

Point of Sale for OpenCart

User Guide



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Support



Introduction

Point of Sale (POS) is an extension, which, if installed on an OpenCart version 3.x ecommerce website, allows owners of OpenCart ecommerce website to create orders from their physical shop/stores. Using POS integration, these orders can be synchronised and created in the same database as that of the OpenCart ecommerce website. Thus, it makes handling Online and Offline modes of selling smooth.

The Point of Sale is nowadays excessively used in all general public sales outlets like restaurant, shopping malls, medical stores, cloth store, and electronic store mean it's much related to general public sales from the general sales stores.

The OpenCart POS extension is an effective tool to manage orders, customers, sales, incomes, revenues etc. of offline stores in accordance with the OpenCart online ecommerce website.

Point of sale (POS) facilitates stores to control their physical shops readily and quite efficiently. The admin controls the products in conjunction with the stock. POS holds all the records for customers and their orders and returns etc.

The benefit of the OpenCart POS is that it facilitates customers to visit a store personally and buy products from the store. The customer can avoid trouble of completing the order and awaiting for shipping and deliveries and other related activities in an online ecommerce website.

Running a Point Of Sale is very easy and smooth for POS Agents and POS Admin.

Thus, there are three main parties involved, POS Admin, POS Agent and obviously POS Customers these are described below.

POS Admin

POS admin can do everything that a normal POS agent can do. POS admin can also look sales report of all POS agents.

POS Admin can also look Returns and Orders of all POS agents besides own orders and returns.

POS Agent

- See all products from the POS System backend
- Create orders from POS System backend
- Create Customer from POS System backend
- View own sales reports

POS Customer

The customer is a normal user who is there to purchase the products. He could also be saved in the system earlier if had visited earlier or can be created as a new one.



Installation

Login to the admin panel.

- Go to Extensions > Installer.
- Upload the extension file with a name ending with ".ocmod.zip".

opencart	7	John Doe 🔻	🕩 Logout
■ NAVIGATION			
🚯 Dashboard			
🏷 Catalog	> H- Upload your extensions		
💼 Extensions	Upload your extensions		
» Marketplace			
» Installer	* Upload File 🔹 💶 🕹		
» Extensions			
» Modifications	Install Progress		
» Events			
🖵 Design	Progress		
🏲 Sales	Install History		
Customers			
< Marketing	Filename Date Added		Action
🔅 System	purpletree-pos-oc-3.x.ocmod.zip 12/11/2021		Ê

Go to Extensions > Modification.

- You will see a new Modification Named as "Purpletree POS for OpenCart 3.x".
- Click on the Refresh Button on top right.

opencart					C	John Doe 🔻	🕒 Logout
■ NAVIGATION	Modifications Home Modifications					3	<i>a</i> 8
🚯 Dashboard							
🏷 Catalog >	Whenever you enable / disable or delete a modification you	need to click the refres	h button to rebuild	your modification	i cache!		
🔥 Extensions 💦 >	III Modification List						
» Marketplace							
» Installer	General Log						
» Extensions							
» Modifications		Author	Version	Status	Date Added		Action
» Events	Purpletree POS for OpenCart 3.x	Purpletree	3.x	Enabled	25/03/2022	%	•
⊊ Design →						Showing 1 to 1 of	1 (1 Pages)
🏲 Sales 🛛 🔸							
🛔 Customers >		OpenCart © 2009-2	2022 All Rights Res	erved			
Karketing >		Vers	ion 3.0.3.2				

Set User group permissions for admin. Go to System > Users > User Groups for OpenCart POS.

626	Dashboard				
۲	Catalog	>	🖋 Edit User Group		
ń -	Extensions	>			
Ţ	Design	>	* User Group Name	Administrator	
ì	Sales	>	Access Permission	✓ extension/module/pp_button	^
*	Customers	>		≪extension/module/pp_login	
*	Marketing	>	L L	✓ extension/module/purpletree_pos	
٠		>		✓ extension/module/sagepay_server_cards	~
*				Colord All (/ University 4)	
»		>		Select All / UnSelect All	
ſ		- I	Modify Permission	Zestalaa/attribuita	^
				✓ catalog/attribute_group	
				✓ catalog/category	
*		>		✓ catalog/download ✓ catalog/filter	~
*		>			

Go to Extensions > Extensions.

- From the extension type, select Modules from Dropdown.
- Find Purpletree POS for OpenCart 3.x, Install it and click on edit button.
- From General Tab, Select Status as "Enabled".

opencart		John Doe 👻 🕼 Logout
■ NAVIGATION	POS Settings Home Strensions POS Settings	B 4
🚳 Dashboard		
S Catalog →	C Edit POS Settings	
♠ Extensions >		
☐ Design >	Status Enabled	
🏲 Sales >	Change License Key	
Customers >		
< Marketing >	Return Action Credit Issued	~
System >		
🖶 POS >	Return Status Awaiting Products	<u>۷</u>
» Settings	Receipt Footer Detail Footer Detail	
» POS Agents		
» Products		
» Sale Report		



• Click on get Licence and Enter Licence key for the extension.

Usually licence key is automatically sent sometime after purchase, on the email id of the extension

Purchaser. If you still haven't received it, please open a ticket with us from

https://helpdesk.purpletreesoftware.com.

0r

Click on the "Get Licence" button. Enter your Order ID which was generated when you placed an order

For our extension and "Email ID". Click on Submit Button and your licence key will be filled on Licence key field

opencart				John Doe 👻 🖙 Logout
■ NAVIGATION	POS Settings	Home > Exter	isions > POS Settings	
🚯 Dashboard		Home - Ester		
Scatalog :	Edit POS Settings			
the Extensions]
🖵 Design 🛛 🗧		Status	Enabled	~
🐂 Sales 🛛			Change License Key	
Customers :				
Karketing	I I I I I I I I I I I I I I I I I I I	Return Action	Credit Issued	~
System :				
🖶 POS 💠		Return Status	Awaiting Products	~
» Settings	Receipt	Footer Detail	Footer Detail	
» POS Agents				
» Products				
» Sale Report				



Opencart Admin Dashboard

Settings

From the setting admin can enable/disable the POS. There is also a space for the licence key.

The licence key will be provided when you will purchase the POS extension, this licence key to be put in the box.

Catalog >	Success: You have modified POS settings!		
* Extensions >	D Edit DOS Settinge		
Design >	La Luitros Stangs		1
ि Sales →	Status	Enabled v	
Customers >			
Marketing >		Change Lioanse Key	
System >	Return Action	Datindad	
🖶 POS 🔷 🔶		- 101300000 · · ·	
Settings	Return Status	Complete v	
» POS Users			
» Products	Receipt Footer Detail	Please visit again soon.	
» Sales Report			
Lill Reports >			
Orders Completed 0%			
Orders Processing 0%			
Other Statuses 0%	Receipt Store Detail	Daffodi Store	
		l	

Return action

It will be the action shown for the return products.

Return Status

It will be the default status shown for return Products.

Receipt Footer details

Receipt footer details is for showing details at footer for the receipt of sale.

Receipt Store Detail

This field is for showing store details.

The receipt will be as below after orders in POS Dashboard





Receipt

City Cent	re Greix		
Order #82			31/03/2022
Cashier:Ara	d Ruhal		Cash Payment
ltems HP LP3065	Quantity	Rate	Amount
Star	1	102.00€	102.00€
Star	1	130.00€	130.00€
Sub Tatal	1	110.00€	110.00€
Coupon (22	222)		-34.00€
Eco Tax (-2.) rto (5%)	00)		2.00€ 17.00€
tyu (Fixed)			2.00€
Discount (F	ixed)		-10.00€
Total Total Items:3 Total Quantity	:3		317.00€
come agai			



POS Users

From here admin can add, edit and delete POS users, after filling the requisite information, it is like creating customers in OpenCart, there by an extra option for POS Agent NO or agent or Admin. If the POS user will be Agent or Admin.

It will be generated.

If the POS agent remains No then the customer will not be created as Agent or POS Admin.

Other		
Newsletter	Disabled	
Status	Enabled ~	
Safe	No v	
POS User	No Admin Agent	

POS Products

The Admin can create the POS products from here after filling up the information as admin creates products in OpenCart.

There is an extra field POS.



.

opencart .	7	John Doe 🔹 🕒 Logout
■ NAVIGATION	Products Home Products	
🚳 Dashboard		
🏷 Catalog	> Add Product	
🔂 Extensions	General Data Links Attribute Ontion Recurring Discount Special Image Reward Points	SEO Design POS
🖵 Design		
🏲 Sales	→ English	
🛎 Customers		
< Marketing	* Product Name Product Name	
System		
🖶 POS	Description	☆ > ?
» Settings		
» POS Agents		
» Products		
🔟 Reports		

On clicking on POS you can put POS products enabled or disabled, Admin can put POS Status and also product quantity here.

	ŋ	John Doe 🔻	🕩 Logout
Products Home > Products			
Add Product			
General Data Links Attribute Option Recurring Discount Special Image Reward Points	SEO	Design PO:	5
POS Status Yes			~
POS Quantity 100			
OpenCart © 2009-2022 All Rights Reserved. Version 3.0.3.2			

Mass Print Barcodes

From this setting at Product page admin can print Barcodes of products in Bulk for any quantity and can select for many products in one go.

First select the product for which the admin needs to publish the Barcode.

After selecting the products click on Mass Print Barcodes.

opencart	,							John	Doe 👻 🕒 Logout
■ NAVIGATION	PC)S Proc	LUCTS Home POSE	Products				Mass Print Ba	arcodes 🕂 💼
🍘 Dashboard									
🏷 Catalog	> 🔳	I≣ Seller Product List							
📩 Extensions	>								
🖵 Design	>	Product Nam	e		Price		Status		
🏲 Sales	>	Product Nar	ne		Price		All		
Customers	>	Model			POS Quantity				
< Marketing	>	Model			POS Quantity				▼ Filter
System	>								
🖶 POS	> C	Image	Product Name ^	Model	Price	Barcode	POS Quantity	Status	Action
ம் Reports	>	12			_ 100.0000		_		
Orders Consoluted	,		Apple Cinema 30"	Product 1	90.0000		188	Enabled	
Orders Processing C	6	10	Canon EOS 5D greta	Product 3	900.0000 80.0000		795	Enabled	8

Here you can see admin needs to put quantities of Barcodes, the number of quantities of Barcode a product will be printed.

opencart			ſ					John	Doe 👻 🕒 Logout
■ NAVIGATION		POS Pro	ducts Home Pr	slips for each products			🔒 Mass Print Barcodes 🛛 🕂 😭		
🚯 Dashboard		1 00 110	ddets nome re				_		
📎 Catalog		🔳 Seller Pro	duct List	Enter Quantity					
📥 Extensions									
🖵 Design		Product Na	me		Clo	se	Status		
🃜 Sales		Product N	ame				All		~
Customers		Model		р	OS Quantity				
< Marketing		Model		POS Quantity					▼ Filter
🍄 System									
DOS		Image	Product Name ^	Model	Price	Barcode	POS Quantity	Status	Action
Lill Reports					100.0000		_		
			Apple Cinema 30"	Product 15	90.0000		188	Enabled	8 6
Orders Completed Orders Processing	0%		Canon EOS 5D greta	Product 3	900.0000		795	Enabled	₽ 🕝

You can see the print page below, there are 5 quantities of Barcodes for all selected products.





Sales Report

From here admin can generate sales reports based on the Agents, Date start and date End filter. Admin can also print reports from print option.

opencart								John Doe	e 👻 Թ Logout
■ NAVIGATION		Sales Repo	Ort Home Sales Report						
🚯 Dashboard		Sures riepe	or control of sales hepore	Print Bi	utton				
📎 Catalog	>	III POS Sale Repo	ort	▼ Filters					
textensions	>	Date Start	Date End	No. Orders	No. Products	Тах	Total	Date Start	
🖵 Design	`	29/03/2022	29/03/2022	1	4	\$7.60	\$387.60	Date Start	m
🏲 Sales	>	28/03/2022	28/03/2022	5	21	\$12.62	\$1,873.62		
🐣 Customers	>	25/03/2022	25/03/2022	2	13	\$0.00	\$730.00	Date End	
< Marketing	>	14/03/2022	14/03/2022	1	4	\$2.00	\$322.00	Date End	
System	,	11/03/2022	11/03/2022	4	10	\$20.00	\$900.00	Agent	
🖶 POS	>					Grand Total	\$4,213.22	Agent	
 » Settings » POS Users » Products » Sales Report 									▼ Filter
Lill Reports				Oper	Cart © 2009-2022 All Right: Version 3.0.3.2	s Reserved.			

POS Agent/Admin Dashboard

Search Products

Search products by different search fields. It shows search results, by doing search. Search by Model, SKU, UPC, EAN, ISBN, JAN, MPN, Barcode.



All Products

If the Agent will click on all products, then all products of POS will be shown that are created by the admin for POS.



Full Screen

If the Agent will click on Full Screen the POS screen will be shown in full mode on the display device.





Popular Products

If agent will click on popular products option then it will be show the popular products (those are most selling)



Bar Codes

Every product will have a barcode.

For any product, the barcode be stored in any *one* of the following fields:

- UPC
- EAN
- MPN
- JAN
- ISBN

An agent can search a product by barcode number, and also: The webcam of the PC can scan the barcode from the physical product. After scan success, it returns the barcode number. The product which matches the scanned barcode. Then the product will be added to the current order.



Categories

On click on categories it will show the categories of the products.



On clicking on a particular category it will show products in that particular category. For category selection has to place cursor on category name for proper working.



	Search product by model, sku, upc, ean, isbn, jan, mpn, barcode
POS	Back
E Full screen	
All Products	iPhone
	product 11 \$101.00
Popular Products	
Barcode	
Categories	
Hold Orders	
Orders	
C	
Doturn	

On click on Back it will reverts to the Back categories for previous level.

Hold Orders On click on Hold orders you can find the order kept on Hold.





On click on revert sign you can further make it active again

Return

For Return, go to Orders select the order duration from Start date and End date.

Select the order for which return is to be made.

Click on return

Products	#67	7							
Froducts	Order Id:#67								
	Order	Date: 25/03/2022	L.						
ılar Products	Payme	ner Name: Diego Keil nt Method: Cash Pavi	ly ment						
	Barcod	le Number:							
	Barcod	le:							
barcoue									
		Name	Model	Quantity	Price	Amount			
tegories		Name Nikon D300	Model Product 4	Quantity 1	Price \$80.00	Amount \$80.00			
tegories		Name Nikon D300 iPod Touch	Model Product 4 Product 5	Quantity 1 1	Price \$80.00 \$50.00	Amount \$80.00 \$50.00			
ategories Did Orders		Name Nikon D300 iPod Touch iPod Shuffle	Model Product 4 Product 5 Product 7	Quantity 1 1 1	Price \$80.00 \$50.00 \$100.00	Amount \$80.00 \$50.00 \$100.00			

Select the product, and put requisite informations like Return reason, Opened or not and put comment.

POS All Products	O O Cu Pa Ba Ba	rder Id rder D ustome ayment arcode arcode	:#67 ate: 25/0 er Name: t Method Number :	3/2022 Diego Kelly I: Cash Payment :						
Popular Products] Name		Model		Quantity	Price	Amount	
		~	Nikon D300		Product 4		1	\$80.00	\$80.00	
Barcode			iPod Touch		Product 5		1	\$50.00	\$50.00	
10 C			iPod Sh	uffle	Product 7	Product 7		\$100.00	\$100.00	
Categories									Receipt Return	
Hold Orders		Na	me	Quan	ntity Re		Return Reason		Opened	
Order	r	Nikon	D300	1	\$	Ord	ler Error	~	Unopened ~	
5 Return		Com Ret	ument urned		<i>h</i>					

Click on submit.

۵	Search product by	model, sku, up	oc, ean, isbn, jan, mpn, barcode			
POS	Date Start		Date End	Order Id		
All Products	01 / 03 / 2022	۲	01 / 03 / 2022	Order Id		Filter
	Return Id	Order Id	Customer Name	Date Added	Return Status	Action
Popular Products	5	67	Diego Kelly	2022-03-28 13:10:48	Complete	<u></u>
Barcode	6	67	Diego Kelly	2022-03-28 14:01:49	Complete	
Categories						
Hold Orders						
Order						
b Return						
Reports						

Select the return order and click on view to check the return orders.



Order

On clicking on the order, you will get the list of orders. You need to select Date Start and Date End and then filter, then the desired order list will be shown.

Date Start	Date End	Order Id			
01 / 03 / 2022	© 01/03/2022	⊗ Order	Id		Filter
Order Id	Customer Name	Status	Date Added	Total	Action
64	Rohan Gupta	Pending	14/03/2022	\$322.00	۲
66	Siddharth Verma	Pending	25/03/2022	\$500.00	۲
67	Diego Kelly	Complete	25/03/2022	\$230.00	٢
68	Diego Kelly	Pending	28/03/2022	\$950.00	۲
69	Demo Noida	Pending	28/03/2022	\$190.00	۲
70	Shaily Ra o	Pending	28/03/2022	\$296.82	۲
73	Rohan Gupta	Pending	29/03/2022	\$387.60	۲

Receipt

First, go to orders.

On click on view orders, you will see the receipt from here you can print on click on receipt and also return option will be there.

Search p						
Ord	er ld	Customer Name	Status	Date Added	Total	Action
6	54	Rohan Gupta	Pending	14/03/2022	\$322.00	۲
					Previous	1 Next
Search	product by mod	el, sku, upc, ean, isbn, jan, r	npn, barcode			
Search #6 Orde	product by mode 4 r Id:#64	el, sku, upc, ean, isbn, jan, r	npn, barcode			
Search #6 Order Order Custo Paym	product by mode 4 r Id:#64 r Date: 14/03 omer Name: ent Method	el, sku, upc, ean, isbn, jan, r 1/2022 Rohan Gupta Cash Payment	npn, barcode			
Search #6 Order Order Custor Paym Barcor Barcor	product by mod 4 r Id:#64 r Date: 14/03 omer Name: ent Method: de Number: de:	el, sku, upc, ean, isbn, jan, r 1/2022 Rohan Gupta Cash Payment	npn, barcode			
Search #6 Order Order Custo Barco Barco	product by mod 4 r Id:#64 r Date: 14/03 omer Name: ent Method: ide Number: ide:	el, sku, upc, ean, isbn, jan, r V2022 Rohan Gupta Cash Payment Name	mpn, barcode	Quantity	Price	Amount
Search #6 Order Order Custor Barco Barco	r Id:#64 r Id:#64 r Date: 14/03 omer Name: ent Method: sde Number: de: Canon E0	el, sku, upc, ean, isbn, jan, r 5/2022 Rohan Gupta Cash Payment Name DS 5D greta	npn, barcode	Quantity	Price \$90.00	Amount \$180.00
Search #6 Order Order Custor Barcor Barcor Barcor Barcor Barcor	r Id:#64 r Id:#64 r Date: 14/03 omer Name: ent Method: ode Number: de: Canon E0 Canon E0	el, sku, upc, ean, isbn, jan, r 5/2022 Rohan Gupta Cash Payment Name DS 5D greta	mpn, barcode Model Product 3 Product 3	Quantity 2 1	Price \$90.00 \$90.00	Amount \$180.00 \$90.00

You can see the receipt after click on receipt.

There is also the option there to print it.







Reports

The POS admin can view Reports, Orders, Returns of All agents and POS agent can view this information of only his orders.

That is the **difference between** POS Agent and POS Admin.

POS Admin Report Dashboard

Here you can see there is field to select agent for admin.

There is also option to print the reports.

POS	Search product by model,	sku, upc, ean, isbn, jan, n	npn, barcode		_	
All Products	Date Start	Date End	Agen	t ~		Filter
To and a constructs	Date Start	Date End	No. Orders	No. Products	Tax	Total
	11/03/2022	11/03/2022	4	10	\$20.00	\$900.00
Barcode						\$900.00
Categories						Print
- Hold Orders						
=						
Order						
Return						
Reports <						

POS Agent Report Dashboard POS Agent can only view his sales reports. There is also option to print the reports.

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POS Order Dashboard

The Order Dashboard is on the right side of the Agent panel of POS, from here all order related tasks are performed here.

The agent when clicking on a product, it will add the product to the order panel.

Also, adding products can be done using the Barcode Scanner.



See below agent after clicking on the products as below they get added on the order panel, you can see in the order panel there are three products by Agent.

î	Order			+ 1	Ī
	New C	rder	Ord	er History	/ (0)
	iPod Touc \$50.00	h +	\$5	0.00 🔽	
	iPod Shuf \$100.00	fle +	\$1	00.00 🔽	
ļ	Nikon D300 \$80.00		\$8	0.00 🔽	
					~
	Customer	Discount	X Coupon	Tax	5 Charge
×	Pay		D	etail \$2	30.00

Custom Product The agent can create custom product also by click on + icon as in the below image:





Then the agent needs to put all the information here like prices, quantities, Taxable classes etc.

	Search product by model, sku, upc, ear	n. isb				+ 🖬 🖷
POS		Add custom produ	ıct	×	New Order	Order History (0)
C Full screen		Name:			\$103.02 - 1 +	
All Products	Canon EOS 5D greta Product 3 \$80.00 \$900.00	Price:			iPod Nano \$102.00	\$102.00 🛛 🖀 🌣
Popular Products		Quantity	0	6	Canon EOS 5D greta	\$90.00 🛛 🍵
Barcode	iPod Nano	Tax Class			\$90.00 - 1 +	
Categories	Product 9 \$102.00	laxable Goods	Subm	ř.	Water Bottle SR. \$100.00	\$100.00 🛛 🍵
Hold Orders	0			•		~
Orders	MacBook	MacBook Air H	IP LP3065 iPod Clas	sic	Customer Discount	Coupon Tax Charge
5 Return K	Product 16	Product 17	Product 21 product 2	0 >	Pay	Detail \$497.02

Options to modify values per product in an order

There, as you can see in the order panel, there are options in blue to modify the quantity and discounts and in red to delete products in the order.

Â	Order			+	ī						
	New C	Order	Ord	er History	r (0)						
	iPod Touc \$50.00	:h	\$50.00								
	- 1	+			_						
	Modify Orders										
	1Pod Shut \$100.00	fle	21	00.00	•						
	- 1	+		/							
	Nikon D3 \$80.00	00	59	0.00 🔽							
	- 1	+									
ł		Delete	Products	in Order							
					~						
	Customer	Discount	X Coupon	रेक Tax	5 Charge						
~	Pay		D	etail \$2	30.00						
>											

^	Order				+	-	Ī	
	New C)rder		Ord	er Hist	ory (C))	
	iPod Touc \$50.00	h		\$5	0.00			î
	- 1	+						
	Price: \$50.0	0 Disc.(%):N	J/A	Dis	c. Price	N/A	1	¢
	Change Pri	ce 🗹	\$1	00		$\stackrel{\wedge}{\scriptstyle \lor}$		1
	Quantity Ty	pe						
	💿 Unit	🔵 Weight (k	g)					
	Quantity	- 10			$\hat{}$	+		
	Discount	Percentage	: v	5		$\hat{}$		
	Update	_						
	iPod Shuf	fle		\$1	00.00			~
	Customer	Discount	Cou	(Ipon	H Tax		اللہ Charg	je
~	Pay			D	etail	\$23	0.00	

Change Price – if it is ticked then the value put in it is including the tax no other tax is calculated on it. If it is not ticked then tax will be additional to the values put in the box.

Quantity- Agent can also put a quantity of products in it.

Discount- Discount value can be put in it.



In the below image we have put the product price as 100, quantity 10 and discount 5 Percentage.

On click on update.

We will see

Price 100, discounted price 95, for 10 quantities it is 950. So this option is for modifying the values product wise.

Order			+ 1	-
New (Drder	Ord	ler Histor	y (0)
iPod Touc \$95.00 — 10	ch +	\$9	50.00 🛛	•
iPod Shut \$100.00	ffle +	\$1	00.00	2
Nikon D300 \$80.00		\$8	0.00	2
Customer	Discount	X Coupon	म्नि Tax	5 Charge
Pay		Det	ail \$1, 1	30.00

So it is basically an option to modify orders product wise. purpletreesoftware.com



If you need to modify the order global for all products check the bottom block options.

These options will apply for complete order.

Global Options for an order

Here you can add a customer, coupon, discount, tax or any other charge for an order.



Customer

Agent can add a customer for the order or select from the existing, while adding a customer default email id will be generated which if the agent wants can be replaced with the new or actual email id.

Agent can also search here the customer and select it.



<u>A</u>	Search product by model, sky, unc	ean ich			Order	+ 🖬 🗊
POS		Customer		×	New Order	Order History (0)
Full screen		Search customer	by name, email or telephone.		iPod Touch \$95.00	\$950.00 🛛 👕
All Products	Canon EOS 5D greta		Add New Custome		- 10 +	•
	\$80.00 \$900.00				iPod Shuffle \$100.00	\$100.00 🗖 👕
Popular Products		B		6	- 1 +	
Barcode			in the second second		Nikon D300 \$80.00	\$80.00 🗾 👕
	iPod Nano	iPhone	iMac	Apple Cinema 30"	E 1 ±	
Categories	Product 9 \$100.00	product 11 \$101.00	Product 14 \$100.00	Product 15 \$90.00 \$ 100.00		
Hold Orders	0	6	0			
Orders	MacRook	MacBook Air	HP I P3065	iPod Classic	Customer Discount	Coupon Tax Charge
	Dalatic	Midebook All	TH 275005	in ou classic		

On clicking on add customer, the agent can easily add the customer after putting in all the information.

<u>~</u>	Search product by model, sky, upc, e	an isn			1	Order			
POS		Add New Cu	istomer	×		New Order			ory (0)
C J Full screen		Customer Group	~			iPod Touch \$95.00		\$950.00	2 🕯 ^
All Products	Canon EOS 5D greta Product 3	First Name			iPod Shuffle Product 7	- 10 +		\$100.00	\$
	\$80.00 \$900.00	Diego			\$100.00	\$100.00		2100.00	
Popular Products		Last Name				— 1 +			
		Kelly			1 Sta	Nikon D300		\$80.00	
Barcode		Email				\$80.00			
10 M	iPod Nano	daymm0zlcik7dd	4r@mzdqtgjlc61y87bq.com		Apple Cinema 30"				
Categories	\$100.00	Telephone			\$90.00 \$100.00				
Ξ.		9811234567							
Hold Orders			Select Add and Se	elect					×
							• ×	'n	B
Orders	MacRook	MacRook Air			iDod Classic	Customer Dis	count Coup	on Tax	Charge
5	Product 16	Product 17	Product 21		product 20				

Discount

Second Option is discount, agent can apply discount to the order value, it can either be fixed or percentage wise.

<u>A</u>	Search product by model, sky, upo	ean ich			Order	+ 🖬 🕯
POS	staten product by model, ska, ape	Apply Custo	m Discount	×	New Order	Order History (0)
0		Discount Type			iPod Touch	\$950.00 😰 🍵
Full screen		Percentage		~	- 10 +	
All Products	Canon EOS 5D greta	Discount Value 10				•
	Product 3 \$80.00 \$900.00	Discount value			iPod Shuffle	\$100.00 🔽 🍵
				Submit	\$100.00	
Popular Products				•		
		0 2 9 2 • 0 7 2 5 2			Nikon D300	\$80.00 🗾 👕
Barcode				-	\$80.00	
10 M	iPod Nano	iPhone	iMac	Apple Cinema 30"	- 1 +	
Categories	\$100.00	\$101.00	\$100.00	\$90.00 \$100.00		
1						
Hold Orders	•			जिल्ला 🚺		~
Orders					Customer Discount	Coupon Tay Charge
	MacBook	MacBook Air	HP LP3065	iPod Classic	Customer Discount	coupon lax charge
5	Product 16	Product 17	Product 21	product 20	✓ Pay	Detail \$1,130.00

Coupon

Similarly the agent can apply coupons to the order and give benefits to customers.



Order		+ 1	Î
Ne	w Order		
iPod Touch \$97.30 - 5 +	\$48	6.50 🔽	•
Star \$110.00	\$55	0.00 🔽	•
- 5 +			
Coffe CUP Gold Checkbox: Checkbox 1 \$120.00	\$12	0.00 🔽	•
- 1 +			
DD Demo \$145.00	\$14	5.00 🔽	•
- 1 +			~
Customer Discount	X Coupon	ोस Tax	5 Charge
Pay	Detail	s \$1,1	19.53

The Agent can see from here the list of coupon available and insert it into the order.

n, isbi	Cou	oons				×	6
	0	2222	-10% Discount				
					Apply Coupon		
		8		0			8

n, isbi	Cart Details		×
	Sub-Total	\$705.00	
	Coupon (2222)	\$-70.50	
	Eco Tax (-2.00)	\$11.20	
	Total	\$645.70	
	Total Items:4	Total Quantity: 9	6
		_	

Тах

The customer can do any other required tax if not set up in OpenCart admin here. Tax can be named here and apply.



POS	Search product by model, sku, upc, ea	Apply Custom	n Tax 🗙		Order New Order	+ 🖬 🖬
Full screen		Title Fuel Tax		0	iPod Touch \$95.00	\$950.00 🛛 👕 ^
All Products	Canon EOS 5D greta Product 3 \$80.00 \$900.00	Type Fixed	~	iPod Shuffle Product 7 \$100.00	iPod Shuffle \$100.00	\$100.00
Popular Products		value		6	- 1 +	\$80.00 🗾 👕
Categories	iPod Nano Product 9 \$100.00	\$101.00	Submit \$100.00	Apple Cinema 30" Product 15 \$90.00 \$100.00	1 +	
Hold Orders	6	6	6			
Orders	MacBook Product 16	MacBook Air Product 17	HP LP3065 Product 21	iPod Classic	Customer Discount	Coupon Tax Charge
9		** *** **	*****		¥ Pay	Detail \$1,017.00

Charge

From here agents can apply custom charges and name the charge it can be fixed or percentage.

<u>_</u>	Search product by model, sku, upc. e	ear isb)		Order	+ 🖬 🗎
POS		Apply Custor	m Charge 🛛 🗙		New Order	Order History (0)
Full screen	Canon EOS 5D greta	Title Packing Charge		iPod Shuffle	iPod Touch \$95.00	\$950.00
All Products	Product 3 \$80.00 \$900.00	Fixed	~	Product 7 \$100.00	iPod Shuffle \$100.00	\$100.00 🔽 🍵
Popular Products		value 25		•	- 1 + Nikon D300	\$80.00 🛛 🗑
Barcode	iPod Nano Product 9 \$100.00	\$101.00	Submit \$100.00	Apple Cinema 30" Product 15 \$90.00 \$100.00	\$80.00 - 1 +	
Hold Orders	0	6	6			v
Orders	MacBook	MacBook Air	HP I P3065	iPod Classic	Customer Discount	Coupon Tax Charge
5	Product 16	Product 17	Product 21	product 20	✓ Pay	Detail \$1,017.00

After applying all these you can check, the complete details of the order after click on details.

Cart Details	5			×
Sub-Total			\$1,130.00	
Fuel Tax (Fixe	ed)		\$20.00	×
Packing Char	ge (Fixed)		\$25.00	×
Discount (10	%)		\$-117.50	×
Total			\$1,057.50	
Total	ltems:3 T	otal Quantit	ty: 12	
iPhone	iM	ас	Apple Ci	nema 30"
product 11	Produ	ict 14	Prod	luct 15

Pay/Order Place

Before pay, you have to **select the customer** or **create the customer**,

For selecting customers, click on Customer type first words of name of customer after that you can select the customer. For adding the customer click on add customer, and fill the information, here default email id will be generated that can be replaced by actual email id by agent.



<u>A</u>	Search product by model, sku, upc, ear, isb				Order	+ 🖬 🗑
POS		Add New Customer	×	0	New Order	Order History (0)
Full screen		Customer Group		0	iMac \$102.00	\$102.00 🛛 👕
		Default 🗸			- 1 +	
All Products	Canon EOS 5D greta Product 3	First Name	iP	od Shuffle Product 7		•
	\$80.00 \$900.00	Enter your first name		\$102.00	iPhone \$103.02	\$103.02 🗾 📕
Popular Products	6	Last Name			- 1 +	
		Enter your last name		97	iPod Nano	\$102.00
Barcode	=.	Email		-	\$102.00	
10 A	iPod Nano	be7wklr4m4hyucn8@bgrcoj27jzcoo0ll.com	Appl	e Cinema 30"	- 1 +	
Categories	\$102.00	Telephone	\$ <mark>9</mark> 1.	.80 \$102.00	Canon EOS 5D greta	\$90.00 🗾 🍵
1		Enter your telephone number			Select: Red \$90.00	
Hold Orders		Select Add and S	elect			
H					•	x r b
Orders	MacBook	MacBook Air HP LP3065	iP	od Classic	Customer Discount	Coupon Tax Charge

When there is a customer created or selected. After clicking on pay, the below window will open.

You have to select the address, or write the address, the taxes will be calculated based on address, either Payment address or shipping address as set in admin.

8	Sur	mmary				Total Amount \$510.00
Name	Quantity	Price	Disc.	Disc. Price	Amount	Shipping/Payments address(optional)[Show More]
iPod Touch	10	\$51.00	-	-	\$510.00	
Model:Product 5					Add Address	
Sub-Total					\$500.00	Payment and Place Order
Eco Tax (-2.00) Fotal					\$10.00 \$510.00	Cash Credit/Debit card
Total Items:1	Total Quantity:10					

Agent can select the payment option by Cash or Debit Card.

÷	Summa	Please co	onfirm		×	otal Amount
		Accept paym	ent through cash?			
Name	Quantity Pi	rice D	No	Yes		nts address(optional)[Show More]
iPod Touch Model:Product 5	10 \$50	0.00 -		Payment Address:		Shipping Address:
Sub-Total Total			\$500.00	Name: Sidddharth Loius Address1:Nickolas County		Name: Sidddharth Loius Address1:Nickolas County
Total Items:1	Total	Quantity:10		Address2: Square A City: Newyork Postcode: 10013 Region / State:NY Country:United States		Address2: square A City: Newyork Postcode: 10013 Region / State:NY Country:United States
			ĺ		Paj	Add Address yment and Place Order Credit/Debit card

Then there will be Pay window as below:

~	Sumi	Summary			Total Amount:\$2,557.80		×	× Total Amount: \$2,557.80			
2 Arad Ruhal Name		Price	Disc.		Place	Order	- 1	Shipping/Payment	s address(optional)[Show More]		
Apple Cinema 30° Model:Product 15 Date: 2022-03-09 Textarea: gtyuop		\$91.80		-	\$91.80	Payment Address: Name: Diego Kleit			Shipping Address:		
Star Moldel:s12345 Checkbox: Checkbox 2		\$110.00			\$220.00	Address1:MV Road Address2: MTR City: Noida			Address 1MM Road Address 2 MTR City: Noida		
Star Mo del:s12345 Checkbox: Checkbox 1		\$180.00			\$120.00	Postcode: 203206 Region/State/UP Country:India			Postcode 203206 Region /State UP CountryIndia		
Star Model: s12345		\$120.00			\$1,200.00						
Star Model: s12345		\$120.00			\$1,200.00			Payr	ment and Place Order		
Sub-Total Coupon (2222) Eco Tax (-2.00) Total Total Items:5	Τα	tal Quantity:24			\$2,840.00 \$-284.00 \$1.80 \$2,557.80				Gredit/Debit card		

Then after clicking on Place order, the order will be placed.

You can check orders as given on page no 18.



Support

If you need any assistance, kindly open a ticket from our helpdesk at <u>https://www.helpdesk.purpletreesoftware.com</u> with following information:

- Order Id
- Issue description with screenshots
- cPanel or FTP Login + OpenCart Admin login access

We will reply within 2 working hours.