

Module Point of sales

User Manual

Summary

Summary

Overview	3
Installation.....	3
Copy files	3
Settings.....	4
General	4
PDF	5
Barcode scanner	5
Receipt.....	6
POS Parameters.....	7
Use it.....	8
How to use.....	8
Products.....	8
Customer	9
Payment Method.....	10
Shipping Method	10
Create order	10
Sales report	11
Barcode Management.....	11
Settings.....	11
Create a new attribute	12
Settings.....	12
How to use.....	13

Overview

Point of Sales is a Magento Extension designed to easily create order from a Point of Sales

Main features:

- Full Magento admin panel integration
- Support multiple POS (with custom currency, customer group, country)
- Several customer modes : guest, name only or full information
- Newsletter subscription
- Automatically send invoice to your local printer
- Automatically print receipt
- Default shipping and payment Method
- POS display (large fonts)
- Web 2.0 user interface

Note : Auto print feature requires [Magento Client Computer](#) installation.

Installation

Copy files

Enable cache in Magento "system" -> "Cache Management", then unzip the archive, open the folder pointofsales_XXX to download content to your site.

Once these files are copied, you must refresh the Magento cache (cache and index)

Once refreshed the cache, log out and log back in Magento (for initializer rights).

Settings

To set Quotation Module configuration, use System > Configuration > Point Of Sales

Warning: id "access denied" message is displayed, you have to log out / log in to reset admin permissions.

Configuration		
Auto print invoice	Yes	[GLOBAL]
Auto print shipment	No	[GLOBAL]
Show print buttons	Yes	[GLOBAL]
Show send to printer buttons	Yes	[GLOBAL]
Empty string	n/r	[GLOBAL]
Tick create invoice checkbox	Yes	[GLOBAL]
Shelf location		[GLOBAL]
▲ Note : if Embedded ERP 2.7.5.7+ is installed, you dont need to specify attribute		
Auto print receipt	Yes	[GLOBAL]
Set as shipped	Yes	[GLOBAL]


General

Fields	Description
Automatically send invoice to printer	If checked, invoice is automatically send to printer (using magento client computer)
Display Print buttons	If checked, print buttons are displayed once an order is created
Empty string	-
Auto select "create invoice"	Auto generate invoice when a new order is created
Shelf location	Allow user to retrieve product location
Auto print receipt	Auto print receipt when a new order is created
Set product as shipped	Auto select shipped checkbox when a product is added to current order.
Auto print receipt	Auto print receipt when a new order is created
Set product as shipped	Auto select shipped checkbox when a product is added to current order.

PDF

PDF

Header Image (585x50)



[STORE VIEW]

PDF footer

Delete Image

all right reserved

[STORE VIEW]

Fields	Description
Header picture	Picture displayed on top of pdfs files
Footer	Content displayed on pdfs footer

Barcode scanner

Barcode Scanner

Enable

[GLOBAL]

Product barcode attribute

[GLOBAL]

▲ Note : if Embedded ERP 2.7.6+ is installed, you dont need to specify attribute

Fields	Description
Enable	Activate adding product using a scanner
Product barcode attribute	Select Product barcode attribute

Receipt

Receipt

Header	HEADER RECEIPT	[GLOBAL]
Footer	FOOTER RECEIPT	[GLOBAL]
Width	7	[GLOBAL]
Unit	cm ▼	[GLOBAL]
Store name	demo.maisondulogiciel.com	[GLOBAL]

Fields	Comments
Header	Text displayed in receipt's header
Footer	Text displayed in receipt's footer
Width	Receipt width (according to your printer)
Unit	Unit of measure used (cm or inch)

Notification

Notification	
Guest account email	<input type="text" value="anonymous@website.com"/> [GLOBAL]
Send new order email	<input type="text" value="Yes"/> [GLOBAL]

Paramètre	Description
Guets account email	Insert the email address of the guest cutomer
Send new order email	yes / no : allow email sending

POS Parameters

To create a new Point Of Sale, you have to create a new Magento User : each point of sale matches to a user. This system allows to manage several point of sales with custom settings (currency, customer group ...)

To create a new user, select menu System > Permission > User > Create user

- Fill in user information and click on save button.

Once the new user is created, you have to fill in POS settings :

POS Information	
Store	<input type="text" value="English"/>
Default Country	<input type="text" value="Andorra"/>
Customers group	<input type="text" value="General"/>
Default Payment Method	<input type="text" value="Credit Card (saved)"/>
Default Shipping Method	<input type="text" value="UPS"/>
Currency	<input type="text" value="Afghan Afghani"/>

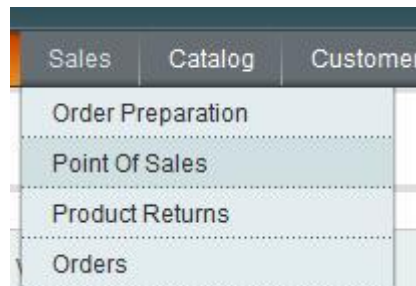
Fields	Description
Shop	Select store to use for this point of sale. Using a specific store is interesting as it allows to apply specific prices for product.
Default country	Country to use to calculate taxes
Customer group	Customer group to use to calculate taxes

Payment Method	Default payment method to use to create orders. Note : this method can be customized during order creation.
Shipping Method	Default shipping method to use to create orders. Note : this method can be customized during order creation.
Currency	Currency to use to create orders

Use it

How to use

To display order creation screen, select menu Sales > Point of Sales > Order form



Products

To display or hide products grid, click on "Show / Hide products" .

From the product grid, you can :

- Look for products using products grid
- Add products to order using "Select" link

Point of Sales

Create Order

Products			
Product	Qty	Price incl tax	Total incl
			Total 0,00 EUR

Add product

Show / Hide Add Products

Customer

Guest New customer Existing customer

Payment Method

Check / Money order

Create invoice

Shipping Method

Federal Express

Create shipment

Create Order

Each time you select a product, a new row is added in the products area. From this row, you can remove product or change product price including tax)

Customer

With POS, there are 3 ways to fill in customer information

- Guest (default) : no information required
- New customer : display a form to fill in customer information. You can only fill in email, name and surname or also set address.
- Existing customer : select customer from grid.

Notice : for guest customer a notification email for new order will be send to the address defined in the configuration (if allowed). See section « configuration » , « notification ».

Address	
Address	<input type="text" value="254 rue Jean Jaures"/>
City	<input type="text" value="Touloon"/>
Zip	<input type="text" value="83000"/>
Country	<input type="text" value="France"/> ▼
Mobile	<input type="text" value="0000"/>
Phone	<input type="text"/>
Fax	<input type="text"/>
Comments	<input type="text"/>

Payment Method

You can select Payment method using drop down menu. Note : default payment method is associated to user (can be edit in system > permissions)

By default, system automatically create an invoice each time an order is placed. If you prefer to wait before creating invoice, uncheck "Create invoice" control.

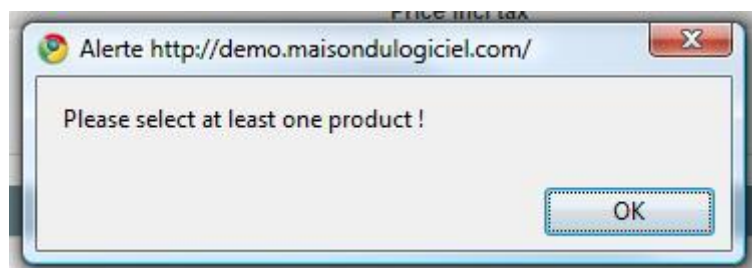
Shipping Method

You can select Shipping method using drop down menu. Note : default Shipping method is associated to user (can be edit in system > permissions)

By default, system automatically create a shipment each time an order is placed. If you prefer to wait before creating shipment, uncheck "Create invoice" control.

Create order

Once all fields are filled, click on "Create order" button.



Once order is created, user is redirected to confirmation page

Order successfully created

Order #10000131 successfully created [Download Invoice](#) [Download Shipment](#) [Print Invoice](#) [Print Shipment](#) [Display Order](#)

Order # 10000131 (Order confirmation email not sent)		Account Information	
Order Date	Mar 17, 2010 5:48:00 PM	Customer Name	Guest
Order Status	Complete	Email	
Purchased From	Main Website Main Store English	Customer Group	NOT LOGGED IN
/ EUR rate:	0.0000		

Billing Address		Shipping Address	
France		France	

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
testeig1 SKU: modeltesteig1	Mixed	€8.36	€8.36	Ordered 1	€8.36	€1.64	0%	€0.00	€10.00
				Invoiced 1					
				Shipped 1					
Nieuwproduct SKU: nwpr	Mixed	€7.53	€7.53	Ordered 1	€7.53	€1.47	0%	€0.00	€9.00
				Invoiced 1					
				Shipped 1					

Depending of your parameters (system > configuration > Point of Sales), system can automatically send invoice and/or shipment to your local printer.

Anyway, you can process printing using top buttons

- Print invoice : Download invoice PDF
- Pring Shipment : Download shipment PDF
- Send invoice to printer: invoice is directly printed on your local printer using Magento Client Computer
- Send shipment to printer : shipment is directly printed on your local printer using Magento Client Computer

Sales report

An other interested feature in Point of Sales is the ability to print a PDF that summarizes sales order for one day with totals grouped per payment method.

To display orders summary for one day, select menu Sales > Point of Sales > Sales report. The grid displays all order for selected date.

To change date, use calendar control and click on refresh button

To export sales at PDF format, use "Print" button

Barcode Management

Point of sales extension supports barcode reader to add product scanning barcode.

Settings

Before configuring extension, you have to create a new product attribute to store barcodes.

Create a new attribute

If you already have an attribute that stores barcode, you can skip this step.

Create a new attributes using menu Catalog > Attributes > Manage attributes > New Attribute

Then create new attribute using this settings :

Fields	Description
Code	Barcode
Scope	Global
Title	Barcode

Then, save attribute.

Once the new attribute is created, you have to assign it to attribute sets. Then, select menu Catalog > Attributes > Manage attribute sets and follow this steps for each attribute sets

Une fois l'attribut ajouté, vous devez l'affecter au différents jeux d'attribut. Pour cela, sélectionnez les menus Catalogue > Attributs > Gérer les jeux d'attributs et pour chaque jeu d'attribut :

- Edit attribute set clicking on the row
- In the right side, barcode attribute should be displayed in Unassigned Attributes list. If it is not displayed, you can skip for this attribute set.
- Drag and drop this attribute under "Sku" in the center list and click on save button

Once you have process every attribute set, select any product barcode field should be displayed under the SKU's one

Settings

Select menu System > Configuration > Point of Sales > Barcode scanner

Fields	Description
Enable	yes
Attribute	Select your barcode attribute

How to use

Once module is configured, you can use barcode scanner to add products to orders. In the order form, a new section is displayed :



Point of Sales		Create Order
Barcode Scanner		
302548645	Ready	

When scanner is ready, you can scan products. Scanner is hold on when you edit a text file. To resume it, click on the scanner zone.

When you scan a product, digits are displayed in the "Scanner are". Once scan is finished, the system search products : if product is found, it is added to the order, else, an error message is displayed.

Notice that you can type a barcode using keyboard, then use Enter to commit entry.