

point_of_sales_magento2

version

BoostMyShop

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Point Of Sales for Magento2

1. Overview

Point of Sales extension for Magento 2 integrates a complete Point Of Sales system in your Magento admin panel.

Main features :

- Barcode scanner and receipt printer support
- User interface optimized for touch screens
- Support Multiple payments, coupon code and custom pricing
- Support guest, existing and new customers
- Z-report generation
- Create shortcuts to quickly add best sellers to cart
- Multiple users, multiple websites
- Integrated Store pickup shipping method

2. Installation

First Installation

To install a boostmyshop magento2 extension on your platform, process the following steps :

- Download zip archive from your boostmyshop customer account
- Upload files on your server : once uploaded, module must be in directory `app/code/BoostMyShop/`
- Connect on your server via ssh. and run the following commands :

```
rm -rf var/*
rm -rf pub/*
php bin/magento setup:upgrade
php bin/magento setup:di:compile
php bin/magento setup:static-content:deploy
```

Once everything is done, go back in Magento, select menu system > web setup wizard, then click on the component manager button : you should see the new extension here

Upgrade

The upgrade process is exactly the same as the installation process

Disable extension

To disable an extension, select menu system > web setup wizard, then click on the component manager button Find the extension you want to disable and select "disable" in the "Actions" column

3. Checkout

The POS interface is available via menu sales > Point Of Sales > Checkout.

You are directly redirected to the screen to place a new order

User and store switcher

POS supports Magento multiple store and users : when you create a new order, it will use the current store and user.

To switch to a different store or user, use the button at the top of the screen (click on the user name / store name).

When the order is created, the selected user is stored in the order. You can retrieve the user that created an order from the "Sales menu" on the left.

Add products to cart

To add products to the cart, you have 3 options :

- Click on the magnifier logo in the top right corner, perform a search in the new screen : once the results are displayed, simply click on a product to add it to quote
- Using the shortcuts button at the bottom : it opens a new screen with every products configured as "shortcuts". To add a product in the shortcuts list, you must enable the product attribute "POS shortcut" to true in the product view. You can do it for one single product going into the product view in magento, or using the mass action in the catalog > products grid.
- Using a barcode scanner : once you have configured the barcode attribute in sales > point of sales > configuration > general > barcode attribute, you can scan the product from the main POS screen : if the product is retrieved, it is automatically added to the cart.

Edit product details

When a product is added to the cart, you can edit it clicking on the product : in this new popup, you can update the quantity but also the unit price. Click on the "Done" button to apply the changes.

Shipping method

POS orders support any magento shipping method : you can then use a regular shipping method (for instance UPS or FEDEX) when you create an order to handle store to web orders.

POS extension adds a new shipping method in Magento : Store Pickup. You can customize this method title in stores > configuration > sales > shipping method > Store pickup. You can define the default shipping method for POS orders in sales > Point Of Sales > Configuration > Checkout > Default shipping method.

If you want to change the shipping method in POS, click on the "Shipping method" button at the bottom (the first one) : a new popup opens, then select the desired method.

Customer mode

POS orders support 3 different modes :

- Guest: you don't need to enter any customer details to create the order. In this case, the system will use the settings configured in sales > point of sales > configuration > Guest customer to create the new order and fill customer details.
- Existing customer : choose an existing customer from Magento database.
- New customer : create a new customer entering customer name, email address and group.

To select a mode, click on the customer button at the bottom : a popup opens where you can select the customer mode.

Whatever method you use, you can enter or edit the customer address and details in the first tab of the popup "Customer details".

Once you have configured the customer settings, click on the "Done" button to apply.

4. Other features

Payment details and Place order

To complete the order, click on the "Pay" button at the bottom right corner : it displays the final popup where you can enter the discount code, payment details and finish the order.

If you have a coupon code to apply, fill it in the "Coupon code" textbox and click on button "Apply" : if the coupon code is valid, the totals are updated.

POS supports every offline payment method in Magento : the list of the payment methods available comes from the enabled payment methods in Magento. POS introduces an additional payment method : Multiple Payment. This method allows to fill several payment records for one single order. This way, you can create an order with 100\$ paid by check, and 50\$ paid by cash.

Fill the payment details and click on the "Create order" button.

Multiple payment configuration

You can configure the multiple payment in menu stores > configuration > sales > payment method > POS multiple payment :

- **Enabled** : enable or disable the method
- **Title** : customize this method title (displayed in orders)
- **New order status** : status of orders created with this method (before they are invoiced)
- **Methods** : list of the methods applicable for the payment records : fill the list of the methods separated with a coma.
- **Method used for cash**: before you configure this part, save the previous changes using the "save" button. When you create an order with multiple payment method, the total of the payment records may exceed the order total (order total is 78\$, customer gives you a 100\$ bill). In that case, the system will create an additional record of -22\$ to handle the money back. To create this additional record, it will use the "Change given" method.

4. Other features

The main POS interface provides additional screen, useful to manage your store business.

Sales menu

Displays the list of orders in magento, according to the current store selected.

Clicking on an order, you can get the order details and re-print invoice / receipt.

Customers menu

Customers menu displays the list of the customers. Clicking on a customer, you get the customer details but also the orders history for the current customer.

Reports menu

The reports menu displays several reports to analyse your business.

Every reports use the date range set at the top (from and to textboxes). If you change these settings, click on the "Refresh" button to apply.

Available reports

- **Totals** : this is the turnover for the selected period and the selected store.
- **Payments** : summarizes the total per payment method
- **Best sellers** : displays the best seller products (quantity and total)

5. FAQ

- **Sales by vendor** : this is the turnover per vendor

Z-Report

You can print the Z-Report using the "Print Z-Report" button at the top of the screen. The Z-Report is designed to summarize every details for the sales and payments for the current date. You can print the Z-Report on your receipt printer, it uses the same layout.

Z-Report details :

- **Report date** : the date when the report has been printed
- **Register** : current user and store name
- **Start date / closing date** : dates configured in the reports screen
- **Opening total** : this is the cash drawer level at the beginning of the period
- **Item sales** : total sales
- **Item returns** : total of items returned
- **Tax** : total of taxes
- **Total** : total of the sales + taxes minus returns
- **Tax collected** : this is a summary of the taxes grouped by tax rate
- **Total per method** : this is the total of the payments grouped by payment method
- **Transaction per method** : this is the number of payments grouped by payment method
- **Sales** : displays the list of the sales with the payment records (if a sale contains several payment records, it is displayed several time)
- **Cash drawer expected**: this is the value of the cash drawer at the end of the period

Settings menu

This is shortcut to go in the configuration menu for the POS extension.

5. FAQ

What product types are supported ?

POS extension only supports simple products for the moment

What payment methods are supported ?

POS supports only offline payment method (any methods connecting to a server like credit card or paypal are not supported for the moment).