

Point of Sale for OpenCart

User Guide



Point of Sale for OpenCart

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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

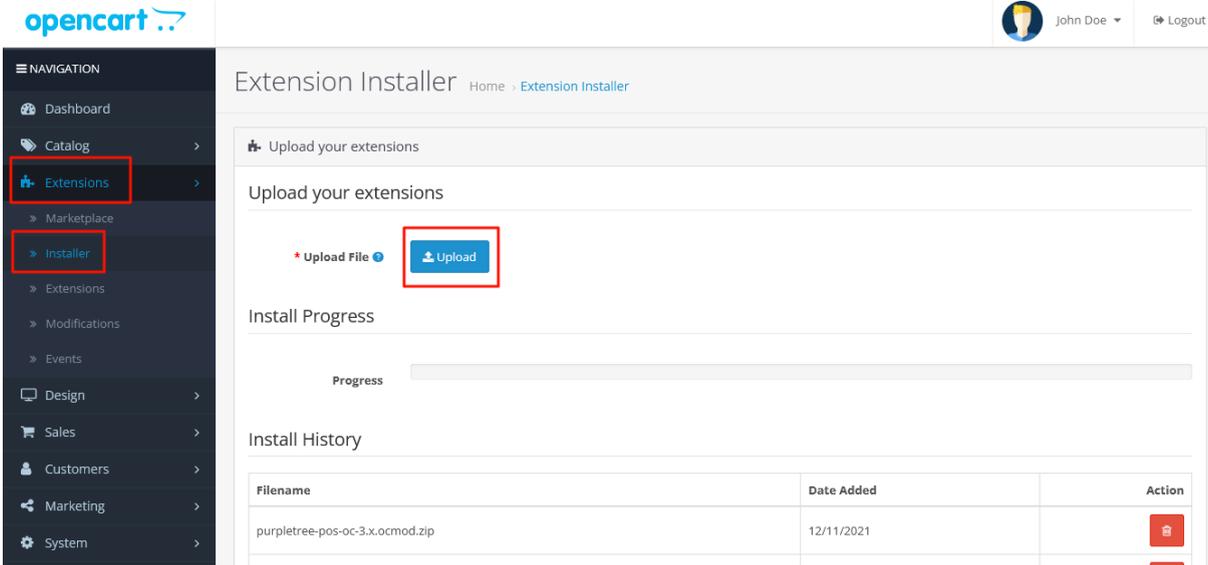
POS Customer

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”.

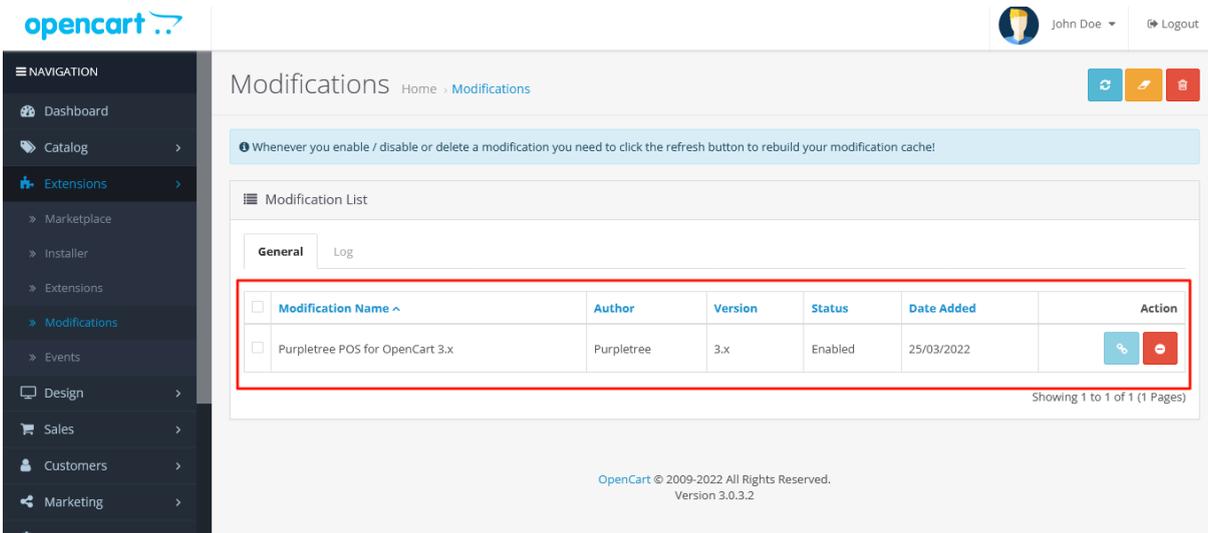


The screenshot shows the OpenCart admin interface. The left sidebar has 'Extensions' and 'Installer' highlighted. The main content area is titled 'Extension Installer'. It features an 'Upload your extensions' section with an 'Upload' button. Below this is an 'Install Progress' section with a progress bar. At the bottom is an 'Install History' table.

Filename	Date Added	Action
purpletree-pos-oc-3.x.ocmod.zip	12/11/2021	

Go to Extensions > Modification.

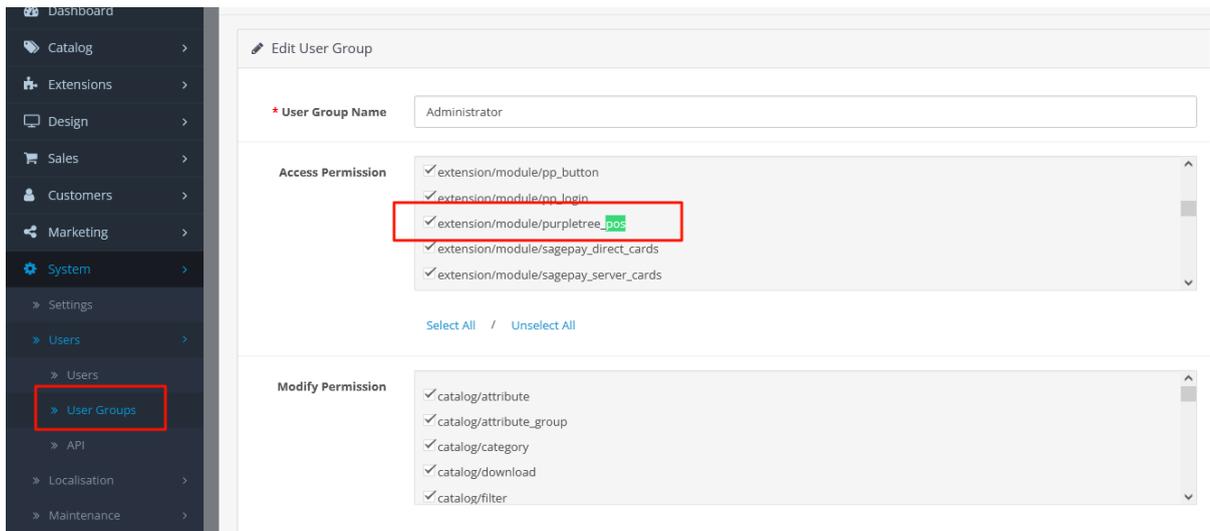
- You will see a new Modification Named as “Purpletree POS for OpenCart 3.x”.
- Click on the Refresh Button on top right.



The screenshot shows the OpenCart admin interface. The left sidebar has 'Modifications' highlighted. The main content area is titled 'Modifications'. It features a 'Modification List' table with one entry: 'Purpletree POS for OpenCart 3.x'. The 'Action' column for this entry contains a refresh button highlighted in a red box.

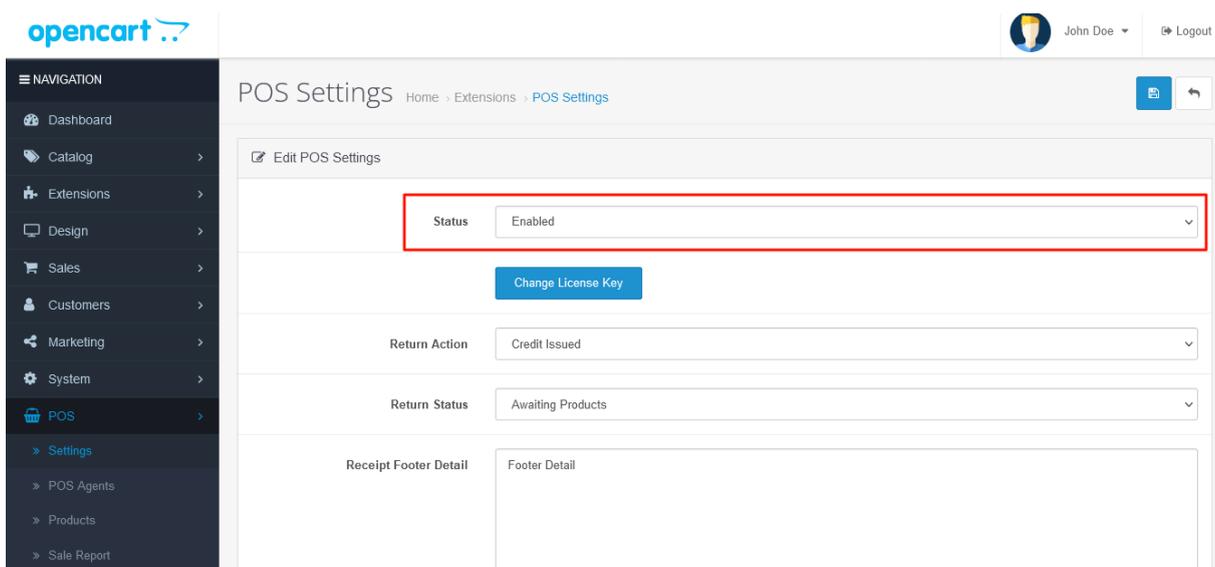
Modification Name ^	Author	Version	Status	Date Added	Action
Purpletree POS for OpenCart 3.x	Purpletree	3.x	Enabled	25/03/2022	

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



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”.



- 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

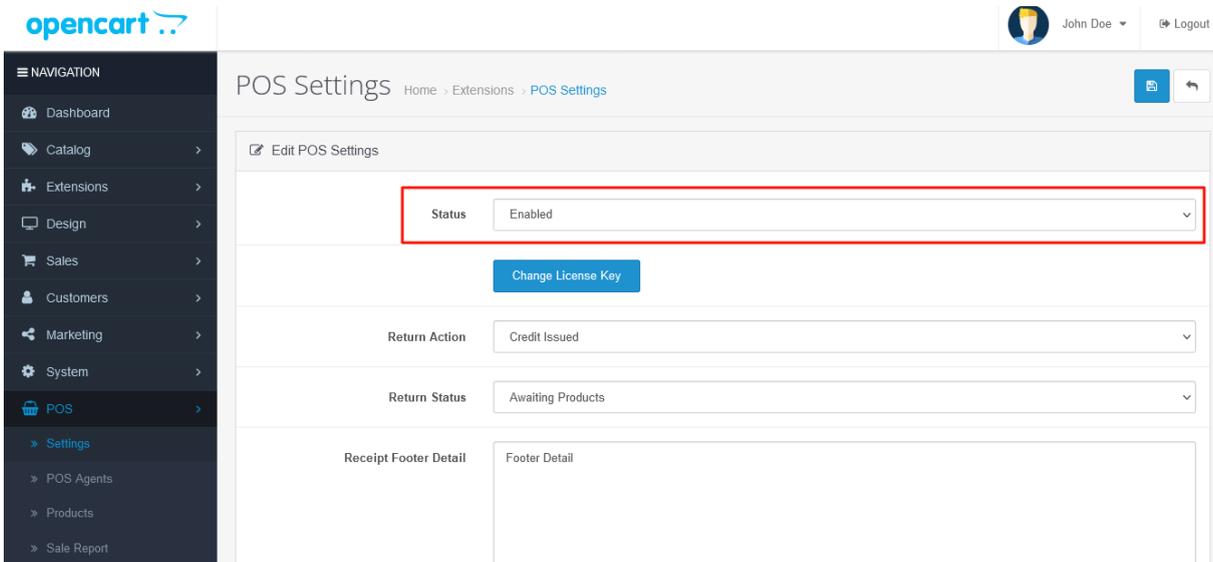
Purchaser. If you still haven't received it, please open a ticket with us from

<https://helpdesk.purpletreesoftware.com>.

Or

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



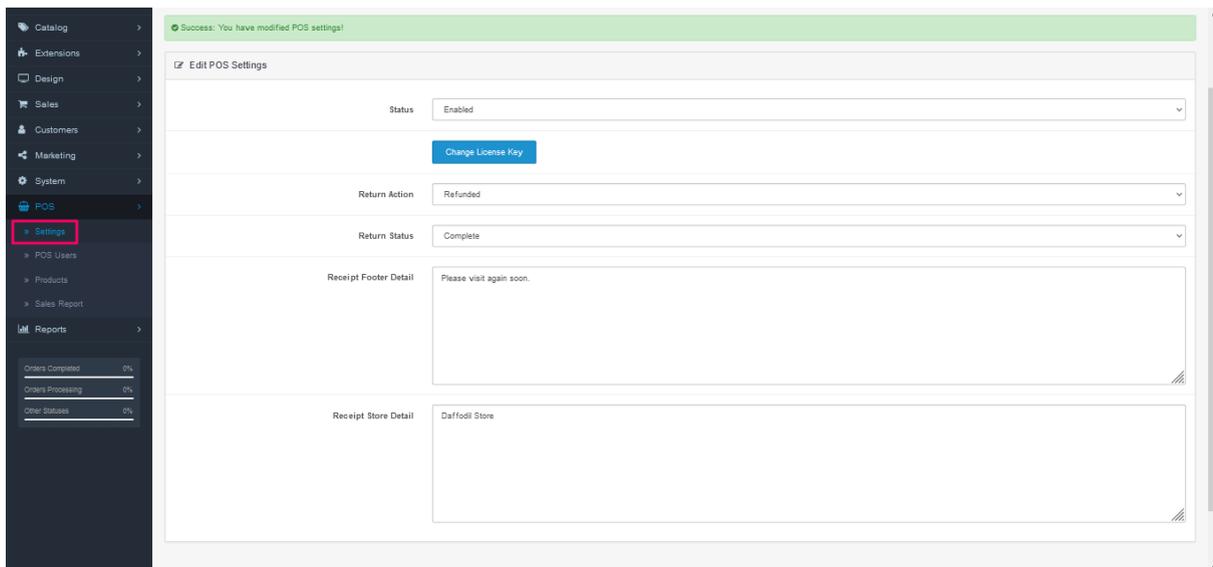
The screenshot shows the OpenCart POS Settings interface. The left sidebar contains a navigation menu with options like Dashboard, Catalog, Extensions, Design, Sales, Customers, Marketing, System, and POS. The main content area is titled 'POS Settings' and includes a breadcrumb trail: Home > Extensions > POS Settings. The 'Edit POS Settings' section is visible, with the 'Status' dropdown menu highlighted by a red box. Below this, there is a 'Change License Key' button, a 'Return Action' dropdown set to 'Credit Issued', and a 'Return Status' dropdown set to 'Awaiting Products'. At the bottom, there is a 'Receipt Footer Detail' section with a 'Footer Detail' input field.

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.



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 Centre Greix

Order #82 31/03/2022

Cashier:Arad Ruhai Cash Payment

Items	Quantity	Rate	Amount
HP LP3065			
	1	102.00€	102.00€
Star			
	1	130.00€	130.00€
Star			
	1	110.00€	110.00€

Sub-Total 340.00€

Coupon (2222) -34.00€

Eco Tax (-2.00) 2.00€

rto (5%) 17.00€

tyu (Fixed) 2.00€

Discount (Fixed) -10.00€

Total 317.00€

Total Items:3

Total Quantity:3

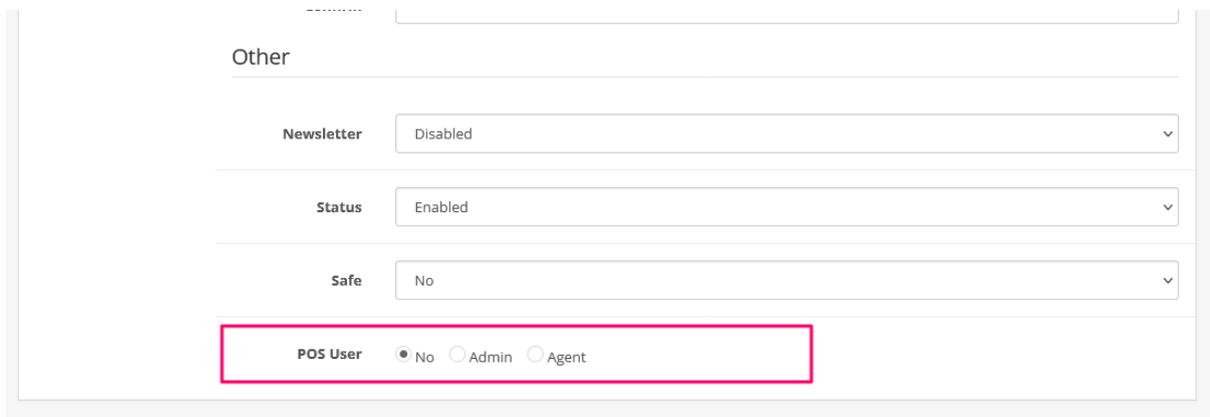
Come again soon!

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.



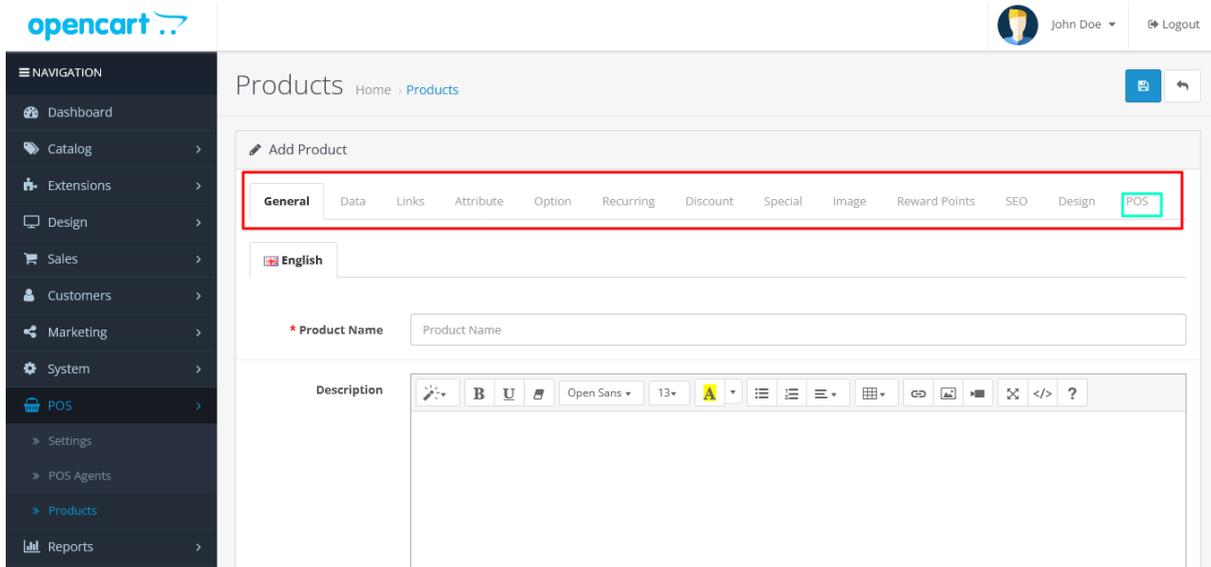
The screenshot shows a form titled "Other" with the following fields:

- Newsletter**: A dropdown menu with "Disabled" selected.
- Status**: A dropdown menu with "Enabled" selected.
- Safe**: A dropdown menu with "No" selected.
- POS User**: A radio button group with three options: "No" (selected), "Admin", and "Agent". This entire section is highlighted with a red rectangular border.

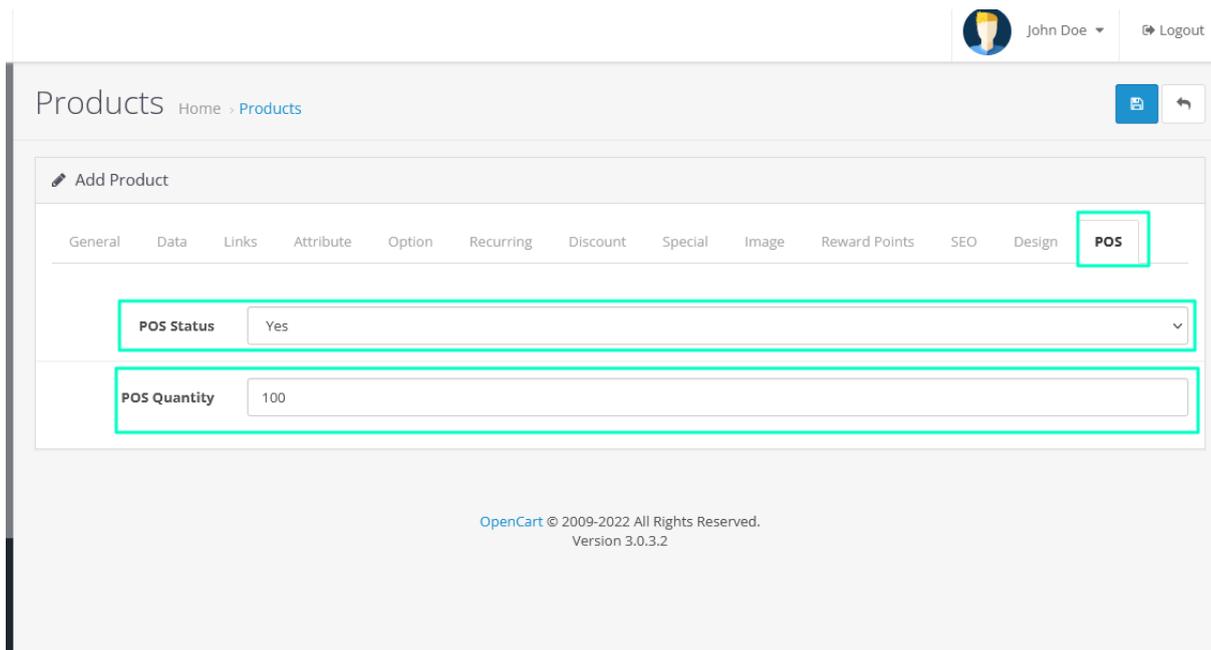
POS Products

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.



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



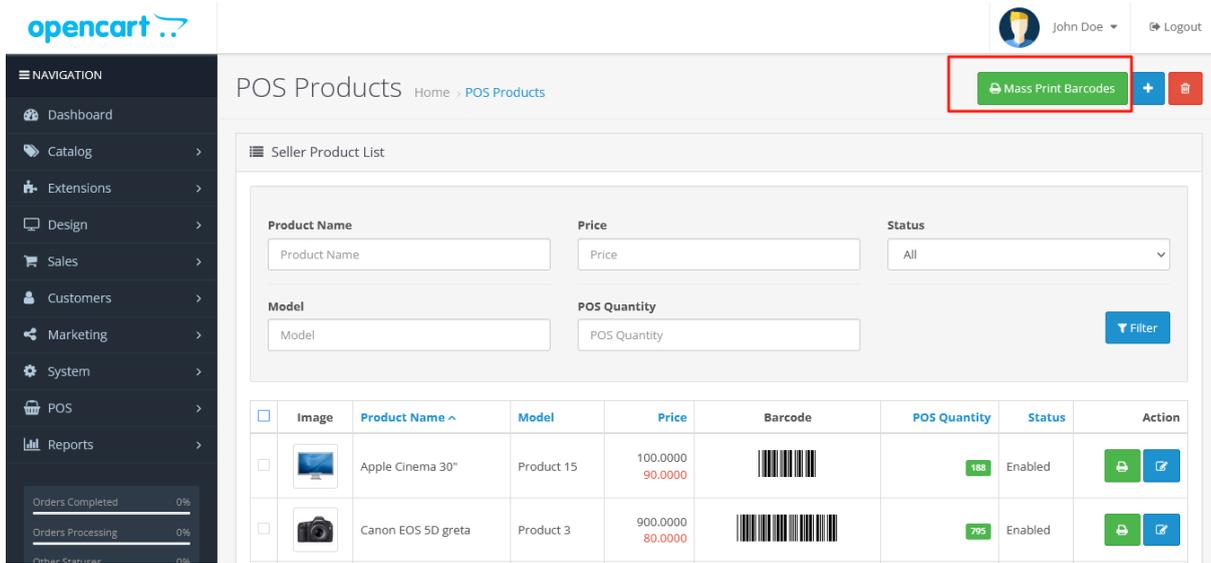
Mass Print Barcodes

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.

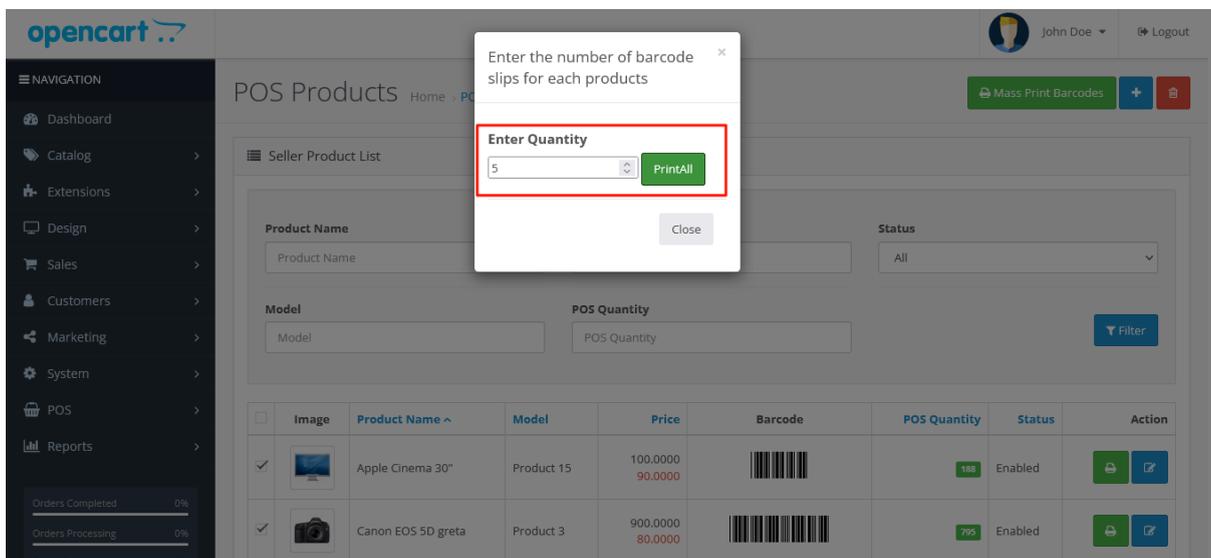
First select the product for which the admin needs to publish the Barcode.

After selecting the products click on Mass Print Barcodes.

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

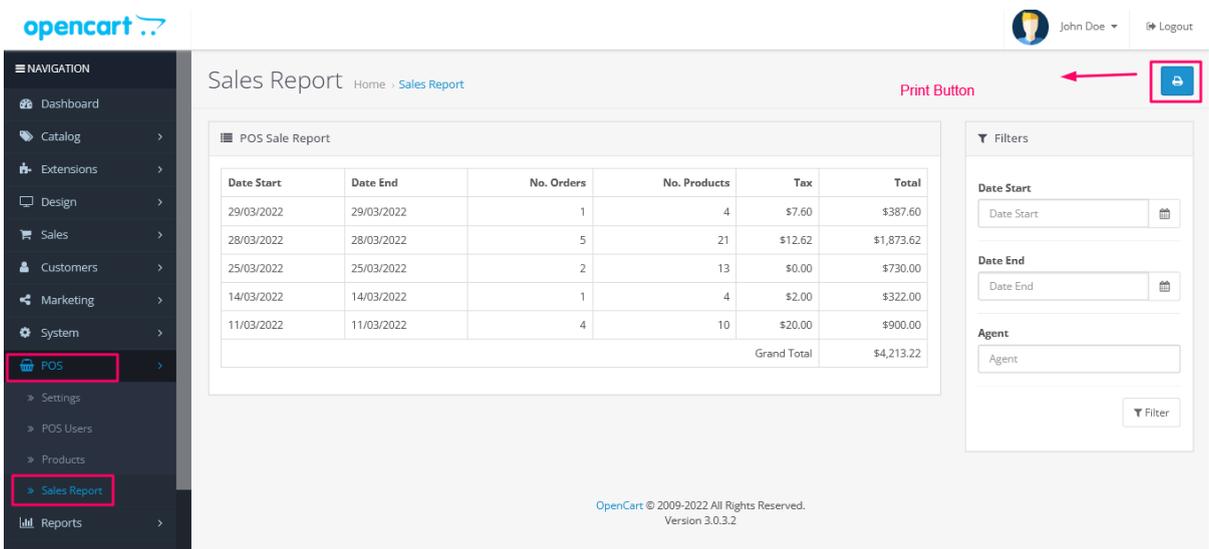


You can see the print page below, there are 5 quantities of Barcodes for all selected products.



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 Logout

Sales Report Print Button

Date Start	Date End	No. Orders	No. Products	Tax	Total
29/03/2022	29/03/2022	1	4	\$7.60	\$387.60
28/03/2022	28/03/2022	5	21	\$12.62	\$1,873.62
25/03/2022	25/03/2022	2	13	\$0.00	\$730.00
14/03/2022	14/03/2022	1	4	\$2.00	\$322.00
11/03/2022	11/03/2022	4	10	\$20.00	\$900.00
Grand Total					\$4,213.22

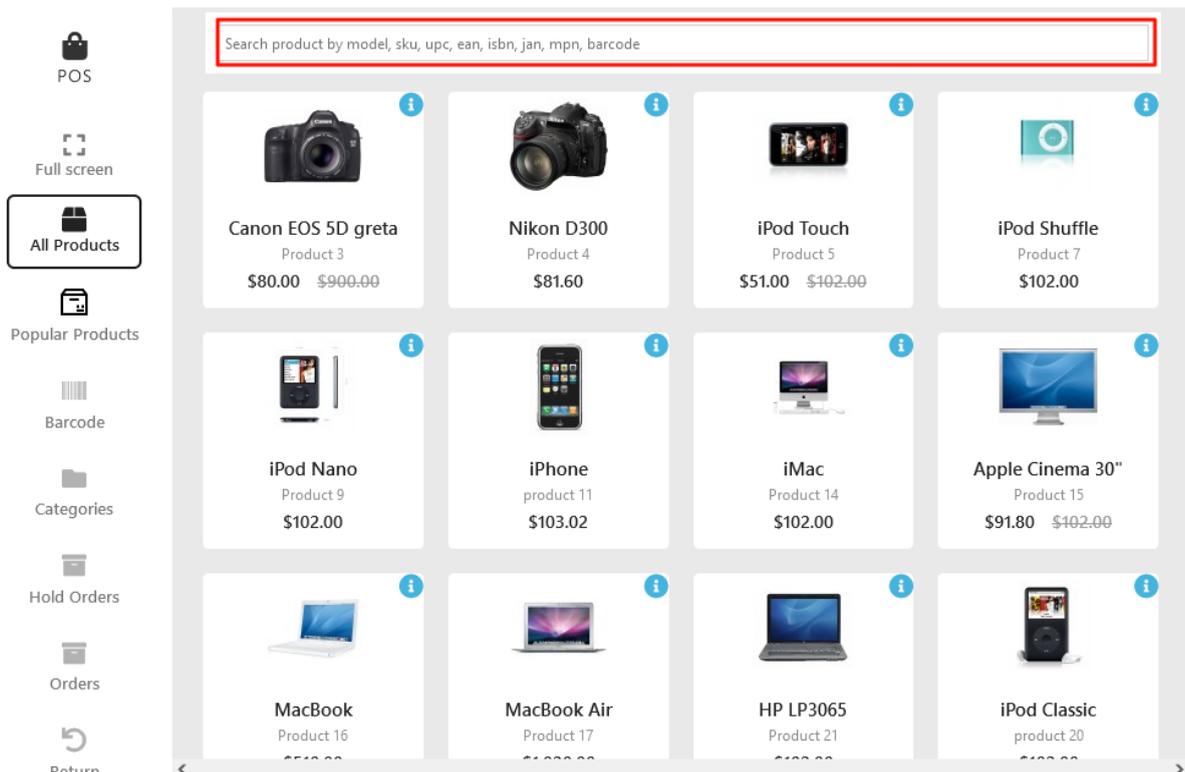
OpenCart © 2009-2022 All Rights Reserved. Version 3.0.3.2

POS Agent/Admin Dashboard

Search Products

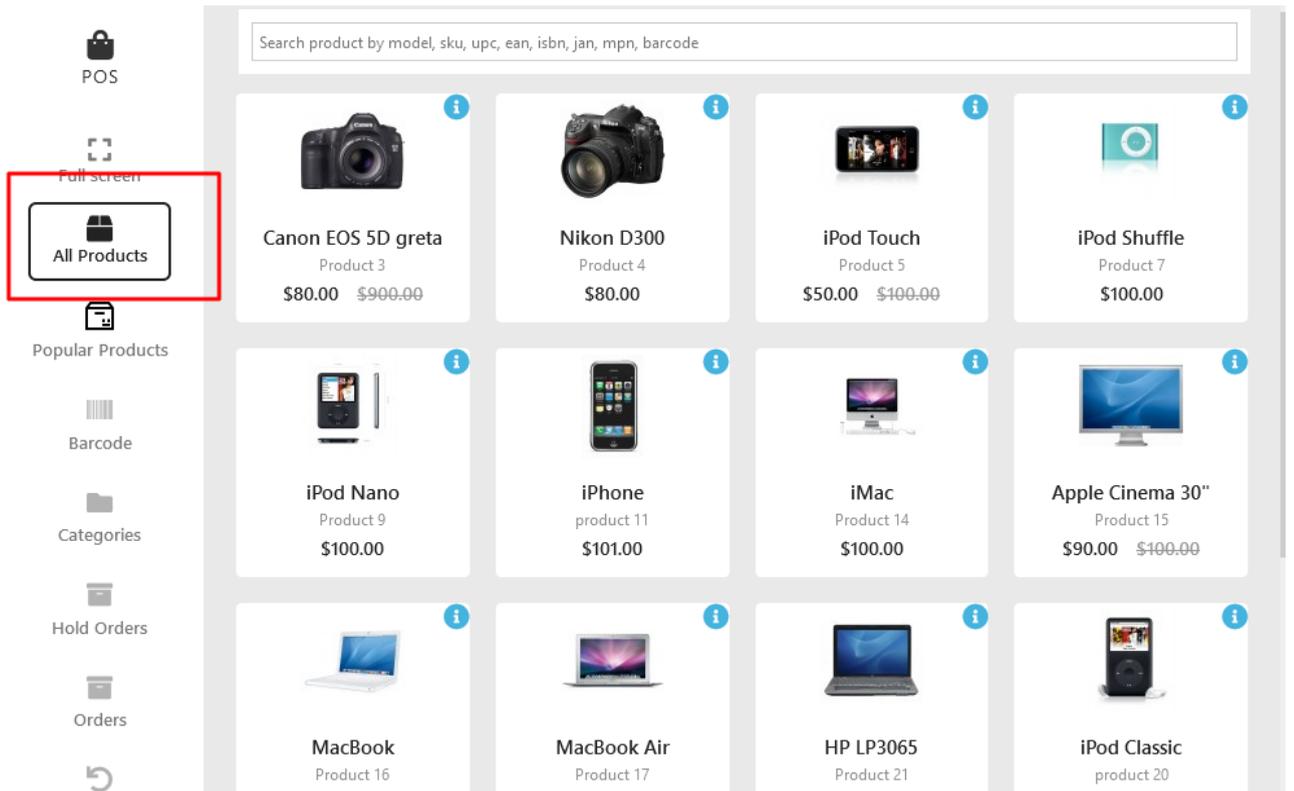
Search products by different search fields. It shows search results, by doing search.

Search by Model, SKU, UPC, EAN, ISBN, JAN, MPN, Barcode.



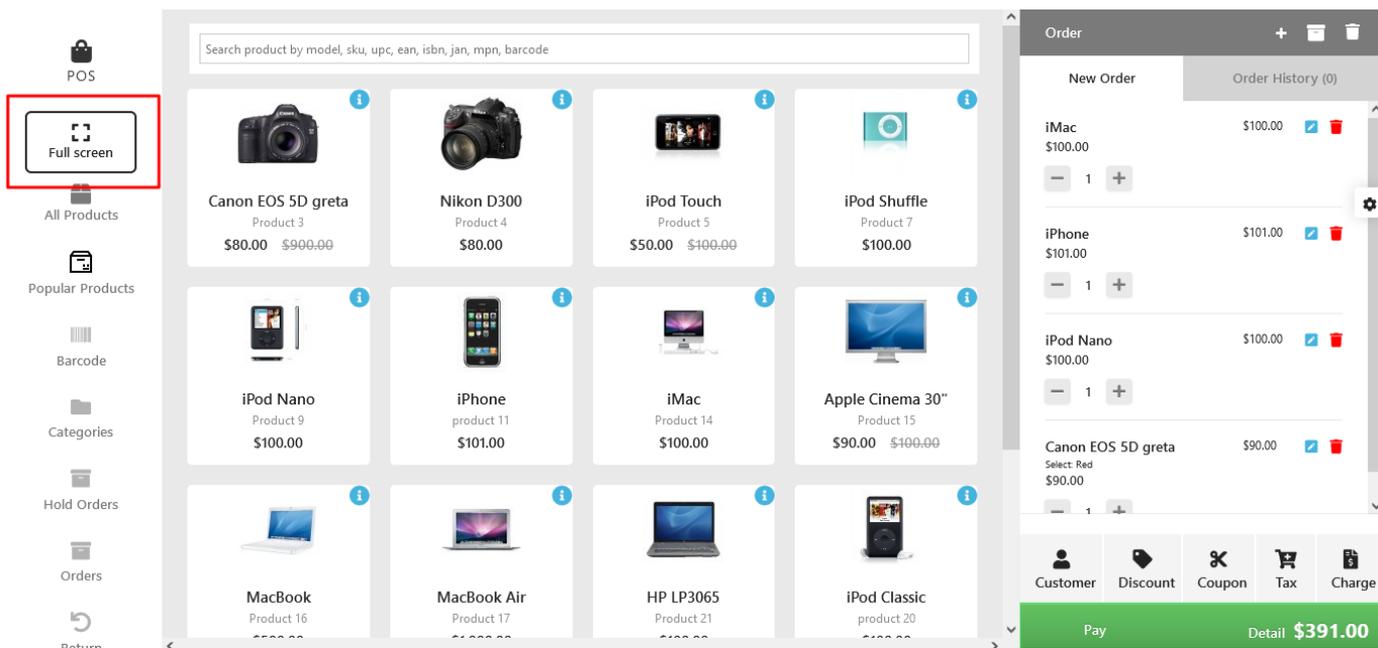
All Products

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



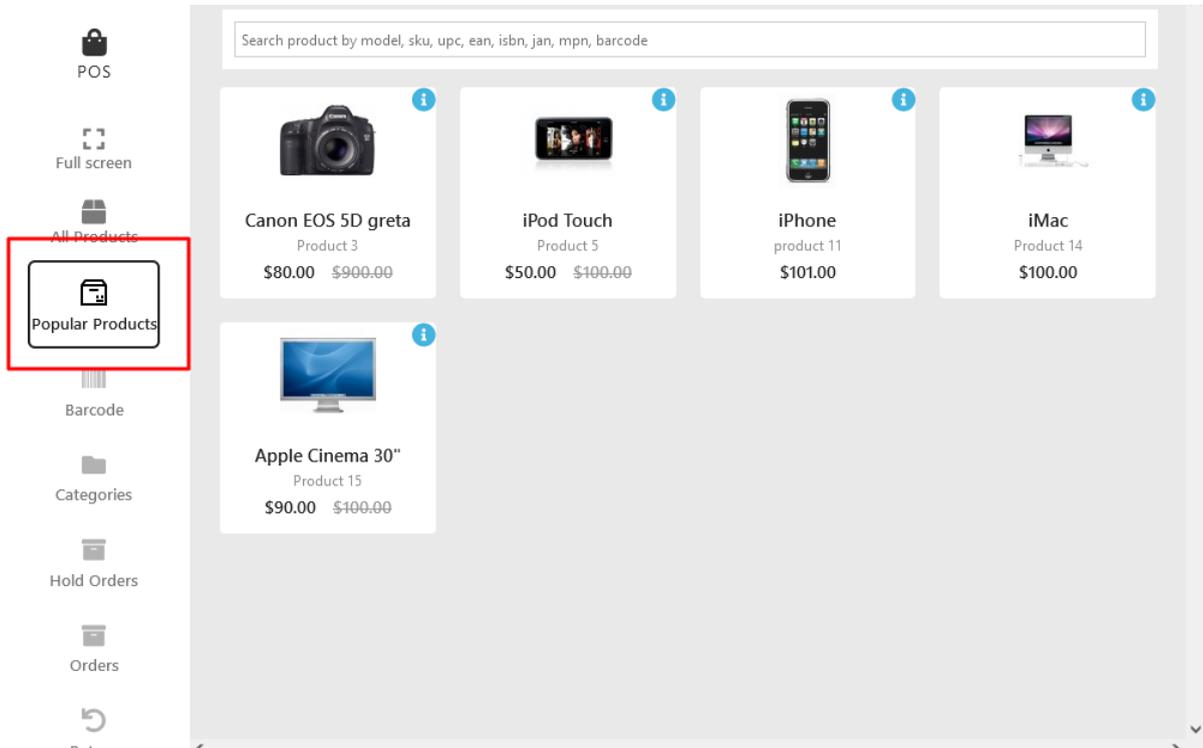
Full Screen

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.

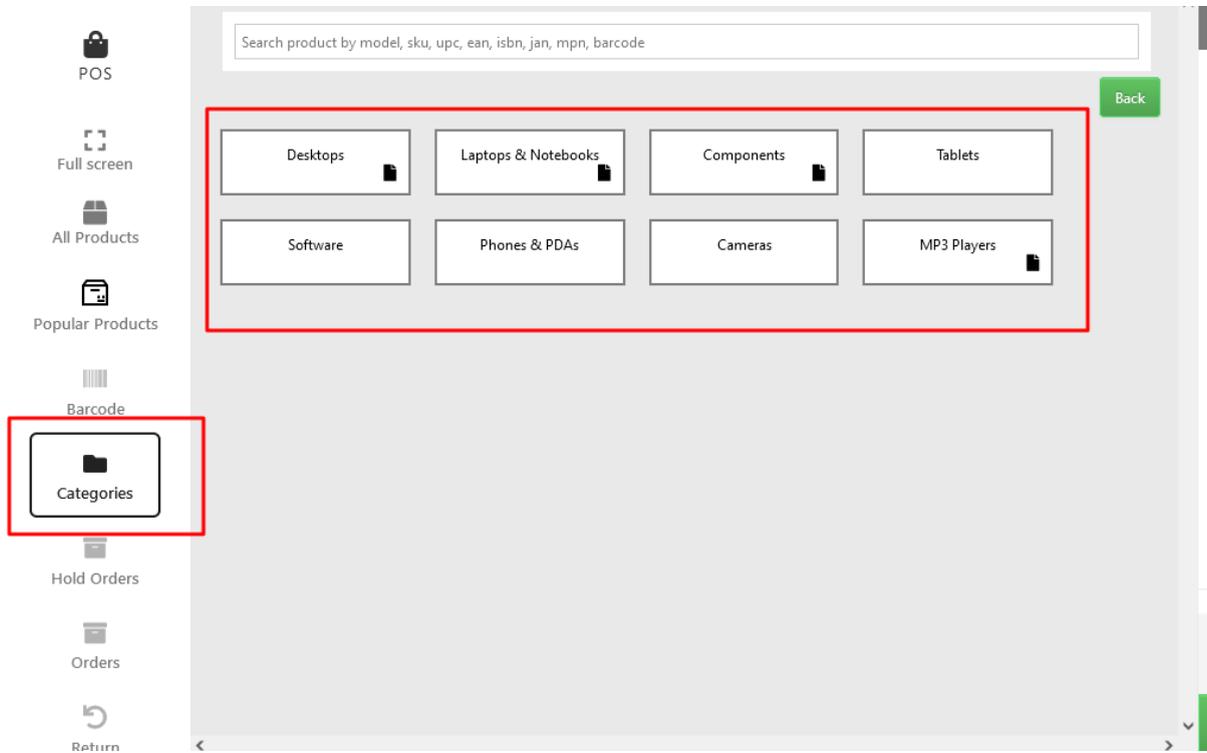
For any product, the barcode be stored in any **one** of the following fields:

- 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.

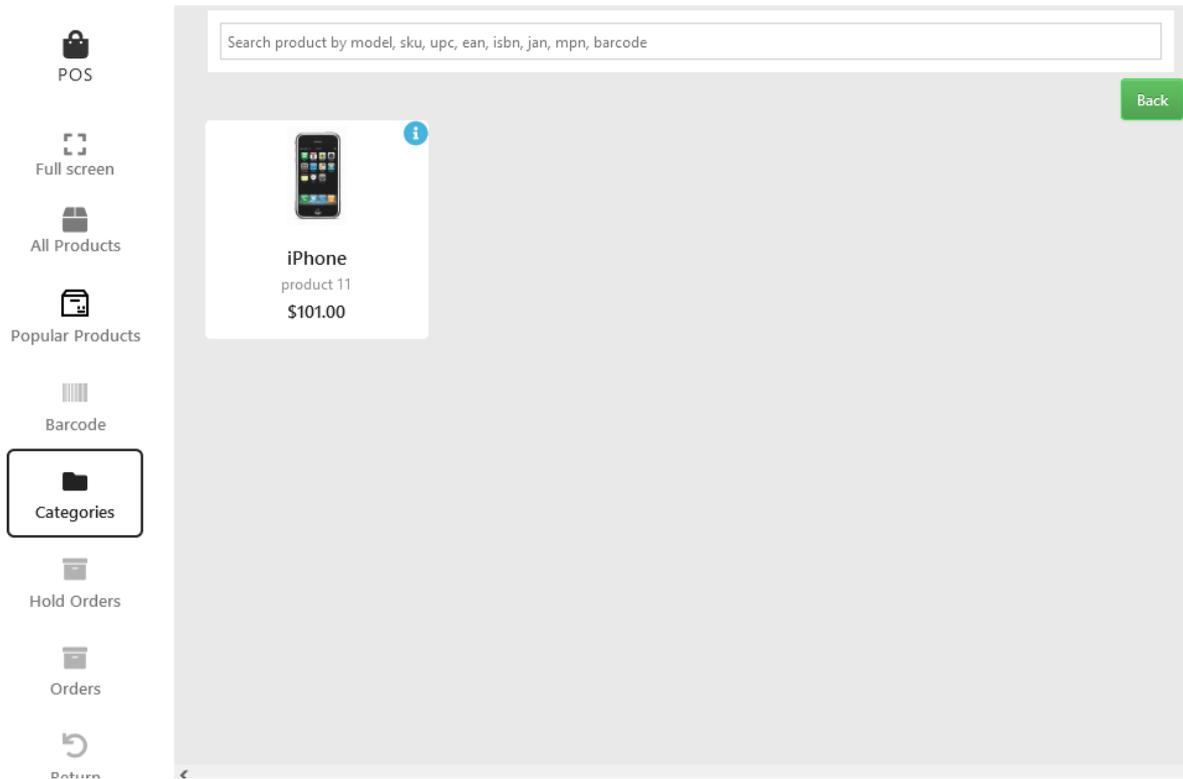
Categories

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.

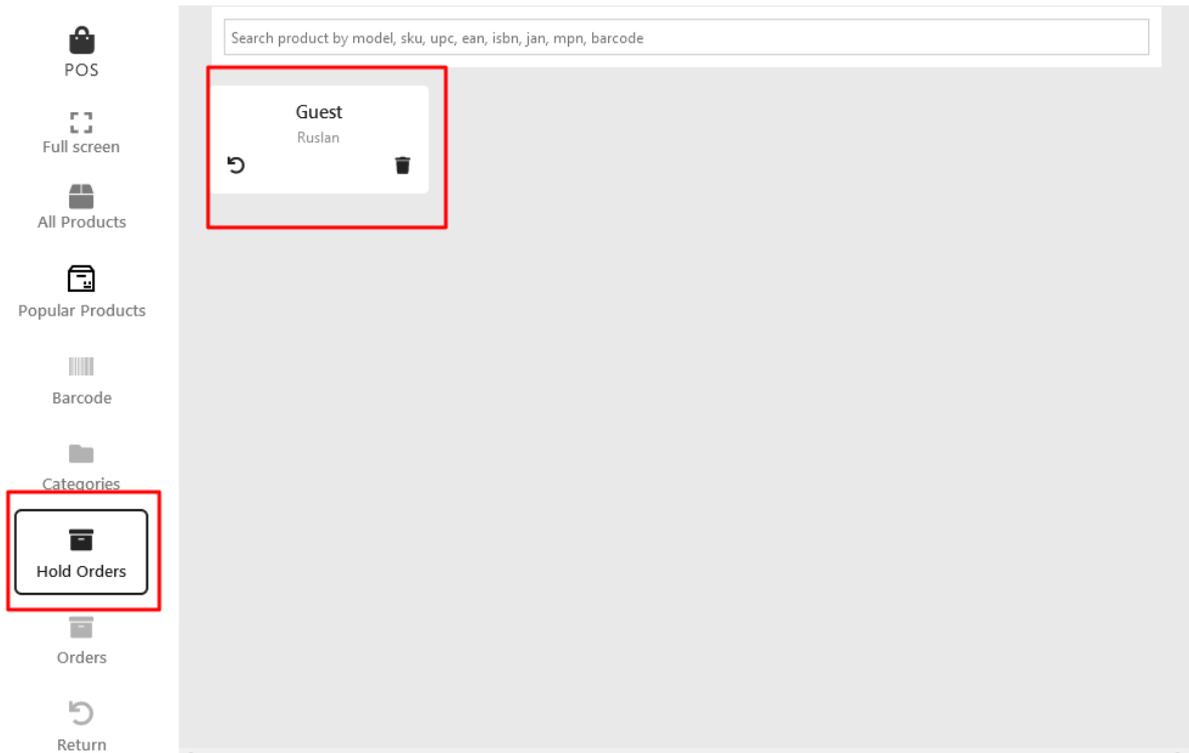
For category selection has to place cursor on category name for proper working.



On click on Back it will revert 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

-  POS
-  All Products
-  Popular Products
-  Barcode
-  Categories
-  Hold Orders
-  Order
-  Return

#67

Order Id:#67
 Order Date: 25/03/2022
 Customer Name: Diego Kelly
 Payment Method: Cash Payment
 Barcode Number:
 Barcode:

<input type="checkbox"/>	Name	Model	Quantity	Price	Amount
<input type="checkbox"/>	Nikon D300	Product 4	1	\$80.00	\$80.00
<input type="checkbox"/>	iPod Touch	Product 5	1	\$50.00	\$50.00
<input type="checkbox"/>	iPod Shuffle	Product 7	1	\$100.00	\$100.00

Receipt
Return

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

-  POS
-  All Products
-  Popular Products
-  Barcode
-  Categories
-  Hold Orders
-  Order
-  Return

Order Id:#67
 Order Date: 25/03/2022
 Customer Name: Diego Kelly
 Payment Method: Cash Payment
 Barcode Number:
 Barcode:

<input type="checkbox"/>	Name	Model	Quantity	Price	Amount
<input checked="" type="checkbox"/>	Nikon D300	Product 4	1	\$80.00	\$80.00
<input type="checkbox"/>	iPod Touch	Product 5	1	\$50.00	\$50.00
<input type="checkbox"/>	iPod Shuffle	Product 7	1	\$100.00	\$100.00

Receipt
Return

Name	Quantity	Return Reason	Opened
Nikon D300	1	Order Error	Unopened

Comment

Returned

Click on submit.

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-  POS
-  All Products
-  Popular Products
-  Barcode
-  Categories
-  Hold Orders
-  Order
-  Return
-  Reports

Date Start

Date End

Order Id

[Filter](#)

Return Id	Order Id	Customer Name	Date Added	Return Status	Action
5	67	Diego Kelly	2022-03-28 13:10:48	Complete	View
6	67	Diego Kelly	2022-03-28 14:01:49	Complete	View

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

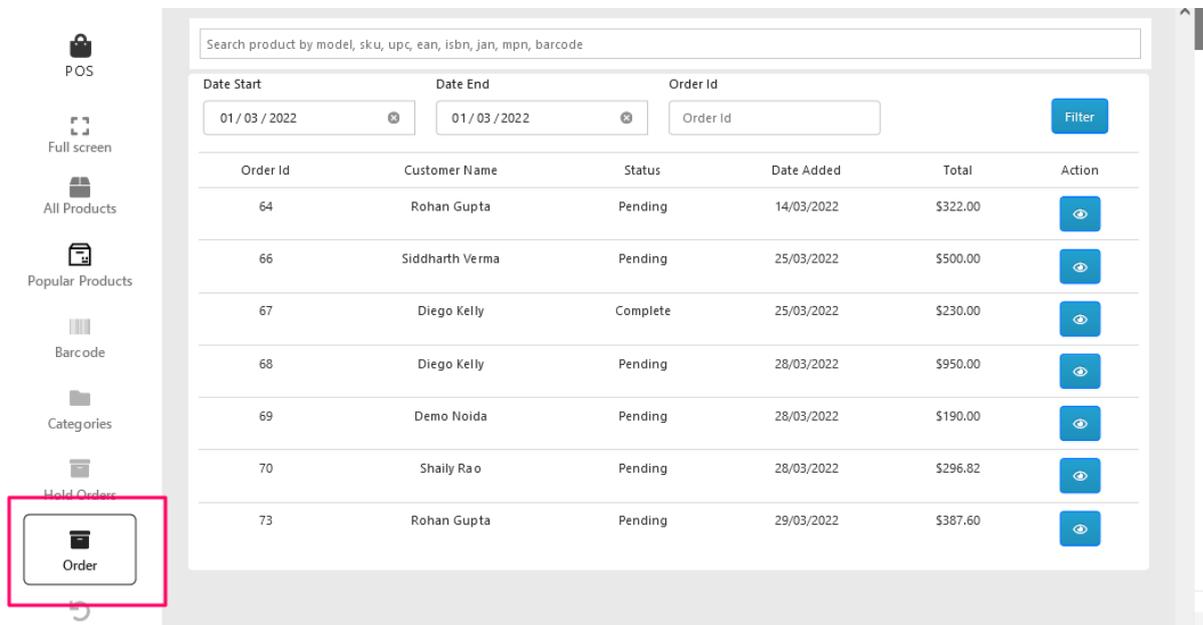
-  POS
-  All Products
-  Popular Products
-  Barcode
-  Categories
-  Hold Orders
-  Order
-  Return
-  Reports

#6

Return Id: #6
 Order Id: #67
 Return Date: 2022-03-28 14:01:49
 Order Date: 2022-03-25
 Name: iPod Touch
 Model: Product 5
 Quantity: 1
 Opened: Opened
 Customer Name: Diego Kelly
 Email: l3bpsoa71gf2rdgw@ow42ow8da27o2ovm.com
 Telephone: 9811234567
 Received Wrong Item
 Comment:
 Return Action: Refunded
 Return Status: Complete

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.



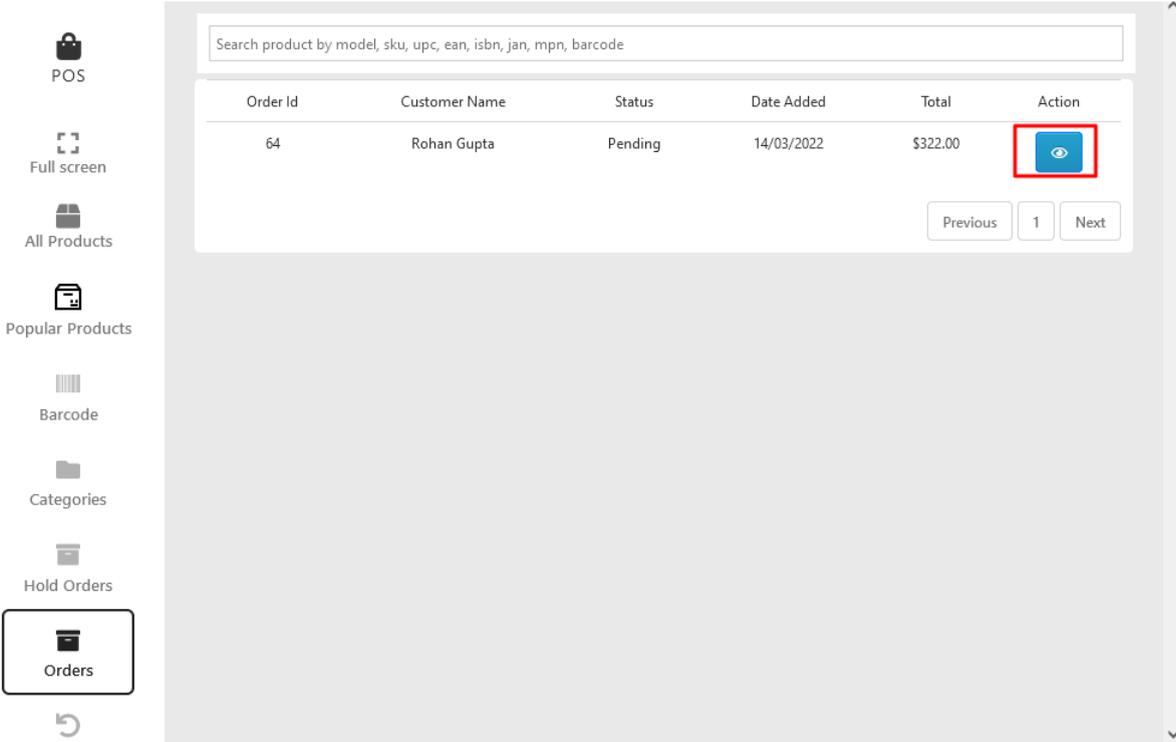
The screenshot shows the Purple Tree POS interface. On the left is a sidebar menu with icons for POS, Full screen, All Products, Popular Products, Barcode, Categories, and Hold Orders. The 'Order' icon is highlighted with a red box. The main area displays a search bar and a table of orders with filters for Date Start, Date End, and Order Id. The table lists orders with columns for Order Id, Customer Name, Status, Date Added, Total, and Action.

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	
66	Siddharth Verma	Pending	25/03/2022	\$500.00	
67	Diego Kelly	Complete	25/03/2022	\$230.00	
68	Diego Kelly	Pending	28/03/2022	\$950.00	
69	Demo Noida	Pending	28/03/2022	\$190.00	
70	Shaily Rao	Pending	28/03/2022	\$296.82	
73	Rohan Gupta	Pending	29/03/2022	\$387.60	

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.



POS

Full screen

All Products

Popular Products

Barcode

Categories

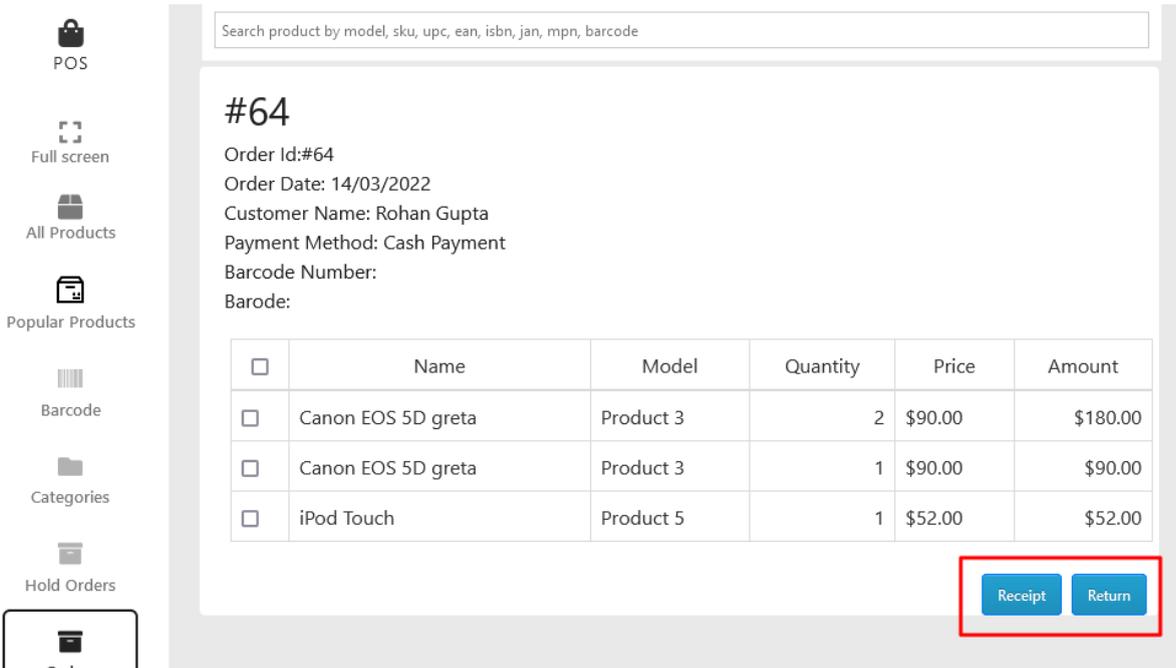
Hold Orders

Orders

Search product by model, sku, upc, ean, isbn, jan, mpn, barcode

Order Id	Customer Name	Status	Date Added	Total	Action
64	Rohan Gupta	Pending	14/03/2022	\$322.00	

Previous 1 Next



POS

Full screen

All Products

Popular Products

Barcode

Categories

Hold Orders

Orders

Search product by model, sku, upc, ean, isbn, jan, mpn, barcode

#64

Order Id:#64
 Order Date: 14/03/2022
 Customer Name: Rohan Gupta
 Payment Method: Cash Payment
 Barcode Number:
 Barode:

<input type="checkbox"/>	Name	Model	Quantity	Price	Amount
<input type="checkbox"/>	Canon EOS 5D greta	Product 3	2	\$90.00	\$180.00
<input type="checkbox"/>	Canon EOS 5D greta	Product 3	1	\$90.00	\$90.00
<input type="checkbox"/>	iPod Touch	Product 5	1	\$52.00	\$52.00

Receipt Return

You can see the receipt after click on receipt.

There is also the option there to print it.



Receipt

City Centre Greix

Order #82 31/03/2022

Cashier:Arad Ruhai Cash Payment

Items	Quantity	Rate	Amount
HP LP3065			
	1	102.00€	102.00€
Star			
	1	130.00€	130.00€
Star			
	1	110.00€	110.00€

Sub-Total 340.00€

Coupon (2222) -34.00€

Eco Tax (-2.00) 2.00€

rto (5%) 17.00€

tyu (Fixed) 2.00€

Discount (Fixed) -10.00€

Total 317.00€

Total Items:3

Total Quantity:3

Come again soon!

Reports

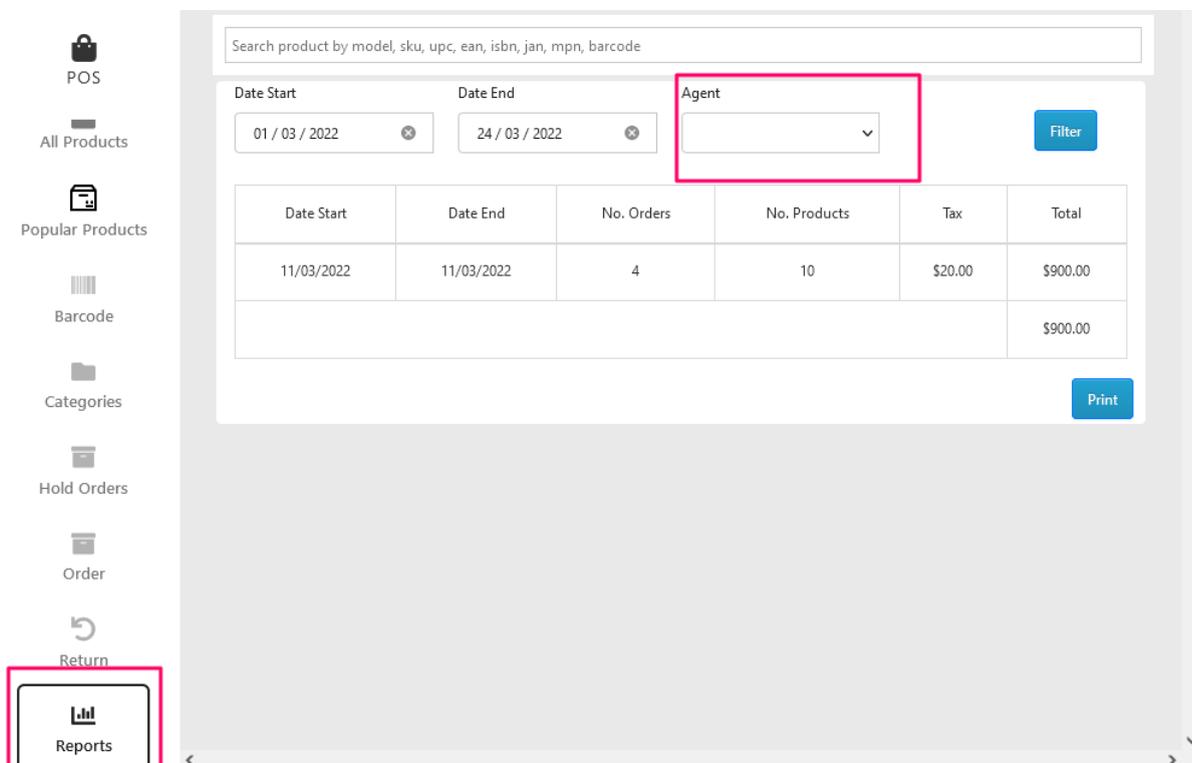
The POS admin can view Reports, Orders, Returns of All agents and POS agent can view this information of only his orders.

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.



Search product by model, sku, upc, ean, isbn, jan, mpn, barcode

Date Start: 01 / 03 / 2022 Date End: 24 / 03 / 2022 Agent: [Dropdown] Filter

Date Start	Date End	No. Orders	No. Products	Tax	Total
11/03/2022	11/03/2022	4	10	\$20.00	\$900.00
					\$900.00

Print

POS
All Products
Popular Products
Barcode
Categories
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.

-  POS
-  All Products
-  Popular Products
-  Barcode
-  Categories
-  Hold Orders
-  Order
-  Return
-  Reports

Search product by model, sku, upc, ean, isbn, jan, mpn, barcode

Date Start
01 / 03 / 2022

Date End
24 / 03 / 2022

Filter

Date Start	Date End	No. Orders	No. Products	Tax	Total
14/03/2022	14/03/2022	1	4	\$2.00	\$322.00
					\$322.00

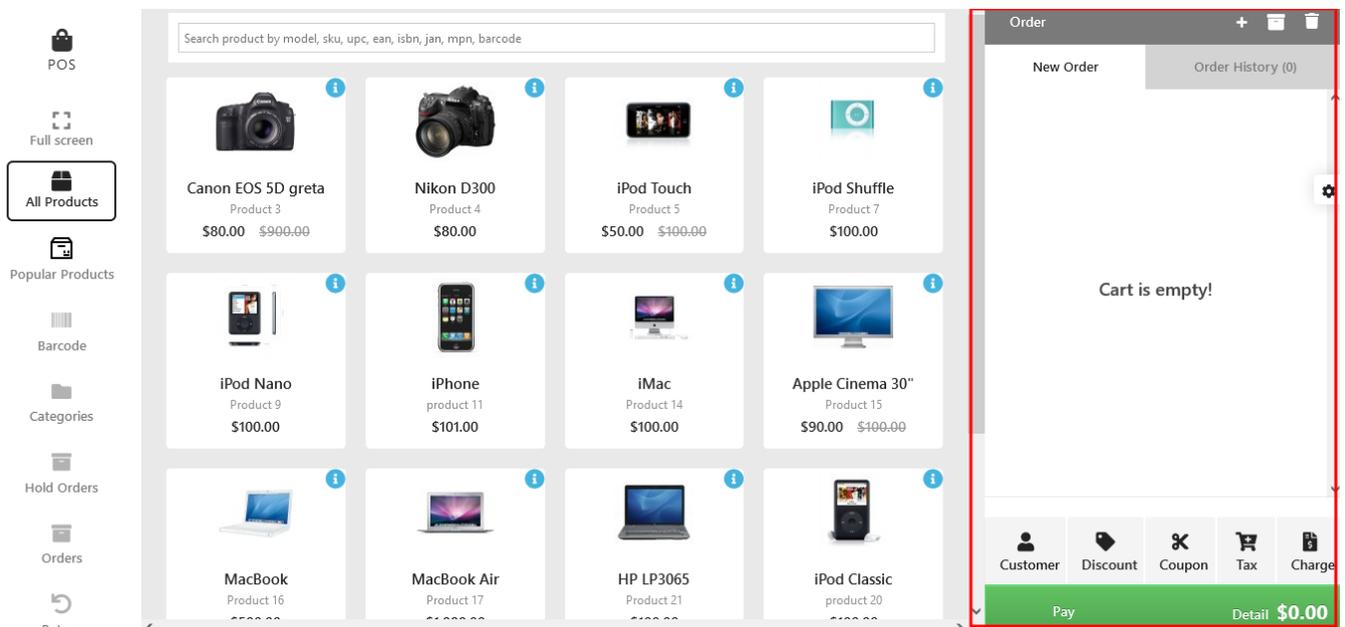
Print

POS Order Dashboard

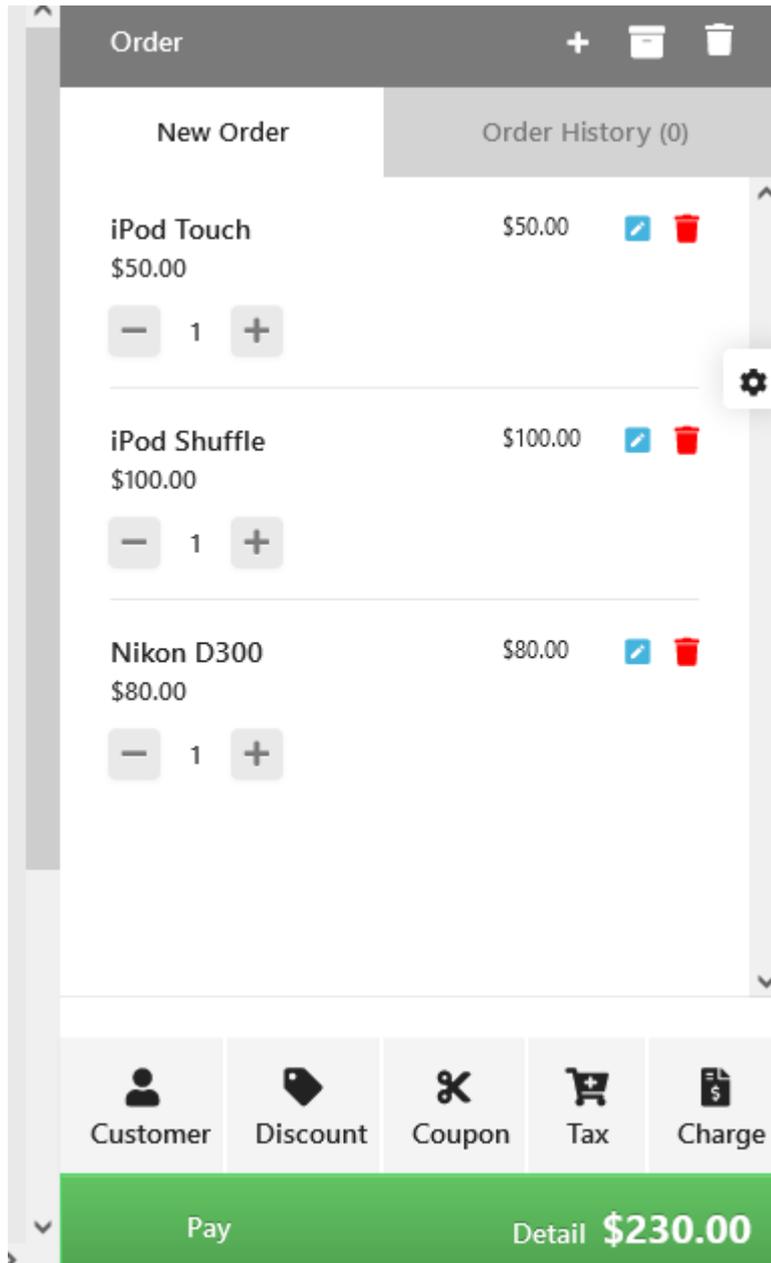
The Order Dashboard is on the right side of the Agent panel of POS, from here all order related tasks are performed here.

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.

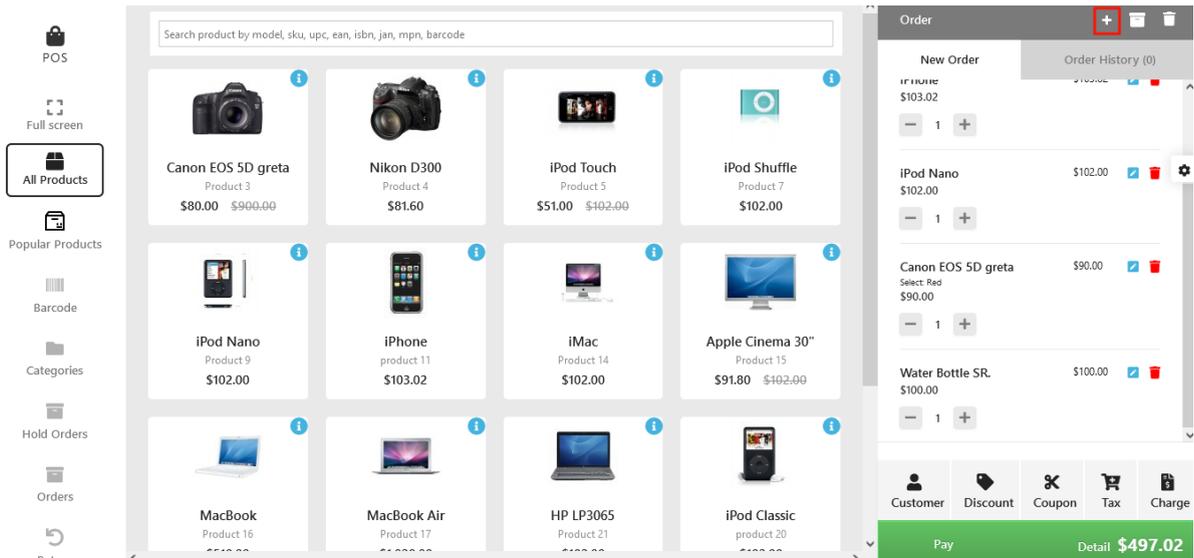


See below agent after clicking on the products as below they get added on the order panel, you can see in the order panel there are three products by Agent.

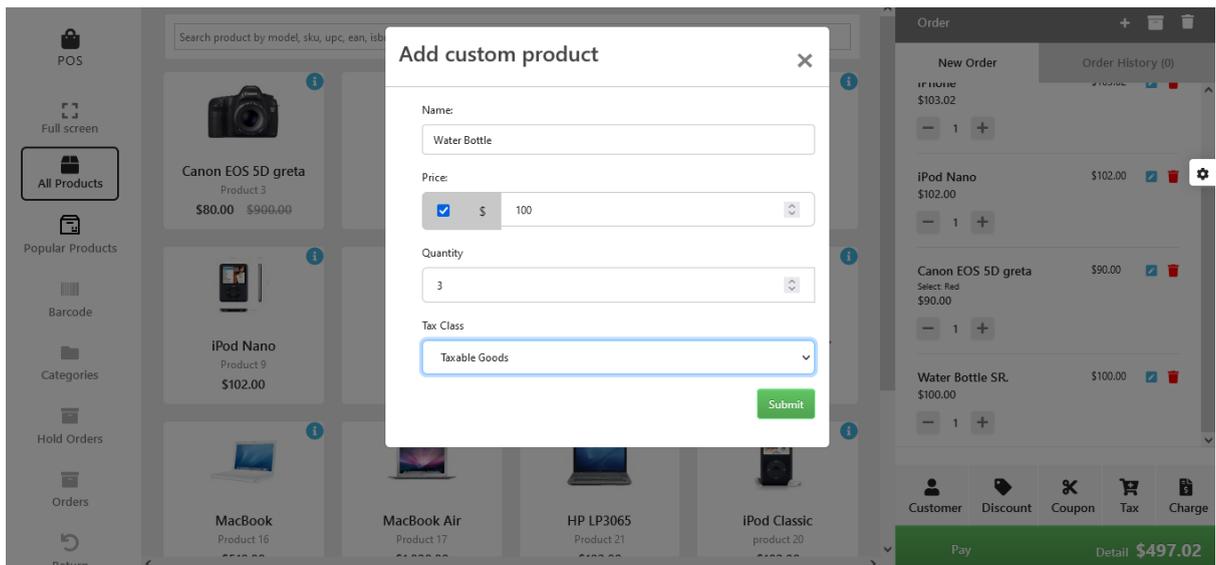


Custom Product

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

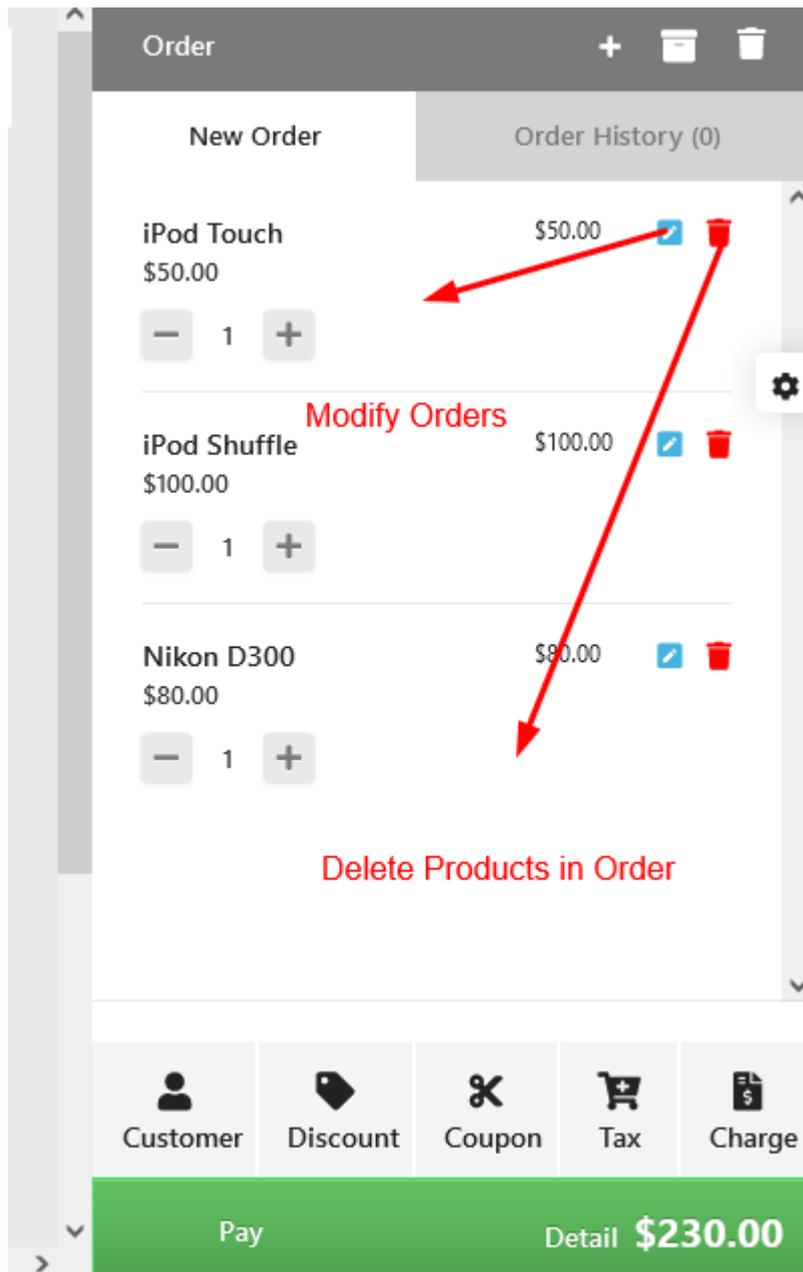


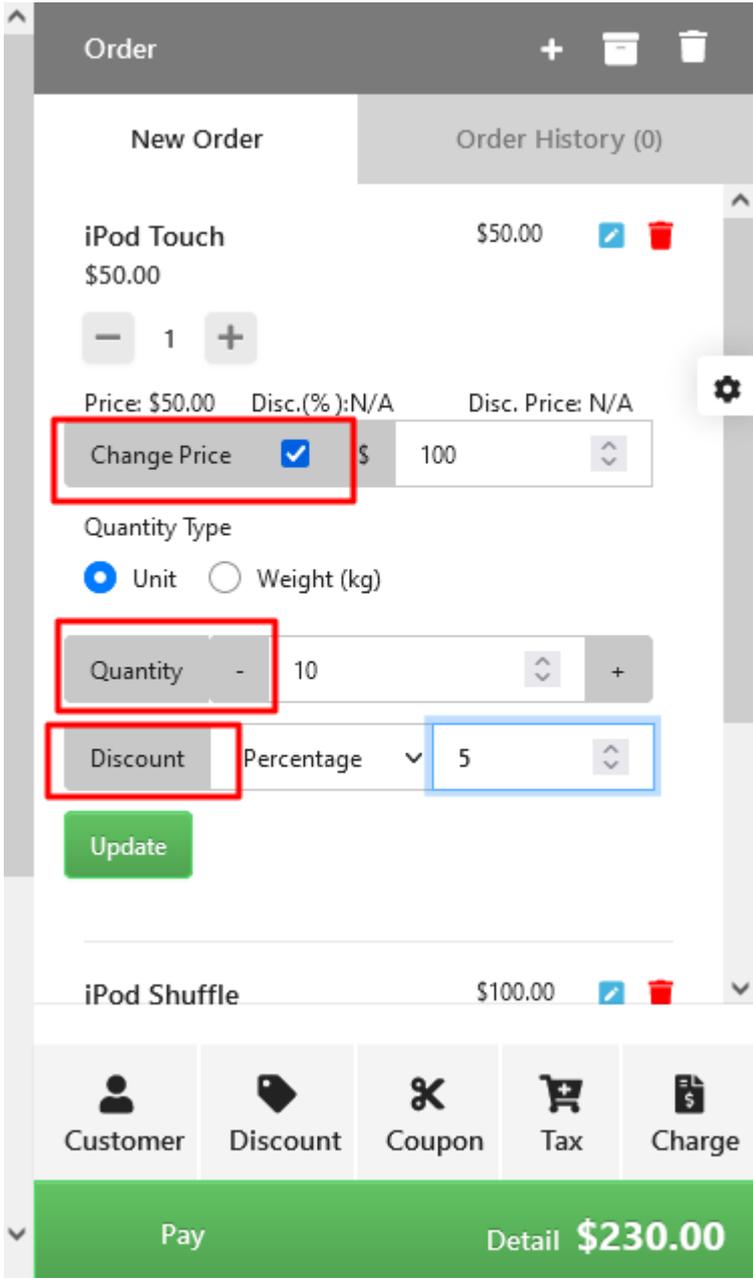
Then the agent needs to put all the information here like prices, quantities, Taxable classes etc.



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.





Order

New Order

Order History (0)

iPod Touch \$50.00

\$50.00

1

Price: \$50.00 Disc.(%):N/A Disc. Price: N/A

Change Price \$ 100

Quantity Type

Unit Weight (kg)

Quantity - 10

Discount Percentage 5

Update

iPod Shuffle \$100.00

Customer Discount Coupon Tax Charge

Pay Detail \$230.00

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.

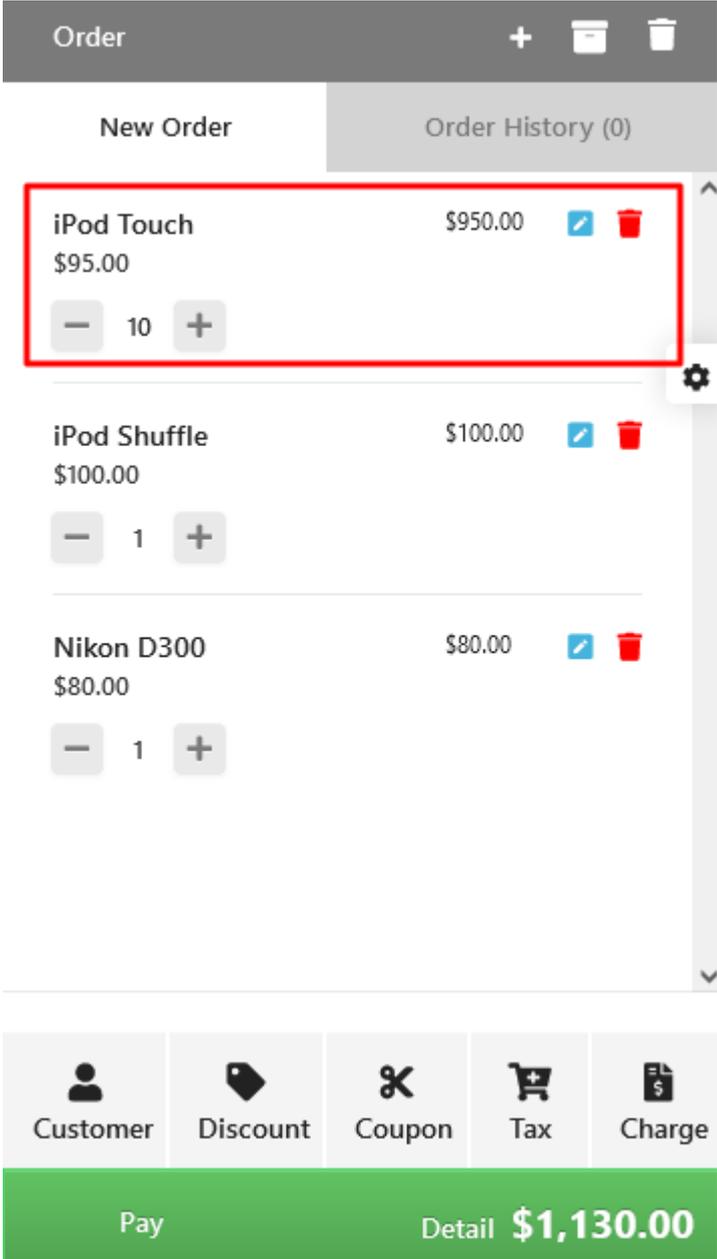
Discount- Discount value can be put in it.

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.



The screenshot shows the 'Order' management interface. At the top, there are tabs for 'New Order' and 'Order History (0)'. Below the tabs is a list of items. The first item, 'iPod Touch', is highlighted with a red box. It shows a price of \$950.00 and a quantity of 10. Below the price and quantity are minus and plus buttons for adjusting the quantity. The second item is 'iPod Shuffle' with a price of \$100.00 and a quantity of 1. The third item is 'Nikon D300' with a price of \$80.00 and a quantity of 1. At the bottom of the interface, there are icons for 'Customer', 'Discount', 'Coupon', 'Tax', and 'Charge'. A green bar at the very bottom displays 'Pay' and 'Detail \$1,130.00'.

Item	Price	Quantity	Total Price
iPod Touch	\$95.00	10	\$950.00
iPod Shuffle	\$100.00	1	\$100.00
Nikon D300	\$80.00	1	\$80.00

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

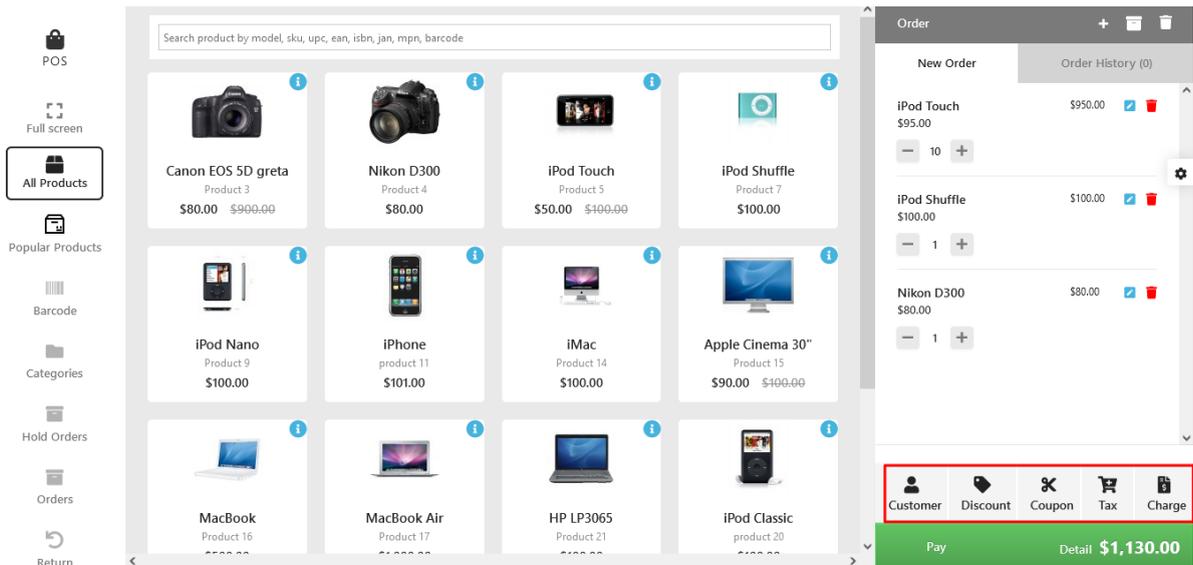
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If you need to modify the order global for all products check the bottom block options.

These options will apply for complete order.

Global Options for an order

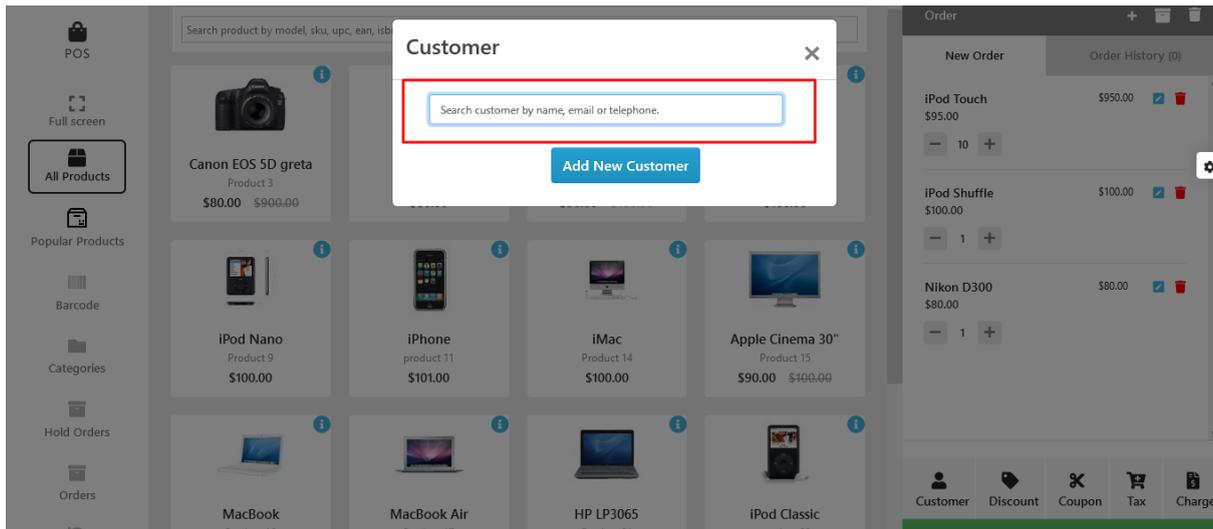
Here you can add a customer, coupon, discount, tax or any other charge for an order.



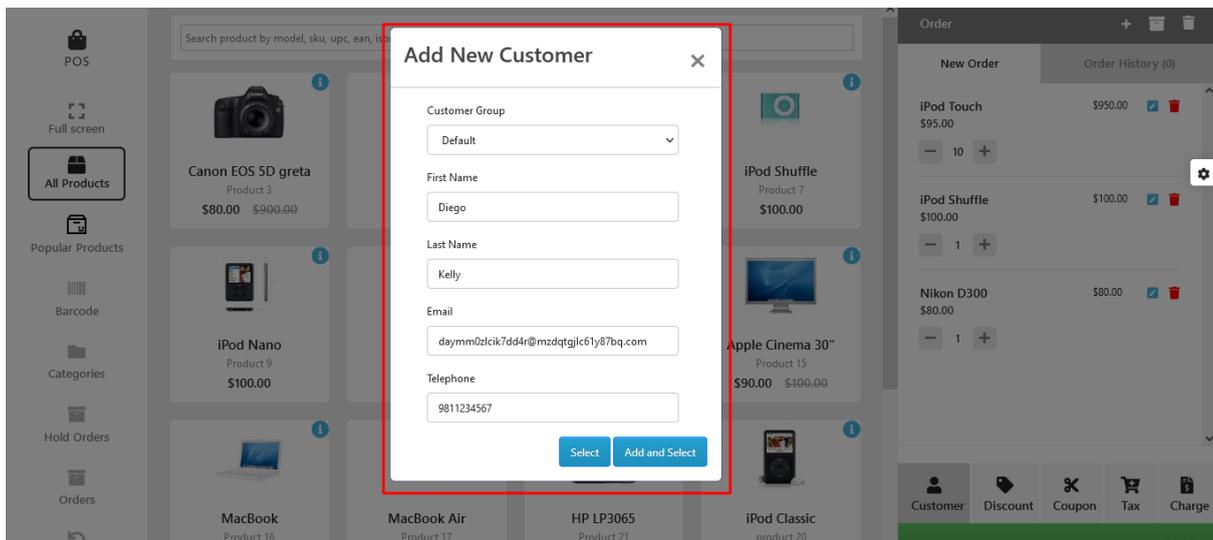
Customer

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.

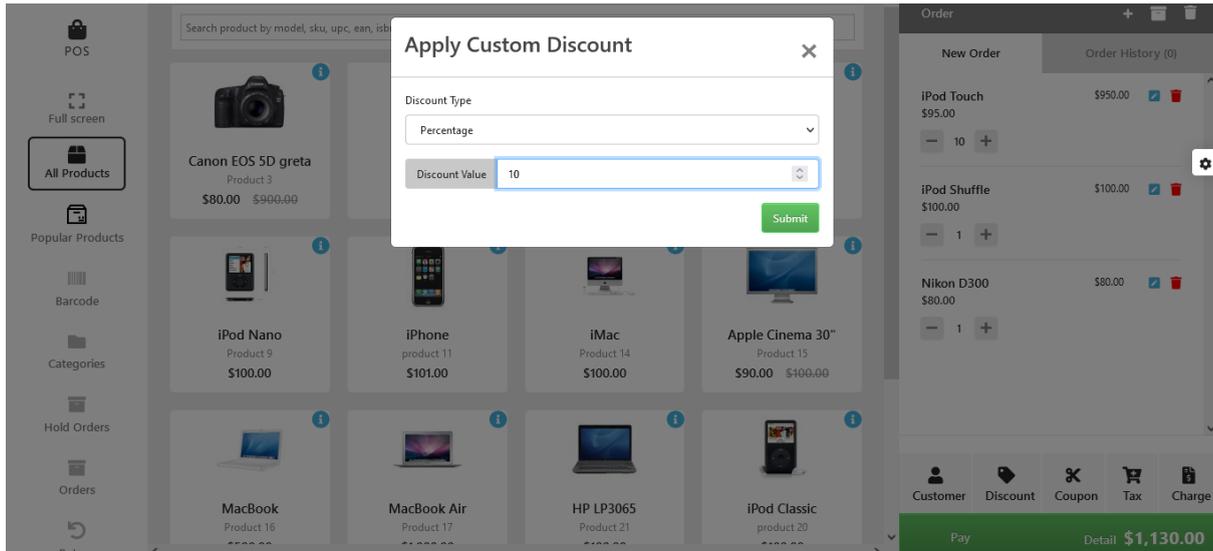


On clicking on add customer, the agent can easily add the customer after putting in all the information.



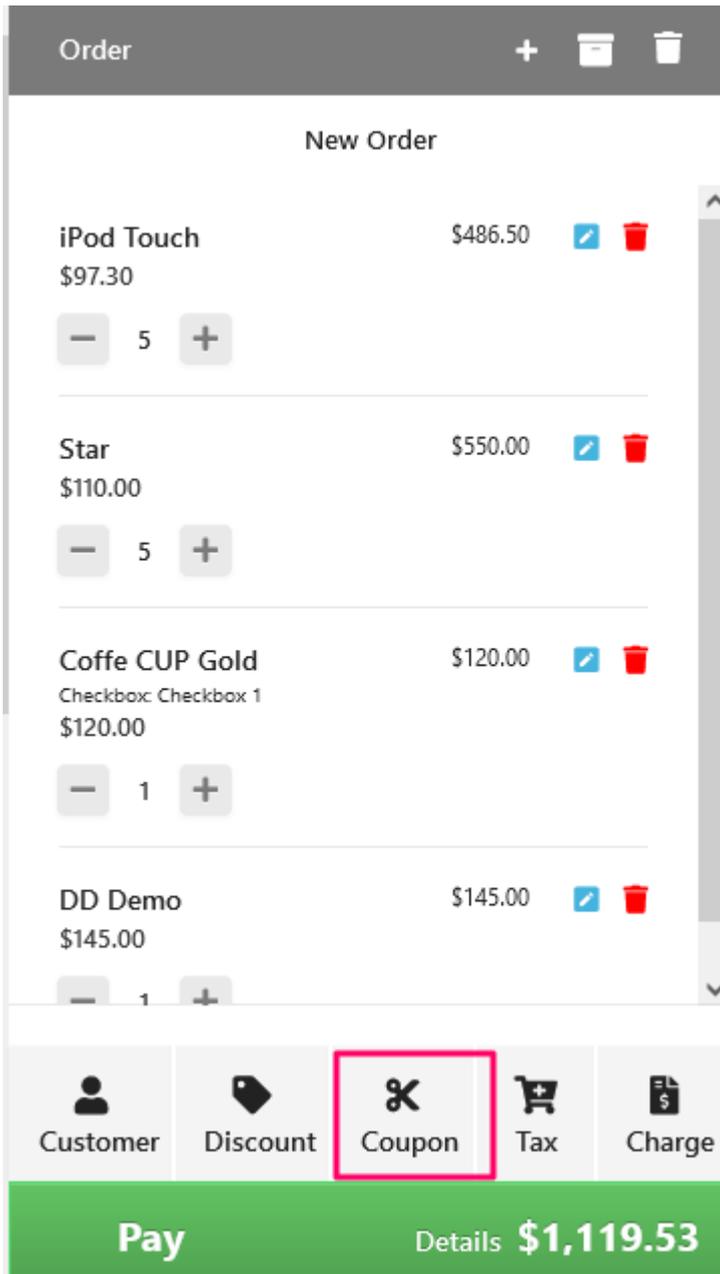
Discount

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

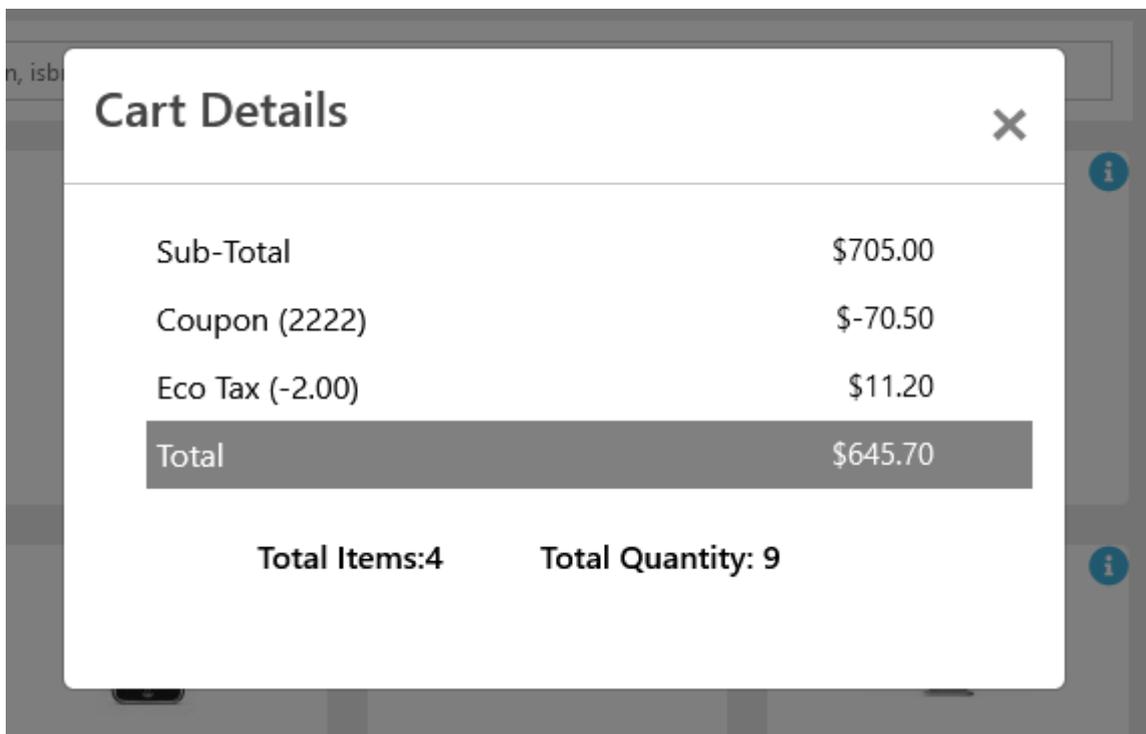
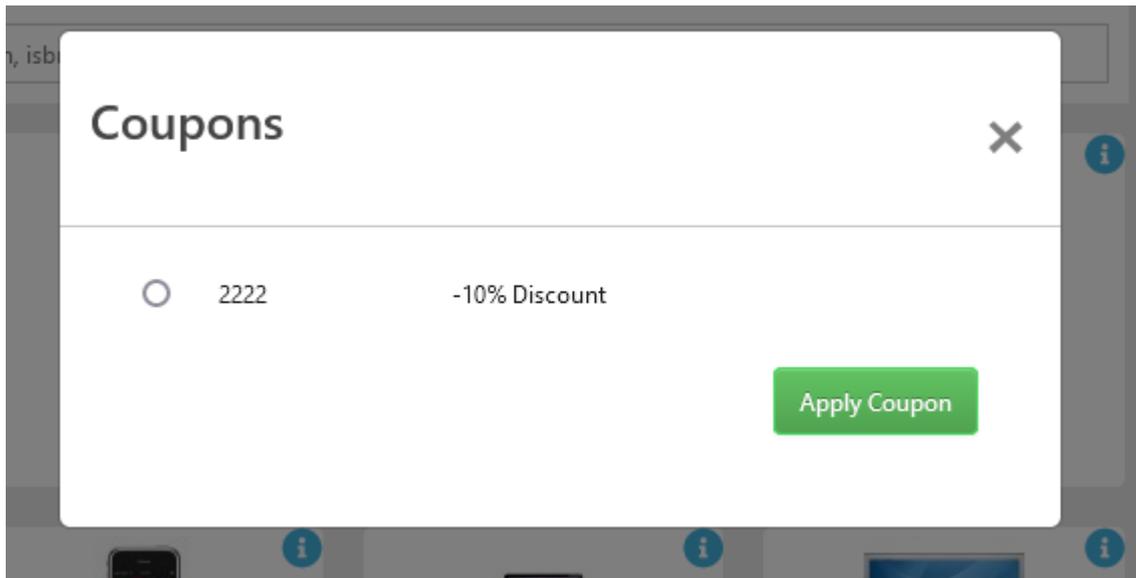


Coupon

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



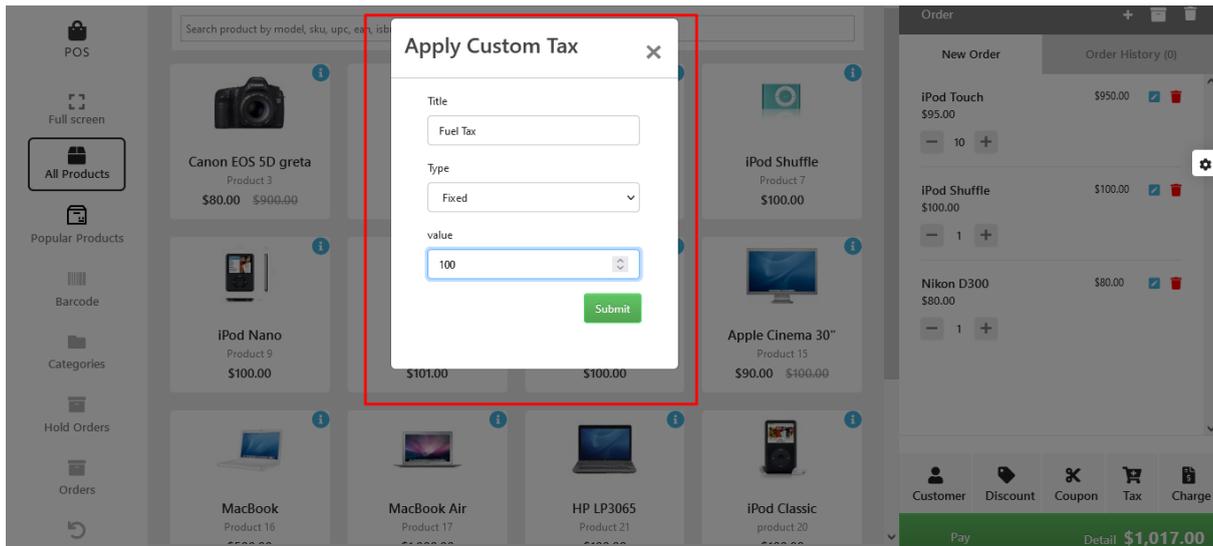
The Agent can see from here the list of coupon available and insert it into the order.



Tax

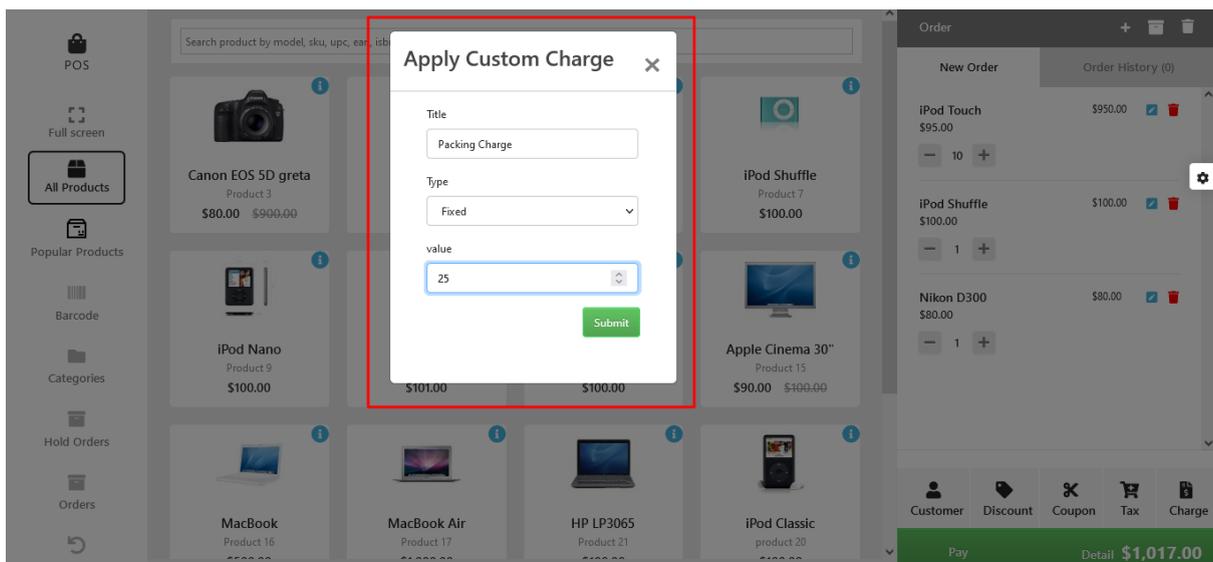
The customer can do any other required tax if not set up in OpenCart admin here.

Tax can be named here and apply.

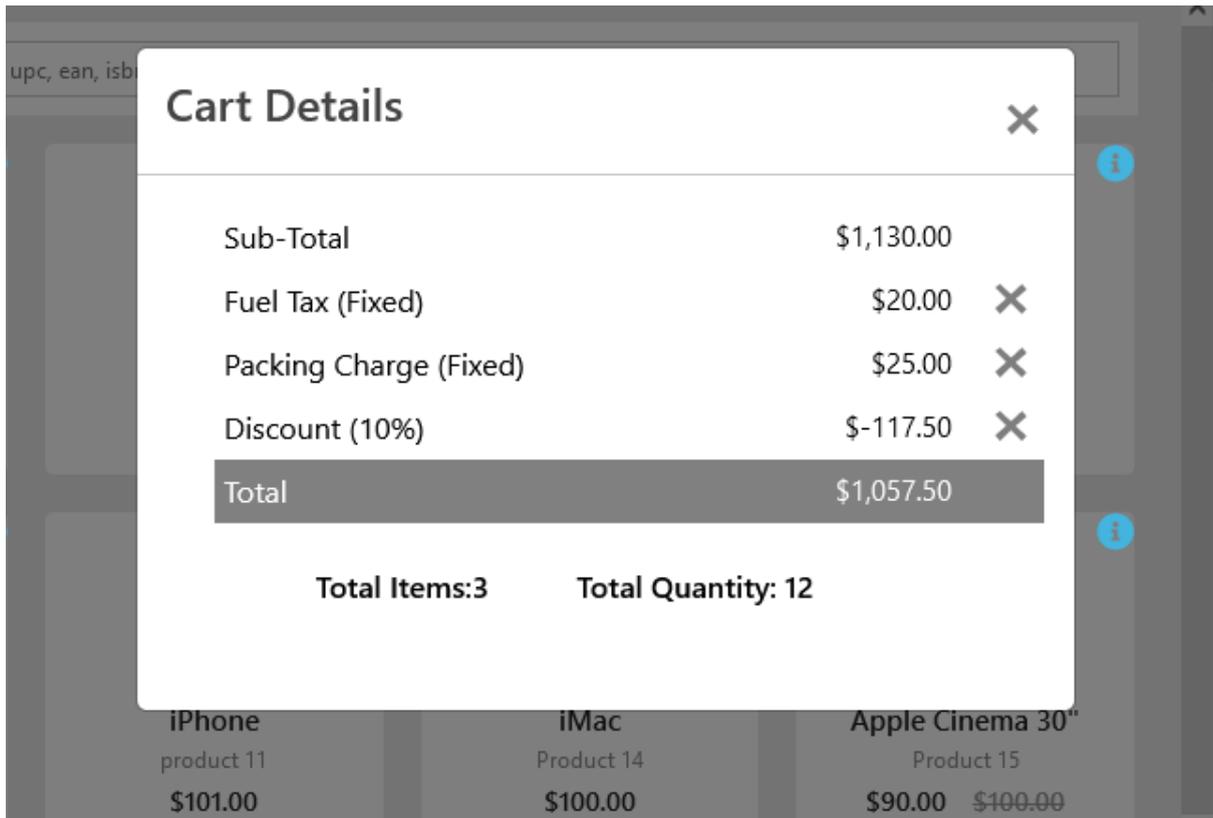


Charge

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



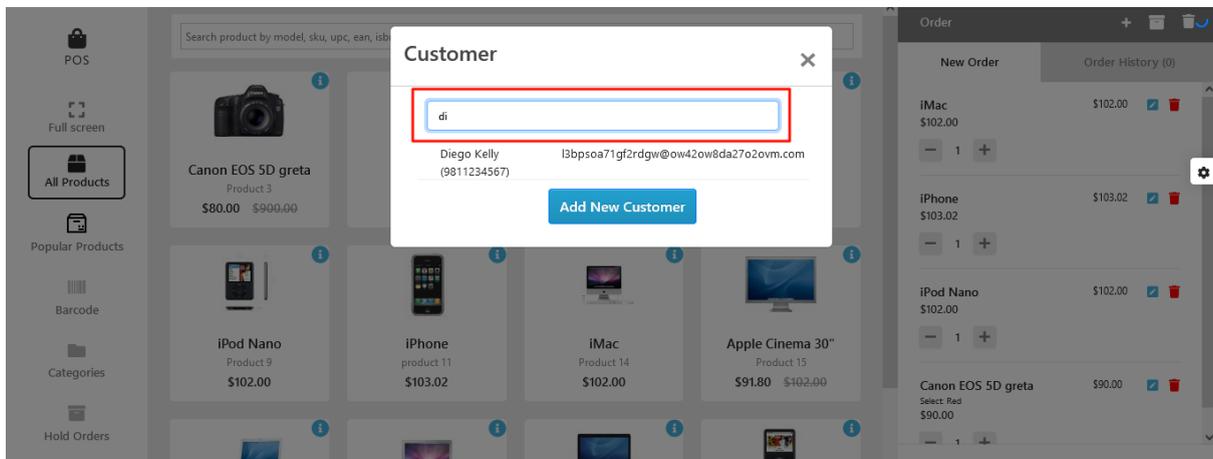
After applying all these you can check, the complete details of the order after click on details.

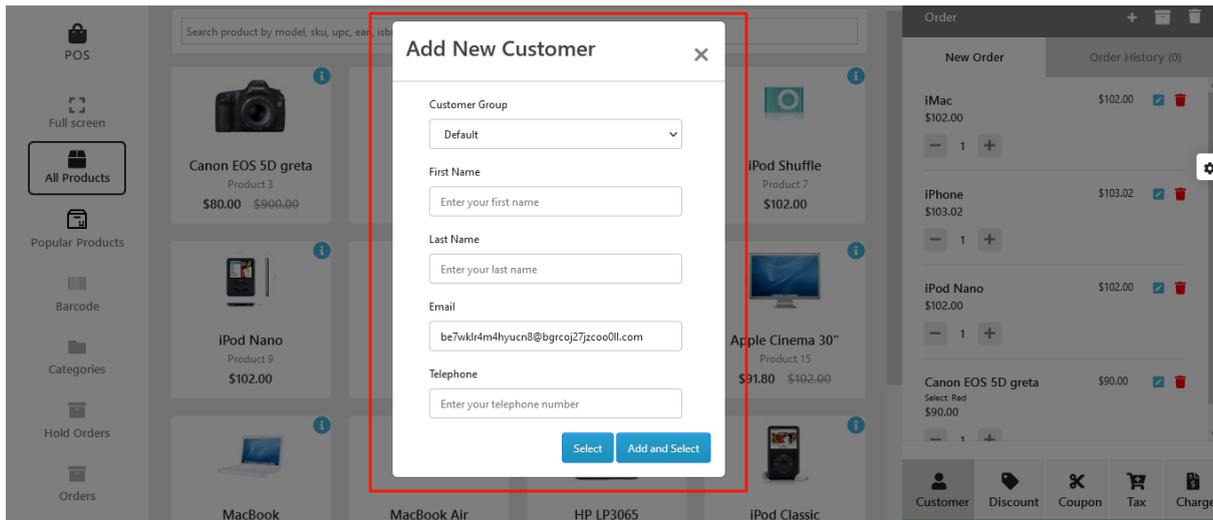


Pay/Order Place

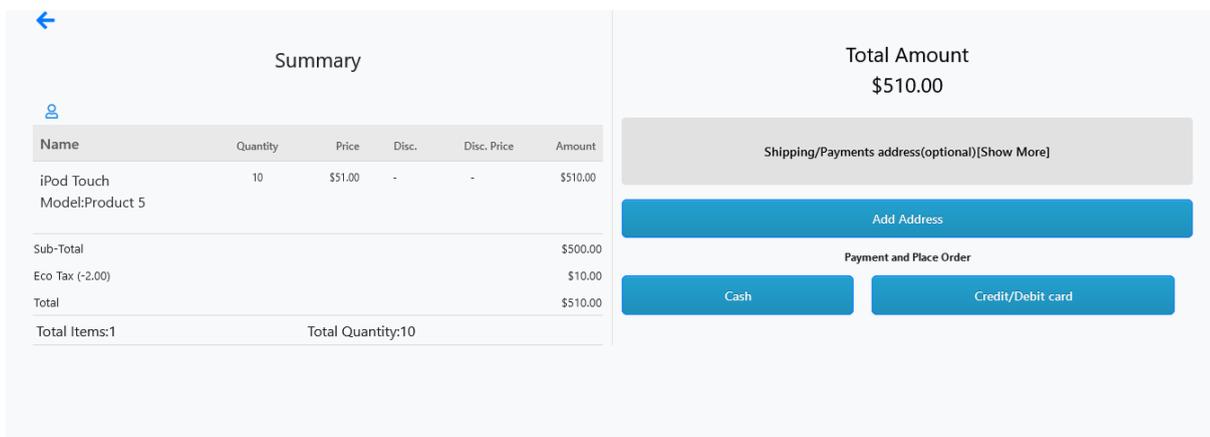
Before pay, you have to **select the customer** or **create the customer**,

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.

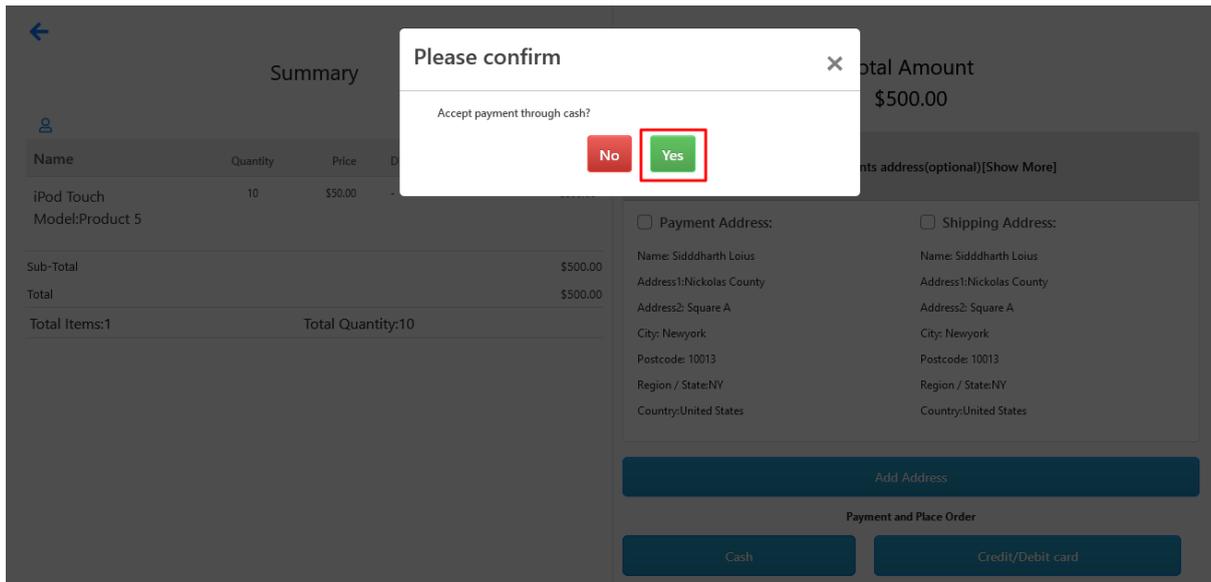




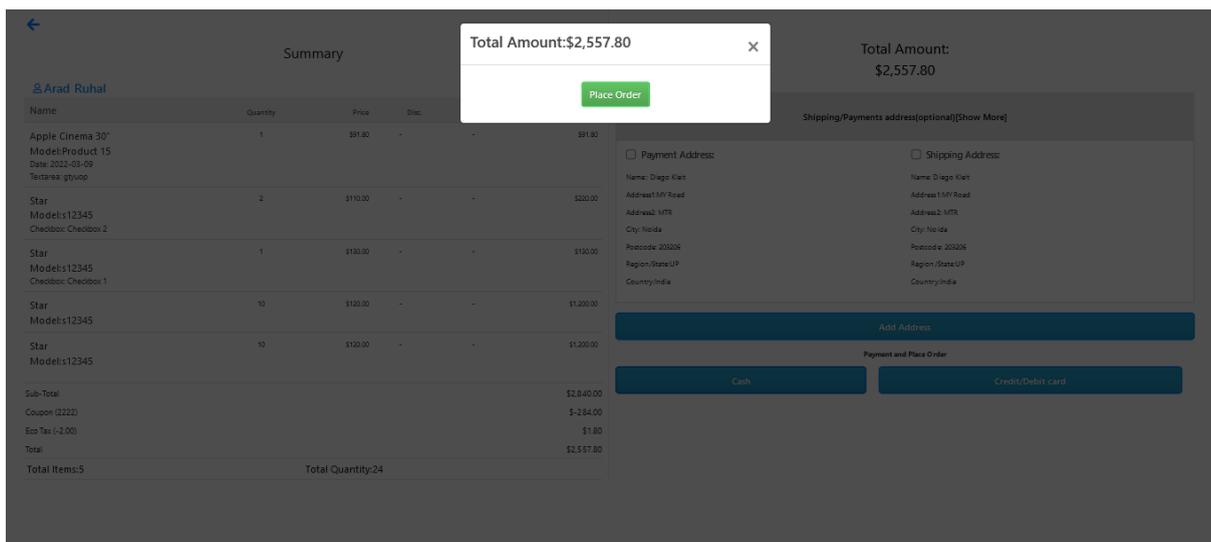
When there is a customer created or selected. After clicking on pay, the below window will open. You have to select the address, or write the address, the taxes will be calculated based on address, either Payment address or shipping address as set in admin.



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



Then there will be Pay window as below:



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 <https://www.helpdesk.purpletreesoftware.com> with following information:

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

We will reply within 2 working hours.