

Magento Extension – Point of Sales User Manual Version 1.0

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1. Overview

Point of Sales is a Magento extension designed to easily create sales orders from a point of sales. Here is the list of the main features:

- Full Magento admin panel integration
- Multiple POS (with specific currency, customer group, country)
- Several customers mode : guest, only names, full information
- Automatically print invoice
- Default shipping method and default payment method
- Add products easily
- POS display (large fonts)
- Web 2.0 interface

Point of Sales
[Create Order](#)

Products

Product	Qty	Price incl tax	Total incl
Microsoft Wireless Optical Mouse 5000	1	59.99	59.99
Microsoft Natural Ergonomic Keyboard 4000	1	99.99	99.99
Western Digital 500GB HD - 7200RPM	1	299	299.00

Total 458.98 EUR

Add product [Show / Hide Add Products](#)

Customer

Guest
 New customer
 Existing customer

Payment Method

Create invoice

Shipping Method

Create shipment

[Create Order](#)

2. Integration

To integrate extension, perform this steps :

1. Copy directory app/code/local/MDN to app/code/local
2. Copy file app/locale/fr_FR/MDN_PointOfSales.csv to app/locale/fr_FR/
3. Copy file app/etc/modules/MDN_PointOfSales.xml to app/etc/modules/
4. Copy file app/design/adminhtml/default/default/layout/PointOfSales.xml to app/design/adminhtml/default/default/layout
5. Copy folder app/design/adminhtml/default/default/template/PointOfSales to app/design/adminhtml/default/default/template
6. Copy file js/mdn/PointOfSales.js in js/mdn

7. Copy files skin/adminhtml/default/default/PointOfSales.css in skin/adminhtml/default/default
8. Copy file skin/adminhtml/default/default/images/OrderWizardCreation/rule_component_remove.gif in skin/adminhtml/default/default/images/OrderWizardCreation
9. Then go back to Magento admin panel, refresh cache, log out and login from magento admni panel

3. General Settings

3.1 Point of sales Settings

1. Log in on Magento Admin
2. Go in Menu System > Configuration > Point Of Sales

Note: if “access denied” error is raised, you have to log out and log in on magento back office

You can define these parameters:

Configuration		
Auto print invoice	No	[GLOBAL]
Auto print shipment	No	[GLOBAL]
Show download buttons	Yes	[GLOBAL]
Show print buttons	Yes	[GLOBAL]

Parameter	Description
Auto print invoice	If checked, invoice is automatically print when a new order is placed
Auto print shipment	If checked, shipment is automatically print when a new order is placed
Show download buttons	If checked, download buttons are displayed in the new order confirmation page
Show print buttons	If checked, download buttons are displayed in the new order confirmation page

3.2 Magento Client Computer Settings

Magento Client Computer is a windows platform software used by Embedded ERP to performs actions on your local network such as printing PDF documents or copy files in a specific directory.

Magento Client Computer is required if you wish to use « optimized » mode to prepare orders. Learn more in “Logistic module section” in this manual.

Exchange directory : directory on you web server in which Embedded ERP stores documents Magento Client computer downloads.

Password : Magento Client Computer software uses web services to download documents from the server. For security purposes, it requires a password to download documents. This password must match the one set in Magento Client Computer settings file.

4. POS settings

Once general settings are filled, you have to create a user per POS : the aim is to be able to create several POS with specific settings (payment method, customer group, website ...).

To create a new POS User, select menu system > permission > users > Add new user :

- Fill user name, email, password

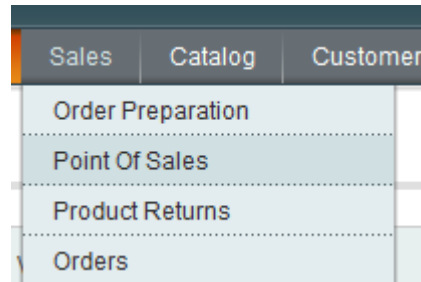
Once the new user is create, we have to set POS information:

POS Information	
Store	English
Default Country	Andorra
Customers group	General
Default Payment Method	Credit Card (saved)
Default Shipping Method	UPS
Currency	Afghan Afghani

Parameter	Description
Store	Store to which orders are associated. This parameter also select a website : only products associated to this website will be available to create a new sales order
Default country	Country used to calculate taxes
Customers group	Customer group to calculate default taxes and to use creating new customer
Payment method	Default payment method
Shipping method	Default shipping method
Currency	Currency to use

5. How to use

To display Order Creation screen, select menu Sales > Point of Sales



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 <input type="text" value="Check / Money order"/> <input type="checkbox"/> Create invoice	Shipping Method <input type="text" value="Federal Express"/> <input checked="" type="checkbox"/> Create shipment
---	--

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5.1 Products

To display or hide products grid, use “Show / Hide Add Products” button.

Using product grid, you can :

- Search products using filters
- Add product to order using “select” link

Products

Product	Qty	Price incl tax	Total incl
Seagate 500GB HD - 5400RPM	<input type="text" value="1"/>	<input type="text" value="299"/>	299.00 <input type="checkbox"/>
Western Digital 500GB HD - 7200RPM	<input type="text" value="1"/>	<input type="text" value="299"/>	299.00 <input type="checkbox"/>
Microsoft Natural Ergonomic Keyboard 4000	<input type="text" value="1"/>	<input type="text" value="99.99"/>	99.99 <input type="checkbox"/>
			Total 697.99 EUR

Each time you select a product, a new row is added to the “Products” area.
From this area, you can customize product quantity and / or product price.

Note : product price always includes taxes. Taxes are calculated using default country a default customer group (set in system > permission).

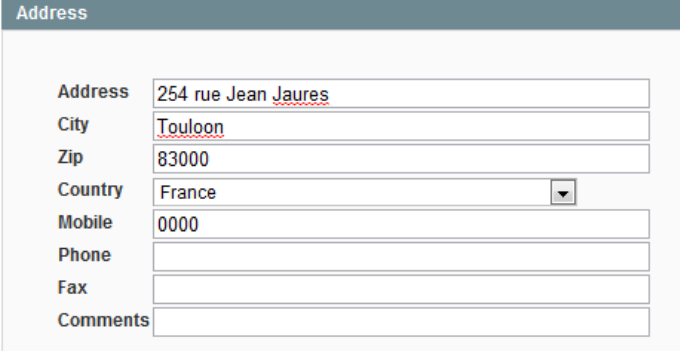
To remove a product from an order, use the “delete” image on the right.

5.2 Customer

POS Extension offers 3 ways to select customer for an order :

- **Guest** (default) : system do not need customer information
- **New customer** : displays a form to fill in customer information (email, firstname, lastname). Once order is validated, this customer is created.
- **Existing customer** : select customer in the database.

If you select “new customer” or “existing customer”, you can fill in address :



The screenshot shows a form titled "Address" with the following fields:

Address	254 rue Jean Jaures
City	Toulon
Zip	83000
Country	France
Mobile	0000
Phone	
Fax	
Comments	

5.3 Payment method

You can select payment method using drop down menu.

You can set default payment method in user form (system > permissions)

By default, system will automatically create invoice once order is validated. However, you can disable it unchecking “Create invoice” checkbox

5.4 Shipping method

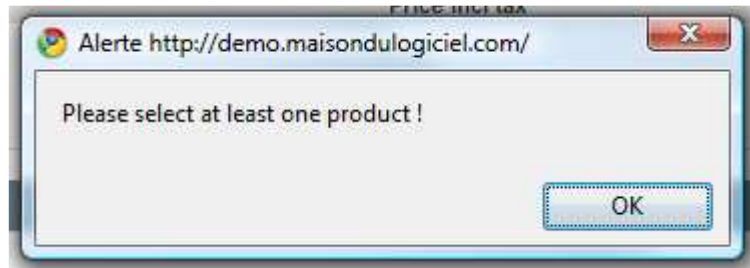
You can select shipping method using drop down menu.

You can set default shipping method in user form (system > permissions)

By default, system will automatically create invoice once order is validated. However, you can disable it unchecking “Create shipment” checkbox.

5.5 Create order

Once every information are filled, you can create the new order using “Create order” button. If some information are missing, an error message is displayed:



Once order is created, user is redirected to confirmation page that displays order summary :

✔ 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 settings (system > configuration > Point of sales), system can automatically print invoice and shipment.

Anyway, you can process printing using top buttons:

- **Download invoice** : download invoice PDF
- **Download shipment** : download shipment PDF
- **Print invoice** : directly print invoice on your printer (uses Magento Client Computer)
- **Print shipment** : directly print shipment on your printer (uses Magento Client Computer)

6 Magento Client Computer

Magento Client Computer is windows platform Software designed to perform actions on your local network directly from the Magento interface such as printing document on your printer or copy file in a specific location.

To benefit of this feature, Magento Client Computer must be installed on a local computer.

6.1 Prerequisites

- Windows 2000, XP, Vista, Seven
- Adobe Acrobat Reader 8 / 9
- Default printer installed on the computer
- Microsoft .Net Framework 2.0 (can be download for free on microsoft website)

6.2 Installation

Magento Client Computer Setup program is available in Embedded ERP archive. Simply launch MagentoClientComputerSetup.exe and follow instructions.

6.3 Settings

To set up MagentoClientComputer, edit pref.xml file (located in program directory : C:\program files\maison du Magento Client Computer\)

You can edit pref.xml using notepad.

To fill a parameter, simply edit « value » attribute.

Pour éditer un paramètre, il vous suffit de saisir sa valeur dans la zone value=’’

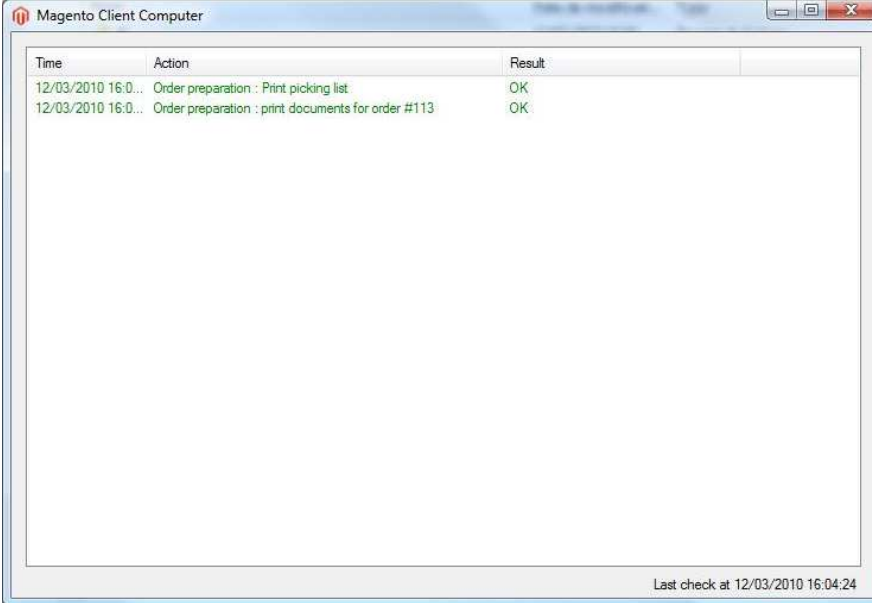
Parameter	Description
url	Communication page url to download actions to perform : http://www.yourwebsite.com/ClientComputer/Front/ You can manually call this url in your favorite to check url. If you get « Access denied » message, it means that the url is correct
Password	Password set in Magento, menu System > Configuration > Client Computer > password

Once parameters are set, close pref.xml and restart Magento Client Computer.

6.4 How to use

Once Magento Client Computer is launch, a new magento icon is displayed in the system tray (in the bottom right corner).

To display main dialog, double click on the Magento icon :



The screenshot shows a window titled 'Magento Client Computer' with a table of log entries. The table has three columns: 'Time', 'Action', and 'Result'. Two rows are visible, both with 'OK' results. The status bar at the bottom right indicates 'Last check at 12/03/2010 16:04:24'.

Time	Action	Result
12/03/2010 16:0...	Order preparation : Print picking list	OK
12/03/2010 16:0...	Order preparation : print documents for order #113	OK

Each time an action is performed, a new row is displayed in the main list describing the action and its result.

If an error happens, row is displayed in red.