8: Auto search – Auto add

If there are some products that match your search keyword, the system will list results for keyword search. The number of results displayed can be adjusted (see [here](#) for detailed instruction).

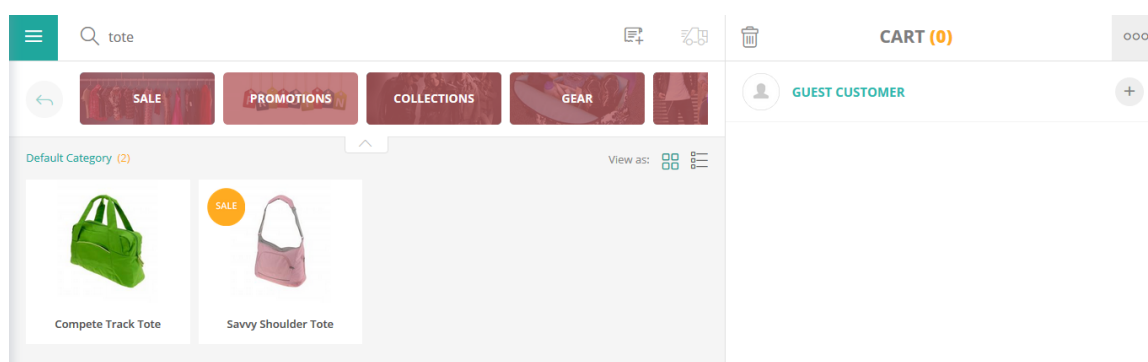


Figure 9: Auto search - suggestion list

3. Add a product by browsing through categories

You can browse categories to find a product and click on it to add to cart. The categories are displayed in the same levels you set up in Magento so that you can navigate more easily.

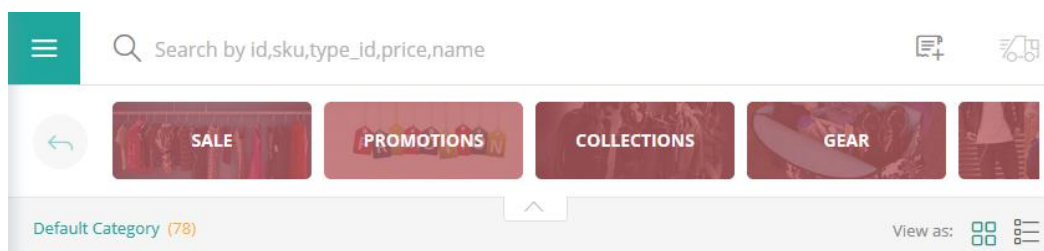


Figure 10: Categories

Add a new product by Custom Sale

If a product has not existed in Magento database yet, you can create a dummy product and setting its price – named "Custom Sale" and add it to cart.

To be able to add and sell Custom Sale products, you need to [enable Custom Sale in POS Settings](#).

To add a Custom Sale product:

1. Click **Custom Sale** icon near the end of the search bar, a pop-up will appear

2. Enter a name and price for the product, and add it to cart.

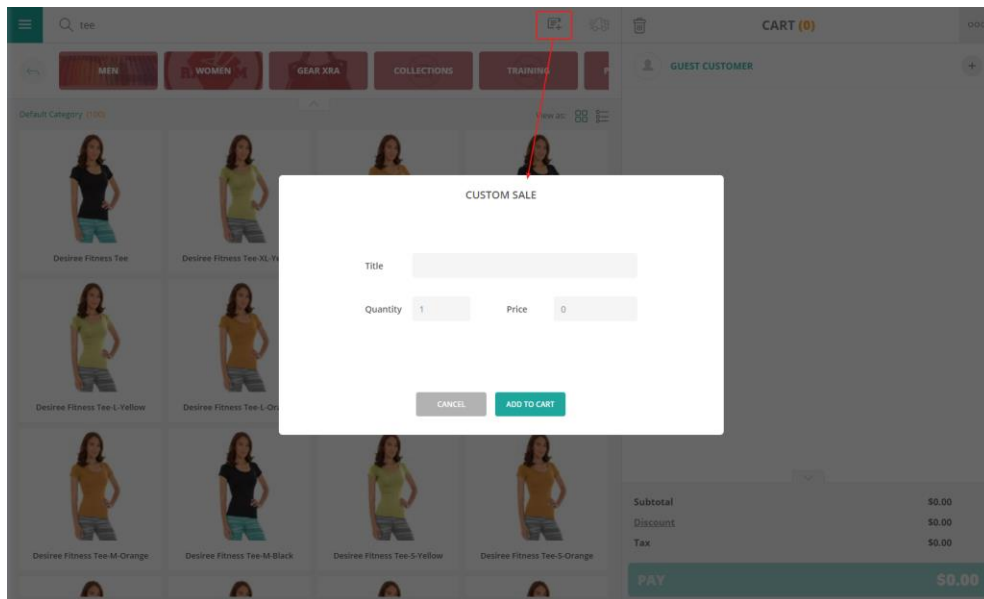


Figure 11: Add Custom Sale Product

Add a product in Wish List to Cart

The synchronized product and customer database between web store and POS enable you to retrieve the wish list of an existing customer and add the items in there to cart.

To add a product in Wish List to Cart:

1. Search and add an existing customer to the order (details [here](#))
2. Click on the customer. A pop up will appear with all information of that customer, including Wish List
3. Tick the product and click "Add to Cart"

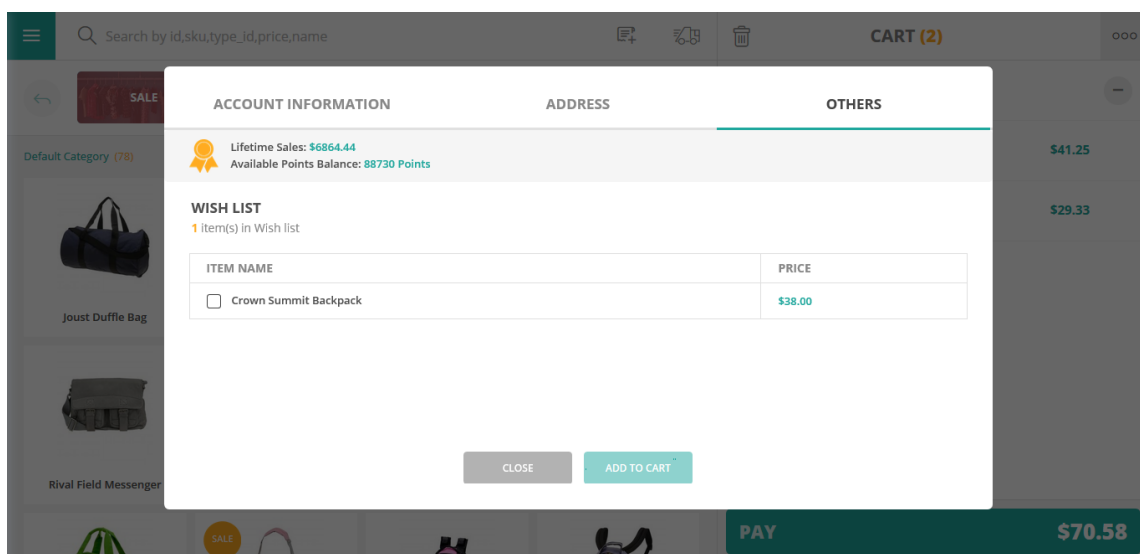


Figure 12: Wish List of a Customer

Edit an Order

In the cart, you can edit the following information of an order:

Item Adjustment

When you click on an item in cart, the section will expand for you to:

- Adjust quantity
- Apply custom price/ Override the original price
- Split quantities of the item (which will be useful for promotion program such as "Buy 3 get 1": you can add 4 of the item to cart, then split 1 and change its price to 0)
- Apply discount per item

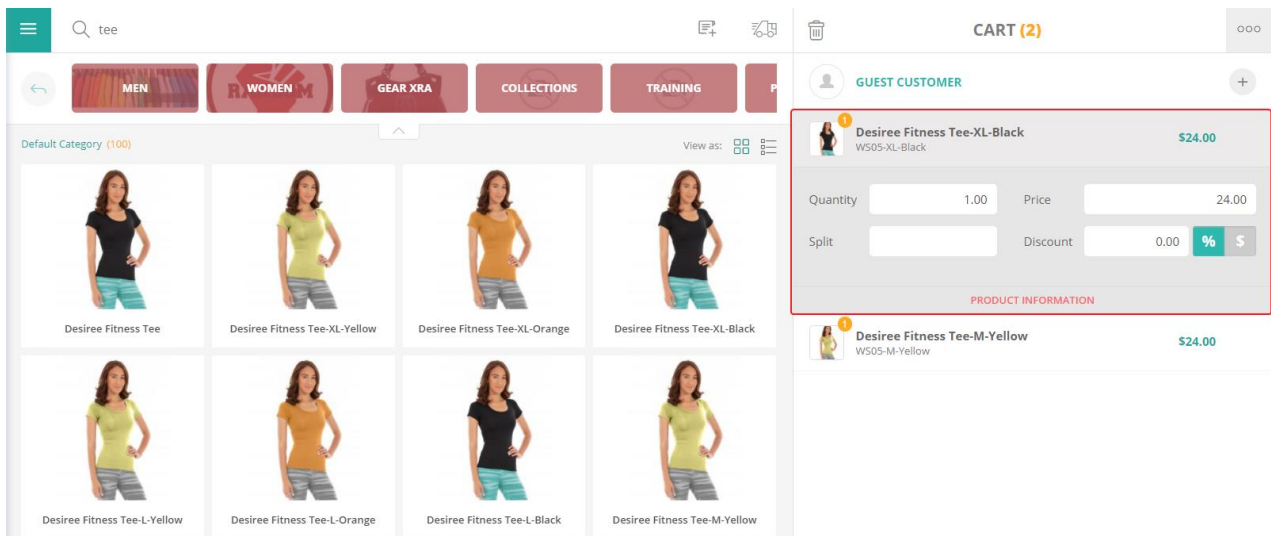


Figure 13: Item Adjustment



The custom price is displayed including or excluding tax based on setting at: Magento Back-end > Settings > configuration > Tax > Calculation settings > Catalog Prices (including tax or excluding tax). **Catalog price is incl/excl tax of order**

While editing custom price, price which is entered by you will be treated as including or excluding tax based on setting: Magento Back-end > Settings > Configurations > Tax > Calculation settings > Catalog Prices (including tax or excluding tax) but **Catalog price is incl/excl tax of store** (improvement for next version: editing custom price should be catalog price, incl or excl tax of order, not store)

Remove a product from cart

To remove a product from cart with all of its quantity:

1. Hover or select the product in the cart
2. Click on the small cross appear at the left side to remove the product from the current order.

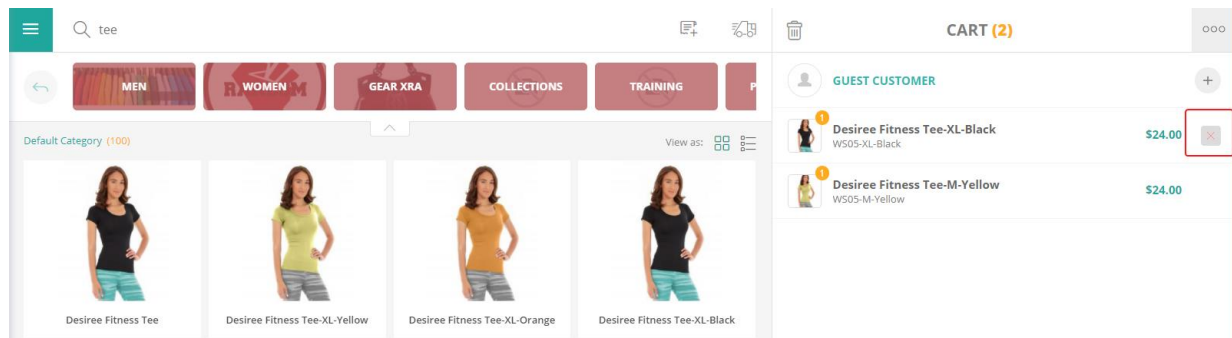


Figure 14: Remove a Product from Cart

Add Customer

You can check out an order with the guest customer (default), an existing customer or a new customer. Your newly created customers in POS will be synced to Magento database in real time and vice versa.

By default, you will check out an order with Guest Customer – no action needed. To add an existing customer or a new customer to the order:

1. Click the "+" icon at the right side of Guest Customer

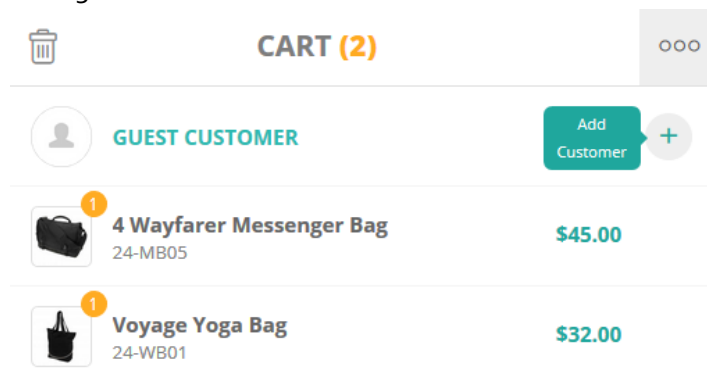


Figure 15: Add Customer icon

2. Type your search keyword in the search bar to look for and add an existing customer to the order. Or Click **"Create New"** to add a new customer.

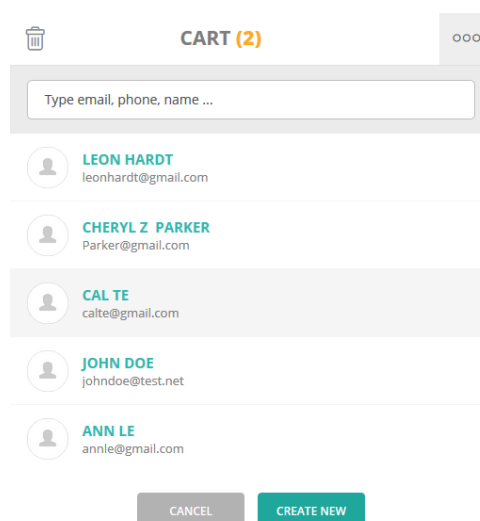


Figure 16: Search Customer

- If you choose to create a new customer, a pop up will appear for you to fill in. Click **"Save"** button to add the customer to the order

Figure 17: Create a New Customer

Discount for the whole cart

To apply discount for the whole cart:

- Click the upward arrow above the **"Pay"** button to expand the sales summary section
- Click **"Discount"**
- Enter coupon code from Magento or the discount amount in percentage or flat amount. In case of coupon, POS will check with Magento if the coupon code is valid or not.

Item	Price
Desiree Fitness Tee-XL-Black	\$24.00
Desiree Fitness Tee-M-Yellow	\$24.00
Discount	\$48.00
Tax	\$0.00
PAY	\$48.00

Figure 18: Discount the whole order



Tip: Create commonly used discounts as a voucher, and store it as barcodes, and then use barcode scanner to add discount quickly.

Add Shipment

To add shipment to an order:

1. Click on the Truck icon on top bar to open the shipment pop up
2. In the shipment pop up, you will find all the address recorded of the current customer to choose or edit
3. You can also add New Address by clicking the button **"New Address"**. Fill in all required information and click **"Save"**.
4. Enter the shipping fee in Shipment Amount
5. Click **"Add Shipment"** to add the shipment information (address and fee) to the order
6. If you want to edit shipping information, click on the Truck icon again

The screenshot shows the 'ADD SHIPMENT' modal form. At the top, there's a 'Shipment Amount' input field with the value '0' and a 'NEW ADDRESS' button. Below this, a list of addresses is shown, with 'RALPH L. DRURY' selected. The address details are '2370 Lindale Avenue London' and 'Tel: 510-530-1732'. At the bottom of the form are 'REMOVE SHIPMENT' and 'UPDATE SHIPMENT' buttons. The background shows a product catalog with 'Desiree Fitness Tee' items in various colors and sizes, and a cart summary on the right showing a subtotal of \$48.00 and a total of \$48.00.

Figure 19: Shipment Form

Order Functions

You can find the order functions by clicking the More icon at the top right corner.

ConnectPOS support the following order functions:

- **Add Note:** add a note to the order to remember the important details.
- **Send to Customer's Wish List:** send the items in cart to the current customer's wish list so he can purchase online or at another store later. You can also retrieve items in the wish list of an existing customer to add to cart (details [here](#))
- **Save an Order and Retrieve a Saved Order:** in case a customer wants to postpone an order for later checkout, you can save his current order.

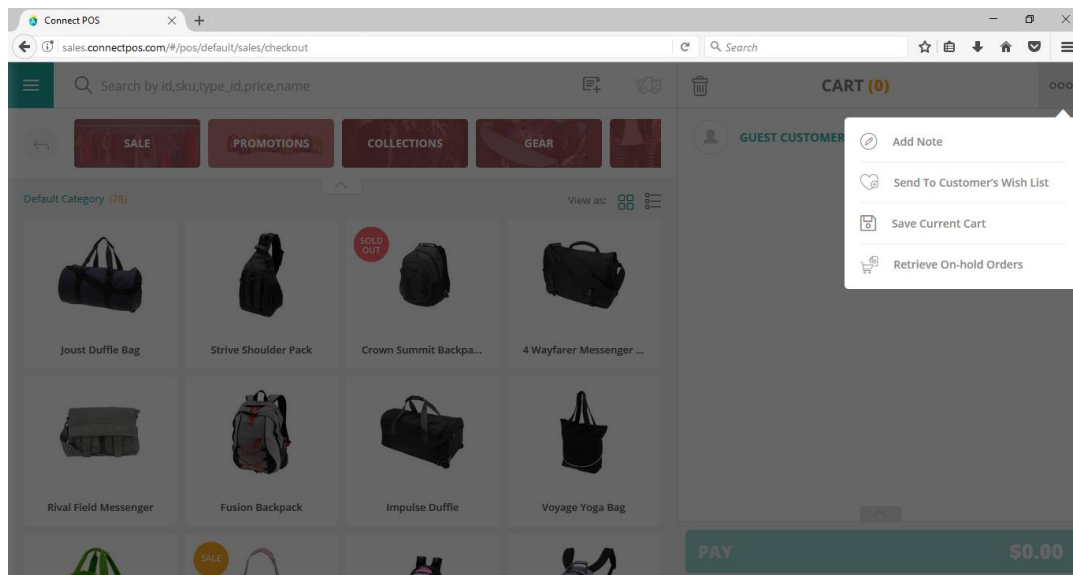


Figure 20: Order Functions



Note that saved orders are created and stored in the local device on which ConnectPOS is running. Saved orders are not synced online that means other devices cannot see them even if they're working on same register.

For more order functions, go [here](#).

Clear Order

Click on the trash icon at top right corner of the cart if you want to clear the existing order.

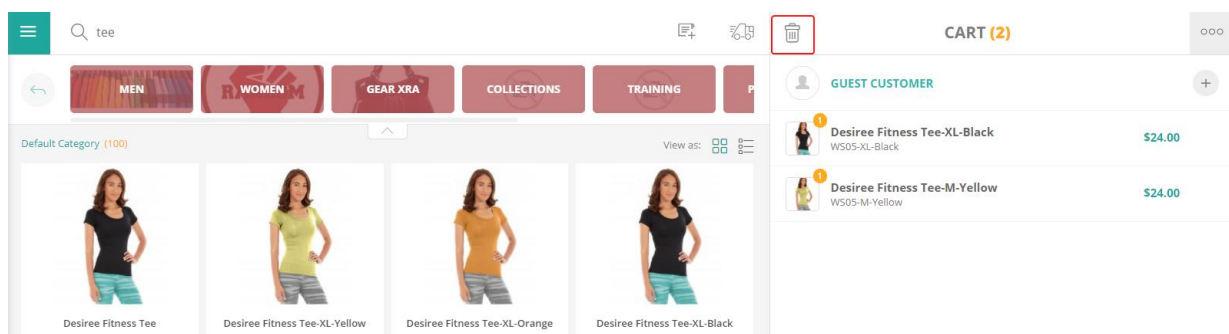


Figure 21: Clear Order

Checkout

When you finish adding items to an order, you can click the **"PAY"** button to go to Checkout screen.

On the left, you can see the Order grayed out, so the cashier can check the order details again if necessary. In case you need to edit something, click **"Back"** to go back to Sell Screen and edit the order.

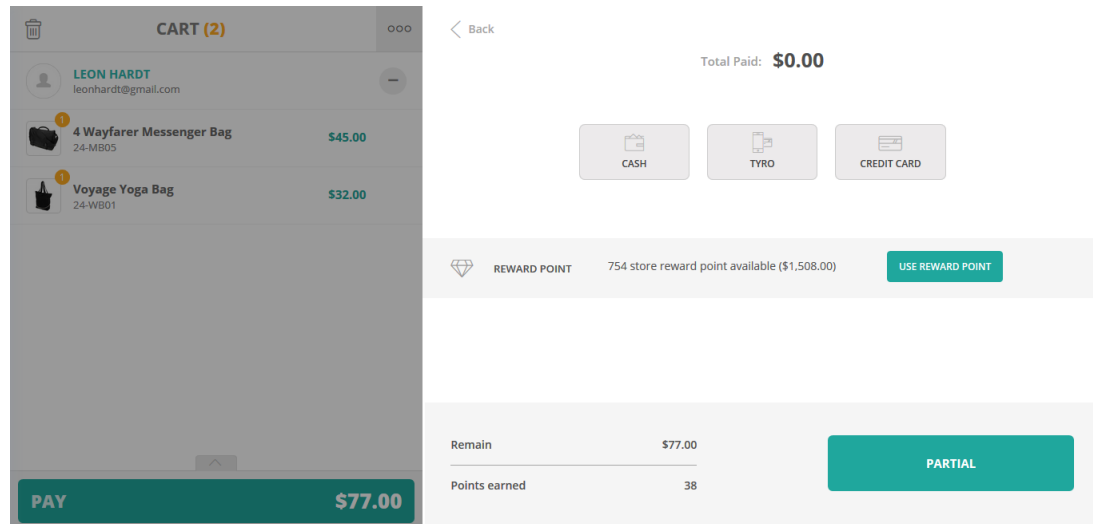


Figure 22: Checkout Screen

Payments

ConnectPOS supports both integrated and non-integrated payment methods.

For Integrated Payments, ConnectPOS is integrated with Tyro, which supports Australian merchants. To learn how to configure and pair TYRO terminal with ConnectPOS, please go [here](#).

For Non-integrated Payments (which means you need to manually type in the amount), you can customize the buttons in Payment Settings to represent different payment methods and manage your sources of payments. For more details of Payment Settings, please go [here](#).

Select payment method(s)

Enabled payment methods in Payment Settings are displayed when you enter Checkout screen. For Cash payment method, you can even see some amount paid suggestions for the order (Quick Cash).

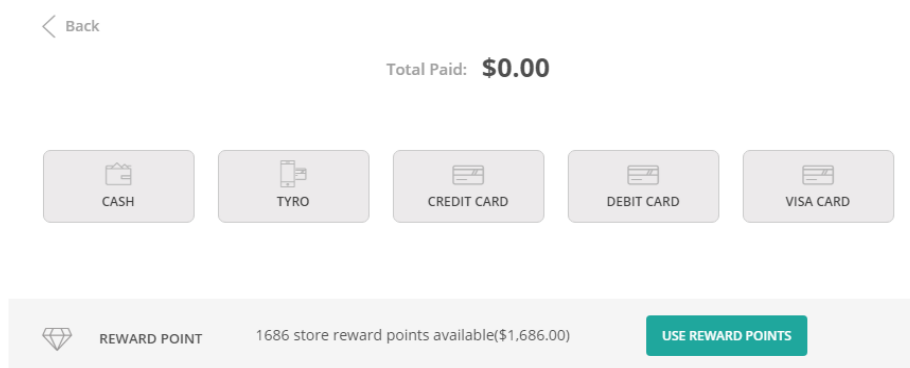


Figure 23: List Of Payments

Besides payment methods such as Cash, Credit Card, Debit Card..., ConnectPOS is integrated with Aheadworks' Reward Points extension so your customers earn and spend their reward points when shopping both online and in store.

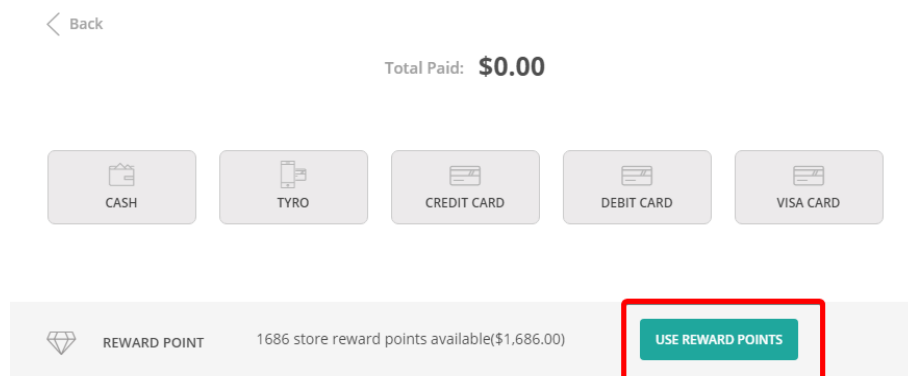


Figure 24: Using Reward Point In Order

If the order is fully paid, it will be marked **"Complete"** as a normal Magento order. The product stock will be updated in Magento system similar to an online order.

Split Tenders

ConnectPOS supports multiple payment methods for one order (split payment). You can select different payment methods, enter the money received corresponding to each method and click "Complete" to finish checking out for that order.

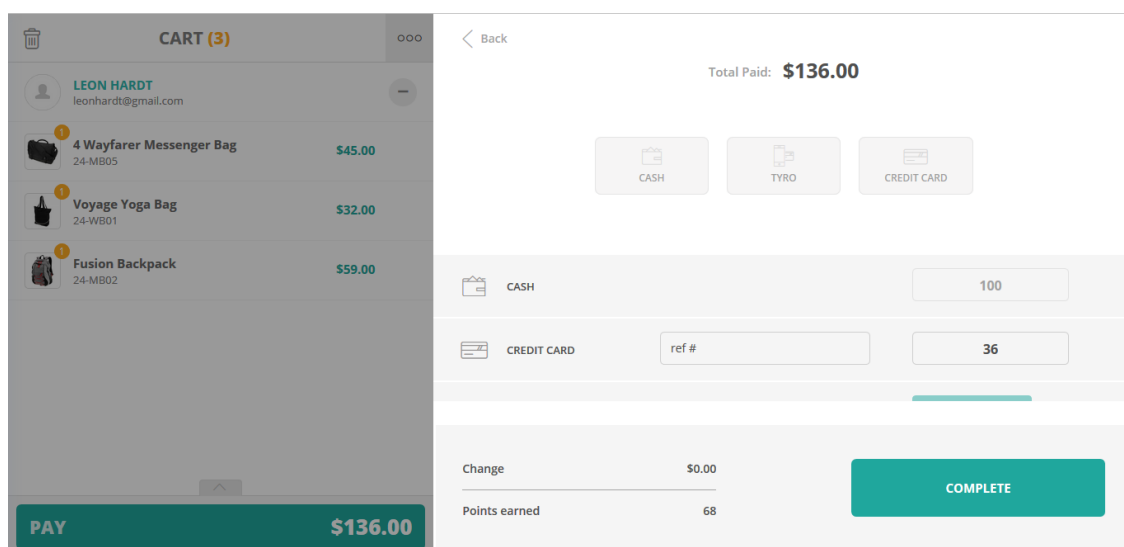


Figure 25: Split Tenders

Layaway (Partial Payment)

ConnectPOS supports partial payments or deposits for orders:

1. Select the payment method(s)

2. Enter the deposit amount
3. Click **"Partial"**. With the orders with deposit amount equal to zero, you can just click **"Partial"** to finish checking out.

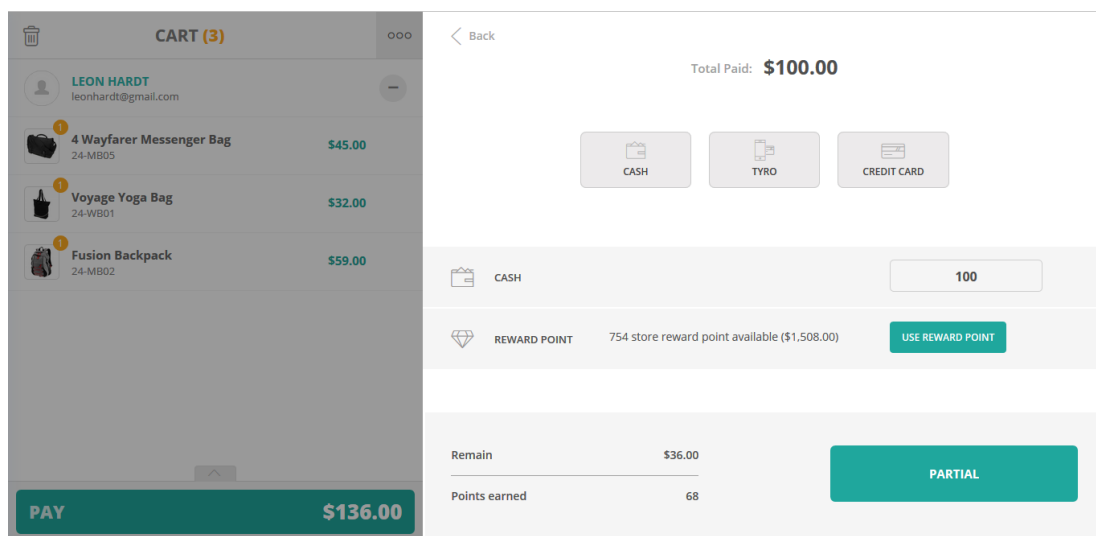


Figure 26: . Layaway/ Partial payment

The partially paid orders will be recorded in ConnectPOS (under Order List). These orders will also be synced to Magento but with status of **"Processing"** and the amount paid equal to zero.

When the customer comes back later to pay the rest, you can add the remaining payments:

1. Go to Order List and find the order using the search bar or filters
2. Click on the order then click **"Add Payment"**
3. Select the payment method(s), enter the amount
4. Click **"Complete"**

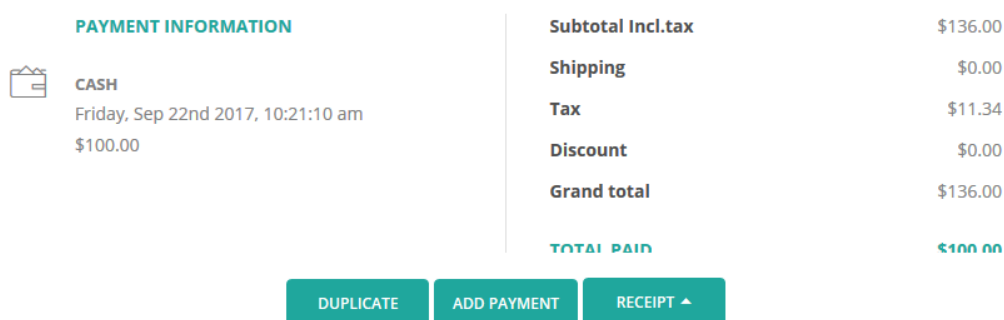


Figure 27: "Add Payment" button

Print and Send Receipts

ConnectPOS will process order and display the sum-up screen. On sum-up screen, you will see the Grand Total as well as some options in regards to receipts:

Print Receipt

Click "Print Receipt" button, then a pop-up window of your browser will appear for printing receipt.

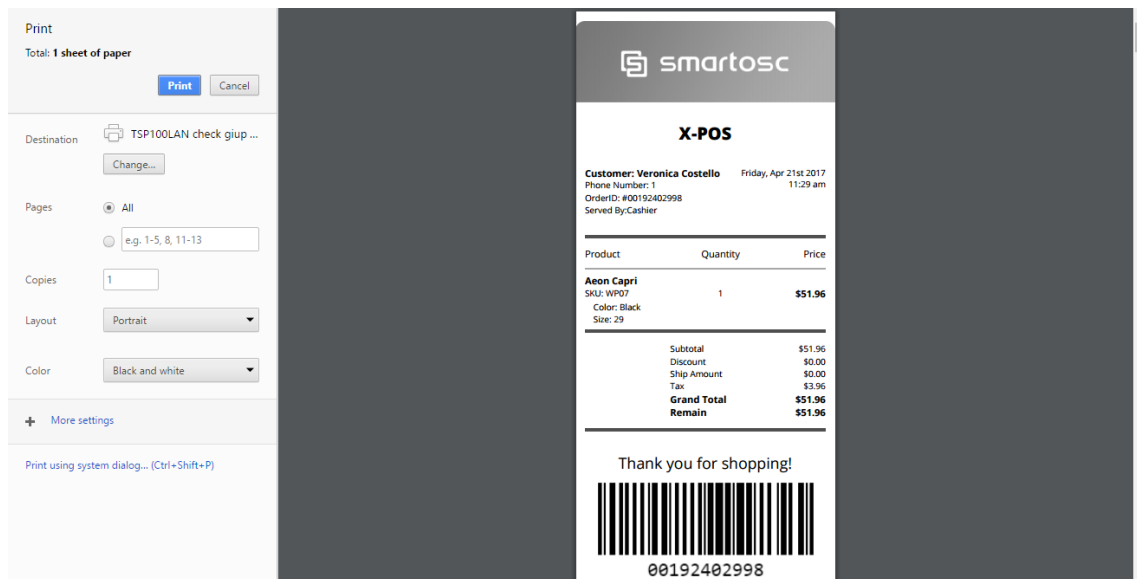


Figure 28: Receipt Printing Pop-up

Email Receipt

Click "Email" button, then an input box will be displayed for you to enter customer's email address. The receipt will be sent to this address after clicking "Send" button.

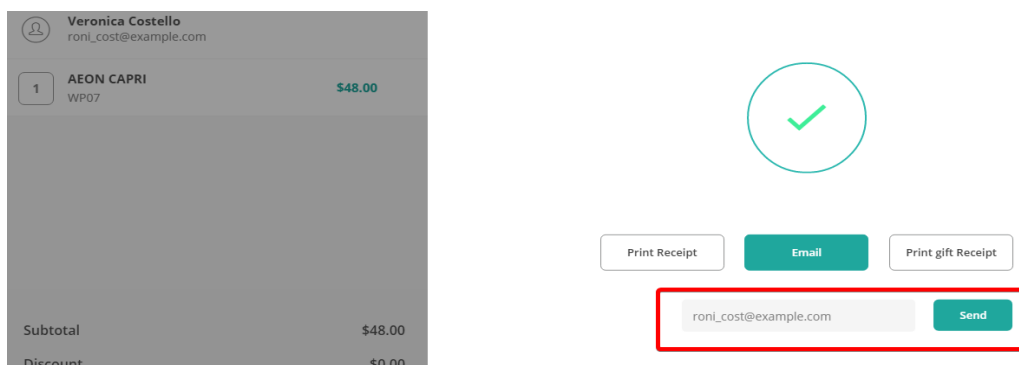


Figure 29: Email Receipt

Print Gift Receipt

Printing Gift Receipt will be the same as printing a normal receipt except it does NOT include prices. The body of the order lines are based on the standard Magento setup for invoice.

Reprint/ Re-email Receipt

You can through the order list also reprint an invoice for an order.

1. From sidebar menu, go to Order List
2. Find the order using the search bar and filters
3. Click "**Receipt**" and then choose to reprint, re-email or print a gift receipt

The screenshot displays the ConnectPOS checkout interface. On the left, a list of orders is shown with columns for date, customer name, status, and amount. On the right, a detailed view of a specific order is shown, including the order number, guest customer information, items, payment information, and a receipt summary. A red box highlights the 'RECEIPT' button in the bottom right corner.

Order List (Left Panel):

Date	Customer	Status	Amount
Tuesday, August 29th 2017	GUEST CUSTOMER #00100000120	COMPLETE	\$97.50
	VERONICAS COSTELLO #00100000119	COMPLETE	\$85.00
Monday, August 28th 2017	SDFSDF SDFSDF #00100000118	COMPLETE	\$2,091.79
	GUEST CUSTOMER #00100000117	COMPLETE	\$433.78
	VERONICAS COSTELLO #00100000116	COMPLETE - NOT SHIPPED	\$45.24
	GUEST CUSTOMER #00100000115	COMPLETE	\$43.21
	VERONICAS COSTELLO #00100000114	PARTIALLY PAID - NOT SHIPPED	\$37.08
Sunday, August 27th 2017	THOMAS E. FULLER #00100000113	COMPLETE	\$0.00

Order Details (Right Panel):

CLIENT ORDER #00100000120 **GUEST CUSTOMER** guest@sales.connectpos.com

Items:

- 1 Erika Running Short-28-Purple WSH12-28-Purple \$48.75
- 1 Erika Running Short-28-Red WSH12-28-Red \$48.75

PAYMENT INFORMATION:

CASH
Wednesday, Aug 30th 2017, 10:15:10 am
\$97.50

Receipt Summary:

Item	Amount
Subtotal Incl.Tax	\$97.50
Shipping	\$0.00
Tax	\$22.50
Discount	\$0.00
Grand total	\$97.50
TOTAL PAID	\$97.50
Remain	\$0.00

Buttons: DUPLICATE, REFUND, RECEIPT (highlighted), RECEIPT ^

Figure 30: Re-print Receipt

Update Magento stock

ConnectPOS synchronizes product information, including stock, in real time with Magento.

In the backend, after completing checkout of order and issuing the receipt in ConnectPOS, the stock of ordered products will be deducted similar to normal Magento order flow.

Order List

You can view all orders placed in the current store, as well as from other stores and online in Order List. By default, all the orders placed within the last 7 days in the current outlet will be listed with a slider on the left side.

The orders made in POS will be automatically synchronized to Magento to ensure you have a unified order database. It may take a while to sync an order to Magento: if you find a yellow marker on the left of the order, it means that the order has not been synced to Magento yet.

The screenshot displays the 'Order List' interface. On the left, a sidebar contains filters for date range (We, Aug 23rd 2017 to We, Aug 30th 2017), payment status, shipment status, and sync status. The main area shows a list of orders grouped by date. The right panel provides a detailed view of a selected order (#00100000115) for a guest customer. It lists items: Clamber Watch (\$58.50), Didi Sport Watch (\$99.67), and Voyage Yoga Bag (\$34.67). The total is \$43.21. Below the items, payment information is shown, including cash and change payments. A summary table on the right shows the breakdown of the total: Subtotal Incl. tax (\$192.84), Shipping (\$0.00), Tax (\$9.97), Discount (\$-149.63), Grand total (\$43.21), and Total Paid (\$43.21). Buttons for Duplicate, Refund, and Receipt are at the bottom.

DATE	CUSTOMER	STATUS	AMOUNT
Tuesday, August 29th 2017	GUEST CUSTOMER #00100000120	COMPLETE	\$97.50
	VERONICAS COSTELLO #00100000119	COMPLETE	\$85.00
Monday, August 28th 2017	SDFSDF SDFSDF #00100000118	COMPLETE	\$2,091.79
	GUEST CUSTOMER #00100000117	COMPLETE	\$433.78
	VERONICAS COSTELLO #00100000116	COMPLETE - NOT SHIPPED	\$45.24
	GUEST CUSTOMER #00100000115	COMPLETE	\$43.21
	VERONICAS COSTELLO #00100000114	PARTIALLY PAID - NOT SHIPPED	\$37.08
Sunday, August 27th 2017	THOMAS E. FULLER #00100000113	COMPLETE	\$0.00

CLIENT ORDER	#00100000115	GUEST CUSTOMER	guest@sales.connectpos.com
1	Clamber Watch 24-WG03		\$58.50
1	Didi Sport Watch 24-WG02		\$99.67
1	Voyage Yoga Bag 24-WB01		\$34.67

PAYMENT INFORMATION		
CASH	Monday, Aug 28th 2017, 4:21:33 pm	\$45.00
CHANGE	Monday, Aug 28th 2017, 4:21:42 pm	-\$1.79

	Amount
Subtotal Incl. tax	\$192.84
Shipping	\$0.00
Tax	\$9.97
Discount	-\$149.63
Grand total	\$43.21
TOTAL PAID	\$43.21
Remain	\$0.00

Figure 31: Order List

You can use the search bar and filters to search for the orders you need. There are 4 filters available:

- **Order Status:** Partially Paid, Complete, Partially Refund, Fully Refund, Exchange
- **Shipment Status:** No Shipping, Not Shipped, Shipped
- **Sync Status:** Not Synced, Synced, Error
- **Date Range**

This screenshot is similar to Figure 31 but highlights the date range filter in the sidebar. A red box is drawn around the date range selector, which shows a calendar for August 2017. The date range is set from Wednesday, August 23rd to Wednesday, August 30th, 2017.

Figure 32: Select the date range

Purchase History

To view the purchase history of a specific customer:

1. Go to Order List
2. Search for the customer using name, phone number, Customer ID... and enter
3. All the orders made by the customer within 7 days in this store will be listed. You can use the filters to see all the orders you need.
4. Tick "Search online" at the end of search bar if you want to see the orders made by that customers online and in other stores, too.

The screenshot displays the 'Purchase History' interface. On the left, a list of orders for 'VERONICA AAA COSTELLO' is shown, filtered by date (August 1st to September 22nd, 2017). The orders are categorized by status: COMPLETE, PARTIALLY PAID, and PARTIALLY PAID. The right side shows a detailed view of a specific order (#00100000056) for 'Strive Shoulder Pack'. The order total is \$17.21. Below the order details, there is a 'PAYMENT INFORMATION' section showing the payment method as CASH and the date/time of payment. A summary table on the right lists the Subtotal, Shipping, Tax, Discount, Grand total, and Total Paid. At the bottom, there are buttons for 'DUPLICATE', 'REFUND', and 'RECEIPT'.

DATE	CUSTOMER	STATUS	AMOUNT
Wednesday, September 20th 2017	VERONICA AAA COSTELLO	COMPLETE	\$17.21
Monday, September 18th 2017	VERONICA AAA COSTELLO	PARTIALLY PAID	\$123.00
Friday, September 15th 2017	VERONICA AAA COSTELLO	PARTIALLY PAID	\$0.00
Friday, August 25th 2017	VERONICA AAA COSTELLO	COMPLETE	

CLIENT ORDER	#00100000056	VERONICA AAA COST...	roni_cost@example.com
1	Strive Shoulder Pack	24-MB04	\$17.21

PAYMENT INFORMATION	
CASH	Wednesday, Sep 20th 2017, 10:09:38 am
	\$17.21

	Amount
Subtotal Incl. tax	\$17.21
Shipping	\$0.00
Tax	\$2.54
Discount	\$0.00
Grand total	\$17.21
TOTAL PAID	\$17.21
Remain	\$0.00

Buttons: DUPLICATE, REFUND, RECEIPT

Figure 33: Purchase History

View Order Details

When you go to Order List and click on an order, you will find its details on the right side:

1. On the top is the Grand Total of the order
2. Below is the order information. Click on the plus icon to expand the section and see the following information:
 - Client Order: the ID of the order in POS
 - Magento Order: the ID of the order in Magento back end. You can look up the order in Magento Order Database using this ID.
 - The status of the order, including Payment Status and Shipment Status
 - Date and time when the order was placed
 - Customer information, including name, phone and address
3. Below the order information, you can find other details:
 - Items ordered with quantity
 - Payment method
 - The sales summary (subtotal, discount, shipping fee, tax, grand total and the amount paid for the order)

\$143.21

CLIENT ORDER	#00100000059	ANN LE	annle@gmail.com
MAGENTO ORDER	#000000649	TELEPHONE	123432342
STATUS	Complete	ADDRESS	Ann Le 1 ABC Street, New York, New York, 12345, US
DATE & TIME	Thursday, Sep 21st 2017, 5:02:18 am		

	1	Fusion Backpack 24-MB02	\$63.53
	1	Impulse Duffel 24-UB02	\$79.68

PAYMENT INFORMATION

 **CASH**
Thursday, Sep 21st 2017, 5:01:23 am
\$50.00

Subtotal Incl. tax	\$143.21
Shipping	\$0.00
Tax	\$21.30
Discount	\$0.00

DUPLICATE
REFUND
RECEIPT ▲

Figure 34: Order Details

Order Functions (continued)

When you select an order in Order List, you can perform the following actions:

- **Duplicate:** click to duplicate the selected order, excluding discount(s) and promotion(s) of selected order
- **Receipt:** click to choose to reprint, re-email the receipt or print a gift receipt
- **Add Payment:** click to add the remaining to the partially paid orders
- **Mark as Fulfilled:** clicking to create shipment in Magento for the order. Only visible for orders with shipment but not shipped yet.
- **Refund:** click to start process of Refunding or Exchanging items of an order. Only visible for complete orders. See below for detailed instruction.

Refund and Exchange

To refund or exchange items of a selected order:

1. Click **"Refund"** button (Please note that only orders marked "Completed" can be refunded or exchanged)
2. By default, all items in the chosen order are selected to be refunded. You can click on any item to unselect it or change the quantity refunded by entering the number in the quantity box.
3. By default, **"Restock"** is checked. Uncheck it if necessary.
4. If a customer wants to exchange for a new item, add the new item to cart
5. Click **"Refunded Total"** button to edit refund shipping or adjustment
6. Click **"Pay"** button to process to Checkout screen
7. Select the payment method(s) that the customer wants to use and click **"Complete"**

The screenshot displays the 'Return refunded item to stock' interface. On the left is a grid of 16 items, including 'Abominable Hoodie', 'Adrienne Trek Jacket', 'Aeon Capri', 'Aero Daily Fitn...', 'Aether Gym Pant', 'Affirm Water Bottle', 'Aim Analog Watch', 'Ajax Full-Zip Sweatshirt', 'Ana Running Short', 'Angel Light Running Short', 'Antonia Racer Tank', and 'Apollo Running Short'. On the right is a summary table. Annotations include: a red box around the quantity '1' for 'APOLLO RUNNING SHORT' with a note 'Return refunded item to stock'; a red box around the quantity '1' for 'AJAX FULL-ZIP SWEATSHIRT' with a note 'Enter quantity to refund'; a green box around the 'AJAX FULL-ZIP SWEATSHIRT' item with a note 'Exchanged item'; a green box around the 'Refund Shipping' and 'Adjustment' rows with a note 'Edit Refund Shipping Fee and Adjustment of Refund'; and a green box around the 'Refund Shipping' and 'Adjustment' rows with a note 'Enter quantity to refund'.

Refunded Total	
Subtotal	\$33.50
Discount Amount	\$0.00
Tax	\$0.00
Refund Shipping	1
Adjustment	0
Total Exchange Amount \$69.00	
Subtotal	\$69.00
Discount	\$0.00
Tax	\$0.00

PAY \$35.50

Figure 35: Refund and Exchange

Shifts

A shift is a period of time during which transactions take place in your store's register. You use shifts to balance your cash drawer on a regular basis and hold staff accountable for the money they've handled.

For example: you can have morning shift with a cashier, afternoon shift with another cashier, or you can have one shift the whole day.

Open A New Shift

At the beginning of your business day, you need to open a new shift to start selling.

To open a new shift:

1. On the Sell Screen, click **"Open"** button to open a new shift.

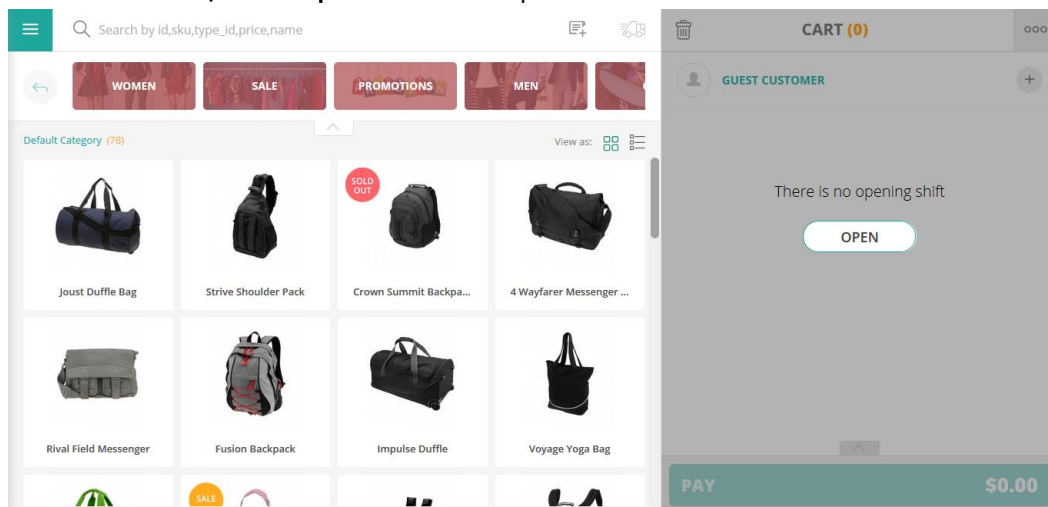


Figure 36: Open a new shift - 1

2. You will be redirected to **Shifts**. Click **"Open"** button again.
3. A pop up will appear for you to enter the amount you start your shift with and leave note if needed
4. Click **"DONE"** button

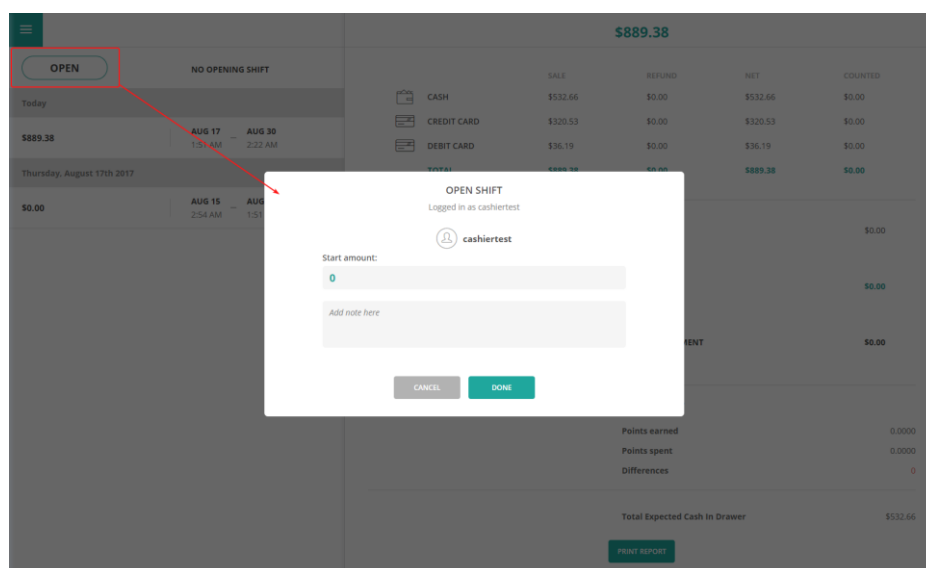


Figure 37: Open a New Shift - 2

Make manual cash transaction

In case you need to adjust the cash during the shift:

1. Go to Order List, click on the current shift
2. Click the **"ADJUST"** button
3. Select to "Add" or "Remove", then enter the amount to put in or take out the money from the cash drawer
4. Add note if needed
5. Click **"DONE"** button and the adjustment will be added to the list of shift activities

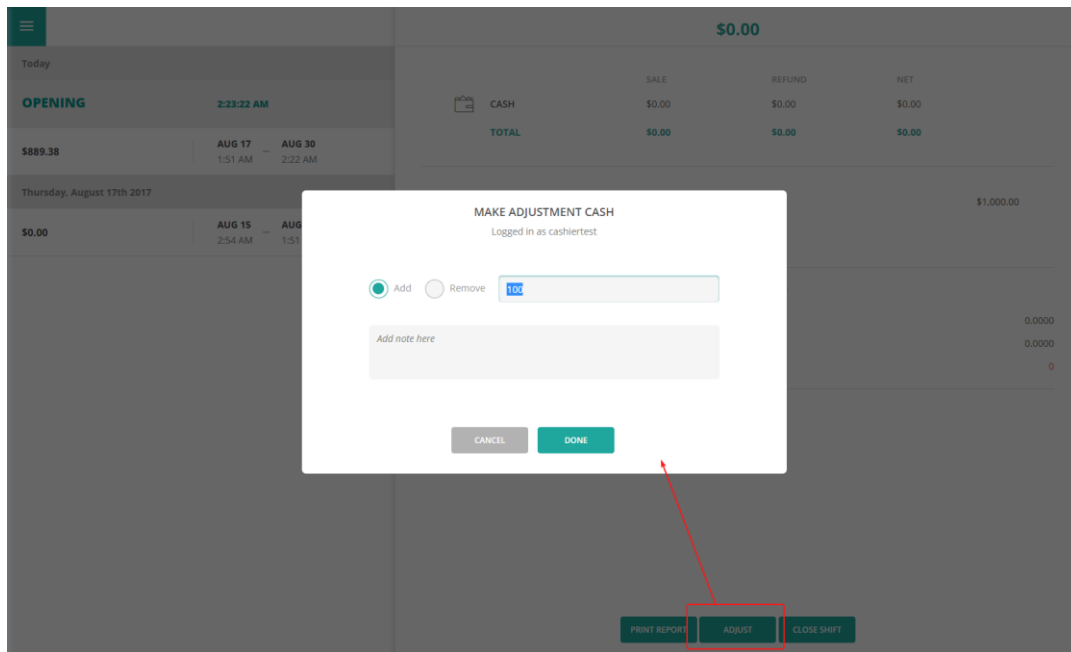


Figure 38: Cash Adjustment

Close A Shift

To close a shift:

1. Go to **Shifts** and click on the current shift
2. Click **"CLOSE SHIFT"** button and a pop-up will appear. You will find the list of payment methods along with the expected amount and the counted amount for each method.
3. In the counted amount for each payment, enter the number you counted.
4. If you take out some money from the register, enter the amount in "Cash Amount Takeout"
5. Add note if needed
6. Click **"CLOSE SHIFT"** button again

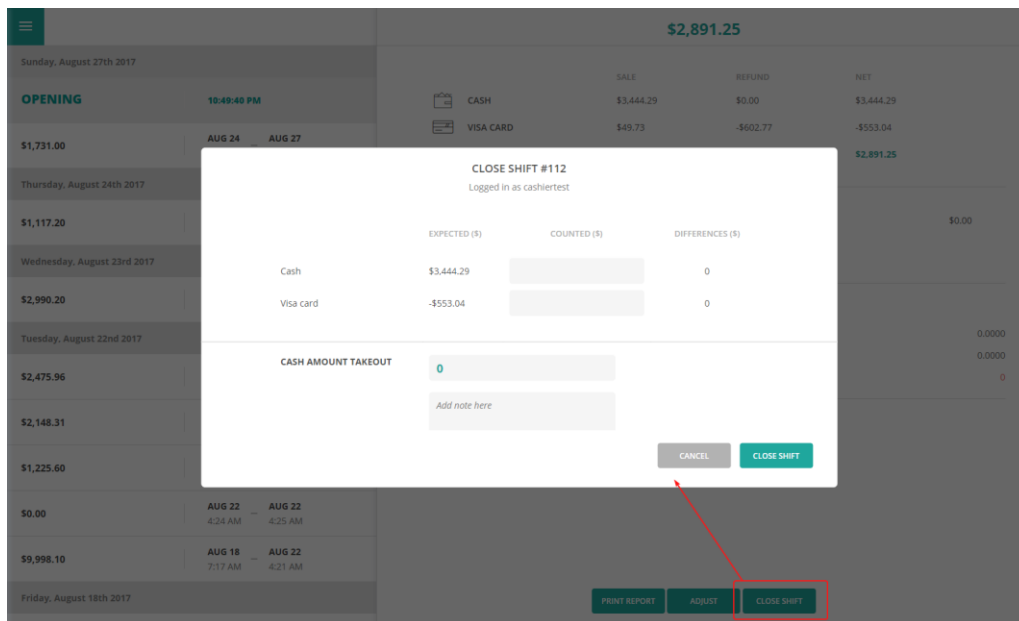


Figure 39: Close a Shift

Shift Reports

ConnectPOS supports both X-Report (aka Mid Day Report) and Z-Report (End of Day Report)

X-Report

X-Report is a summary of the activities from the beginning of the shift until that point on the register.

To print a X-Report:

1. From the sidebar menu, go to **Shifts**
2. Click on the current opening shift
3. Click **"Print Report"**

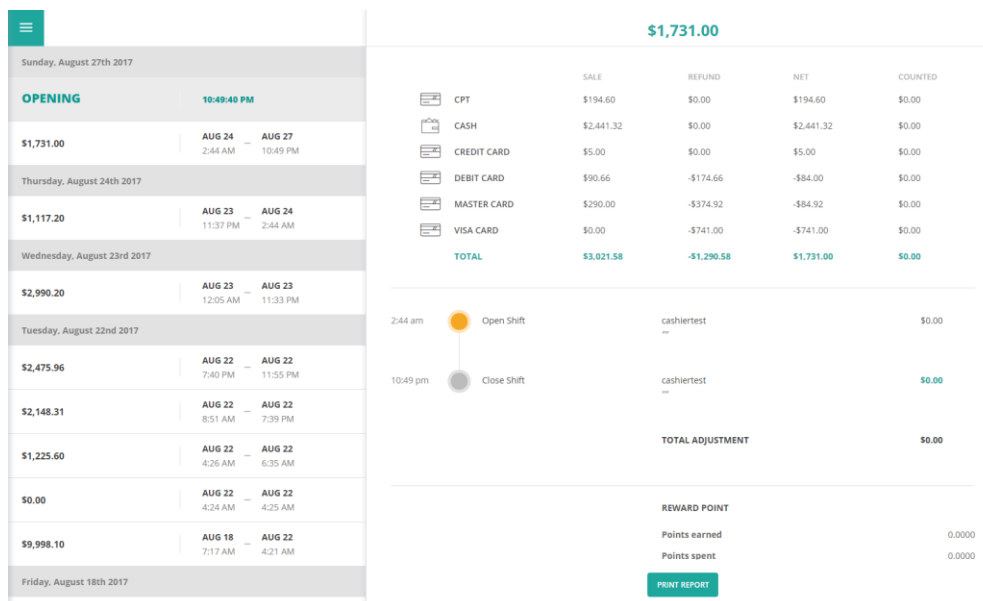


Figure 40: X- Report

Z-Report

After closing the shift, you will be able to print Z-Report – End of Day Report. This report includes not only all information of payment, activities but also the counted and “take out” amount of all payments.

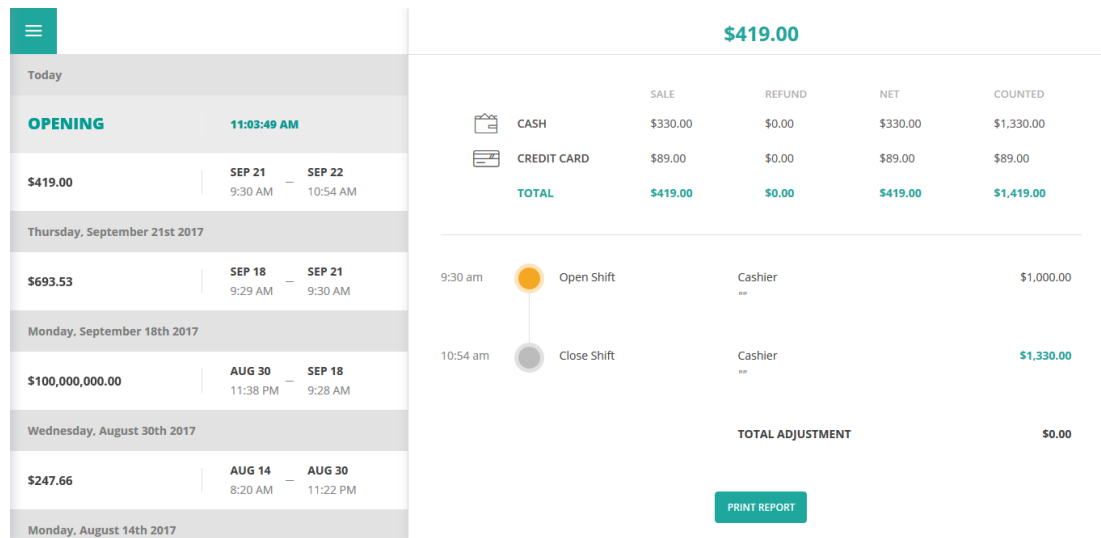


Figure 41: Z- Report

Multi-currency mode

To create a seamless shopping experience for customers, they want to accept payment in different currencies at their brick-and-mortar stores, too.

The new feature 'Multi-currencies' in ConnectPOS enables you to do so. It will take the exchange rate from Magento and display the converted price directly on your POS screen, so you know how much you should charge for orders.

For the setting of multi-currency, please go [here](#).

1. Put items into cart (for ways to add items to cart, please go [here](#))
2. Click the arrow to expand other options when in cart. Here, you can see the convert button. Select the currency that you would like to convert and ConnectPOS will do the calculation for you.

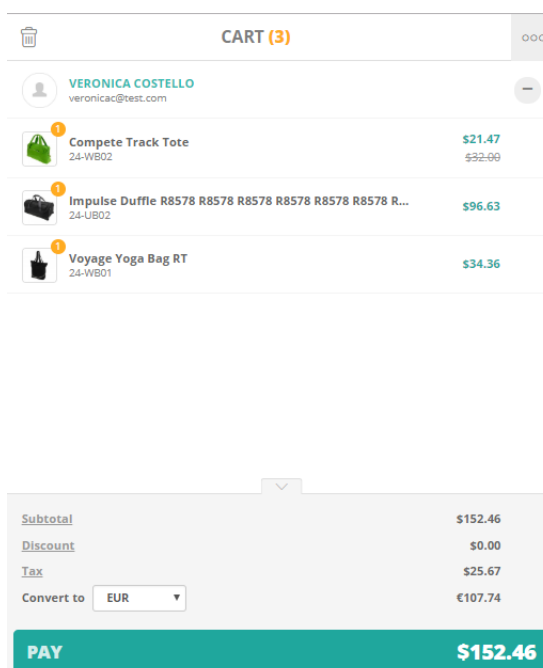


Figure 42: Convert button

3. Click "Pay" to navigate to payment page. Select Cash payment. Here, you can select the currency that customer would like to use. ConnectPOS will tell you how much customer will need to pay. In case customers pay more than the converted amount, ConnectPOS will also tell you the change amount (in base currency).

Print label

Go to **ConnectPOS** menu -> **Print label**

Place items into Cart area. Choose the number of labels of each item to be printed. Click **"Print"**. A preview window will pop-up and ask for your confirmation to print. Click **"Print"** again to start printing.

The screenshot displays the ConnectPOS interface. At the top, there is a search bar and a 'Scan' button. Below the search bar are several category buttons: TRAINING, SOCKS, COBBA F-MAX, WHAT'S NEW, SALE, and PROMOTIONS. The main area shows a grid of items for sale, each with a 'SALE' tag and a price. The items include MMA, Strive Shoulder Pack Br, Impulse Duffel R8578 R8..., Voyage Yoga Bag RT, Compete Track Tote, Savvy Shoulder Tote, Endeavor Daytrip Backpack, Driven Backpack, Overnight Duffel, Push It Messenger Bag, Pursuit Lumaflex™ ..., Sprite Foam Yoga Brick, Sprite Foam Roller, Luma Analog Watch, and Bolo Sport Watch. On the right side, there is a 'LABELS (5)' section showing a list of items in the cart with their quantities and prices. At the bottom right, there is a large green 'PRINT' button.

Item	Quantity	Price
Compete Track Tote (24-WB02)	2	\$32.00
Push It Messenger Bag (24-WB04)	1	\$45.55
Bolo Sport Watch (24-WB01)	1	\$49.00
Overnight Duffel (24-WB07)	1	\$45.00

Figure 43: Print label

Database

Download data

After you install and activate API to connect POS to Magento successfully, upon entering the Sell Screen for the first time, you will find ConnectPOS pulling all necessary data from Magento such as customers, products, etc. The time it takes depends on the data you have.

The data will be stored locally on your PC in a web browser so next time you log in, you don't have to wait for the data to load.

A small tip here is if you have a lot of customers and it takes a long time to pull the data, you can [enable Customer Online Mode](#) in POS Settings to save time.

The screenshot displays the 'CUSTOMER MODE' settings in the POS interface. On the left is a dark sidebar with a 'BACK' button and a menu including 'GENERAL', 'POS SETTING' (highlighted), 'Product & Category', 'Customer', 'Outlet & Register', 'Payment', 'Checkout', 'Receipt', 'Integrations', 'TRANSLATE', and 'ADVANCED'. The main content area has a light blue header 'CUSTOMER MODE' and a toggle 'USE CUSTOMER ONLINE MODE' which is turned on. Below this are three sections: 'SEARCH CUSTOMER' containing 'CUSTOMER'S ATTRIBUTES' (checkboxes for First Name, Last Name, Email, Customer ID, and Telephone) and 'NEW CUSTOMER' (a 'DEFAULT COUNTRY' dropdown set to 'United Kingdom'); 'SEARCH ORDER' containing 'ORDER'S FIELDS' (checkboxes for Email, Phone Number, First Name, and Customer ID); and a 'MAXIMUM RESULT' input field set to 8. A green 'SAVE' button is located at the bottom right of the settings area.

Figure 44: Enable Customer Online Mode

Update data

The below data will be updated in real time, which means any changes in your Magento back-end will be updated to ConnectPOS automatically:

- **Product:** product's name, pricing, stock
- **Customer:** customer's name, address, information, customer group
- **Tax configuration:** tax rate, tax rule, tax settings
- **Settings of ConnectPOS** (Outlet settings, Payment settings, etc)

Set up the Magento Backend

Tax Setup

In Magento, the tax of items in an order is calculated based on:

- Product tax class
- Customer tax class
- And "the address for calculating tax"

Since the order from ConnectPOS does not always have a specific address (compared to Magento frontend checkout), it is necessary to setup "default address for calculating tax".

Product Tax Class

Each product has its own field to setup the tax class, this field will impact to tax rule while calculating tax for product in order.

Customer Tax Class

The tax can be set differently for different customer groups following default Magento. ConnectPOS will follow the rules from Magento backend. The tax setup is very flexible in Magento, and we refer to Magento online documentation for configuration hereof.

Address for Calculating Tax

"Address for Calculating Tax" can be configured from Outlet section in ConnectPOS settings, there are 2 options to choose:

- **Outlet:** means that Magento and ConnectPOS will take address of outlet as "address for calculating tax" of items in order. By this way, if there are multiple outlets have different tax rates, you do not need to create many websites in Magento to assign its storeview to Outlet
- **Magento:** meaning using configuration of Magento to take address for calculating tax. It can be found at Magento back-end > System > Configurations > Sales > Tax > Tax Calculation Based On

ConnectPOS Configuration

To access the settings of ConnectPOS, from the sidebar menu of Sell Screen, go to Settings > POS Settings.

Product & Category

The “Product & Category” pane has all the settings that are considered the configuration of products and categories in ConnectPOS. Since products & categories need to be configured for each register, please select a register before accessing Product & Category in POS Settings.

Figure 45: Product & Category Configuration

Show Disabled Product

If enabled, ConnectPOS will show all disabled products from Magento on Sell Screen, otherwise disabled products will be hidden

Show Out Of Stock Product

If enabled, Out Of Stock Product will be shown on Sell Screen of ConnectPOS, otherwise they will be hidden.

Note that Out Of Stock products follows the “Stock Status” attribute of product in Magento.

Product Type

Select the product types that will be included in products displayed in ConnectPOS. If you for example only wish to search in Simple products, only select “Simple products”.

Default value: *All selected*

Product Visibility

Set whether filter should look at the value for Visibility set for the products. Visibility set is taken from Magento.

Default value: *All selected*

Sort Products Based On & Sorting Type

Select product's attribute that will be used for sorting increasingly or decreasingly

Search Product

Select the product attribute fields that you want to use to search. The fewer fields you select, the faster you can search.

Next to that, also enter the maximum results you want to display when you search using a keyword, i.e.: 5 or 10.

Barcode Fields

If you want to be able to scan product's barcode, select the attributes used as barcode that you want to use to scan.

Figure 46: Barcode Fields

Custom Sales

This section contains settings for feature of creating new product from ConnectPOS. Tax class setting is used to set tax class for this new product.

Figure 47: Enable and Set Tax for Custom Sale

Sort Categories Based On & Sorting Type

Select the category position or category name that will be used for sorting increasingly or decreasingly

Customers

The configurations under “Customer” pane are all related to how customers and their orders are handled in ConnectPOS.

Figure 48: Customer Configurations

Customer Mode

Customer Online Mode: By default, Customer Online Mode is disabled and ConnectPOS will load customer data to your local database. If you enable this, ConnectPOS will NOT load customer data to the local database; only when you start searching for a customer, ConnectPOS start loading data to display the result.

In case you have a lot of customers (30k – 50k records), we recommend you enable this to have a faster experience with ConnectPOS afterwards.

Search Customer

Select the customer attribute fields that you want to use to search. Like product search, the fewer fields you select, the faster you can search.

New Customer

To create a new customer quickly, a default country should be set to the country where the outlet is located.

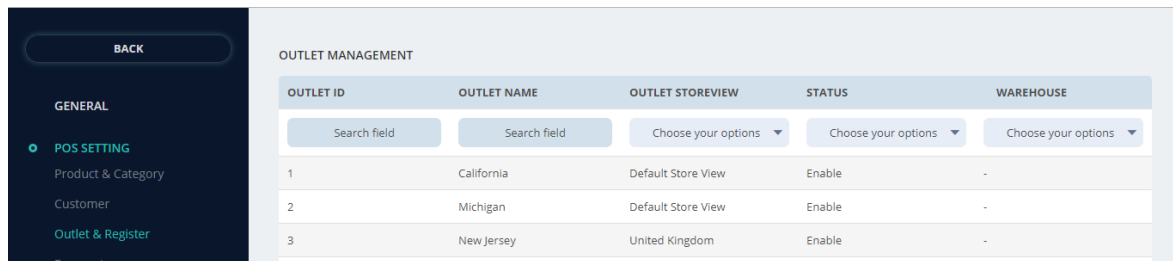
Search Order

Select the order attribute fields that you want to use when searching. Like product search, the fewer fields you select, the faster you can search.

Maximum result should be set for increasing performance of searching.

Outlet & Register

You will find all your outlets listed here along with their status (Enabled/ Disabled).



OUTLET ID	OUTLET NAME	OUTLET STOREVIEW	STATUS	WAREHOUSE
1	California	Default Store View	Enable	-
2	Michigan	Default Store View	Enable	-
3	New Jersey	United Kingdom	Enable	-

Figure 49: Outlet Configurations

Only enabled outlets and registers appear on "Select Register" screen.

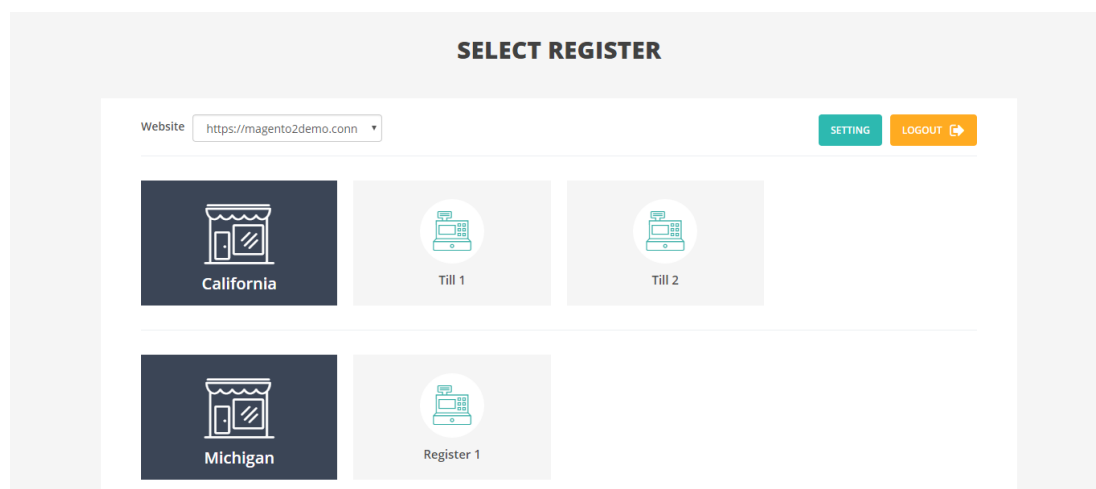


Figure 50: Enabled Outlets and Registers on "Select Register" Screen

Create New Outlets & Registers

1. Create a new outlet:

1.1. From the Sell Screen of POS Area, click on sidebar menu and go to **Settings > POS Settings > Outlets & Registers**

1.2. Click **"New Outlet"** button and fill in the required information (do NOT fill in the Outlet ID – it will be automatically generated):

- **Outlet Name:** used to distinguish with other outlets
- **Outlet Status:** only enabled outlet can be chosen on Outlet Selection screen after logging in
- **Street/ Postal code/ City/ Country/ Telephone/ Region:** fill in information of your outlet
- **Warehouse:** Choose the warehouse of Magento backend that the outlet is associated with
- **Store View:** choose one of your Magento store view, from which ConnectPOS will pull data to this outlet
- **Allow Guest Customer:** choose "Yes" to allow creating orders for non-register customers (in your Magento).
- **Register:** The number of register that is in this outlet. The instruction on how to create register is [below](#).

- **Paper Receipt's Template:** select one from the list of receipt's templates for outlet's order receipts. You can create a new receipt template or edit the current one in Receipt area.
- **Cashier:** assign your users to this outlet. Users will see the outlet(s) they are assigned to on their Outlet Selection screen. To create a new user and assign a role, go to your **Admin Area > User Management**.

Click **Save**.

Figure 51: Create a new outlet

2. Create a register:

- 2.1. Click on the outlet you've just created, then click **Add Register**
- 2.2. Fill in the requirement information and click **Save**

Figure 52: Create a new register

Repeat these steps to create all the outlets and registers you need.

3. Multi currency:

The setting for multi currency should be configured in both Magento setting and ConnectPOS setting:

3.1. Go to **Magento -> Store -> Configuration -> General -> Currency Setup**

Select the base currency and Allowed Currency. This will set up the currencies using for ConnectPOS.

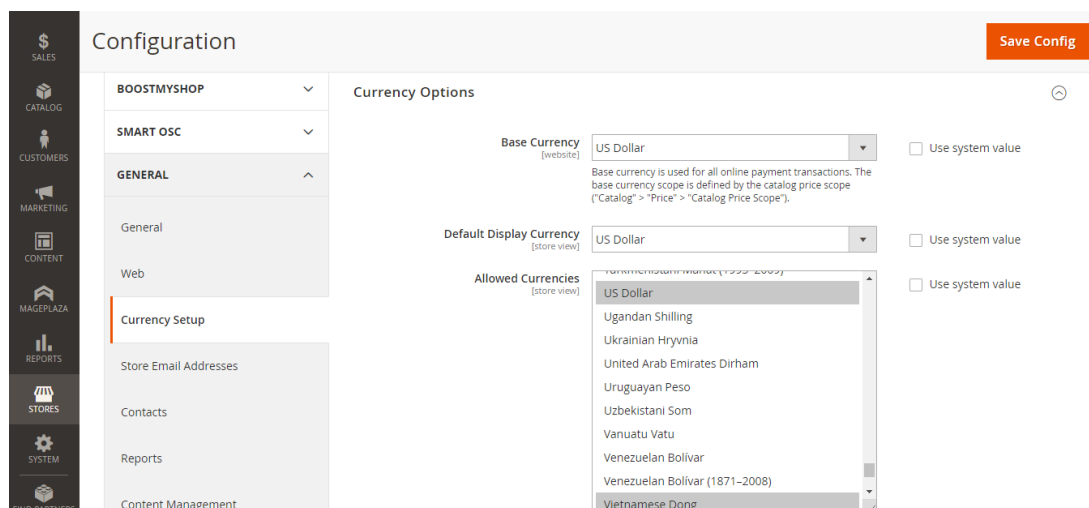


Figure 53: Currency setting in Magento

3.2. Click "Enable Multi-currency" to enable Multicurrency mode in ConnectPO

- **Display limits for decimal:** Decide how many decimal number ConnectPOS will display. The default setting is 2
- **Allowed currency:** Decide the currencies that ConnectPOS can convert from base currency.
Note: Currencies that are not allowed in Magento setting cannot be enable in ConnectPOS
- **Currency rates:** The currency rate which ConnectPOS use to convert from base currency. The base currency is placed on top of the list. ConnectPOS automatically update the currency rates everytime user logged in. User can also update the rate manually by click "Update rate" button.

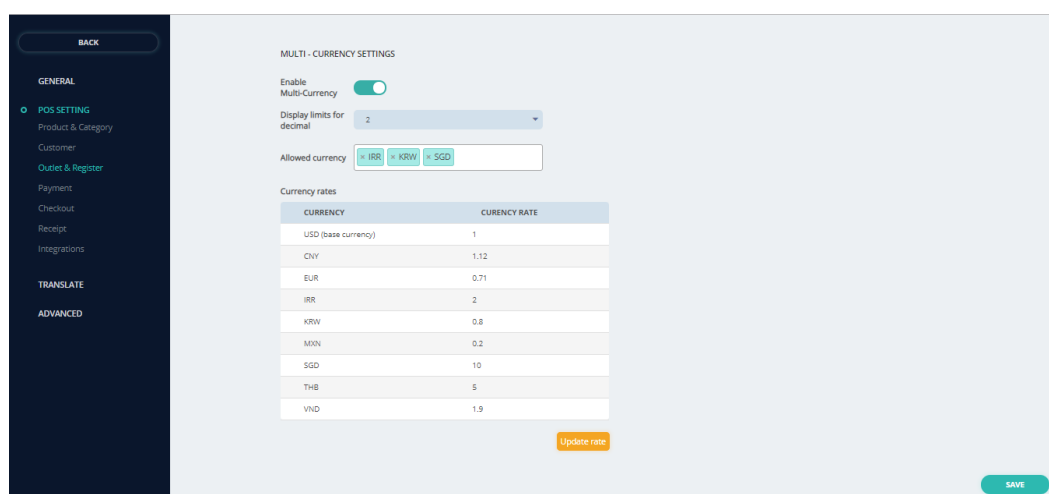


Figure 54: Multi currency setting

Change Website, Outlet and Register

ConnectPOS is designed for omnichannel; thus, it can work with multiple registers and outlets at the same time. You can choose the website, then Outlet and Register that you want ConnectPOS to work with on each device you use.

To change the website, outlet or register, from the sidebar menu of POS, click on “Change Outlet” to go to “Select Register” screen.

From the dropdown menu, select the website (aka the corresponding Magento back end). Once a website is chosen, ConnectPOS start loading the outlets and registers in corresponding with that website for you to select.

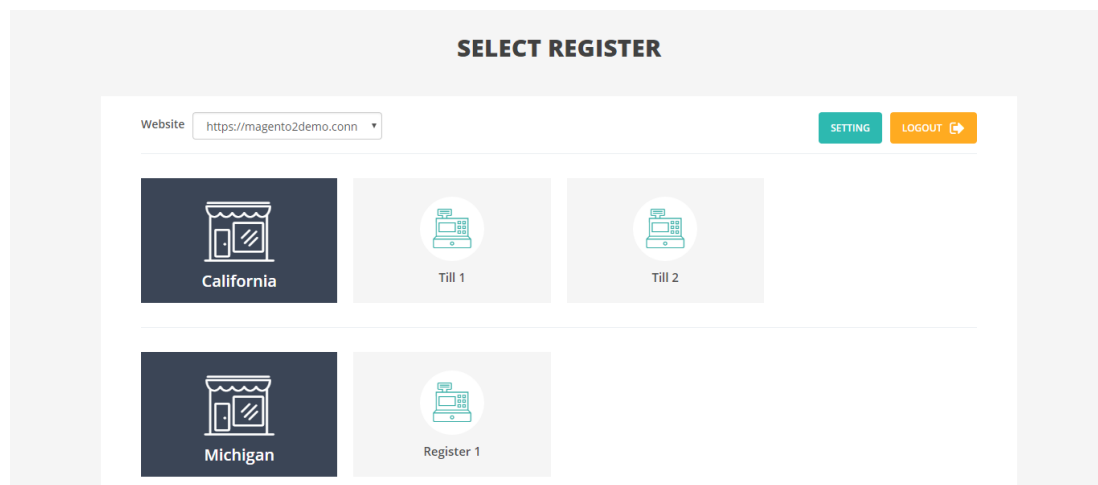


Figure 55: Dropdown menu to select a Magento web store

Payments

You can create and enable the buttons that represent different payment methods on Checkout screen here. By default, you will have Cash and Tyro – an integrated payment method for Australian merchants.

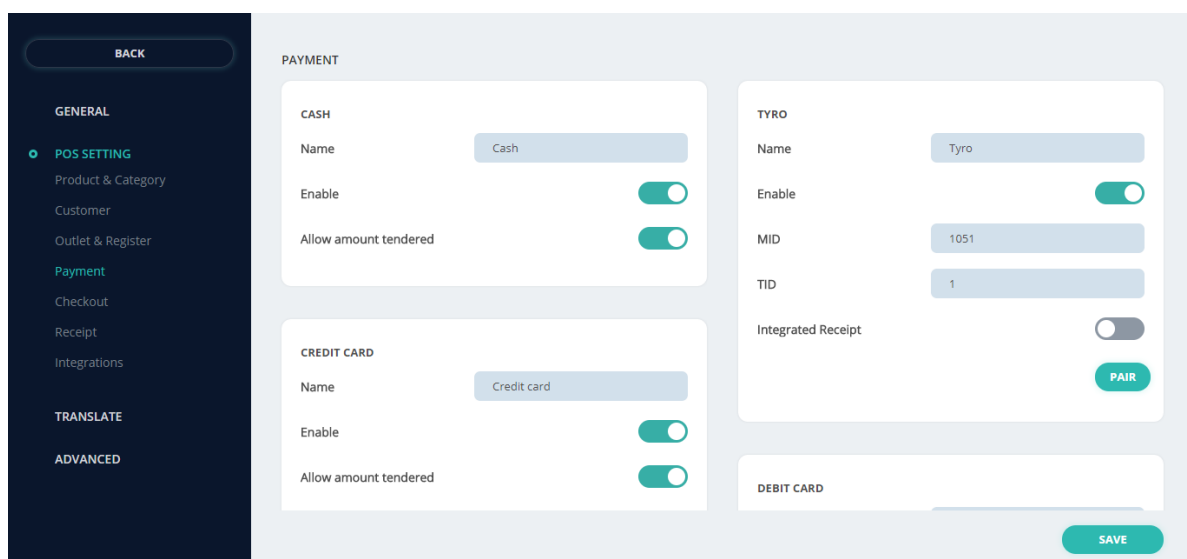


Figure 56: Payments Configurations

You can add new payment buttons and customize them to represent different payment methods and help you manage which sources the payments come from.

Non-integrated Payments

Non-integrated Payments mean that you need to manually enter the amount customers pay in POS.

To create a payment button representing a non-integrated payment method:

1. Go to Settings > POS Settings > Payment
2. Click **"New Payment"** button at the end of the panel. A new form for payment will appear.
3. Enter the name, i.e. Credit Card and choose to enable it. You can also choose to enable "Allow amount tendered" if you want to accept Split Tenders using this payment method.
4. Click **"Save"** at the right bottom of the panel

Integrated Payments

Integrated Payments mean that when your customers swipe cards, the amount will be sent to ConnectPOS automatically. For the time being, ConnectPOS is integrated with Tyro on the web version and on the application version (available on AppStore), Connect POS is integrated with PaypalHere, izettle, payment express, Moneris, authorize.net.

Pair Tyro terminal with ConnectPOS

To connect your Tyro terminal to ConnectPOS:

1. Find the TYRO payment in Payment Settings and enable this payment method
2. On your Tyro terminal, press the Menu button, find and open the "Integrated EFTPOS" menu.
3. Enter your admin PIN (which you can get from TYRO)
4. Select 'Authorize POS'. A Merchant ID (MID) and Terminal ID (TID) will appear on the screen
5. Enter the Merchant ID (MID) and Terminal ID (TID) in TYRO payment form in POS
6. Click "Save" at the right bottom of the panel

Wait a few seconds, then hit "Start" on the terminal. This will pair the Tyro terminal with ConnectPOS.

Checkout

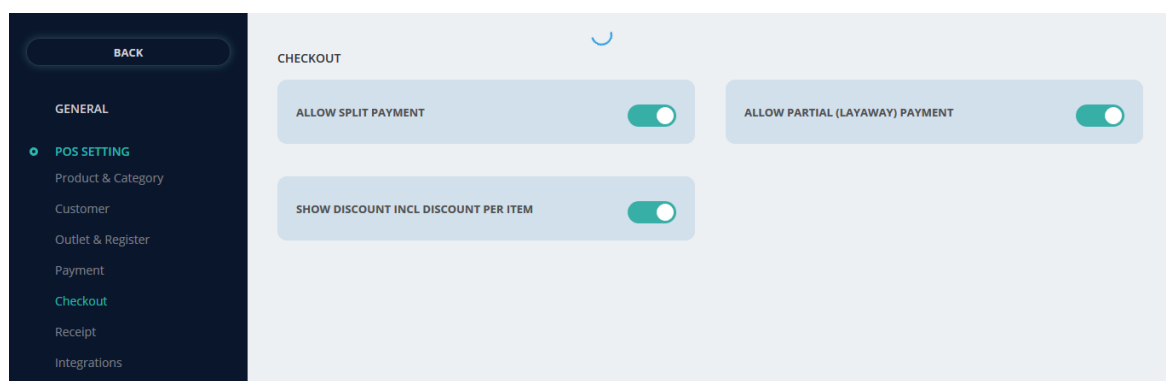


Figure 57: Checkout Configurations

Allow Split Payment

If enabled, you when placing order can select more than 1 payment method. Otherwise, only 1 payment method is accepted for order.

Allow Partial (Layaway) Payment

If enabled, order can be paid partially and customer can come back next time to complete order's payment.

Show Discount Incl Discount Per Item

There are two main types of discount in ConnectPOS: Discount Per Item and Discount Whole Order. If enabled, the Discount Amount in order's information will contain both of these values. If disabled, then it contains Discount Whole Order only.

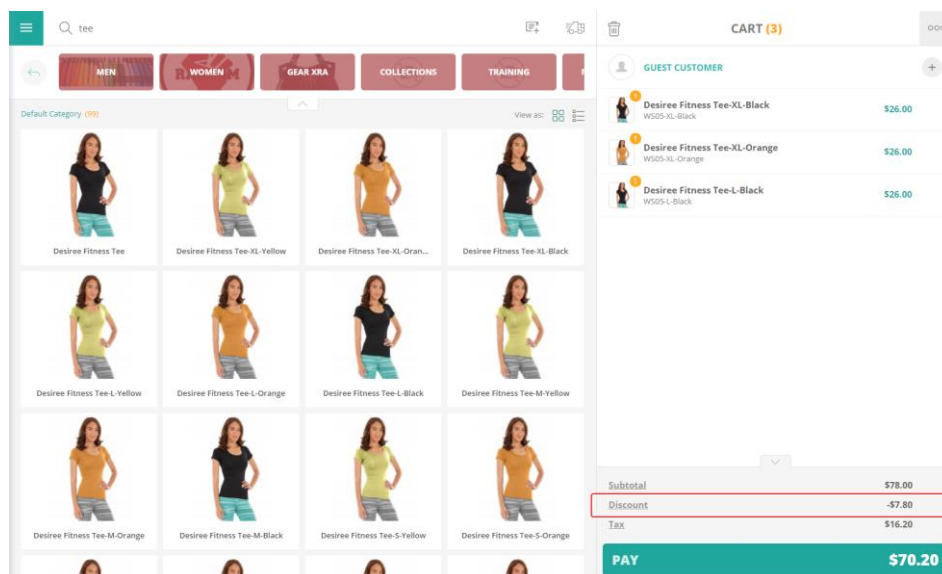


Figure 58: Discount Amount of an Order displayed

Receipt

The receipt section is for configuration of both printed and email receipt. Receipts are managed in templates, and each template has its own configuration that can be modified. When you modify a receipt template, the live preview will be changed accordingly.

You can create new receipt templates and then, in each outlet, you can choose a specific receipt template for that outlet.

Create A New Receipt

To create a new receipt:

1. Go to **Settings > POS Settings > Receipt**
2. In the dropdown menu of Select Template, select **"Add a new one"**
3. Customize the receipt, including:
 - **Template Name**

- **Logo:** upload outlet logo that will be printed on receipt (supported formats: jpg, png, gif)
- **Header:** the receipt's header text
- **Customer Info:** you can choose which customer information will be displayed on receipt: phone number only, email only or both.
- **Order Info:** Check or uncheck the following options:
 - o Only show shipping address when order has shipment
 - o Show salesperson
 - o Show discount, shipment amount if they're zero
- **Show Row Total:** Row Total can be set to display Including Tax or Excluding Tax.
- **Show Sub Total:** Sub Total can be set to display Including Tax or Excluding Tax.
- **Footer:** Enter footer's message which will be printed on receipt
- **Footer Image:** Upload footer image that will also be printed on receipt
- **Order Barcode:** Enabled this if you want to print order's barcode on receipt.
- **Barcode Symbology:** Once order barcode is enabled, choose a barcode symbology from this field.
- **Powered Text:** When enabled, the text of "Powered by SmartOSC 2017" will be shown on receipt.

The screenshot displays the 'RECEIPT CONFIGURATION' interface. On the left is a dark sidebar with a 'BACK' button at the top and a menu including 'GENERAL', 'POS SETTING' (highlighted), 'Product & Category', 'Customer', 'Outlet & Register', 'Payment', 'Checkout', 'Receipt', 'Integrations', 'TRANSLATE', and 'ADVANCED'. The main area is titled 'RECEIPT CONFIGURATION' and contains several settings: 'Select Template' (X-Retail default receipt), 'Template Name' (X-Retail default receipt), 'Logo Image Status' (Enable), and 'Logo' (a smartosc logo with an 'Upload' button). Below these is a 'Header' section with a rich text editor toolbar. On the right, a preview of the receipt is shown, featuring the smartosc logo, 'X-POS' title, customer details for John Doe, and a table of items including 'Hyperion Elements Jacket' with a price of \$56.87. A 'SAVE' button is at the bottom right.

Figure 59: Receipt Template Customization

Integrations

This section allows you to enable available integrations between ConnectPOS and 3rd extensions.

BoostMyShop's Multi Inventories

Under Multi Inventories section, choose BoostMyShop if you have Multi Inventories extension from BoostMyShop installed on Magento and want to integrate ConnectPOS with it.

- Plan Accurate Procurement Needs
- Make the Best Possible Buys
- Optimize Order Picking, Packing & Shipping
- Activity Reporting for Analysis

Aheadworks' Reward Points

Under Reward Points section, choose AheadWorks if you have Reward Points extension from AheadWorks installed on Magento and want to integrate ConnectPOS with it.

Once ConnectPOS is integrated with Aheadworks RP extension, you can:

- View lifetime sales and reward points balance
- Make a deposit or pay using reward points
- Earn reward points for placing an order in-store
- Refund to reward points balance

Aheadworks' Gift Card

Under Gift Card section, choose AheadWorks if you have Gift Card extension from AheadWorks installed on Magento and want to integrate ConnectPOS with it.

Once ConnectPOS is integrated with Aheadworks Gift Card extension, you can:

- Sell all Gift Card Product types
- Print gift card receipt
- Apply gift card in checkout
- See gift card report in Register

Translate

This section allows you to translate the ConnectPOS to your native language. ConnectPOS is currently support: English, Spanish, Netherlands, French and Vietnamese.

Go to **ConnectPOS Menu -> Settings -> Translate**

Select the language you would like to translate and Refresh the page.

Further information

If you have any other question, feel free to contact us at support@connectpos.com, or visit our website <https://www.connectpos.com> for information on our other extensions and services.

You can create and submit tickets through our Help Center here: <https://connectpos.zendesk.com/hc/en-us/requests/new>.